



# **Ektron CMS400.NET Administrator Manual**

**Version 7.0, Revision 7**

Ektron® Inc.  
542 Amherst St.  
Nashua, NH 03063  
Tel: +1 603-594-0249  
Fax: +1 603-594-0258  
Email: [sales@ektron.com](mailto:sales@ektron.com)  
<http://www.ektron.com>



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# What's New in the 7.0 Release

- A new **Taxonomy** features lets you categorize your content. You can then extract only content to which use those classes categories are applied. See ["Taxonomy" on page 605](#).
- A new Map server control lets you display a map with links to content. See the **Ektron CMS400.NET** Developer Manual section "Map Server Control."
- The **search** has been revamped. These changes affect the site visitor and Workarea searches. See ["Searching Your Web Site" on page 395](#)
- You can now schedule **Site Replication** to occur at regular intervals. See the **Schedule On** field of the Sending Server's Configuration Screen in the **Ektron CMS400.NET** Site Replication Manual.
- **Community folders** allow membership users to add and edit content. See ["Creating a Community Folder" on page 51](#). Quick Deploy now moves content updated on the production server to the staging server. See "Quick Deploy" in the **Ektron CMS400.NET** Site Replication Manual.
- You can set up an **approval process** for any **collection**. See ["Setting up Approval for Collections" on page 589](#).
- Added the following features to **Discussion Boards**:
  - Outputting a Forum as an RSS Feed. See ["Outputting a Forum as an RSS Feed" on page 506](#).
  - Attaching Images and Files to a Post. See ["Attaching Images and Files to a Post" on page 481](#).
  - Members can now moderate discussion board forums. See ["Discussion Forum Permissions for Membership Users" on page 493](#).
  - Users can now send private messages to each other when logged in to the forum. See ["Sending a Private Message" on page 508](#).



- You can configure Ektron CMS400.NET Forums to replace unwanted words in a post. See ["Replacing Words in a Post" on page 483](#).
- If you are not using authentication for the forums and want to block a site visitor from posting to the forum, you can use the Restricted IP feature. See ["Restricting an IP Address" on page 487](#).
- Topics can be sorted by the columns of a forum. See ["Sorting Topics" on page 497](#).
- When logged in to the site, discussion board users can subscribe to posts and replies for a forum. See ["Subscribing to a Discussion Board" on page 506](#).
- Terms & Conditions let you convey expectations for a discussion board. See ["Terms & Conditions" on page 462](#).
- You can set a topic's priority, which affects its location when sorting. See ["Setting and Changing the Topic Priority" on page 473](#).
- The User Ranking feature allows you to recognize forum users for how much they contribute to the forum. See ["Ranking Forum Users" on page 468](#).
- A new Discussion Board Property, Accepted HTML, lets you define which HTML features are allowed in a post. See the properties table in ["Creating a Discussion Board" on page 456](#).
- The Control Panel allows logged in users to view your profile, read, reply to and delete private messages. It also lets users with moderate permissions moderate the forum. See ["Using the Control Panel" on page 509](#).
- You can now quote a post and have the contents of that post appear in your post. See ["Quoting a Post" on page 498](#).
- Users can now report a post to moderators of the discussion board. See ["Setting Up Post Reporting" on page 488](#) and ["Reporting a Post" on page 502](#).
- In the user profile, you can add a Signature and an Avatar for use with the Discussion Board feature. See the fields table in ["Creating a New User" on page 635](#) and ["Editing a User" on page 638](#).



- The Content Rating feature has been updated to work with the ContentReview server control. See ["Content Rating" on page 92](#).







# Securing Ektron CMS400.NET

## Security Checklist

The following is a checklist of things an Administrator must do to secure **Ektron CMS400.NET**.

☐ **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 and Sample Membership 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.

| CMS400.NET Users   | Membership Users   |
|--|--|
| <input type="checkbox"/> jedit<br><input type="checkbox"/> Admin2<br><input type="checkbox"/> tbrown<br><input type="checkbox"/> jsmith<br><input type="checkbox"/> vs<br><input type="checkbox"/> EkExplorerUser<br><input type="checkbox"/> Explorer | <input type="checkbox"/> jmember<br><input type="checkbox"/> member@example.com<br><input type="checkbox"/> north<br><input type="checkbox"/> supermember<br><input type="checkbox"/> west |



## Additional Information

You *do not* need to make these changes if you are using the CMS400.NET 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.NET 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.”
- 



## The Everyone Group

By default, the root folder in Workarea provides the Everyone Group with all permissions except Overwrite Library. Ektron Inc. recommends reviewing the permission needs of the Everyone Group when you add folder. For information on Permissions, see the Administrator Manual section “Managing User and Permissions” > “Setting Permissions.”

## 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**.
2. Click the Edit button (.
3. 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\CMS400versionnumber\Utilities.

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## ServerControlWS.asmx

### Best Practice

For improved security, Ektron recommends renaming or removing the Web services file when you move it to your production server. After installation, this file is named ServerControlWS.asmx and resides in the *webroot/siteroot/Workarea* folder.

ServerControlWS.asmx is the Web service that lets the server controls talk to **Ektron CMS400.NET**. The path is coded in the web.config file. This is how it appears:

```
<!-- Web Service URL for Server Controls design time --> <add key="WSPath" value="http://localhost/CMS400Min/Workarea/ServerControlWS.asmx" />
```

You will need to edit this line if you change the location or name of the ServerControlWS.asmx file.



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# Introduction to Ektron CMS400.NET

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

See Also:

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

## About Ektron CMS400.NET

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

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



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

## Who Should Read This Documentation?

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

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

## Online Learning Center

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

## Sample Site Used in this Document

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

## Types of Users

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

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



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

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

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

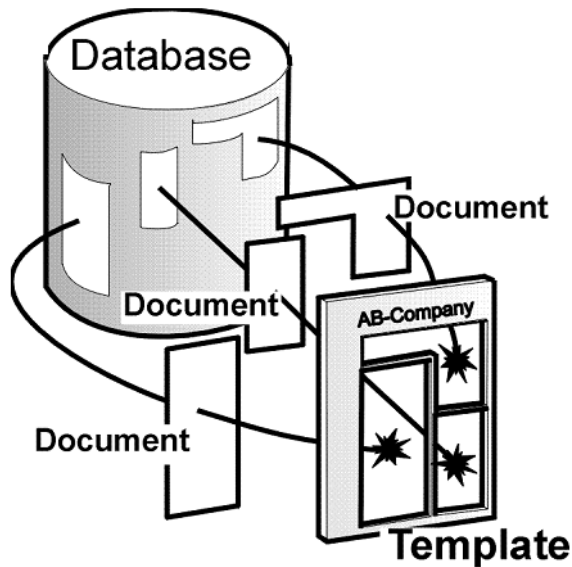
## Management of Content

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

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



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



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

## Conventions of the Documentation

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

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



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



# Getting Started

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

This section has the following topics:

- "Logging Into an Ektron CMS400.NET Web Site" on page 6
- "Accessing the Workarea" on page 11
- "Workarea Navigation" on page 14
- "Recognizing Content" on page 15
- "Site Preview" on page 25

## Logging Into an Ektron CMS400.NET Web Site

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

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

## Making Passwords Case Sensitive

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

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

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



## Restricting Login Attempts

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

You can control the following capabilities.

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

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

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

### ***Changing the Number of Unsuccessful Login Attempts***

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

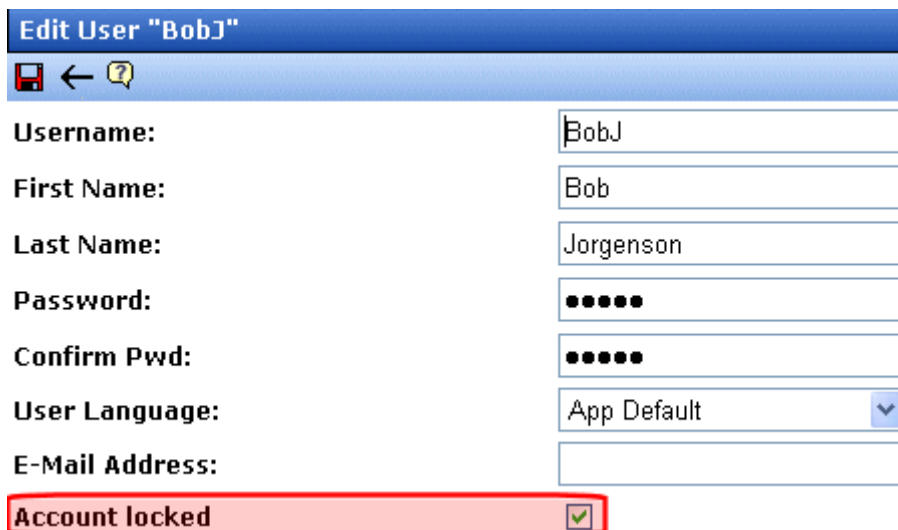


You can change the text of the error message in the resource file. To learn about editing the resource file, see ["Procedure for Translating Workarea Strings" on page 819](#)

To change the number of unsuccessful login attempts that occur prior to logout, edit the value of the `ek_loginAttempts` element in the `web.config` file. (The `web.config` file is located in your site's root directory.) For example, to allow only three unsuccessful logins, change the `value` to **3**. You cannot enter a value greater than **254**.

## Unlocking a Locked Account

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



**Edit User "BobJ"**

Username: BobJ

First Name: Bob

Last Name: Jorgenson

Password: •••••

Confirm Pwd: •••••

User Language: App Default ▼

E-Mail Address:

**Account locked** ☒

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

### NOTE

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

## Manually Locking a User from Signon



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

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

### ***Disabling the Login Attempts Feature***

To disable the Login Attempts feature, set the value of the `ek_loginAttempts` element in the `web.config` file to **-1**. If you do, any user can try to log in as many times as he wants. The error message never appears, and he is not prevented from entering a password.

---

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

---

### ***Preventing CMS Users from Signing On***

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

---

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

---

### ***Preventing All Users from Signing On***

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

---

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

---

## **Changing Images Used for Logging In and Out**

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

1. Move the new images to the following folder: *webroot\your site's root directory\Workarea\images\application*.



2. Open the web.config file in your Web site's root directory.
3. Change the images referenced in this section of the file:

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

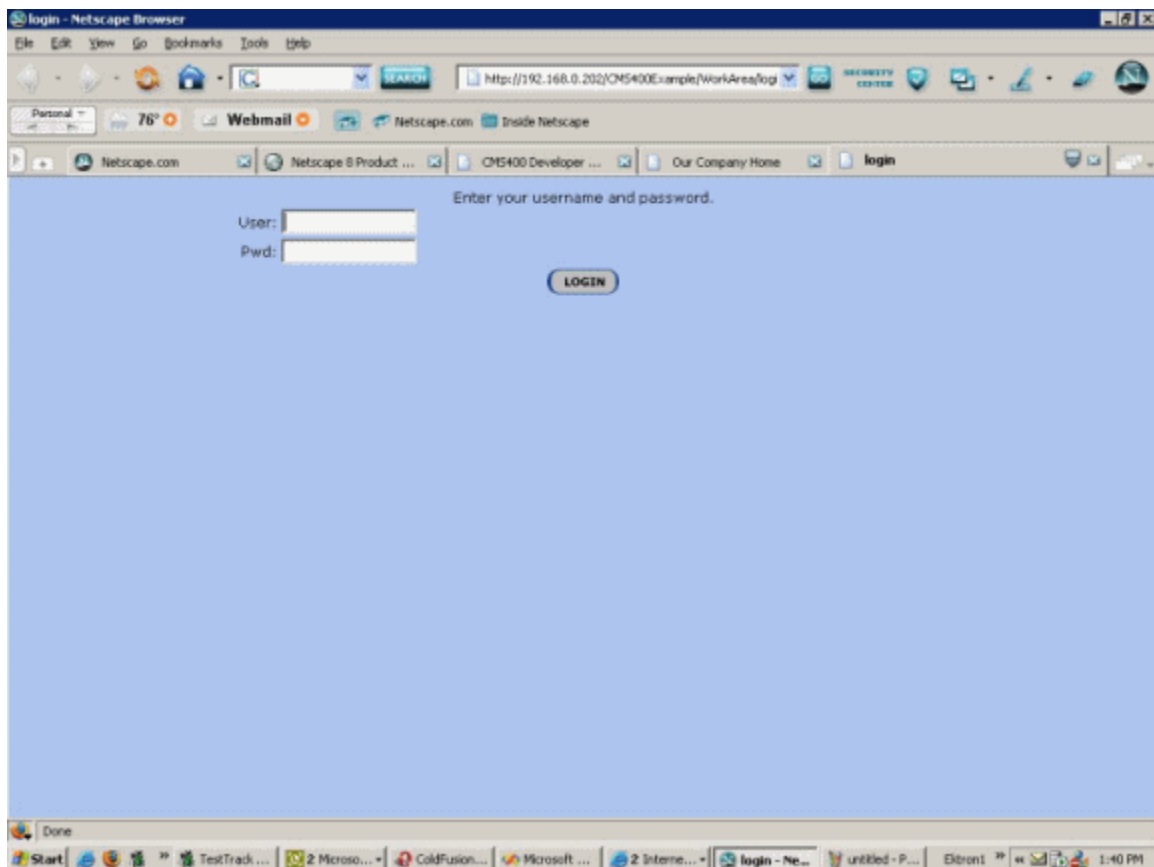
```
<add key="ek_Image_2" value="btn_login.gif" />
```

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

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

## Resolving Problem with Sign in Screen

You may find that in certain browsers, the login screen occupies the entire browser window instead of just a small box (see illustration below).



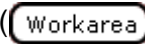



Browsers such as Netscape 8 and Firefox have a feature called tabs. When the login window pops up, it appears as a new tab as shown above.

You can fix this problem by turning off tabs within the browser.

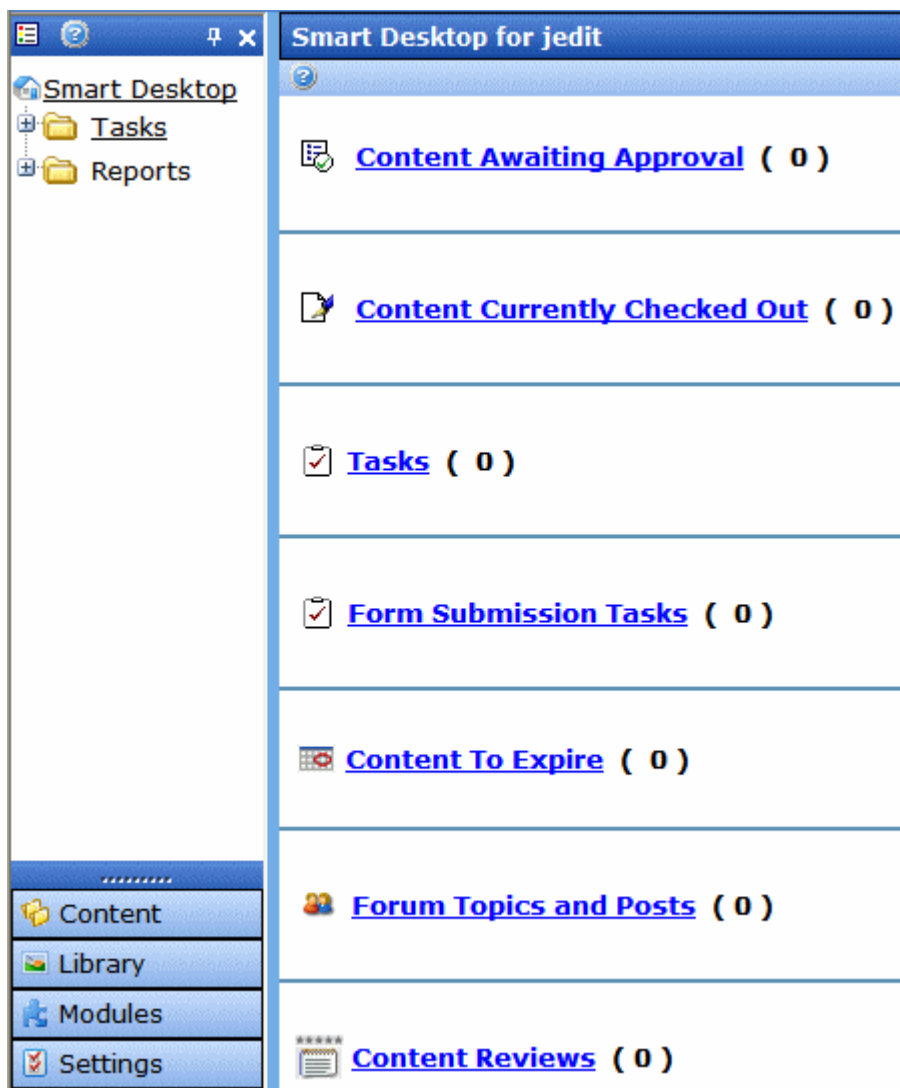
## Accessing the Workarea

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

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

The Workarea has a Windows Explorer-like interface.





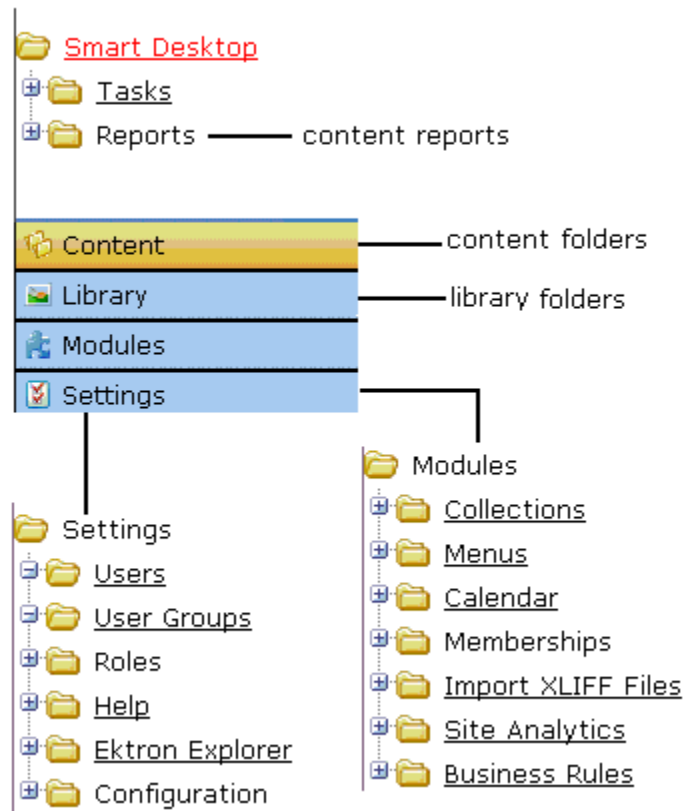
When you first access your Workarea, your Smart Desktop is displayed. The smart desktop contains useful information that pertains to you.

**NOTE** In the Application Setup screen, you can determine which screen appears when you access the Workarea. See Also: "Set smart desktop as the start location in the Workarea" on page 30


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



## Ektron CMS Workarea Site Map



## Closing the Workarea

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

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



## Workarea Navigation

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

- the left frame displays the system's folders
- the right frame displays common reports (For more information, see "[Content Reports](#)" on page 143)

---

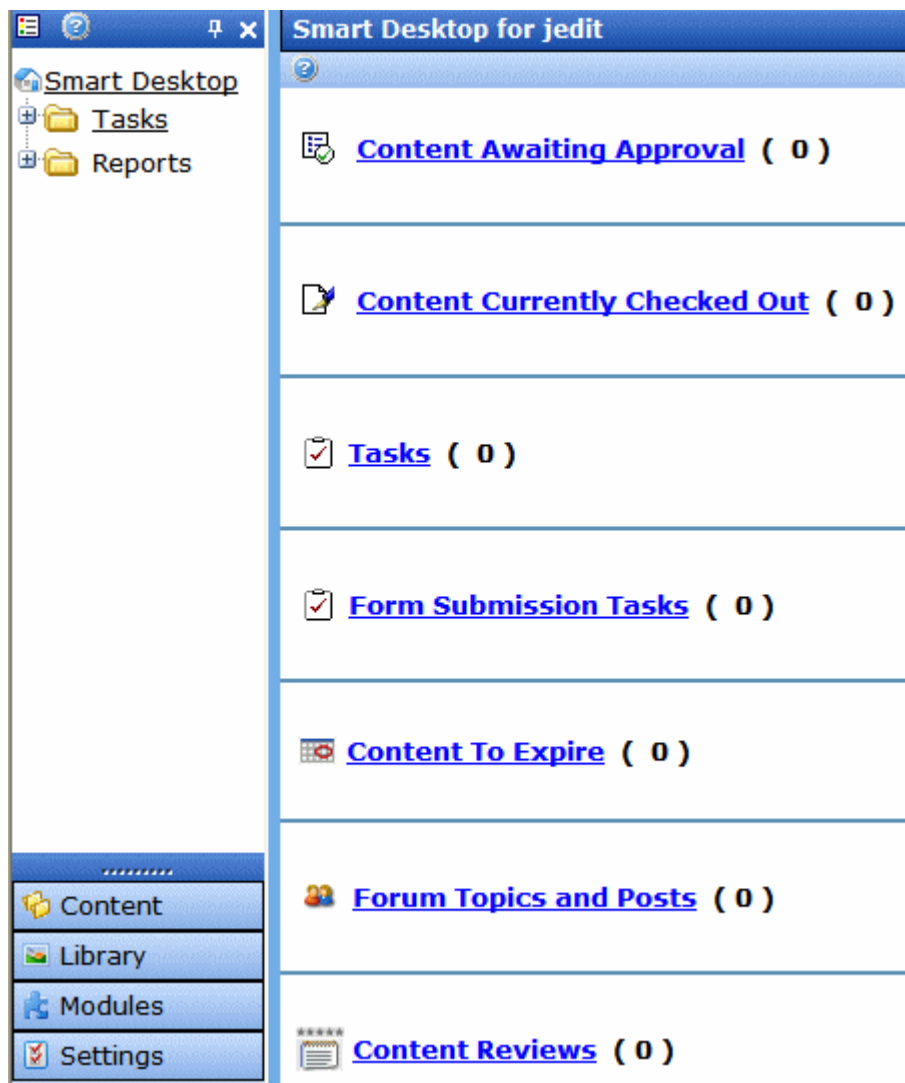
**NOTE**

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

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

---





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

## Recognizing Content

After you sign in, notice that as you move the cursor, colored borders appears around areas of the page, as illustrated below.



The border disappears when you move the cursor out of the area.  
 See Also: ["Returning to the Classic CMS Interface" on page 18](#)

**NOTE**

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



Click here to proceed to the demo site  
[XML Content](#)  
[Show Calendar](#)  
[Contact Us Form](#)

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

**CMS400 Membership allows non-CMS users to login to view private**

*To see this feature, login as member / member*

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

## Meaning of Border Color

The table below describes the meaning of each border color.

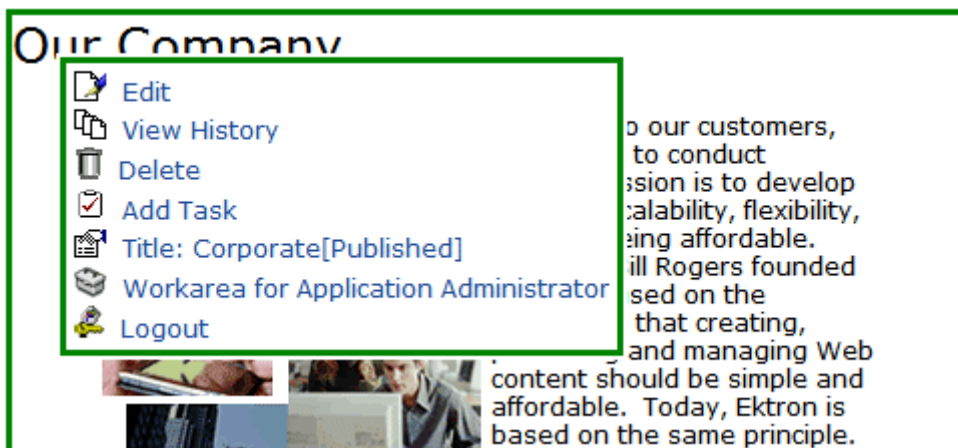
| Color  | Meaning          | Description   |
|--------|------------------|---|
| Green  | Active           | Content is active and ready to be edited                                  |
| Red    | Checked Out      | Another user is editing the content                                       |
| Yellow | Approval Process | Content has been submitted for publication, and is in the approval chain. |



| Color | Meaning         | Description   |
|-------|-----------------|---|
| Grey  | Pending Go Live | Content was approved, but the go-live date hasn't occurred yet. |

## The Floating Menu

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



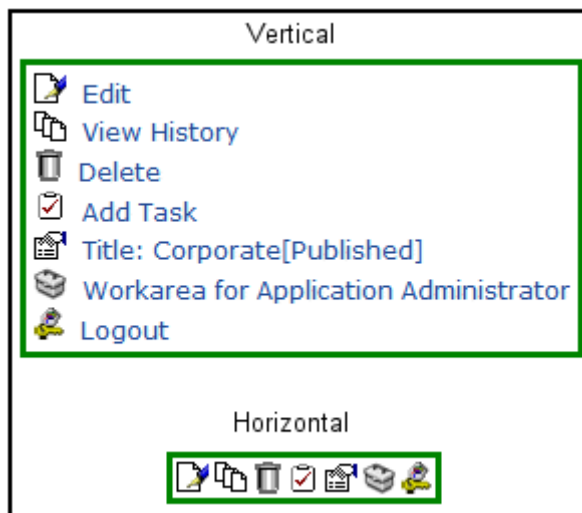
Toolbar buttons let you act on the displayed content and display important information about it. For example, one toolbar button lets you edit the content, while another displays previous versions of it. The toolbar buttons change depending on the content's status or your permissions for the content.

Each button is described in ["Floating Menu Buttons" on page 19](#).

### ***Floating Menu Display Type***

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





To change the display type, follow these steps.

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

## Returning to the Classic CMS Interface

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

### NOTE

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










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

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





## Floating Menu Buttons


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

| Toolbar Button  | Name                    | Description   | More Information  |
|---|-------------------------|---|---|
|    | Add                     | Appears if you selected a language and the content is not available in that language. Use this button to copy existing content into new content and translate it to the new language. | "Translating Content" on page 788                               |
|    | Approve                 | Approve or decline request for content to be published or deleted.  | "Approve ()" on page 22   |
|    | Assign Task             | Assign a task related to this content.  | "Managing Tasks" on page 365                                    |
|    | Delete                  | Opens content's View Content screen. From here, you can view important information about the content and perform all actions on it.   |   |
|  | Edit                    | Checks out content to be edited by you.   | "Edit ()" on page 21  |
|  | Logout                  | Log out of Ektron CMS400.NET view of Web site.  | "Logout ()" on page 25  |
|  | Preview                 | Preview content before it is published.   | "Preview ()" on page 24   |
|  | Properties              | Opens content's View Content screen. From here, you can view information about content and perform all actions on it.   | "Content Status" on page 20; "Managing HTML Content" on page 71 |
|  | View Content Difference | Displays differences between historical version and published versions of content.  | "View Content Difference ()" on page 22                         |



| Toolbar Button  | Name         | Description  | More Information             |
|---|--------------|--|------------------------------|
|  | View History | Displays historical versions of content. You can also restore older version if needed. | "View History ()" on page 23 |
|  | Workarea     | Opens the Workarea. From here, you can perform all actions.                            | "Workarea ()" on page 24     |

## Content Status

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



Below are the content statuses and their abbreviations.

| Letter   | Border Color | Meaning                       | Content state  |
|----------|--------------|-------------------------------|--|
| <b>A</b> | green        | <b>Approved</b>               | Through workflow and published on the Web site   |
| <b>O</b> | red          | <b>Checked Out</b>            | Currently being edited. Has not been checked in.   |
| <b>I</b> | green        | <b>Checked In</b>             | Checked in for others to edit  |
| <b>S</b> | yellow       | <b>Submitted for Approval</b> | Saved and submitted into approval chain<br>See Also: "Setting Approval Chains" on page 695 |
| <b>M</b> | yellow       | <b>Marked For Deletion</b>    | Requested for deletion   |



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

For more information about

- content statuses, see Appendix A of the **Ektron CMS400.NET User Manual**
- content activities, see ["Managing HTML Content" on page 71](#)

## Edit ()


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

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

### NOTE

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

To edit content, follow these steps.

1. Log in to Ektron CMS400.NET, as described in ["Logging Into an Ektron CMS400.NET Web Site" on page 6](#).
2. Browse to content you want to edit.
3. Right click the mouse to display the floating toolbar.
4. Click the Edit button ()



5. The Edit Content screen is displayed.
6. From that screen, you can
  - Edit content
  - Save changes
  - Check-in content
  - Enter or edit a summary
  - Enter or edit metadata
  - Submit the content for approval
  - Publish content to the Web site
  - Access the library


For more information, see the **Ektron CMS400.NET** User Manual Section “Working with Folders and Content” > “Editing Content”.

## View Content Difference ()

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

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

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

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





## Approve ()

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




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

To approve submitted content, follow these steps.

1. Browse to a content that is submitted and awaiting your approval.
2. *See Also:* If the floating toolbar does not appear, right click the mouse to display it.
3. Click the Approve button (.
4. The Approve Content screen is displayed.
5. Perform one of the following actions:
  - **Approve** () the content and submit it to the next approver. If you are the last approver, the content is published to the site.
  - **Decline** () the content, which checks the content in and makes it available for editing. You are prompted to enter a comment that provides a reason for the decline. The user who made the edit receives email notification of the decline. The content inserted by the last editor remains in the file. If you do not want it to remain, choose the edit option.
  - **Edit** () lets you update the submitted content. You can then check it in or submit to the next approver. If you are the last approver, the content is published to the site.

#### NOTE

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

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


For more information, see "[Setting Approval Chains](#)" on page 695.

## View History ()

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



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

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

See *Also*: **Ektron CMS400.NET** User Manual section "Viewing and Restoring Previous Content"

## Preview ()


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

To preview staged content, follow these steps.

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

### NOTE

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

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


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

## Workarea ()

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



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

1. Log in to Ektron CMS400.NET, as described in ["Logging Into an Ektron CMS400.NET Web Site" on page 6](#).
2. Navigate to any page that has Ektron CMS400.NET content displayed on it.
3. Right click the mouse to display the floating toolbar.
4. Click the Workarea button (  ).
5. The Workarea opens in a new window.
6. To learn more about the Workarea, see ["Accessing the Workarea" on page 11](#).

## Logout ( )

This button logs you out of Ektron CMS400.NET.

## Site Preview

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



# Modifying the Application Setup Screen

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

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

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

- ["Enabling WebImageFX" on page 31](#)
- ["Enabling CMS to Create File System Folders" on page 32](#)
- ["BuiltIn User" on page 33](#)
- ["Editor Options" on page 33](#)

---

**NOTE**

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

---

## Viewing Application Setup Information


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



1. Access the Workarea. See Also: ["Accessing the Workarea" on page 11](#)
2. Click the **Settings** folder button in the left frame.
3. Expand the folder tree, and click **Configurations > Setup**.
4. The Application Setup screen is displayed.

## Updating Setup Information

To update setup information, follow these steps.

1. Access the Application Setup screen, as described in ["Viewing Application Setup Information" on page 26](#).
2. Click the Edit button ()
3. The Application Setup screen appears. Update the fields as needed. The following table explains the fields.

| Field                        | Description   |
|------------------------------|---|
| License Key(s)               | Enter the license key sent to you from Ektron via email into this field.  |
| Module Licenses              | Enter the license key for WebImageFX that was sent to you via email. See <a href="#">"Enabling WebImageFX" on page 31</a> for more information.   |
| Default Application Language | <p>Select a default language for Ektron CMS400.NET.</p> <p><b>How a User's Application Language Affects His Use of Ektron CMS400.NET</b></p> <p>This user's language determines the screens and messages that appear in <b>Ektron CMS400.NET</b>.</p> <p><b>How the System Default Language Relates to a User's Language Setting</b></p> <p>In the user profile, you can set each user's language. You can set any user's language to system default. Each user whose language is set to system default uses the language assigned here.</p> <p><u>Note: Do not confuse this default application language with the ek_DefaultContentLanguage variable in web.config. For more information on that variable, see <a href="#">"The Default Language" on page 786</a>.</u></p> |





| Field  | Description   |
|--|---|
| Maximum Content Size   | In characters, limit the size of each content item by specifying a maximum size. If a user's changes to content result in exceeding this limit, the user is told to reduce the content before he can save it. It cannot exceed 1,000,000 characters.  |
| Maximum Summary Size   | In characters, limit the size of each summary by specifying a maximum size. If a user's changes to a summary result in exceeding this limit, the user is told to reduce the summary before he can save it. It cannot exceed 65,000 characters.  |
| System email Address   | Enter a valid email address. This address will appear in the <b>From</b> field in the notification emails.  |
| Enable Sending of System Notification Email  | Check the box to enable email notification for the entire CMS. Unchecking this box disables email notification, regardless of whether individual users have their email enabled.  |
| Asynchronous Processor Location  | If your site uses the Web Alerts feature, enter or update the location of the asynchronous processor Web Services file. The default location appears below. See Also: <a href="#">"Setting Up the Message Queue and Asynchronous Processor" on page 861</a>   |
| This is a Staging Server (Only used with Site Replication)                           | Check this box if you use the Site Replication feature, and <b>Ektron CMS400.NET</b> resides on a staging server.<br>If you check this box, Web alerts are not generated when content is updated. Web alerts should only be created on a production server.<br>See Also: The <b>Ektron CMS400.NET</b> Site Replication Manual |
| Publish in Other Format: Enable Office documents to be published in other format     | Check the box to allow <b>Ektron CMS400.NET</b> to render Office documents in either PDF or HTML format. When a checked, PDF or HTML generation is available for individual folders.<br>See Also: <a href="#">"Editing Folder Properties" on page 48</a>  |
| Library Folder Creation: Enable CMS to create file system folders for library assets | Check the box if you want to create physical folders on your file system server that match the Ektron CMS400.NET library folder tree.<br>See Also: <a href="#">"Enabling CMS to Create File System Folders" on page 32</a>  |




| Field   | Description   |
|---|---|
| Built - in User   | <p>Edit the username and/or password for the built in user. By default, the username and password combination is <b>builtin/builtin</b>.</p> <p><b>Important! Ektron strongly urges you to change the default password assigned to the builtin user. An opportunity to do this is presented during installation.</b></p> <p>See Also: "BuiltIn User" on page 33</p> |
| Editor Options  | <p>Toggle between displaying and not displaying font related buttons in the editor. Also choose to remove styles and preserve MS Word styles and classes. See Also: "Editor Options" on page 33</p>   |
| Accessibility/Section 508 Evaluation  | <p>"Validating Content For Compliance with Accessibility Standards" on page 106</p>   |
| <p><b>Work Page Size</b></p> <p>The following fields change the</p> <ul style="list-style-type: none"> <li>• default editor screen size</li> <li>• whether button text appears in the title bar</li> <li>• default Web page after sign-in</li> <li>• default Workarea page</li> </ul> <p>The default values are automatically applied to all new users, and to all existing users when you upgrade.</p> <p>Normally, you can modify these values for any user via the Edit User screen. But, you can force these values on all users, removing the ability to personalize them.</p> |   |
| Width   | <p>If desired, change the width of the screen in which <b>Ektron CMS400.NET</b> appears. The width in pixels must be between 400 and 2400.</p> <p>This field accommodates users who have larger monitors and/or prefer a higher resolution, such as 1280 x 1024.</p> <p>The default value for this setting is 790.</p>  |
| Height  | <p>If desired, you can change the height of the screen in which <b>Ektron CMS400.NET</b> appears. The height in pixels must be between 300 and 1800.</p> <p>This field accommodates users who have larger monitors and/or prefer a higher resolution, such as 1280 x 1024.</p> <p>The default value for this setting is 580.</p>                                    |



| Field   | Description  |
|---|--|
| Display button text in the title bar                    | <p>Check this box if you want any button's caption text to appear in the screen title's bar whenever a user moves the mouse over the button. Note the word <b>Update</b>, describing the button, in the illustration below</p>  <p>If you do not check this box, the screen's title remains in the title bar when the user moves the mouse over the button, as illustrated below.</p>  |
| Landing Page after login                                | <p>If you want one page in your Web site to appear after users sign in, enter the URL to that page. You can click <b>Select Page</b> to browse to the landing page. The last published version of the page appears. If the page has never been published, nothing appears.</p> <p>By default, the page from which the user logged in reappears.</p>  |
| Set smart desktop as the start location in the Workarea | <p>If you want the Smart Desktop to appear as soon as users enter the Workarea, click inside this check box.</p> <p>See Also: <a href="#">"Workarea Navigation" on page 14</a></p> <p>By default, the user sees the Smart Desktop after sign in.</p> <p>If you leave this check box blank, when you enter the Workarea, you go to the folder of the content specified at the <b>Landing Page after login</b> field.</p>  |
| Force preferences to all users                          | <p>To force these settings on all <b>Ektron CMS400.NET</b> users, check this box. If you do, users can see the values in the user profile screen but not change them.</p> <p>If you leave this box blank, users can personalize these values in their User Profile.</p>  |
| Enable Verify email?                                    | <p>Check this box if users should be notified whenever they subscribe to an email notification list. See Also: <a href="#">"What Happens if Verification email is Used" on page 889</a></p>  |



| Field                    | Description   |
|--------------------------|---|
| Enable PreApproval Group | Use this field to enable Automatic Task Creation. See Also: " <a href="#">Automatic Creation of Tasks Associated with Content</a> " on page 376 |

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

## Enabling WebImageFX

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

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

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

**Module Licenses:**

1.

**Default Application Language:**

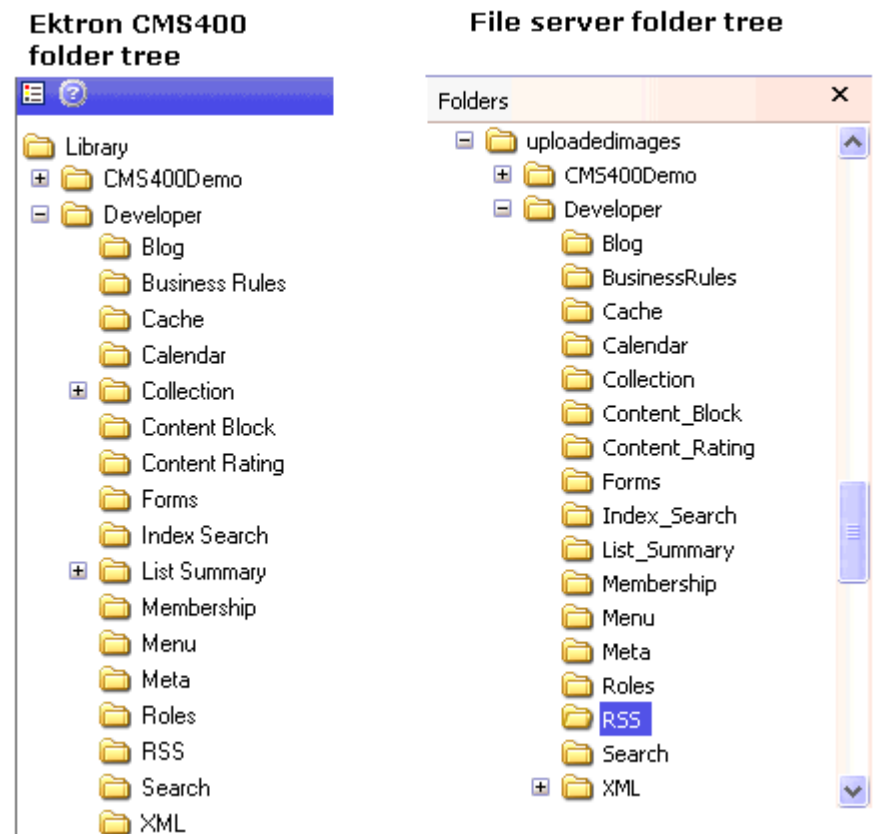
**Maximum Content Size ( 1 - 1,000,000 characters):**



## Enabling CMS to Create File System Folders

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

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

**NOTE**

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



## BuiltIn User

The builtin user is a user that is defined in the Ektron CMS400.NET setup screen. Primarily, he's an emergency user if you cannot log in to Ektron CMS400.NET as the administrator.

### NOTE

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


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

### IMPORTANT!

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

## Editing the BuiltIn User

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

1. Accessing the Edit Application Setup Information screen, as described in "Updating Setup Information" on page 27.
2. Locate the **Built In User** field.
3. Edit the built in user information by changing the username and password.
4. Click the Update button (  ).

### 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\CMS400versionnumber\Utilities.

## Editor Options

Style sheets greatly reduce the source code (and thereby the size of) a content. For this reason, they are becoming more popular than font-related tags for marking up content. The editor options section lets you determine how the editor handles this issue.

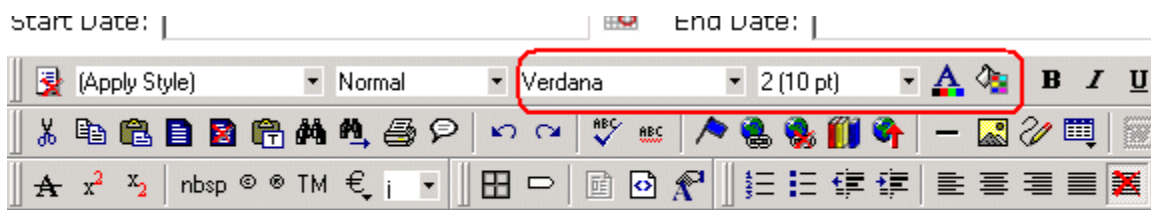
The following table explains the editor options you may set.



| Editor Option            | Description   |
|--------------------------|---|
| Enable Font Buttons      | <p>This option displays the following font-related buttons on the editor toolbar:</p> <ul style="list-style-type: none"> <li>• Font Face</li> <li>• Font Size</li> <li>• Font Color</li> <li>• Font Background Color</li> </ul> <p>See Also: <a href="#">"Enable Font Buttons" on page 34</a></p> |
| Preserve MS-Word Styles  | <p>When content from MS Word is cut and pasted into the editor, the editor, by default, removes some MS Word styles. Checking this box prevents the editor from removing them.</p> <p><u>Note: Ektron does <i>not</i> recommend enabling this feature.</u></p>                                    |
| Preserve MS-Word Classes | <p>Similar to styles, when content from MS-Word is cut and pasted into the editor, the editor, by default, removes some MS-Word classes. Checking this box prevents the editor from removing them.</p>  |

## Enable Font Buttons

Here is the editor with font related buttons enabled.





## Disable Font Buttons

Here is the editor with the font buttons disabled.

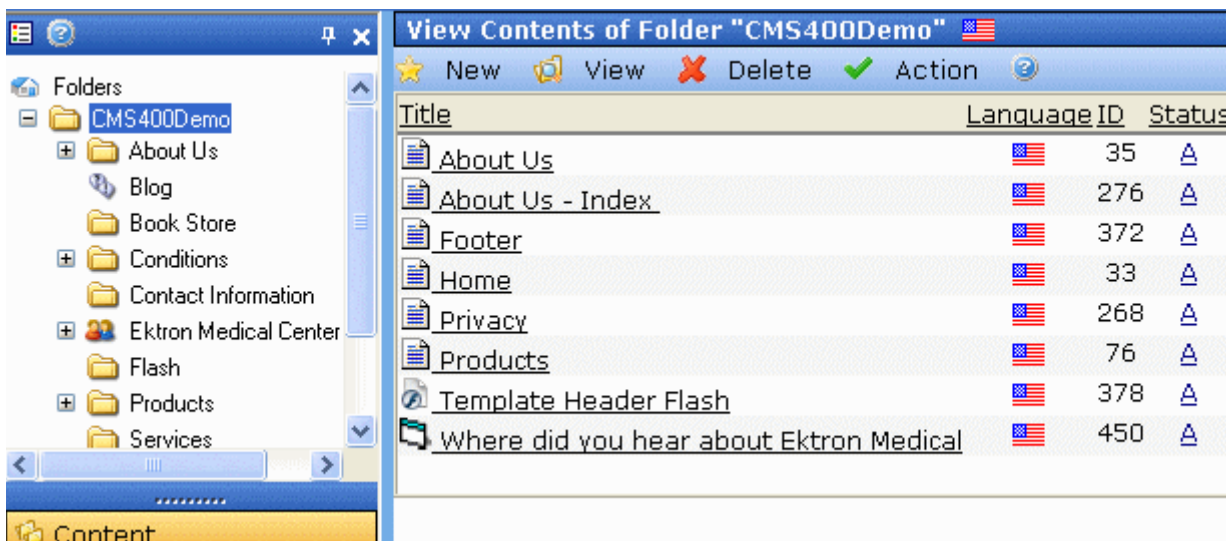




# Managing Content

## Managing Content Folders

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



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

- "Accessing the Content Folder" on page 37
- "Folder Properties" on page 43
- "Adding Subfolders" on page 49
- "Deleting Folders" on page 50
- "Community Folders" on page 50
- "Purge History" on page 57
- "Smart Forms" on page 58

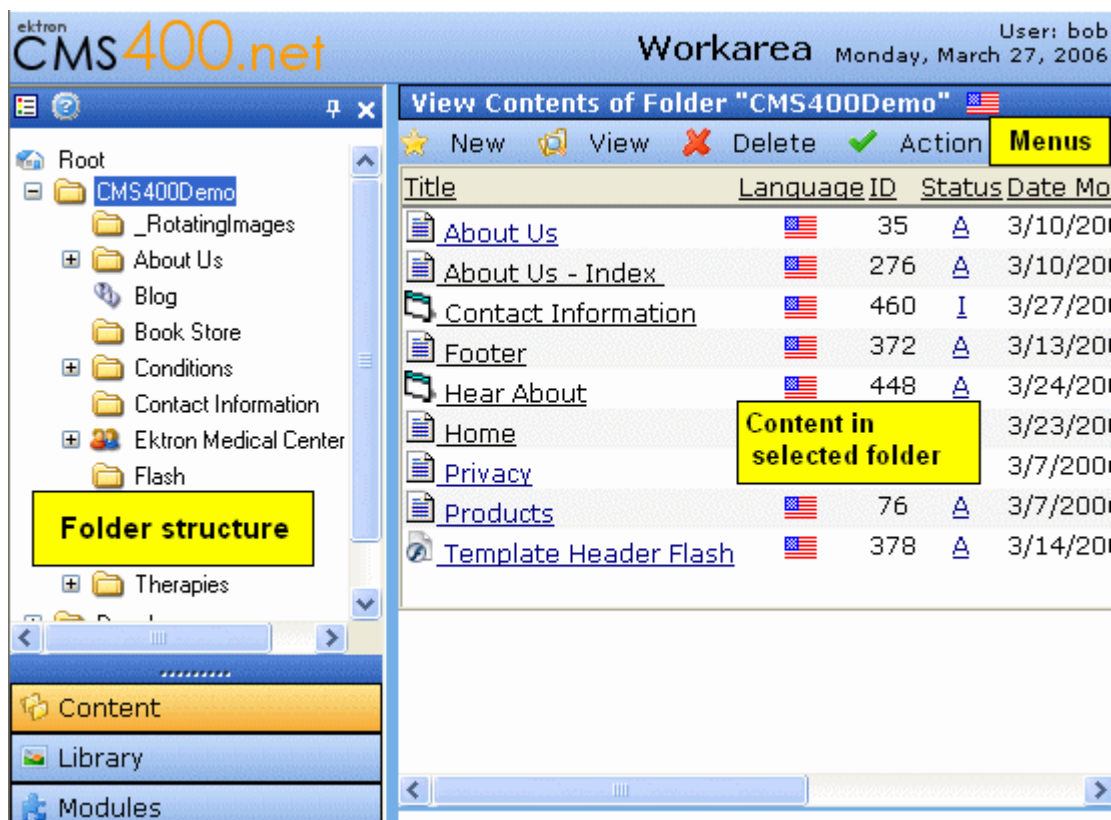


- "Breadcrumbs" on page 60
- "Search Content Folder" on page 69

## Accessing the Content Folder

To access a content folder, follow these steps.

1. Access the Workarea.
2. Click the **Content** folder in left side of the Workarea.
3. All content in the root content folder appears in the right frame. In the left frame, the content folder expands to display its subfolders.



### NOTE

To learn about modifying the folder display, see "Modifying the Folder Display" on page 42.



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

| Field         | Description  |
|---------------|--|
| Title         | The name given to the content by the creator.  |
| Language      | The content's language. See Also: <a href="#">"Working with Multi-Language Content" on page 779</a>        |
| ID            | The number Ektron CMS400.NET assigns to the content. It is used to retrieve the content from the database. |
| Status        | The content's status. See Also: <a href="#">"Content Status" on page 20</a>                                |
| Date Modified | The most recent date that the content was added, edited, or published.                                     |
| Last Editor   | The last user who accessed the content.  |

Additionally, each folder has the following menus.

- ["New Menu" on page 38](#)
- ["View Menu" on page 39](#)
- ["Delete Menu" on page 41](#)
- ["Action Menu" on page 41](#)

## New Menu

| Menu Option | Creates the following new item within selected folder | For more information, see                          |
|-------------|---|--|
| Folder      | folder  | <a href="#">"Search Content Folder" on page 69</a> |



| Menu Option       | Creates the following new item within selected folder | For more information, see  |
|-------------------|---|--|
| Blog              | Blog  | "Blogs" in the <b>Ektron CMS400.NET</b> User Manual  |
| Discussion Board  | Discussion Board                                      | "Discussion Boards" on page 450  |
| Community Folder  | Community Folder                                      | "Community Folders" on page 50   |
| HTML Content      | HTML content  | "Adding Content" on page 81  |
| HTML Form/ Survey | HTML Form, Poll, or Survey                            | "Managing HTML Forms" on page 300  |
| Smart Form        | Smart Form  | "Smart Forms" on page 58   |
| Office Documents  | Office Document                                       | <b>Ektron CMS400.NET</b> User Manual Section "Using the Document Management Functionality" > "Working with Microsoft Office Documents" |
| Managed Files     | Managed file, any supported type                      | <b>Ektron CMS400.NET</b> User Manual Section "Using the Document Management Functionality" > "Working with Managed Files"              |
| Multimedia        | Multimedia file, any supported type                   | "Managing Multimedia Assets" on page 325   |
| Open Office       | Open Office file, any supported type                  | <b>Ektron CMS400.NET</b> User Manual Section "Using the Document Management Functionality" > "Working with Open Office Files"          |
| Collection        | Collection  | "Collections" on page 585  |
| Menu              | Menu  | "Menu Feature" on page 597   |

## View Menu

The View Menu provides the following functions.



| Menu Option  | Function  | For more information, see   |
|--|---|---|
| All types  | Displays <i>all</i> content types of selected language.   |   |
| <ul style="list-style-type: none"> <li>• HTML content</li> <li>• HTML Form/Survey</li> <li>• Office Documents</li> <li>• Managed Files</li> <li>• Multimedia</li> <li>• Open Office</li> </ul> | <p>Limits folder display to <i>selected content type</i>. For example, choose <b>View &gt; Office Documents</b>, and see only Office Documents in the folder -- other content types are suppressed.</p> <p>This is especially helpful if the folder has a lot of items, and you are looking for only one type of content.</p> | <ul style="list-style-type: none"> <li>• <a href="#">"Adding Content" on page 81</a></li> <li>• <a href="#">"Managing HTML Forms" on page 300</a></li> <li>• <b>Ektron CMS400.NET</b> User Manual Section "Using the Document Management Functionality" &gt; "Working with Microsoft Office Documents"</li> <li>• <b>Ektron CMS400.NET</b> User Manual Section "Using the Document Management Functionality" &gt; "Working with Managed Files"</li> <li>• <a href="#">"Managing Multimedia Assets" on page 325</a></li> <li>• <b>Ektron CMS400.NET</b> User Manual Section "Using the Document Management Functionality" &gt; "Working with Open Office Files"</li> </ul> |
| Language   | <p>Limits display within a folder to one language.</p> <p>The language setting also determines the language of any new items you create in the folder.</p>  |   |
| Menus  | Lets user view and work with menus  | Ektron CMS400.NET User Manual section "Working with Menus" > "Adding a New Menu" "Adding a New Menu" > "Adding a Menu via Content Folder" "Adding a Menu via Content Folder" on page <a href="#">454</a>  |
| Collections  | Lets user view and work with Collection   | <a href="#">"Collections" on page 585</a>   |



| Menu Option       | Function   | For more information, see   |
|-------------------|--|---|
| Archived Content  | Lets user view and work with Archived content. That is, content that passed its scheduled End Date and whose archive option is either <b>Archive and remove from site</b> or <b>Archive and remain on Site</b> . | Ektron CMS400.NET User Manual section "Scheduling Content to Begin and End" > "Setting Archive Options" |
| Folder Properties | Lets user view and edit a folder's properties. In the properties screens, you can set permissions, approvals, etc.   | "Folder Properties" on page 43  |

## Delete Menu

This menu lets you perform the following functions.

| Menu option        | Lets you   | More Information   |
|--------------------|--|--|
| Delete this folder | Delete current folder and all of its content         | "Deleting Folders" on page 50  |
| Delete content     | Delete one, some, or all content items within folder | <b>Ektron CMS400.NET</b> User Manual section "Working with Folders and Content" > "Deleting Content" |

## Action Menu

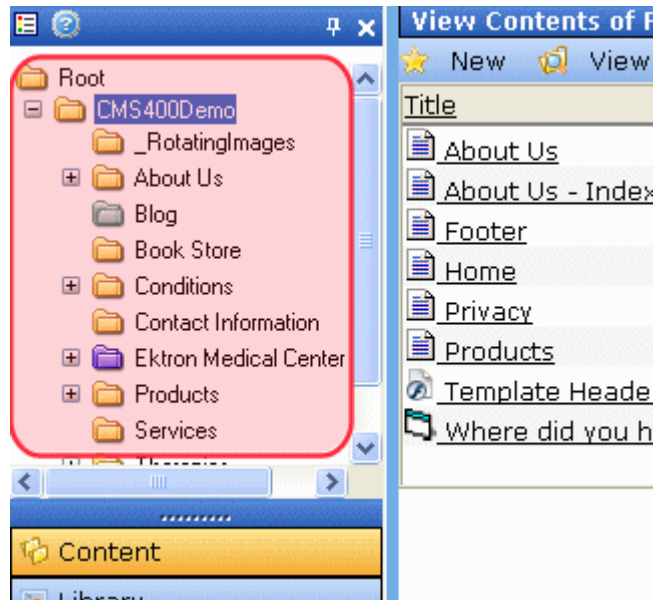
This menu lets you perform the following functions.

| Menu option            | Lets you  | More Information                                |
|------------------------|---|---|
| Export for translation | Prepare content for translation by a translation agency | "Using the Language Export Feature" on page 794 |
| Move/Copy Content      | Move or copy content to another folder.                 | "Moving or Copying Content" on page 86          |
| Search                 | Search through content in the Workarea.                 | "Search Content Folder" on page 69              |



## Modifying the Folder Display

**Ektron CMS400.NET** provides two techniques for displaying the folder tree. (The folder tree appears in the left frame when the Content tab is selected, as shown below.)



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

The following table contrasts the two techniques.

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



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

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

## Folder Properties

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

**NOTE** Only members of the Administrator User Group and those defined in the Manage Members for Role: Folder User Admin screen can view, add, or edit folder properties. (See Also: "Defining Roles" on page 704) In addition, if a user is not a member of the Administrators group, he must be given permission for individual folders on the Folder Properties > View Permissions for Folder screen. (See Also: "Setting Permissions" on page 686)

---

### Accessing the Folder Properties Screen

To access the folder properties screen, follow these steps.

1. Navigate to and click the content folder whose properties you want to edit.
2. Click **View > Folder Properties**.
3. The folder's View Properties screen appears.



**View Properties for the folder "Heart and Vascular Health Center"**

English (U.S.)

**Properties** | Metadata | Web Alerts | Smart Forms | Breadcrumb

**Foldername:**  
Heart and Vascular Health Center

**ID:**  
132


**Description:**

**Style Sheet filename for this folder:**  
[None Specified]  
**The inherited style sheet for this folder is: /CMS400Demo/default.css**

**Page Templates**

☒ Inherit Parent Template Configuration

| Default               | Page Template Name |
|-----------------------|--------------------|
| <input type="radio"/> | dynamic.aspx       |

If you want to change any properties, click the Edit button () to proceed to the edit screen.

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

### Fields on the Folder Properties Screen

| Tab        | Field       | Description  |
|------------|-------------|--|
| Properties | Foldername  | Edit the name of the content folder.<br><u>Note: You cannot change the root folder name.</u> |
|            | Description | Edit the description of the content folder.  |



| Tab | Field  | Description   |
|-----|--|---|
|     | Style Sheet filename for this folder: (leave blank to inherit) | <p>Specify a style sheet that defines the styles of the content within the content folder. Or, leave this field blank to inherit the style sheet from the parent content folder.</p> <p><u><a href="#">This style sheet affects content while being edited but has no effect on how the content appears on your Web site. To set or edit the style sheet that determines how your Web pages display, open the page's Web form and place a &lt;link rel="stylesheet"... tag within its &lt;HEAD&gt; tags.</a></u></p>  |
|     | Page Templates   | Lets you specify one or more templates for content in this folder. This folder's content uses the specified template when appearing on your Web site. See Also: <a href="#">"Inheritance of Folder Templates" on page 77</a>  |
|     | Inherit Parent Template Configuration                          | <p>Check this box to inherit the template from the parent content folder.</p> <p>Or, do not check this box and specify one or more templates below. See Also: <a href="#">"Inheritance of Folder Templates" on page 77</a></p>  |
|     | Taxonomy   | <ul style="list-style-type: none"> <li>If you want this folder to inherit taxonomy configurations from the parent folder, check <b>Inherit Parent Taxonomy Configuration</b>. If you uncheck <b>Inherit Parent Taxonomy Configuration</b>, you can then select taxonomies that can be applied to content in this folder.</li> <li>If you want all content in this folder to be assigned at least one taxonomy category, check <b>Required at least one category selection</b>.</li> </ul> <p>See Also: <a href="#">"Inheriting Taxonomies from a Parent Folder" on page 614</a>; <a href="#">"Taxonomy" on page 605</a></p> |
|     | Multi-Site Domain Configuration                                | Lets you set up and manage several Web sites under one CMS. See Also: <a href="#">"Support for Multiple Sites" on page 840</a>  |



| Tab | Field   | Description   |
|-----|---|---|
|     | <p>Should Office documents added to this folder be published in other format?</p> <p><u>Note: This field only appears if the <b>Enable Office documents to be published in other format</b> property is checked in the Settings &gt; Configuration &gt; Setup screen. See Also: "Updating Setup Information" on page 27</u></p> | <p>Select <b>Publish Office documents as PDF</b>, <b>Publish Office documents as HTML</b>, or <b>No</b> to elect neither choice.</p> <p><b>Publish Office documents as PDF</b><br/>(This field only appears if the <b>Publish as PDF</b> property is checked in <b>Settings &gt; Configuration &gt; Setup</b>.)<br/>Select this option if Office documents in this folder are published as PDF files. See Also: "<a href="#">PDF Generation</a>" on page 332</p> <p><b>Publish Office documents as HTML</b><br/>Select this option if you want to publish Office documents in this folder in an HTML format.<br/>If you select this option, Office documents are transformed to HTML format, which means they are formatted to display within a browser. As a result, anyone visiting your site can view the document, whether or not they have Microsoft Office software installed on their computer.<br/>If you do not elect this option, nor <b>Publish Office documents as PDF</b>, a site visitor without Microsoft Office software cannot view a page that contains an Office document.</p> <p><u>Note: Only Microsoft Word, Excel, and PowerPoint files can be published as HTML.</u></p> <p><u>Note: This property is not inherited from a parent folder, nor is it inherited by any subfolders below this folder.</u></p> <p>For more information about working with Office documents, see the <b>Ektron CMS400.NET</b> User Manual section "Using the Document Management Functionality"&gt; "Working with Office Documents."</p> |
|     | Quick Deploy:<br>Replicate Folder<br>Contents   | <p>Determines whether content in this folder is updated when Quick Deploy is run.</p> <p>See Also: "Quick Deploy" in the <b>Ektron CMS400.NET</b> Site Replication Manual</p>   |

### Tabs on the Folder Properties Screen








| Tab      | Description  |
|----------|--|
| Metadata | See " <a href="#">Assigning Metadata to a Folder</a> " on page 137 |



| Tab         | Description  |
|-------------|--|
| Web Alerts  | See <a href="#">"Assigning Web Alert Information to Content"</a> on page 884 |
| Smart Forms | See <a href="#">"Smart Forms"</a> on page 58                                 |
| Breadcrumb  | See <a href="#">"Breadcrumbs"</a> on page 60                                 |
| Category    | See <a href="#">"Making a Taxonomy Available to a Folder"</a> on page 612    |

## Folder Properties Toolbar

The Folder Properties screen contains these toolbar buttons.

| Button  | Name                          | Description  | More Information   |
|---|-------------------------------|--|--|
|    | Edit Properties               | Access the Edit Folder Properties screen                           | <a href="#">"Editing Folder Properties"</a> on page 48                                       |
|   | Permissions                   | Access the folder's Permissions Table                              | <a href="#">"Setting Permissions"</a> on page 686  |
|  | Modify Preapproval Group      | Set or update preapproval group assigned to folder                 | <a href="#">"Automatic Creation of Tasks Associated with Content"</a> on page 376            |
|  | Approvals                     | Access the folder's approvals table                                | <a href="#">"Setting Approval Chains"</a> on page 695  |
|  | Purge History                 | Access the folder's purge history table                            | <a href="#">"Purge History"</a> on page 57   |
|  | Restore Web Alert Inheritance | Assigns the folder's Web Alert properties to all content in folder | <a href="#">"Inheriting Content-Level Web Alert Information from Its Folder"</a> on page 886 |
|  | Back                          | Go to previous screen  |  |




## Editing Folder Properties

A content folder's properties consist of

- name
- description
- style sheet
- template
- Metadata
- Web Alerts
- "Smart Forms" on page 58
- "Breadcrumbs" on page 60

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

1. Access the View Properties screen for the folder you want to edit, as described in "[Accessing the Folder Properties Screen](#)" on page 43.
2. Click the Edit button ()
3. The folder's Edit Properties screen appears.



**View Properties for the folder "Content"**

English (U.S.)

**Properties** **Metadata** **Web Alerts** **Smart Forms**

**Foldername:**  
Content

**ID:**  
0

**Description:**


**Style Sheet filename for this folder:**  
/CMS400Demo/default.css

**Page Templates**

☐ **Inherit Parent Template Configuration**

| Default                          | Page Template Name |
|----------------------------------|--------------------|
| <input checked="" type="radio"/> | dynamic.aspx       |

**Should documents added to this folder be published in other format?**  
No


4. Make the necessary changes to the content folder's properties. See ["Fields on the Folder Properties Screen"](#) on page 44.
5. Click the Update button (.

## Adding Subfolders

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

1. Navigate to and click the folder within which you want to create a subfolder.
2. Click **New > Folder**.
3. The Add a Subfolder screen appears.



4. Complete the fields. See ["Fields on the Folder Properties Screen" on page 44](#).
5. Click the Save button ().

You can modify the subfolder's properties, permissions, approval chain, etc. For a list of options, see ["Folder Properties Toolbar" on page 47](#).

## Deleting Folders

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

---


**NOTE** You cannot delete the top-level folder, **Content**.

---

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

---

To delete a content folder, follow these steps.


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

## Community Folders

---

**IMPORTANT!** This feature is an optional add-on. See your Ektron sales consultant for information.

---

Community folders resemble regular folders in most ways. The only difference is that membership users can add and edit content in these folders only. Community folders have a unique icon, which looks like two houses (.

Membership users add and edit Community folder content after signing in to the Web site. They do not use the Workarea to add or edit content.



**NOTE** [Authorized CMS users can also create and update Community folder content.](#)

---

## How Quick Deploy Moves Content in Community Folders

The Quick Deploy feature moves content created/edited by users from your production server to the staging server. Once the Quick Deploy feature is enabled, all folders, blogs, and forums include a **Quick Deploy** checkbox. Since Community folders provide membership users with the ability to add and edit content on the production server, the **Quick Deploy** checkbox cannot be unchecked. See Also: “Quick Deploy” In the **Ektron CMS400.NET** Site Replication Manual

**NOTE** [Membership users can view private content in any folder.](#)

---

## Creating a Community Folder


1. In the **Workarea > Content**, go to the folder in which you want to create the community folder.
2. Select **New > Community Folder**.
3. Assign properties as you would any other folder. See [“Folder Properties” on page 43](#)

**NOTE** [The folder properties screen lets you require metadata for any content item. However, membership users cannot enter metadata. Therefore, this requirement is ignored when membership users edit community folder content. If an Ektron CMS400.NET user tries to edit that content, he is required to enter a metadata value.](#)

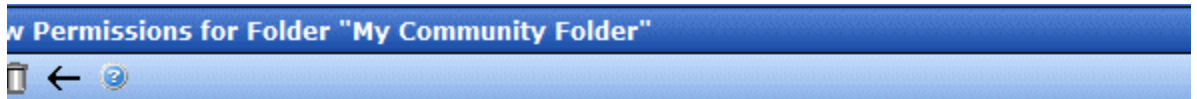
---

## Assigning Permissions for a Community Folder

Since Community folders are intended for membership users, this section explains how to assign permissions for them. To assign folder permissions for regular users, see [“Setting Permissions” on page 686](#).

1. Navigate to the folder.
2. Click **View > Folder Properties**.
3. Click the View Permissions button (.
4. If necessary, uncheck the **Allow this object to inherit permissions** checkbox.
5. Click **View Membership Users**.






low this object to inherit permissions.


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

#### Advanced Permissions

[View MemberShip users](#)

| or Group Name | Read Only | Edit | Add | Delete | Restore | Library<br>Read Only | Add<br>Images | Add<br>Files | Add<br>Hyperlinks | Overwrite<br>Library |
|---------------|-----------|------|-----|--------|---------|----------------------|---------------|--------------|-------------------|----------------------|
| BobBolt       | x         | x    | x   | x      | x       | x                    | x             | x            | x                 | x                    |

6. Click the Add button (.
7. Select the membership user or group to which you want to assign permission for this folder.
8. Check the permission boxes as appropriate.




| Username | Read Only                           | Edit                                | Add                                 | Delete                   | Restore                  | Library<br>Read Only                | Add<br>Images                       | Add<br>Files                        | Add<br>Hyperlinks        | Overwrite<br>Library     |
|----------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| jmember  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## How a User Views and Edits Community Folder Content


When a user with Read-only or higher permission navigates to a page whose content is in a community folder, he can view it. If he has edit permission, a green border surrounds it.





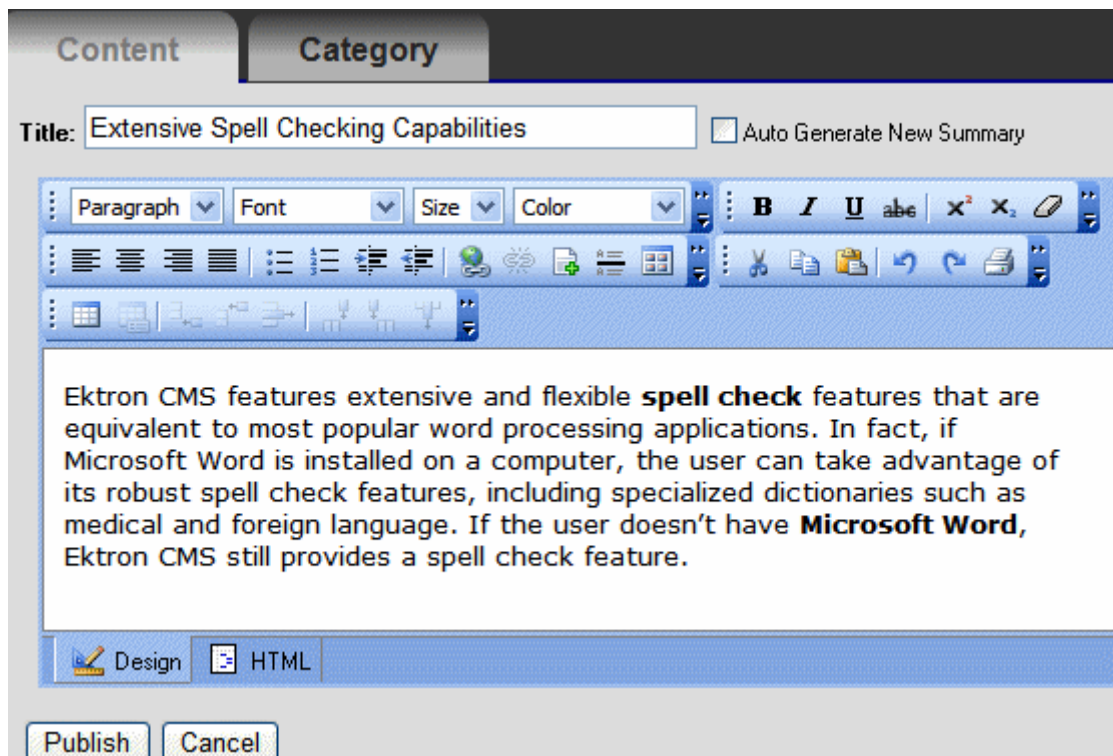
 **Amherst, N.H. – December 13, 2005** – Ektron Inc., an innovator in Web content management software, today announced the company received a “positive” rating in Gartner’s “MarketScope for Web Content Management, 2005” (1). Ektron was one of 16 vendors included in the report from the leading provider of research and analysis on the global information technology industry.

**IMPORTANT!**

Membership users can edit only HTML content and assets. They cannot edit other content types (HTML forms, Smart Forms, etc.).

When a membership user clicks the Edit button () , a new window displays the content within an editor.

Other membership buttons are View History () and Log out () . See Also: ["View History \(\)" on page 23](#)



**Content** **Category**

Title:  ☐ Auto Generate New Summary

Paragraph Font Size Color **B** *I* U abc  $\times^2$   $\times_2$



Ektron CMS features extensive and flexible **spell check** features that are equivalent to most popular word processing applications. In fact, if Microsoft Word is installed on a computer, the user can take advantage of its robust spell check features, including specialized dictionaries such as medical and foreign language. If the user doesn't have **Microsoft Word**, Ektron CMS still provides a spell check feature.

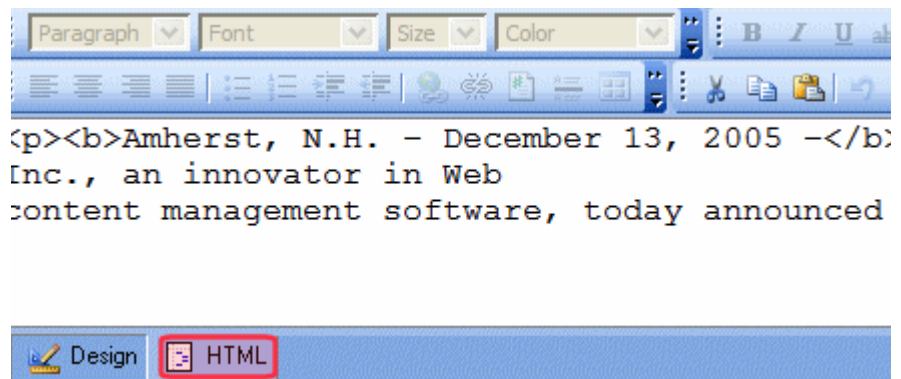
Design HTML

Publish Cancel



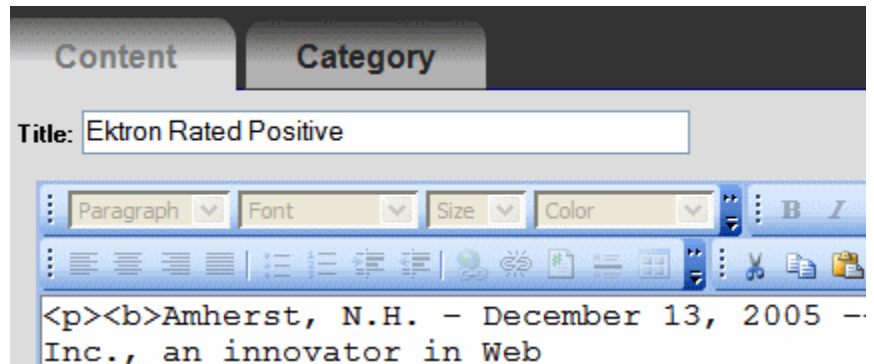
This editor has fewer capabilities than **Ektron CMS400.NET**'s editor. However, a membership user can

- add images and files via the library button (  ) if the membership user has **Add Images** and **Add Files** permission. See Also: "[Library Folders and Permissions](#)" on page 173
- add a wiki using the page link button (  ). See Also: **Ektron CMS400.NET** User Manual section "Introduction to eWebEditPro+XML" > "Using Ektron CMS400.NET's Wiki Feature"
- view the page's HTML source by clicking the HTML tab in the lower left corner



- Assign a taxonomy category to the content by clicking the **Category** tab. See Also: "[Taxonomy](#)" on page 605





**NOTE** The **Category** tab only appears if a Taxonomy is applied to the content's folder.

- replace the content summary with the first 50 words of the content, using the **Auto Generate New Summary** check box. See *Also: "Auto Generating Summaries" on page 82*

When a membership user finishes editing, he clicks **Publish**. If the content's folder has an approval chain, the content's status changes to submitted, and the border color changes to yellow. If there is no approval chain, the content is published immediately.

## How a Membership User Adds Community Folder Content

You will need the assistance of your developer to enable this feature. Instructions for doing so are in the developer sample site. After you install it, go to `siteroot/developer/ContentBlock/AddContentMembershipUser.aspx`.

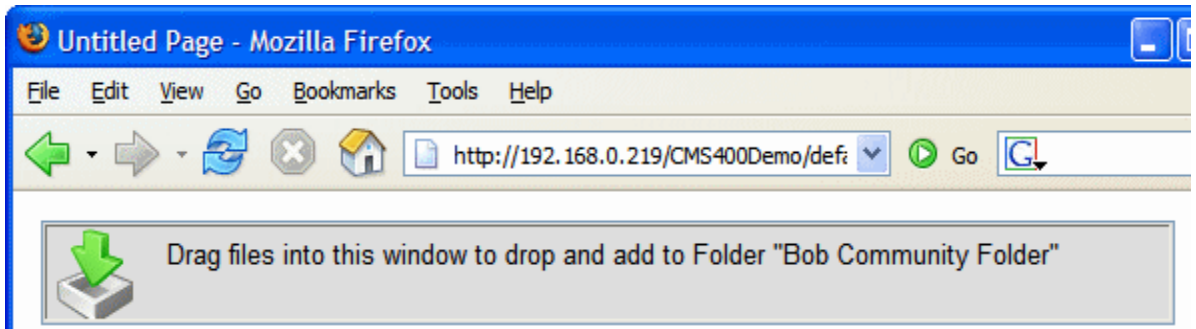
Or, from the developer home page (`siteroot/developer/default.aspx`), go to **Content Blocks > Membership Add Content**.

## How a Membership User Adds an Asset

First, your developer must create a template, then drop an Asset Server Control onto it. While adding the Asset Server Control, the developer specifies **Add** at the **Upload Type** property, and a community folder to which the asset will be saved at the **DefaultFolderID** property.



When a membership user authorized to add content navigates to the page with the server control, he sees an Asset control area like the one that appears when CMS users add assets. He can then drag and drop assets into **Ektron CMS400.NET**.



This is described in the **Ektron CMS400.NET** User Manual section "Using the Document Management Functionality" > "Importing Files via Drag and Drop."

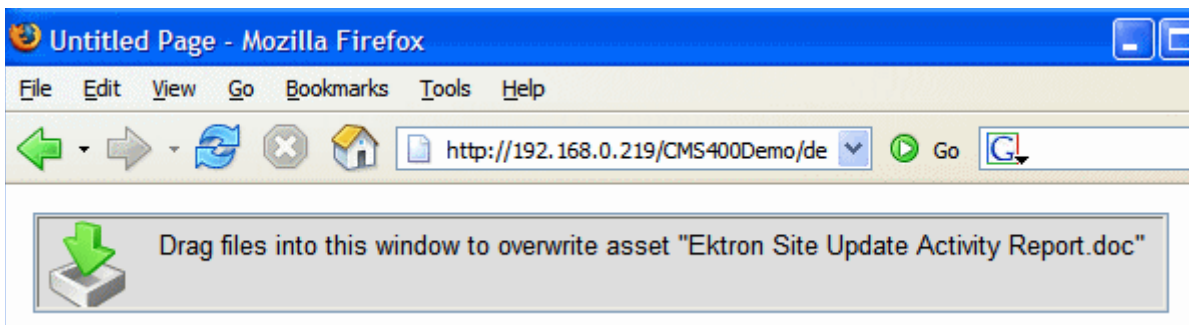
Additional information about administering assets is found in ["Managing Assets" on page 313](#).

## How a Membership User Updates an Asset

Your developer adds the Asset Server Control, as described in ["How a Membership User Adds an Asset" on page 55](#). The only difference is that the developer specifies **Update** at the **Upload Type** property, and a community folder to which the asset will be saved at the **DefaultFolderID** property.

Then, the developer specifies an asset ID number at the **DefaultAsset ID** property. Using that control, the membership user can update the identified asset only.





## Purge History


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

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

### NOTE

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


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

1. Access the View Folder Properties screen for the content folder you want to purge the history for, as described in ["Accessing the Folder Properties Screen" on page 43](#).
2. Click the Purge History button (.
3. The Purge History screen appears.
4. Use the following table to customize the Purge History options.

| Field                                 | Description   | Required? |
|---------------------------------------|---|-----------|
| Only purge historical versions before | Specify a date to limit the number of historical versions to purge. When specified, only historical versions with a date before this date are purged. | Yes       |
| Recursive Purge                       | Purges historical records for content in this folder's subfolders.  | No        |



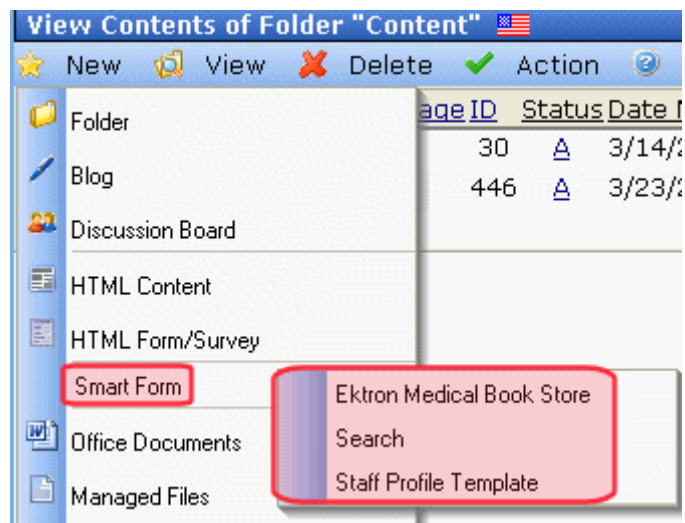
| Field                              | Description  | Required? |
|------------------------------------|--|-----------|
| Purge versions marked as Published | Purges published versions of content as well as checked-in versions. | No        |

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

## Smart Forms

Use the Smart Forms screen to assign one or more XML configurations to a folder. (To learn about how Smart Forms are created, see ["Working with Smart Forms" on page 182.](#))

When creating new content in a folder, the **New** menu provides a Smart Form option. This option displays a secondary menu, which lists Smart Forms that you can use to create XML content. (See graphic below.)





This section explains how to determine the list of Smart Forms available when creating content.

## Inheritance and Smart Forms

A folder's Smart Forms can be inherited from the parent folder, or you can break inheritance and assign a unique group of Smart Forms. Use the **Inherit Parent Configuration** checkbox to retain or break inheritance.

## Assigning Smart Forms to a Folder

If you break inheritance, you then select the Smart Forms that can be assigned to content in the folder using the Smart Forms dropdown list (shown below).

**Edit Properties for the folder "Developer"**

Properties Metadata Web Alerts **Smart Forms**

**Enabled Smart Forms**

☐ Inherit Parent Configuration

| Smart Form                | Action                                      |
|---------------------------|---|
| Search                    | <a href="#">View</a> <a href="#">Remove</a> |
| [Select Smart Form]       | <a href="#">Add</a>                         |
| [Select Smart Form]       |   |
| Ektron Medical Book Store |   |
| Staff Profile Template    |   |

You can preview any Smart Form by clicking the Preview button (). To add any Smart Form, select it from the dropdown list and click **Add**.

To remove a Smart Form, click **Remove**.




## Requiring Smart Forms

You can require a Smart Form to be the only type of content that can be added within a folder. To enable this, click the **Require Smart Forms** check box on the Smart Forms tab.

The screenshot shows the 'Edit Properties for the folder "Root"' dialog box with the 'Smart Forms' tab selected. The 'Enabled Smart Forms' section includes a table of configured smart forms and a 'Require Smart Forms' checkbox at the bottom, which is highlighted with a red rectangle.

| Default                          | Smart Form                | Action                                      |
|----------------------------------|---------------------------|---|
| <input checked="" type="radio"/> | Ektron Medical Book Store | <a href="#">View</a> <a href="#">Remove</a> |
| <input type="radio"/>            | Blank HTML                | <a href="#">Remove</a>                      |

[Select Smart Form]  [Add](#)

☐ **Require Smart Forms**

If you do, the user can only choose enabled Smart Forms when viewing that folder's **New** menu -- all other content types are suppressed.

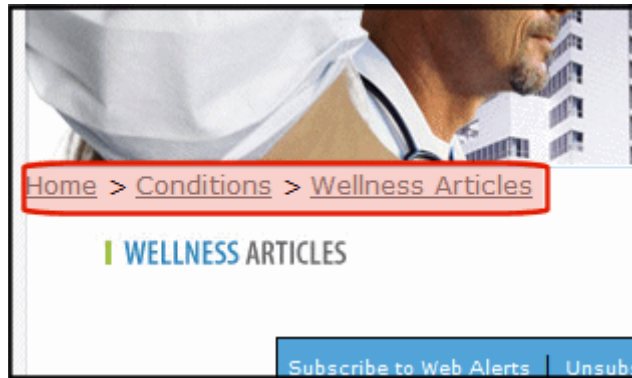
## Breadcrumbs

### WARNING!

The information described in this section is for use with the FolderBreadcrumb server control, *not* the BreadCrumb server control. For additional information on each server control, see The Developer Manual sections "[Introduction to Ektron CMS400.NET Server Controls](#)" > "[BreadCrumb Server Control](#)" and "[Introduction to Ektron CMS400.NET Server Controls](#)" > "[FolderBreadcrumb Server Control](#)".

Use the Breadcrumb tab to define a site map for the folder or to inherit one from the parent folder. Breadcrumbs improve the way site visitors can navigate around your site. Below is an example.





The following topics explain Breadcrumbs in more detail.


- "Inheritance and Breadcrumbs" on page 61
- "Adding a Breadcrumb" on page 61
- "Reordering Breadcrumb Items" on page 64
- "Editing a Breadcrumb Item" on page 66
- "Removing a Breadcrumb Item" on page 68

## Inheritance and Breadcrumbs

A folder's breadcrumbs can be inherited from the parent folder, or you can break inheritance and assign a path of breadcrumbs. Use the **Inherit Parent Configuration** checkbox to retain or break inheritance.

## Adding a Breadcrumb

Navigate to the folder for which you want to add the breadcrumbs. The example below adds three breadcrumbs to the trail.

1. On the **View Contents of Folder** screen, click **View > Folder Properties**.
2. Click the Edit Properties button ()
3. Click the **Breadcrumb** tab.
4. The Edit Breadcrumbs screen appears.



**Edit Properties for the folder "Wellness Articles"**

← ?

**Properties** | **Metadata** | **Web Alerts** | **Smart Forms** | **Breadcrumb**

**Path:**

↑ ↓

☐ Inherit from parent folder

**Add New Item**

Title

URL Link  🔍

Description:

5. In the **Add New Item** section of the screen, add the following information.
  - **Title** - the name of the breadcrumb as you want it to appear in the breadcrumb trail
  - **URL Link** - the URL path to the breadcrumb's destination, typically a **Ektron CMS400.NET** content item. For example, default.aspx.  
 If you are not sure what the file's name is, click the Binoculars (🔍), and the library for quicklinks appears. Select the content item to add to the breadcrumb.  
 You can also enter a URL, for example, `www.example.com`.
  - **Description** - add a description for the breadcrumb
6. Click the Add button (  ).
7. The first item in the breadcrumb path appears.



**Edit Properties for the folder "Wellness Articles"**

**Properties** | **Metadata** | **Web Alerts** | **Smart Forms** | **Breadcrumb**

**Path:**  
**Home**

☐ Inherit from parent folder

 Home

[Add New Item](#)

Title


URL Link  

Description:

8. Repeat steps 5 through 7 for each item in the breadcrumb path.
9. The items in the breadcrumb now appear like this.




**Edit Properties for the folder "Wellness Articles"**


  

**Properties** | **Metadata** | **Web Alerts** | **Smart Forms** | **Breadcrumb**

**Path:**  
**Home >> Conditions >> Wellness Articles**

☐ Inherit from parent folder

 Home  
 Conditions  
 Wellness Articles

[Add New Item](#)


Title

URL Link  

Description:



10. Click the Save button ().

## Reordering Breadcrumb Items

1. On the **View Contents of Folder** screen, click **View > Folder Properties**.
2. Click the Edit Properties button (.
3. Click the **Breadcrumb** tab.
4. The Edit Breadcrumbs screen appears.




**Edit Properties for the folder "Wellness Articles"**


  


**Properties** | **Metadata** | **Web Alerts** | **Smart Forms** | **Breadcrumb**


**Path:**  
**Home >> Conditions >> Wellness Articles**

☐ Inherit from parent folder

 Home

 Conditions

 Wellness Articles

**Add New Item**

Title

URL Link  

Description:

5. Click a breadcrumb item.

**WARNING!**

Do not click on the red X. This deletes the breadcrumb item. See Also: "Removing a Breadcrumb Item" on page 68.



**Edit Properties for the folder "Wellness Articles"**

Properties Metadata Web Alerts Smart Forms Breadcrumb

**Path:**  
Home >> Conditions >> Wellness Articles

☐ Inherit from parent folder  
 X Home  
 X Conditions  
 X Wellness Articles

**Add New Item**

Title: Wellness Articles

URL Link: wellness\_article.aspx

Description: Wellness Articles

Save Reset



6. Click the green Up and Down buttons (↑ ↓) to move the item around in the list.
7. Once the items are in the correct position, click the Save button (💾).

## Editing a Breadcrumb Item

1. On the **View Contents of Folder** screen, click **View > Folder Properties**.
2. Click the Edit Properties button (✎).
3. Click the **Breadcrumb** tab.
4. The Edit Breadcrumbs screen appears.




**Edit Properties for the folder "Wellness Articles"**




  

**Properties** | **Metadata** | **Web Alerts** | **Smart Forms** | **Breadcrumb**

**Path:**  
**Home >> Conditions >> Wellness Articles**

☐ Inherit from parent folder

 Home  
 Conditions  
 Wellness Articles

**Add New Item**

Title

URL Link  

Description:

5. Click a breadcrumb item.

**WARNING!**

Do not click the red X. This deletes the breadcrumb item. See Also: "Removing a Breadcrumb Item" on page 68.



**Edit Properties for the folder "Wellness Articles"**

Properties Metadata Web Alerts Smart Forms Breadcrumb

**Path:**  
Home >> Conditions >> Wellness Articles

☐ Inherit from parent folder  
 Home  
 Conditions  
 Wellness Articles

**Add New Item**

Title: Wellness Articles

URL Link: wellness\_article.aspx

Description: Wellness Articles

Save Reset

6. In the **Add New Item** section, edit the information.
7. Click the Save button ( ).
8. Click the Save button ( ).

## Removing a Breadcrumb Item

1. On the **View Contents of Folder** screen, click **View > Folder Properties**.
2. Click the Edit Properties button ( ).
3. Click the **Breadcrumb** tab.
4. The Edit Breadcrumbs screen appears.



**Edit Properties for the folder "Wellness Articles"**

← ?

**Properties** | Metadata | Web Alerts | Smart Forms | Breadcrumb

**Path:**  
**Home >> Conditions >> Wellness Articles**

↑ ↓

☐ Inherit from parent folder

✗ Home  
 ✗ Conditions  
 ✗ Wellness Articles

**Add New Item**

Title

URL Link

Description:

5. Click the Red X ( ✗ ) next to the breadcrumb item you want to remove.
6. The breadcrumb item is deleted.
7. Click the Save button ( ).

## Search Content Folder

You can search a folder to locate content within your Web site. Use this feature to find content when you know the text that needs to be updated but are unsure of its folder or where it is on the Web site. The search only looks through the current folder and its subfolders. So if you want to search the entire site, begin with the root content folder.

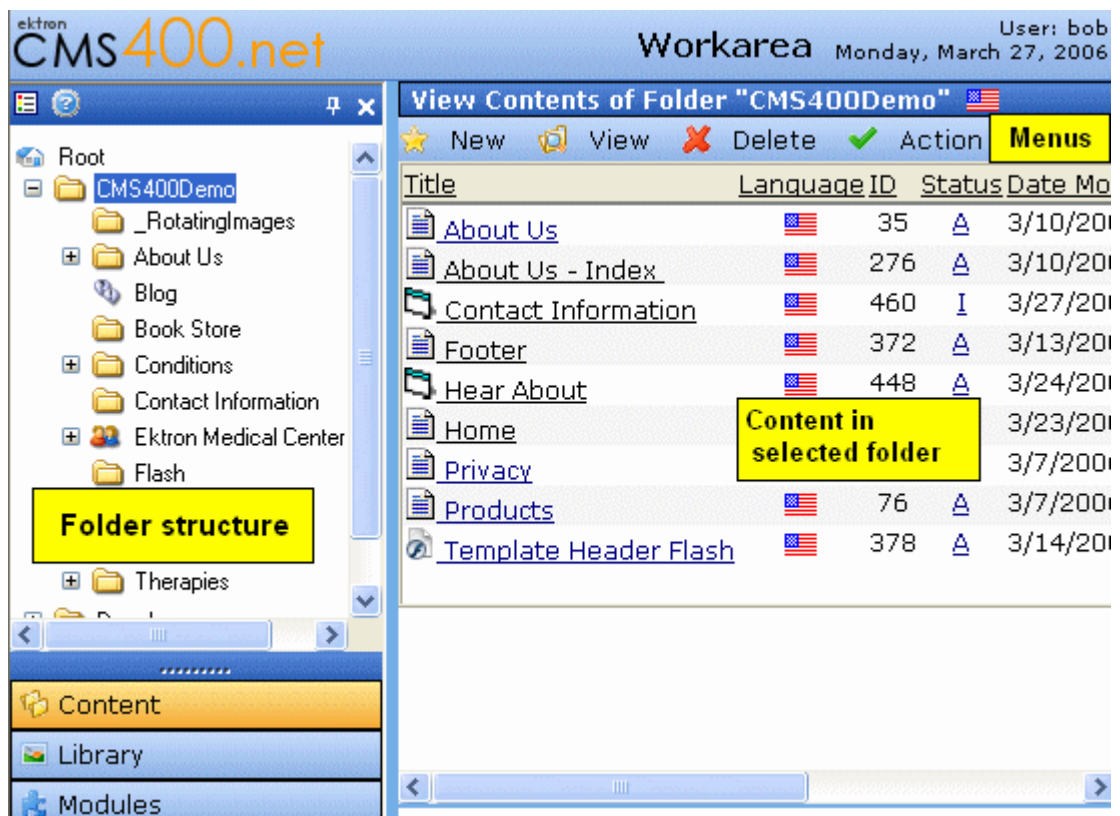


To learn more about searching through folders on **Ektron CMS400.NET**, see “Searching the Workarea” in the **Ektron CMS400.NET** User Manual.



# Managing HTML Content

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



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

See Also:

- "Creating/Updating Templates" on page 72
- "Adding Content" on page 81



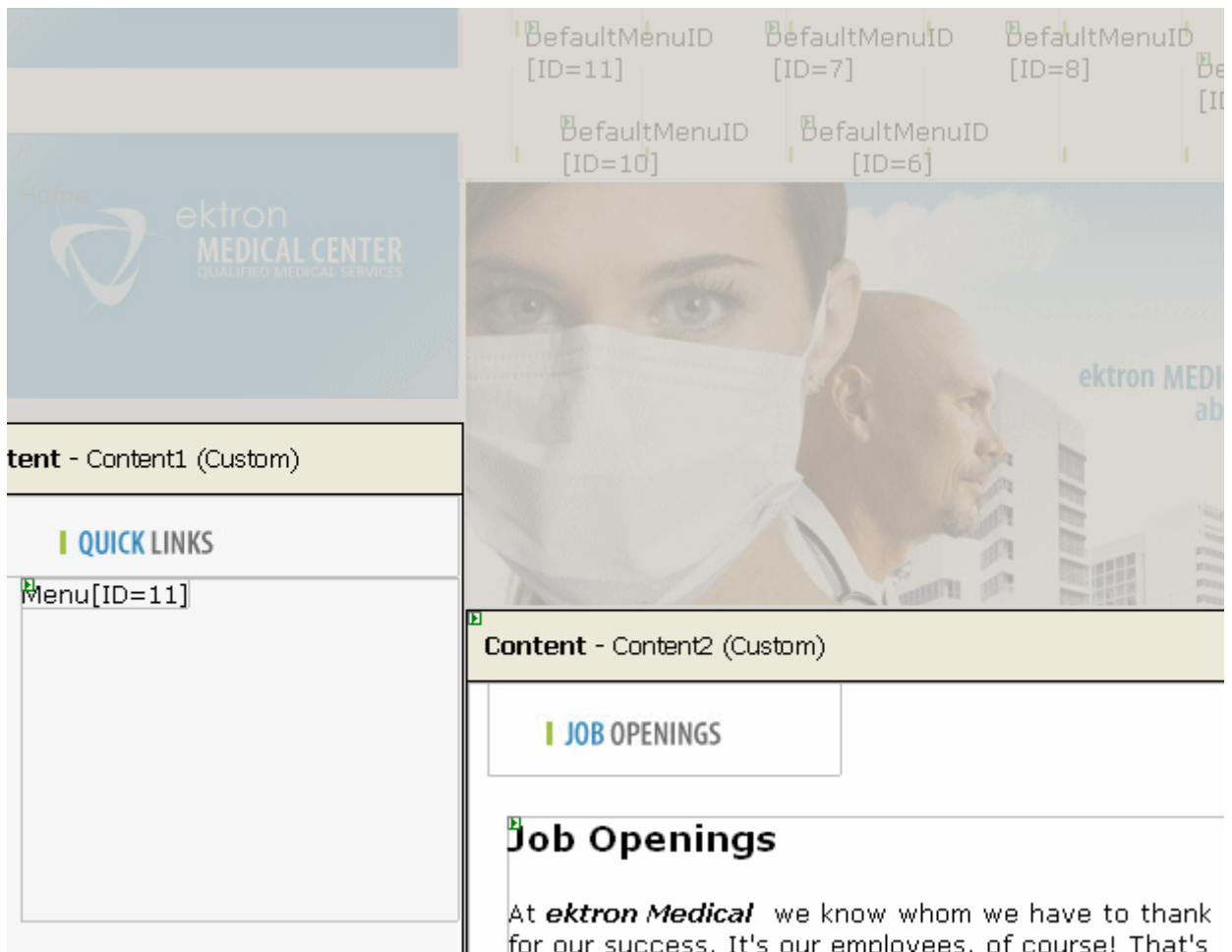
- "Forming URLs For Ektron CMS400.NET Documents" on page 84
- "Viewing Content" on page 85
- "Editing Content" on page 86
- "Moving or Copying Content" on page 86
- "Viewing and Restoring Historical Versions of Content" on page 89
- "Scheduling Content" on page 90
- "Deleting Content" on page 90
- "Content History" on page 90
- "Content Permissions" on page 90
- "Content Approvals" on page 90
- "Content Workflow" on page 91
- "Link Checking" on page 91
- "Assigning Tasks to Content" on page 91
- "Content Properties" on page 91
- "Content Rating" on page 92

## Creating/Updating Templates

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

A template included with Ektron's sample site appears below. Notice that the top of the screen contains headers that appear on several pages. Other areas contain links to **Ektron CMS400.NET** objects, such as menus and text. The developer can easily modify the content inside these areas.





**NOTE** To learn more about creating templates, see the **Ektron CMS400.NET Developer's Manual** section "Introduction to Ektron CMS400.NET Server Controls" > "Setting Up a Template." Another good resource is the Ektron technical article "Templating in CMS400.NET" (<http://dev.ektron.com/articles.aspx?id=6724>).

Templates are more fully explained through the following topics.

- "How Templates are Used" on page 74
- "Declaring Templates" on page 74
- "Inheritance of Folder Templates" on page 77
- "Assigning Templates to Folders" on page 78

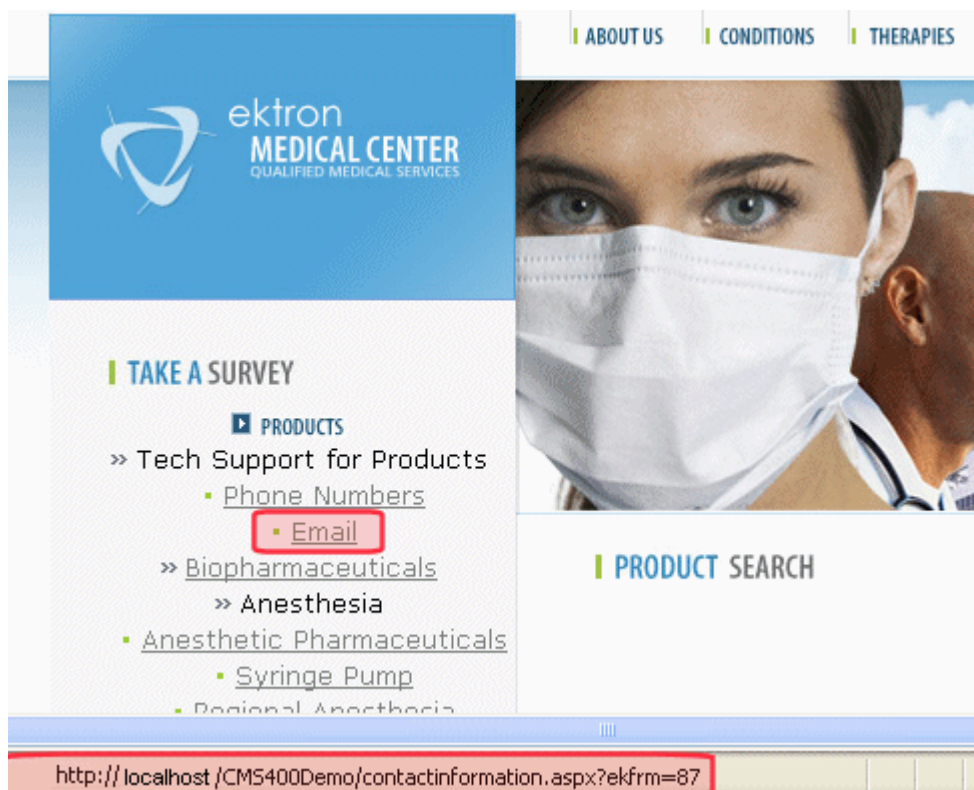


- "Assigning Templates to Content" on page 79

## How Templates are Used

Except for your Web site's home page, all pages on your site are made accessible by *hyperlinks*. Hyperlinks can appear within content. They are also used to link content items from list summaries, menus, and collections.

The template is a key component of the hyperlink definition -- it defines the template in which to display the content. As seen in the example below, when the user selects **Email**, that content item (ID 87) will display within the `contactinformation.aspx` template.



## Declaring Templates

After creating your templates, declare them within **Ektron CMS400.NET**. To do this, go to the Active System Templates



screen, available from **Settings > Configuration > Template Configuration**.

| Active System Templates              |                        |                        |
|--------------------------------------|------------------------|------------------------|
| +                                    |                        |                        |
| aboutus.aspx                         | <a href="#">Update</a> | <a href="#">Delete</a> |
| blog_comment.aspx                    | <a href="#">Update</a> | <a href="#">Delete</a> |
| contactinformation.aspx              | <a href="#">Update</a> | <a href="#">Delete</a> |
| Developer/Collection/collection.aspx | <a href="#">Update</a> | <a href="#">Delete</a> |
| Developer/ListSummary/pr.aspx        | <a href="#">Update</a> | <a href="#">Delete</a> |
| dynamic.aspx                         | <a href="#">Update</a> | <a href="#">Delete</a> |
| login.aspx                           | <a href="#">Update</a> | <a href="#">Delete</a> |
| news.aspx                            | <a href="#">Update</a> | <a href="#">Delete</a> |
| products.aspx                        | <a href="#">Update</a> | <a href="#">Delete</a> |
| services.aspx                        | <a href="#">Update</a> | <a href="#">Delete</a> |
| staff.aspx                           | <a href="#">Update</a> | <a href="#">Delete</a> |
| therapies.aspx                       | <a href="#">Update</a> | <a href="#">Delete</a> |


From this screen, you can add new templates, or delete or update existing ones.

**NOTE** Only members of the Administrators group and users defined in the Manage Members for Role: Template Configuration screen have permission to add, delete or update templates. *See Also:* "Defining Roles" on page 704

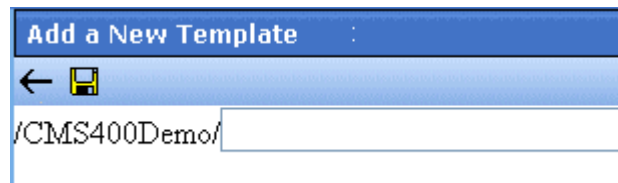
*See Also:*

- "Creating/Updating Templates" on page 72
- "Adding a New Template" on page 75
- "Deleting a Template" on page 76
- "Updating a Template" on page 76

## Adding a New Template

To add a new template, click the Add button (  ). The Add a New Template screen appears.





Enter the path to the new template and click the Save button (floppy disk icon).

### ***Deleting a Template***

To delete a template, click Delete next to the template.

You can only delete a template if it is not assigned as any folder's default template. If you choose a template that is assigned as a default, a screen tells you why you cannot delete it and lists the folders for which it is the default.

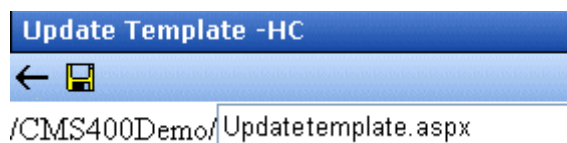
If you delete a template that is not used as a default but is applied to content, that content's template is changed to its folder's default template.

### ***Updating a Template***

Use the **update** command to change all references from an old to a new template. For example, your old template is named MyTemplate.aspx. You can want replace all references to it to Updatetemplate.aspx.

To do this, follow these steps.

1. Click Update next to the template.
2. A new screen appears.
3. Enter **Updatetemplate.aspx**.
4. Click the Save button (floppy disk icon).





## Inheritance of Folder Templates

By default, all folders below the root folder inherit from their parent. However, you can override the default and assign a unique set of templates to any folder.

Before you can change a folder's template assignment, you must break inheritance from the parent folder. To do this, go to the Edit Folder Properties screen and uncheck the box next to **Inherit Parent Template Configuration** (illustrated below). See Also: ["Editing Folder Properties" on page 48](#)

**Edit Properties for the folder "CMS400Demo"**

Properties Metadata Web Alerts Smart Forms

**Foldername:**  
CMS400Demo

**Description**

**Style Sheet filename for this folder: (leave blank to /CMS400Demo/**  
/CMS400Demo/

**The inherited style sheet for this folder is: /CMS400**

**Page Templates**

☒ **Inherit Parent Template Configuration**

| Default                          | Page Template Name                   |
|----------------------------------|--------------------------------------|
| <input type="radio"/>            | Developer/Collection/collection.aspx |
| <input checked="" type="radio"/> | login.aspx                           |
| <input type="radio"/>            | news.aspx                            |

Each folder must have at least one template. Also, one template must be chosen as the default.



If the folder's default template is changed, all existing template assignments remain. However, any new content added or moved into the folder will assume the new default template.

## Assigning Templates to Folders

If you break template inheritance, all inherited templates are initially assigned to the folder. You can then remove unwanted templates or add new ones.

All available templates appear in the template dropdown list (illustrated below). Select any that you want to be available from the folder and click **Add**.

**Page Templates**

☐ Inherit Parent Template Configuration

| Default                          | Page Template Name | Action                                      |
|----------------------------------|--------------------|---|
| <input checked="" type="radio"/> | dynamic.aspx       | <a href="#">View</a> <a href="#">Remove</a> |

**Add a New Template**

☐ Multi-Site

☐ Domain

☐ Product

☐ Should be published in other format?

☐ Publish

☐ e-publish

☐ Publish

**Available Templates:**


- [Select Template]
- [Select Template]
- aboutus.aspx
- blog\_comment.aspx
- bobtest.aspx
- contactinformation.aspx
- Developer/Collection/collection.aspx
- Developer/ListSummary/pr.aspx
- login.aspx
- news.aspx
- products.aspx
- services.aspx
- staff.aspx
- therapies.aspx

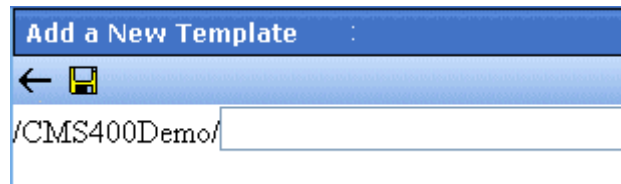
**Add**

The list of available templates is managed through the Active System Templates screen. See Also: ["Declaring Templates" on page 74](#)

## Adding a Template to a Folder



To add a new template, click the Add button (). The Add a New Template screen appears.



Enter the path to the new template and click the Save button ().

### ***Removing a Template from a Folder***

- If you try to delete a template that is the default for a folder, you are notified that you must assign a new default to that folder before you can delete it.
- If you try to delete a template that is assigned to a content block, you are notified via the following message **If you wish to continue and delete this template, the above content will be set to their parent folder's default template. Do you wish to continue?**

### **Assigning Templates to Content**

A folder's default template is automatically applied to all content in the folder. However, you can change a content item's template to any of those assigned to the folder.

This relationship is illustrated below.



**Edit Properties for the folder "Content"**

← ?

**Properties** | Metadata | Web Alerts | Smart Forms

**Foldername:**  
Content

**Description**


**Style Sheet filename for this folder: (leave blank to inherit)**  
/CMS400Demo/

---

**Page Templates**

☐ Inherit Parent Template Configuration

| Default                          | Page Template Name                   | Action                 |
|----------------------------------|--------------------------------------|------------------------|
| <input checked="" type="radio"/> | Developer/Collection/collection.aspx | <a href="#">Remove</a> |
| <input type="radio"/>            | login.aspx                           | <a href="#">Remove</a> |
| <input type="radio"/>            | news.aspx                            | <a href="#">Remove</a> |
| <input type="radio"/>            | products.aspx                        | <a href="#">Remove</a> |

[Select Template] ▼  [Add](#)

**Edit Content in Folder "Content"**

Title:  [English (U.S.)]

[Content](#)
[Summary](#)
[Metadata](#)
[Schedule](#)
[Comment](#)
[Web Alerts](#)
[Templates](#)

**Template Selection**  
 Developer/Collection/collection.aspx  
 login.aspx  
 news.aspx  
 products.aspx

Template Assigned to Content



To change the template applied to a content item, edit that content, and go to the **Templates** tab as shown above. Then, select a template to apply to the content.

As explained in "[How Templates are Used](#)" on page 74, the template assigned to the content will be used whenever a hyperlink is created to it.

See Also: "[Editing Content](#)" on page 86

## Adding Content

Ektron CMS400.NET allows for several types of content.

- **HTML** - Content created using HTML code.
- **HTML Form/Survey** - Users can create and maintain HTML forms to collect information and opinions from visitors to your Web site.
- **Smart Forms** - Content created using an XML configuration
- **Multimedia Files** - Files that include audio, video, or both.
- **Microsoft Office Documents** - Content created in Microsoft Office and stored in CMS400.NET via the Document Management functionality.
- **Open Office Documents** - Content created Open Office and stored in CMS400.NET via the Document Management functionality.
- **Managed Files** - Content created with software external to the CMS and stored in CMS400.NET via the Document Management functionality. These files are typically .pdf, .gif, .jpeg, .zip, and .txt files.

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

- By dragging and dropping files from Windows Explorer to the drag and drop box in the Workarea. See Also: The User Manual section "Using the Document Management Functionality" > "Importing Files via Drag and Drop"
- or



- By choosing the type of content from the Content Type dropdown box. Then, clicking the Add Content button or Add Several Files button. See *Also*: The User Manual section “Using the Document Management Functionality”

See *Also*:

- ["Adding HTML Content" on page 82](#)
- ["Adding XML Content" on page 83](#)
- ["Creating New Content" on page 787](#)
- ["Translating Content" on page 788](#)

## Adding HTML Content

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

## *Auto Generating Summaries*

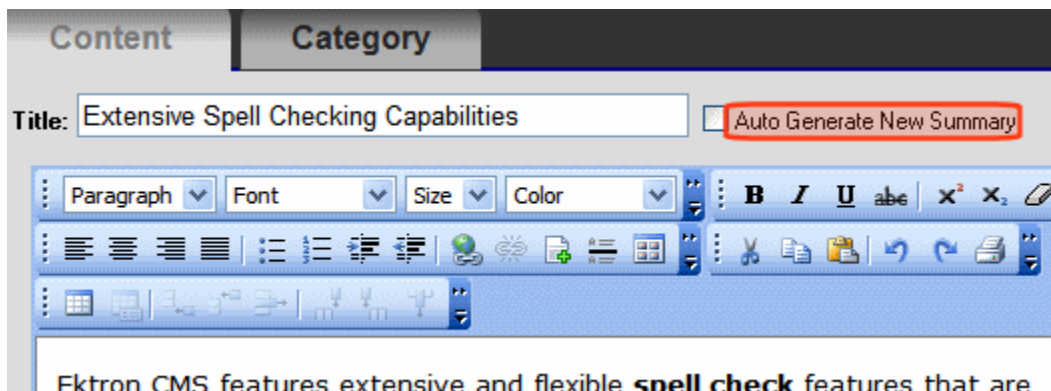
**Ektron CMS400.NET** automatically generates a new content item’s summary, if none exists. To do this, it checks the summary the first time new content is published. If the summary is blank, **Ektron CMS400.NET** copies the first 50 words of the content into the summary.

After the content is published, a CMS user can update or delete the summary. If it is deleted, the summary remains blank and is never again automatically generated for that content.

### Membership User Summary Editing

If a membership user edits content and wants to update the summary, he can automatically copy the first 50 words of the content into the summary. To do this, the membership user checks the **Auto Generate New Summary** field on the membership editing screen (shown below).





There is no limit on the number of times a membership user can automatically generate a new summary.

## Adding XML Content

If one or more Smart Forms are assigned to a content folder, users can create XML content within it. Any folder (other than the root content folder) can have a unique group of Smart Forms or inherit them from the parent folder. See Also: ["Working with Smart Forms" on page 182](#)

To add XML content, follow these steps.

1. In the Workarea, browse to a folder to which at least one Smart Form has been assigned.
2. Click **New > Smart Form** then select the Smart Form you will use for the content.

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

**NOTE** Depending on the Smart Form assigned to the content, the default XML may appear differently.

3. The procedure for creating XML content is similar to that for creating HTML content. Follow the steps described in ["Adding HTML Content" on page 82](#).

The Smart Form formats the screen display. When that content is published and a site visitor completes the screen, the user's input



is saved as XML. For more information, see ["Working with Smart Forms" on page 182.](#)

## Forming URLs For Ektron CMS400.NET Documents

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

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

- Site address
- ["The Template" on page 84](#)
- ["The Content Variable" on page 85](#)
- ["The Language Identifier" on page 85](#)

### Warning!

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

| Web Site Address  | Template | Content Block ID # | Language Identifier |
|---|----------|--------------------|---------------------|
| <a href="http://www.yoursite.com/news.asp?id=9&amp;LangType=1036">http://www.yoursite.com/news.asp?id=9&amp;LangType=1036</a> |          |                    |                     |

## The Template

The template determines much of the page layout. By itself, the template URL retrieves the empty template or the template with its default document.

### NOTE

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

*See Also:* ["Creating/Updating Templates" on page 72](#)



## The Content Variable

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

| Content variable | Example   | Description  |
|------------------|---|--|
| ID=n             | <code>http://www.example.com / index.aspx?ID=1</code> | ID selects a single document to display. Use this variable for a single document template type. The value corresponds to the content's id value. |

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

## The Language Identifier

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

### **WARNING!**

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

To learn more, see ["Multi-Language Support" on page 779](#).

## Viewing Content

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

### **NOTE**

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

**Page 1 of 2**

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



## Editing Content

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

## Moving or Copying Content

You can *move* content from any folder to any other folder. Or, you can *copy* content from one folder to another. At the end of both procedures, a copy of the content resides in the new folder. The new content gets the next available `Content Id` number.

When copying, you *leave* the content in its original folder, while moving *deletes* the content from the original folder. Other than that difference, the procedure for performing both actions is virtually identical.

### Who Can Move or Copy Content?

Only members of the Administrators user group or those assigned in the Roles > Folder User Admins screen can move or copy content. See Also: ["Defining Roles" on page 704](#) and ["Guidelines for Using The Folder-User Admin Role" on page 707](#)

### Which Content Can Be Moved Or Copied?

You can only move or copy content with a status of Approved (Published). This includes expired content. If the content's status is not published, you must wait for it to reach that status before moving or copying it.

### What is Moved Or Copied?

When content is moved or copied, the following changes are made.

- The content inherits permissions and the approval chain from the new folder.

The content's Quicklink is moved or copied in the library to the destination folder. However, the Quicklink remains the same (that is, the default template doesn't change). You can update this by editing the Quicklink. This procedure is described in the **Ektron**



**CMS400.NET** User Manual section “Updating Default Template for Multiple Quicklinks.”


Note

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

- If the new folder already contains content with the same title, **Ektron CMS400.NET** appends a number to the title to make it unique. For example: `ASP.NET Unleashed(2)`.
- The new folder’s default template is assigned to the content
- If the content has a Smart Form, it remains assigned even if the Smart Form is not assigned to the new folder

## Moving Or Copying One Content Item

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


1. Access the View Content screen for the content you want to move or copy, as described in “[Viewing Content](#)” on page 85.
2. Click the Move/Copy Content button (.
3. The Move/Copy Content screen is displayed.
4. Select either **Move** or **Copy**.
5. If you choose **Copy**, and you want the content to be published as soon as the copying is complete, check **Publish Copied Content**.

If you want the content status in the new folder to be checked in, uncheck the **Publish Copied Content** checkbox.

6. Enter the path to the destination folder. If you don’t know the path, click **Select Folder**. Then, navigate to the destination folder.



**Move/Copy Contents of Folder "Content"**




☒ Move  
☐ Copy    ☒ Publish Copied Content

Destination Folder:  Select Folder

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

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

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

## Moving Or Copying Several Content Items

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

**Note** Only published and expired content can be moved or copied.

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



6. Check the boxes next to the content that you want to move or copy.

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

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

Move/Copy Contents of Folder "Content"

☒ Move
   
☐ Copy

☒ Publish Copied Content

Destination Folder:


Select Folder

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

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

## Viewing and Restoring Historical Versions of Content

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

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

### Purging Historical Versions of Content

See "Purge History" on page 57.



## Scheduling Content

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

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

## Deleting Content

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

---

**NOTE** An Ektron Knowledge Base article explains how to delete content programmatically. Go to <http://dev.ektron.com/filesare.aspx>, click **View All** under **Filters**, then click **Programmatically Delete Content**.

---

## Content History

See the **Ektron CMS400.NET** User Manual section “Viewing and Restoring Previous Content”.

## Content Permissions

See “[Setting Permissions](#)” on page 686.

## Content Approvals

See “[Setting Approval Chains](#)” on page 695.




## Content Workflow

To learn about the process content must pass through to get published to your Web site, see the **Ektron CMS400.NET** User Manual section “Approving/Declining Content.”

## Link Checking

The link checker button locates all content with a link to the displayed content. This feature is useful if you decide to delete content. You can use this to remove those links, which will not work after the deletion.

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

1. Access the View Content screen for the content you want to execute the link checker for, as described in [“Viewing Content” on page 85](#).
2. Click the Check Links button (  ).
3. A screen displays each content item with a link to the current content.
4. Click the content title to access the View Content screen for the selected content and perform the necessary actions on it.

## Assigning Tasks to Content

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

## Content Properties


The Content Properties screen lets you determine if this content is included in a search of your Web site. This box has no effect on the ability to find this content from the Workarea Advanced search.

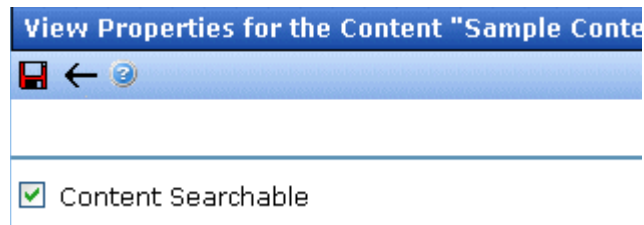
If you uncheck this box, Ektron CMS400.NET excludes this content when a search is performed.




See Also: "Searching Your Web Site" on page 395

To view the Content Properties screen, follow these steps.

1. Access the View Content screen for the content whose properties you want to view, as described in "Viewing Content" on page 85.
2. Click the Properties button (  ).
3. The View Properties for the Content screen appears.



4. Check the **Content Searchable** box to include this content in a search of your Web site.
5. Click the Update button (  ).

#### NOTE

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

## Content Rating

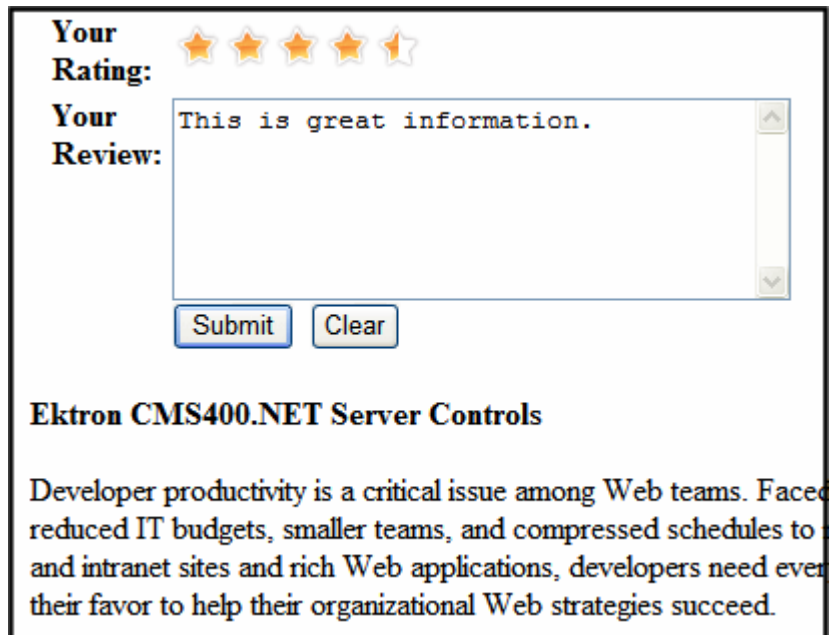
**Ektron CMS400.NET** provides a rating system, based on stars, so site visitors can rate content on your Web site. A visitor can rate content on a scale of one through five stars. The ratings are collected from the Web page via the ContentReview server control.

Depending on the XSLT used with the ContentReview server control, you can allow half star rating increments and let site visitors submit comments (see illustration below).

#### NOTE

If a visitor is not logged in as a CMS or membership user, his browser must have cookies enabled in order to submit a content rating.





The screenshot displays a web form for user feedback. At the top, it asks for a 'Your Rating' with five yellow stars, four of which are filled. Below this is a 'Your Review' section with a text area containing the text 'This is great information.' and two buttons, 'Submit' and 'Clear'. The form is titled 'Ektron CMS400.NET Server Controls' and includes a paragraph of text about developer productivity.

**Your Rating:** ★★★★★

**Your Review:** This is great information.

**Ektron CMS400.NET Server Controls**

Developer productivity is a critical issue among Web teams. Faced with reduced IT budgets, smaller teams, and compressed schedules to develop and deploy new Web sites and intranet sites and rich Web applications, developers need even more tools and resources to help their organizational Web strategies succeed.

In addition to consuming site visitors' ratings and reviews and displaying the information in the Workarea, the ContentReview server control can be used to display reviews on your site. See [Also: "Displaying Reviews On the Site" on page 96](#)

Reviews can be moderated from the "Workarea" > "Smart Desktop" or from the Content Rating screen associated with a content item. See [Also: "Moderating Reviews" on page 97](#)

The content review feature is explained through the following topics.

- ["Inserting the ContentReview Server Control" on page 93](#)
- ["Limiting Visitors to One Review" on page 94](#)
- ["Viewing the Content Rating Report" on page 94](#)

## Inserting the ContentReview Server Control

To allow site visitors to rate and review content on a Web page, your developer inserts a server control. This procedure is



described in the **Ektron CMS400.NET** Developer Manual section “ContentReview Server Control.”


## Limiting Visitors to One Review

**Ektron CMS400.NET** assumes you want to limit a user to rating a content item once. If a regular or membership user logs in before rating a piece of content, **Ektron CMS400.NET** remembers the user ID. For any other site visitor, **Ektron CMS400.NET** places a cookie on his computer.

So, whenever a page with a ContentReview server control is visited, **Ektron CMS400.NET** checks for the user ID or cookie. If neither exists, it displays a rating scale. If the page has already been rated by the user, the user can edit his existing rating and review by clicking a star, editing the comments, and clicking the submit button.

## Viewing the Content Rating Report

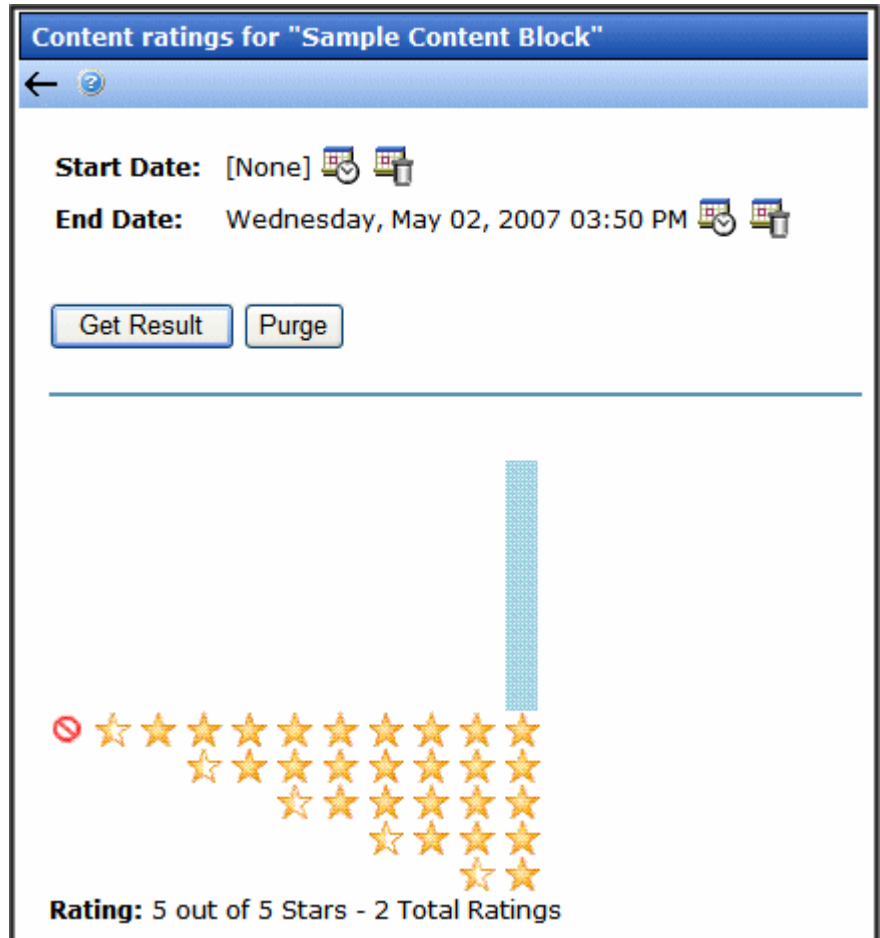
All content rating and review data for a content item is maintained and can be displayed in detail and summary format. To view this data, follow these steps.

1. Sign in to **Ektron CMS400.NET**.
2. Do one of the following:
  - Use the site’s menu toolbar
    - browse to the content item
    - right click the mouse
    - click **View Advanced Report**
  - Navigate to the content item in the Workarea
    - Go to **Workarea > Content**.
    - Navigate to the folder that contains the content.
    - Navigate to the content item.
    - Click the View Rating Reports toolbar button ().



- If the review is awaiting moderation, use the Content Review section of the Smart Desktop.
  - Go to the **Workarea > Smart Desktop**
  - Click **Content Reviews**
  - Select the content item

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



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



## Viewing Content Rating Details

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

Content ratings for "Sample Content Block"

Start Date: [None]
End Date: [None]

Get Result
Purge

**Rating:** 5 out of 5 Stars - 2 Total Ratings

| Username | Date      | Comments   | Status   |
|----------|-----------|--|----------|
| admin    | 4/22/2007 | What a great set of server controls. Our organization is committed to .NET, and this is the most complete .NET CMS by far. | Approved |
| jmember  | 4/22/2007 | CMS400.NET provides so many features that I want on my website, all in one integrated package. This is amazing.            | Pending  |

Export to Excel

## Displaying Reviews On the Site

Displaying reviews on your site allows visitors see how other people in your site's community feel about a product or content article. It also helps build that community by empowering site visitors and allowing them to have voice.



If your site displays reviews and a user does not see his review, it is probably because moderation is enabled for the content reviews. If a user's review is pending or rejected, it is not displayed. A site or membership user can determine the status of his review by logging into the site and navigating to the Web page that hosts the content review. Next to the title of his review is **Rejected** or **Pending**. The user can then submit another review if his review was rejected or has been pending for too long.

The ContentReview server control's `DisplayXSLT` property handles the displays of site visitor reviews on the site. The server control can display reviews for specific content or a specific user. For additional information on the `DisplayXSLT` property, see the **Ektron CMS400.NET** Developer Manual section "ContentReview Server Control."

## ***Moderating Reviews***

Since reviews can be displayed on your Web site, **Ektron CMS400.NET** lets you moderate reviews from the Content Ratings screen in the Workarea. This capability is handled by the ContentReview server control's `Moderate` property. See the **Ektron CMS400.NET** Developer Manual section "ContentReview Server Control" > "ContentReview Server Control Properties" > "Moderate."

A site visitor can change his rating and review at any time, even if its status is pending or rejected. When a visitor changes his rating or review, the information is updated immediately in the Workarea, and the review's status changes to pending.

There are two ways to moderate reviews.

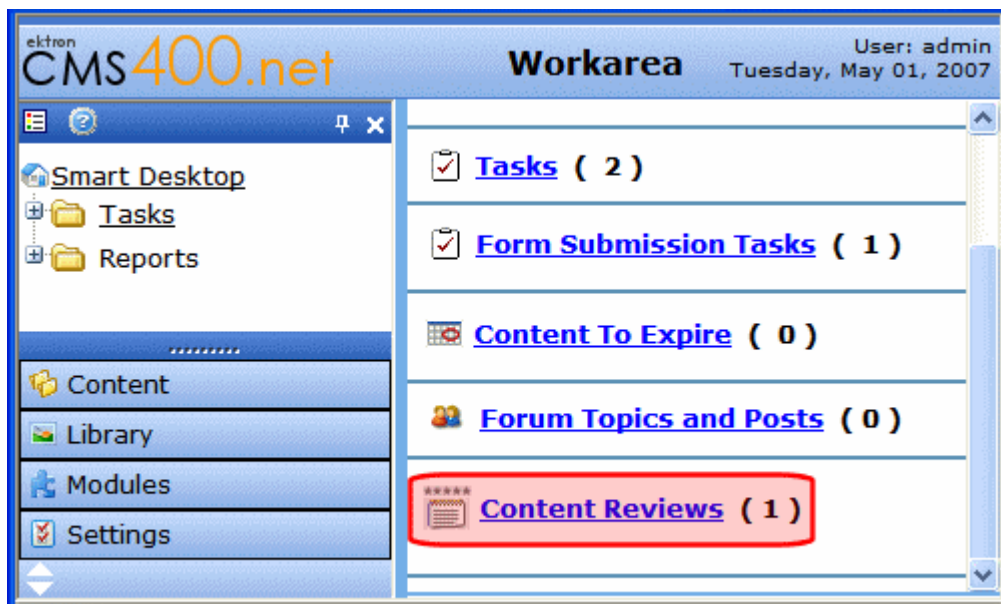
- from the **Smart Desktop > Content Reviews** area. See Also: ["Moderating Reviews From the Smart Desktop" on page 97](#)
- from the **Content Rating** screen associated with a content item. See Also: ["Moderating Reviews From the Content Rating Screen" on page 103](#)

## **Moderating Reviews From the Smart Desktop**



To moderate reviews from the Smart Desktop, follow these steps.

1. Log into Ektron CMS400.NET.
2. From the Workarea's Smart Desktop, click the Content Reviews link.





3. The five latest reviews awaiting moderation appear. Note the **View all pending reviews** link. Click it to see all pending reviews. See Also: "Viewing All Pending Reviews" on page 99.


**Content Reviews ( 5 )**

[View all pending reviews](#)

| Approve               | Decline               | Title                          | Display Name | Date:     | Rating | Comment  |
|-----------------------|-----------------------|--------------------------------|--------------|-----------|--------|--|
| <input type="radio"/> | <input type="radio"/> | <a href="#">Sample Content</a> | Nor          | 5/1/2007  | ★★★★★  | I Like the new Stars rating system.                |
| <input type="radio"/> | <input type="radio"/> | <a href="#">Sample Content</a> | Anonymous    | 5/1/2007  | ★★★★★  | Good content, keep up the good work.               |
| <input type="radio"/> | <input type="radio"/> | <a href="#">Sample Content</a> | JE           | 5/1/2007  | ★★★★★  | This new ContentReview server control looks great. |
| <input type="radio"/> | <input type="radio"/> | <a href="#">Beating Cancer</a> | jmember      | 4/22/2007 | ★★★★★  | Very informative.                                  |
| <input type="radio"/> | <input type="radio"/> | <a href="#">Sample Content</a> | AA           | 4/22/2007 | ★★★★★  | These server controls seem easy to use.            |

Update Reviews

4. Select an **Approve** or **Decline** radio button for each item in the list.
5. Click the **Update Reviews** button.
- Once the reviews are approved, they appear on the site.

**NOTE**

A ContentReview server control set to display reviews must be on the page for reviews to be displayed. See the Ektron CMS400.NET Developer Manual section "ContentReview Server Control" > "ContentReview Server Control Properties" > "DisplayXSLT."

## Viewing All Pending Reviews

You can view all pending reviews by clicking the **View all pending reviews** link in the Smart Desktop > Content Review screen.




**Content Reports: Pending Reviews**

View: English (U.S.)

[Mark all approved](#) [Mark all declined](#)

| Approve               | Decline               | Title                          | Display Name | Date      | Rating | Comment  |
|-----------------------|-----------------------|--------------------------------|--------------|-----------|--------|--|
| <input type="radio"/> | <input type="radio"/> | <a href="#">Sample Content</a> | Nor          | 5/1/2007  | ★★★★★  | I Like the new Stars rating system.                |
| <input type="radio"/> | <input type="radio"/> | <a href="#">Sample Content</a> | Anonymous    | 5/1/2007  | ★★★★★  | Good content, keep up the good work.               |
| <input type="radio"/> | <input type="radio"/> | <a href="#">Sample Content</a> | JE           | 5/1/2007  | ★★★★★  | This new ContentReview server control looks great. |
| <input type="radio"/> | <input type="radio"/> | <a href="#">Beating Cancer</a> | jmember      | 4/22/2007 | ★★★★★  | Very informative.                                  |
| <input type="radio"/> | <input type="radio"/> | <a href="#">Sample Content</a> | AA           | 4/22/2007 | ★★★★★  | These server controls seem easy to use.            |

From that screen you can:

- Approve or decline a review - select an **Approve** or **Decline** radio button for each item on the list. Then, click the Submit button(.
- Mark all reviews approved or all declined - click the **Mark all approved** link to set all the radio buttons to Approve. Click the **Mark all declined** link to set all the radio buttons to Decline.

**Content Reports: Pending Reviews**

View: English (U.S.)

[Mark all approved](#) [Mark all declined](#)

| Approve               | Decline               | Title   | Display Name |
|-----------------------|-----------------------|---|--------------|
| <input type="radio"/> | <input type="radio"/> | <a href="#">Sample Content Block</a>          | Nor          |
| <input type="radio"/> | <input type="radio"/> | <a href="#">Sample Content Block</a>          | Anonymous    |
| <input type="radio"/> | <input type="radio"/> | <a href="#">Sample Content Block</a>          | JE           |
| <input type="radio"/> | <input type="radio"/> | <a href="#">Beating Cancer With Nutrition</a> | jmember      |
| <input type="radio"/> | <input type="radio"/> | <a href="#">Sample Content Block</a>          | AA           |



- Edit the rating, review or status of an individual review - click on a review's title and the Edit screen appears. Change as needed. Click the Save button (💾).

**NOTE**



After editing a rating, click the **Back Arrow** to return to the content item's Content Rating screen.

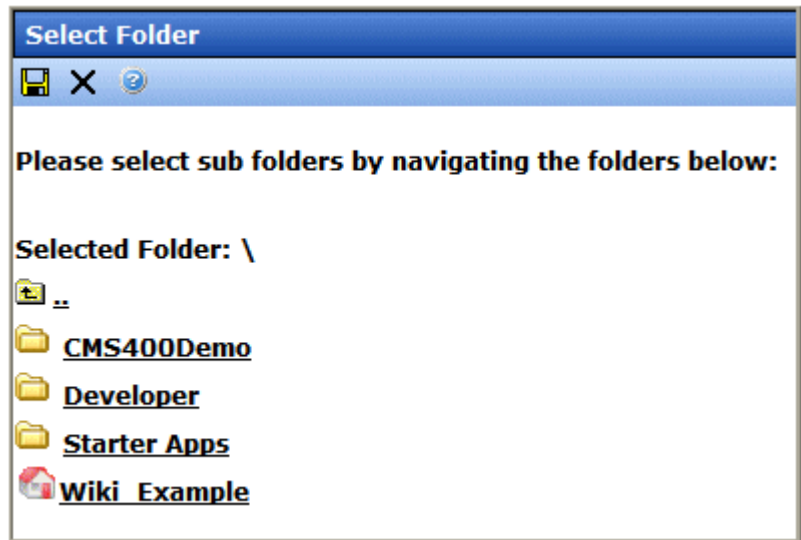
- Print a report of all pending content reviews - click the Print button (🖨️) to create an HTML version of the pending content review report that is ready for printing.
- Email a pending content review report - click the Email button (✉️) to email a pending content review report to Ektron CMS400.NET users. Next, select the users to receive the report. Then, click the Email button (✉️) to send the report.

| <input type="checkbox"/> | User or Group Name | Email address not available |                      |
|--------------------------|--------------------|-----------------------------|----------------------|
| <input type="checkbox"/> | admin              | Email address not available | <input type="text"/> |
| <input type="checkbox"/> | explorer           | Email address not available | <input type="text"/> |
| <input type="checkbox"/> | jedit              |                             |                      |
| <input type="checkbox"/> | vs                 | Email address not available | <input type="text"/> |
| <input type="checkbox"/> | Administrators     |                             |                      |
| <input type="checkbox"/> | Everyone           |                             |                      |
| <input type="checkbox"/> | starterapps.pm     |                             |                      |

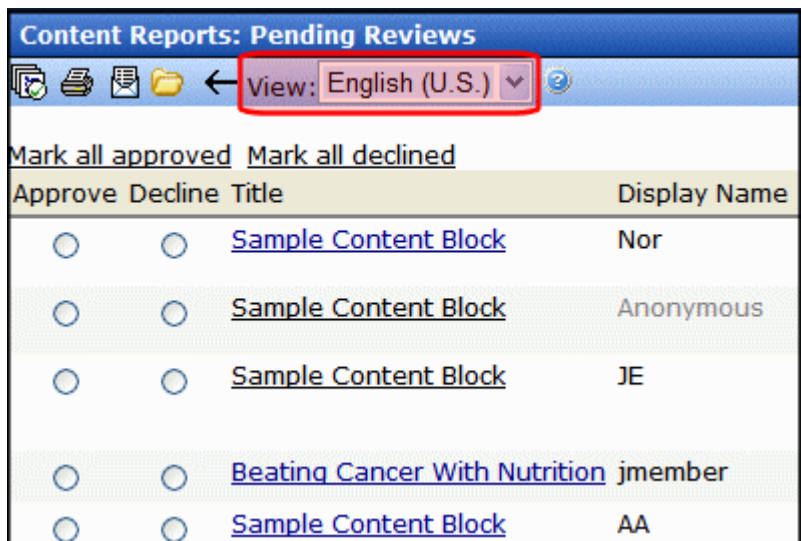
- Filter content reviews by folder - because reviews are associated with content items in a folder, you can filter reviews by folder. This makes it easier to moderate reviews if you are




responsible for content in a specific folder. Click the Folder button (  ) and navigate to the folder by which the reviews will be filtered. Then, click the Save button (  ).



- Filter reviews by language - from the Language dropdown box, select the language by which the reviews are filtered.



After you approve or decline reviews, click the Submit button (  ). Once reviews are approved, they appear on the site.





## Moderating Reviews From the Content Rating Screen




To moderate content reviews from Content Ratings screen, follow these steps:

1. Navigate to the Content Ratings screen for the content item using one of the methods in ["Viewing the Content Rating Report" on page 94](#).
2. On the Content Ratings screen, click the **Get Results** button.
3. A list of reviews appear for the content.
4. Click the **Date** link of the content to be moderated.
5. The View Rating screen appears.

The screenshot shows a web application window titled "View". It contains the following information:

- Username:** admin
- Date:** Sunday, April 22, 2007 1:26 PM
- Rating:** A red circle with a slash over five yellow stars, followed by the text "5 stars".
- Status:** A dropdown menu showing "Approved".
- Review:** A text area containing the text: "What a great set of server controls. Our organization is committed to .NET, and this is the most complete .NET CMS by far."

From this screen, you can choose to Edit () or Delete () reviews.

- To change information on this screen, click the Edit button (). From the Edit screen, you can change the rating, review and status. When finished editing, click the Save button (.
- To delete the review, click the Delete button (.



### ***Exporting Details to Excel***

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

### ***Purging Rating Data***

You can remove content rating data to free up space in your database. To do so, select the date range of the data you want to purge using **Start Date** and **End Date**. Then click the **Purge** button.



---

# Validating XHTML Content

**Ektron CMS400.NET** can check content for two types of compliance:

- XHTML standards - see ["Validating Content for Compliance with XHTML Standards" on page 112](#)
- accessibility standards established by agencies such as W3C Markup Validation Service - see ["Validating Content For Compliance with Accessibility Standards" on page 106](#)

This check is performed when a user tries to save, check in or (submit for) publish content.

In addition, some dialogs add accessibility data to **Ektron CMS400.NET** content. As examples, the Picture Properties is used to add an image's `<alt>` attribute. When a user clicks **OK** to save these dialogs, **Ektron CMS400.NET** can check that compliance information is being added. See ["Dialogs that Allow Input of Accessibility Information" on page 111](#)

This section explains how to enable these features, and how to customize them to meet your needs.

The rest of this section provides details about validating XHTML content through these topics.

- ["Validating Content For Compliance with Accessibility Standards" on page 106](#)
- ["Dialogs that Allow Input of Accessibility Information" on page 111](#)
- ["Validating Content for Compliance with XHTML Standards" on page 112](#)



# Validating Content For Compliance with Accessibility Standards

To have **Ektron CMS400.NET** check content for compliance with accessibility standards, you enable `<accessibility>` in the configuration data *and* specify an XSLT or Web site to check against.

To have **Ektron CMS400.NET** check content for compliance with accessibility standards, enable accessibility *and* define an XSLT or Web site to check against.

## Enabling Accessibility

In Ektron CMS400 .NET, accessibility options appear on the Configuration Setup screen under **Accessibility/Section 508 Evaluation** (below the **Editor Options**). The options are explained below.

- **Do not validate** - do not check content for compliance with accessibility standards
- **Warn if fails** - the user is warned but allowed to save content
- **Enforce** - the user must bring the content into compliance before submitting it for publication or publishing it; however, can save it or check it in after being warned.

## Enabling Accessibility Validation in the Configuration Data

By default, content is not checked for compliance to accessibility standards. You enable such validation at the following configuration data attribute.

```
<validate accessibility="none"....
```

Enable compliance by setting the attribute to one of these options.

- **loose** - the user is warned but allowed to save content
- **strict** - the user must bring the content into compliance before saving it



## Defining the XSLT or Web Site

When a user tries to save content and `<accessibility>` is set to `loose` or `strict`, the content is checked against an XSLT, a Web site designed to validate content, or both.

If you enable both, the content is checked in this order.

1. XSLT
2. Web site

If the first check fails, the second check is not performed.

### *The XSLT File*

**Ektron CMS400.NET** content can be checked against an XSLT that enforces W3C's WCAG Level 1 requirement. This XSLT, `ektaccesseval.xslt`, resides in the folder to which **Ektron CMS400.NET** is installed.

The XSLT is identified in the following line (highlighted in red) of the configuration data. (In **Ektron CMS400.NET**, the configuration data is stored in site root folder\Workarea\ewebeditpro\cms\_config.aspx.)

```
<!-- accessibility options are "strict", "loose" and "none" -->
    <validate accessibility="none" suggestdefaultval="true">
<xslt enabled="true" src="[eWebEditProPath]/ektaccesseval.xslt" />
```

You can modify this XSLT as needed.

Or, you can place a different XSLT in the **Ektron CMS400.NET** root directory and refer to it in the `src` attribute shown above. If you use a different XSLT and validation fails, it should return a description of the problem(s) as HTML. If validation succeeds, it should return nothing.

### *Validating Against a Web Site*



You can also validate XHTML content against a Web site that evaluates its compliance with accessibility standards. Two such sites are listed in the configuration data:

- [hermish.com](http://hermish.com)
- [webaim.org](http://webaim.org)

You can use either listed site or any other site designed to check for accessibility compliance. Regardless of the site's origin, you can only use one.

The Web sites are specified in these lines of the configuration data. To activate a site, set `enabled` to `true`.

```
<online enabled="false" type="string" contentname="myHTML" src="http://www.hermish.com/
check_this.cfm">
  <data name="URLtest">Your HTML</data>
  <data name="CheckURL">1</data>
  <data name="p1">1</data>
  <data name="p2">1</data>
  <data name="p3">1</data>
  <data name="s508">1</data>
</online>

<online enabled="false" type="file" contentname="upload" src="http://wave.webaim.org/wave/
Output.jsp">
  <data name="Submit">Submit</data>
  <data name="IPAddress">127.0.0.1</data>
</online>
```

### ***Enabling a Site Not Included in the Configuration Data***

Ektron only supports sites listed in the configuration data by default. If you want to validate content against another Web site designed to do that, follow these guidelines.

- Web sites that perform validation typically accept input in this format.

```
<form action="http://www.example.com/validationaction.asp">

  <textarea name="testcontent"></textarea>

  <input type="submit" name="btnSubmit" value="Validate the
content"/>

</form>
```



To accommodate this format, define the configuration data's `<online>` element as follows.

```
<online enabled="true" type="string" contentname="testcontent"
src="http://www.example.com/ validationaction.asp"
keywordsearchresult="failure" keyword="invalid">

    <data name=" btnSubmit"> Validate the content</data>

</online>
```

The following table describes `<online>`'s attributes.

| <b>&lt;Online&gt; Attribute</b> | <b>Description</b>  |
|---------------------------------|---|
| type                            | If the form accepts an HTML string as input, enter string.<br>If the form accepts a file name as input, enter file.   |
| contentname                     | Enter the value of the <code>name</code> attribute of the textarea or input element in the form.<br>For a form that accepts an HTML string, the textarea may appear as:<br><pre>&lt;textarea name="testcontent"&gt;&lt;/textarea&gt;</pre> In this case, the value for <code>contentname</code> would be <code>testcontent</code> .<br>For a form that accepts a file, the input element may appear as:<br><pre>&lt;input type="file" name="testfile" /&gt;</pre> In this case, the value for <code>contentname</code> would be <code>testfile</code> . |
| src                             | To obtain the URL of the Web page that validates HTML content, go to the site and view the source. From there, you should be able to obtain the form's action attribute. Place that into this attribute.  |

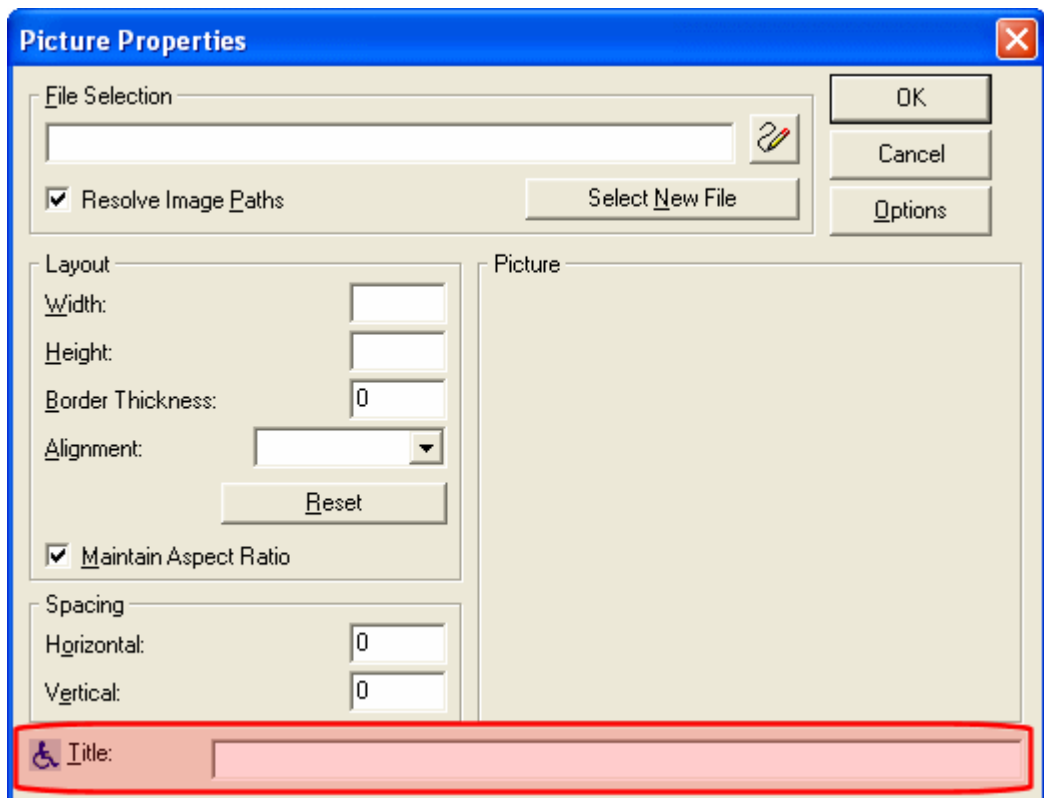


| <Online> Attribute  | Description  |
|---------------------|--|
| keywordsearchresult | <p>Takes one of two values: <code>failure</code> or <code>success</code>.</p> <ul style="list-style-type: none"> <li>• If set to <code>success</code> and <b>Ektron CMS400.NET</b> finds the keyword (set in the keyword attribute) in the validating Web page's response, the content is saved.</li> <li>• If set to <code>success</code> and <b>Ektron CMS400.NET</b> does <i>not</i> find the keyword in the validating Web page's response, the Web site's failure page appears. Typically, the page explains why the content failed validation.</li> <li>• If set to <code>failure</code>, and <b>Ektron CMS400.NET</b> finds the keyword (set in the keyword attribute) in the validating Web page's response, Web site's failure page appears. Typically, the page explains why the content failed validation.</li> <li>• If set to <code>failure</code>, and <b>Ektron CMS400.NET</b> does not find the keyword in the validating Web page's response, the content is saved.</li> </ul> <p>If you do not define a keyword and keywordsearchresult, the validating Web page's response (or report) appears.</p> |
| keyword             | <p>Enter a text string that <b>Ektron CMS400.NET</b> searches for in the source of the Web site's response to the validation check.</p> <p>For example, if the site displays <b>Congratulations</b> when validation passes, enter <b>Congratulations</b> in this attribute. In this case, enter <code>success</code> as the keywordsearchresult.</p> <p>As another example, if you know that a Web site displays the <code>images/icon_violation.gif</code> image when validation fails, enter that as the keyword. In this case, enter <code>failure</code> as the keywordsearchresult.</p>   |
| data                | <p>Enter additional form fields to be posted to the Web site during form submission.</p> <ul style="list-style-type: none"> <li>• The <code>name</code> attribute of the data tag specifies the name of the form field.</li> <li>• The value between the data tags is the value of the form field when submitted.</li> </ul> <p>You may specify as many data tags as needed. For example</p> <pre>&lt;data name="btnSubmit"&gt;Validate the content&lt;/data&gt;</pre>   |



## Dialogs that Allow Input of Accessibility Information

Several dialog boxes have fields that collect required accessibility data. An example of such a field is highlighted below.



When the configuration data's `suggestdefaultval` property is set to `true`, **Ektron CMS400.NET** tries to ensure that a value exists in required accessibility fields of the following dialogs.

| Dialog             | Field | How filled if no value exists                  |
|--------------------|-------|--|
| Picture Properties | Title | Contents of <b>File Selection</b> field copied |



| Dialog   | Field        | How filled if no value exists  |
|--|--------------|--|
| Hyperlink  | Title        | Contents of <b>Text</b> field copied                                     |
| Group Box  | Caption      | Contents of <b>Descriptive Name</b> field copied to <b>Caption</b> field |
| Several Data Designer dialogs, such as Plain Text Field, Image Only field, Link Field, Select List Field | Tooltip text | Contents of <b>Descriptive Name</b> field copied                         |

## Validating Content for Compliance with XHTML Standards

**Ektron CMS400.NET** content can be validated against the XHTML 1.0 schema, a Web site, or both. These are described in ["The Schema" on page 112](#) and ["The Web Site" on page 113](#).

### NOTE

This validation occurs when content is saved regardless of the value of the `<accessibility>` attribute.

Besides specifying a schema or Web site, you need to uncomment the following line in `ektfiler.xslt` (located in the `webroot/ewebeditpro5` directory). This XSLT removes non-W3C-compliant tags and attributes.

```
<xsl:include href="ektfilerxhtml10.xslt"/>
```

## The Schema

Two schemas from the W3C site are provided with **Ektron CMS400.NET**.

- [www.w3.org/2002/08/xhtml/xhtml11-strict.xsd](http://www.w3.org/2002/08/xhtml/xhtml11-strict.xsd)
- [www.w3.org/2002/08/xhtml/xhtml11-transitional.xsd](http://www.w3.org/2002/08/xhtml/xhtml11-transitional.xsd)

The schemas are installed to the `siteroot/workarea/ewebeditpro` directory. You identify a schema in the following lines of the `siteroot/workarea/ewebeditpro/config.xml` file.

```
<schema enabled="false" src="[eWebEditProPath]/xhtml11-strict.xsd"/>
<schema enabled="false" src="[eWebEditProPath]/xhtml11-transitional.xsd"/>
```



To specify a schema against which to validate content, set `enabled` to `true`.

The options are explained below.

- **Both schemas disabled**- do not check content for compliance with XHTML standards
- **Transitional or strict enabled** - the user must bring the content into compliance before submitting it for publication or publishing it; however, he can save it or check it in after being warned.

You can modify either `.xsd` file as needed. Or, you can use your own `.xsd` file.

## Using Your Own Schema

The `src` attribute can reference any URL. If you want to place your own `.xsd` file in the `siteroot/workarea/ewebeditpro` directory, use `[eWebEditProPath]`. To place the `.xsd` file in another location, enter the path to it relative to the site root directory. For example, `src="/siteroot/schemas/myschema.xsd"`.

### IMPORTANT!

If you are using a different `.xsd` file, you must add `elementFormDefault="qualified"` to the schema as shown below.

```
<xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema"
elementFormDefault="qualified">
```

### IMPORTANT!

Because of an error in XML parser 4 (see <http://support.microsoft.com/default.aspx?scid=kb;EN-US;q262585>), Ektron has removed the namespace from the schemas. If you design your own schema, do not use 'xml' to begin user-defined namespace prefixes.

## The Web Site

You can validate content against any Web site that enforces W3C's XHTML standards. One site is listed in the configuration data: `validator.w3.org`.

You can use that site or another site designed to check for XHTML compliance.

To activate the site in the `siteroot/workarea/ewebeditpro/config.xml` file, set `enabled` to `true` in the code snippet shown below.



```
<online enabled="false" type="string" contentname="fragment" src="http://validator.w3.org/  
check"/>
```

If you want to use a different Web site, follow the directions in ["Enabling a Site Not Included in the Configuration Data" on page 108.](#)



---

# Metadata

Metadata is information about a content item, such as its title and language. **Ektron CMS400.NET** provides extensive and flexible support for metadata, which it uses in both standard and innovative ways.

This section explains the types of metadata available, and procedures for working with metadata through the following subtopics.

- ["Types of Metadata" on page 115](#)
- ["Working with Metadata Definitions" on page 125](#)

## **WARNING!**

If your site uses Site Replication/Quick Deploy: New metadata definitions are not moved to the production server by Quick Deploy. If you create new metadata definitions, use Site Replication to move them from staging to production. If you do not, your next Quick Deploy may generate errors due to metadata definitions that do not exist on the production server. *See Also:* [Ektron CMS400.NET Site Replication/Quick Deploy manual](#)"Quick Deploy" on page 75

---

## Types of Metadata

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

| Metadata type | Description  | For more information, see               |
|---------------|--|---|
| Meta tag      | Resides in the source cod. Helps search engines find a Web page. | <a href="#">"Meta Tags" on page 116</a> |



| Metadata type      | Description   | For more information, see                 |
|--------------------|---|---|
| HTML tag           | Information about the page to be used by a Web browser. For example, <title> identifies the content in the screen title, the favorites list, and the browser's history. | "Title Tag" on page 118                   |
| Searchable         | Metadata that can be found by <b>Ektron CMS400.NET</b> 's search.   | "Searching Your Web Site" on page 395     |
| Related content    | A related content item, collection, List Summary, or library item that accompanies a content item on a Web page.  | "Related Content Metadata" on page 120    |
| Simple Dublin Core | A set of fifteen standard fields that cover the most useful information about content.  | "Simple Dublin Core Metadata" on page 123 |

## Meta Tags

The META element is an extensible container for use in identifying specialized document meta-information. Meta-information has two main functions:

- to provide a means to discover that a data set exists and how it might be obtained or accessed
- to document the content, quality, and features of a data set, indicating its fitness for use

(Above copied from [www.w3.org/MarkUp/html-spec/html-spec\\_5.html](http://www.w3.org/MarkUp/html-spec/html-spec_5.html).)



## Example Meta Tags

```
<HTML>
<HEAD>
<META HTTP-EQUIV="Content-Type" CONTENT="text/html; charset=iso-8859-1"
<meta name="robots" content="index, follow">
<meta name="revisit-after" content="15 days">
<META HTTP-EQUIV="imagetoolbar" CONTENT="no">
<Title>Ektron; Inc. - Web Content Management and Document Management wi
scalable flexible and affordable authoring solutions.</Title>
<meta name="Keywords" content="document management web content manageme
content management cms">
<meta name="Description" content="Ektron's Web Content Management and
Document Management software products manage web content and documents
WYSIWYG XHTML/HTML editors offering easy to use browser-based web autho
and publishing solutions for web content management and document
management">
```

## Creating and Deploying Meta Tag Definitions

1. While creating a metadata definition, enter the metadata name at the Name field. For example, **Description** and **Keywords**.  
See Also: ["Adding a Metadata Definition" on page 125](#)
2. Reply to the standard fields. See ["Metadata Definition Fields" on page 127](#).
3. Respond to the additional fields for meta tags. See ["Meta Tag Additional Fields" on page 129](#)
4. Add the definition to all applicable folders. See ["Assigning Metadata to a Folder" on page 137](#)
5. Add the definition to applicable content within the folder. See ["Adding Metadata to Content" on page 140](#)
6. Add a Metadata server control to every Web form (.aspx page) on which the content will appear.

To learn how to do this, see the Ektron CMS400.NET Developer Manual section "Custom Functions (for your server platform)" > "Metadata Function", "MetaData Server Control" and "MetaDataList Server Control."



## Title Tag

The title should identify the contents of the document in a global context. A browser may display the title of a document in a history list or as a label for the window displaying the document.

(Above text copied from [www.w3.org/MarkUp/html-spec/html-spec\\_5.html](http://www.w3.org/MarkUp/html-spec/html-spec_5.html).)

### Example Title Tag

### Example Meta Tags

```
<HTML>
<HEAD>
<META HTTP-EQUIV="Content-Type" CONTENT="text/html; charset=iso-8859-1"
<meta name="robots" content="index, follow">
<meta name="revisit-after" content="15 days">
<META HTTP-EQUIV="imagetoolbar" CONTENT="no">
<title>Ektron; Inc. - Web Content Management and Document Management with
scalable flexible and affordable authoring solutions.</title>
<meta name="Keywords" content="document management web content management
content management cms">
<meta name="Description" content="Ektron's Web Content Management and
Document Management software products manage web content and documents.
WYSIWYG XHTML/HTML editors offering easy to use browser-based web authoring
and publishing solutions for web content management and document
management">
```

## Creating and Deploying Title Tag Definitions

1. While creating a metadata definition, enter **Title** at the **Name** field. See Also: ["Adding a Metadata Definition" on page 125](#)
2. Reply to the standard fields. See ["Metadata Definition Fields" on page 127](#).
3. Respond to the additional field for HTML tags. See ["HTML Tag Additional Field" on page 128](#)
4. Add the definition to a folder. See ["Assigning Metadata to a Folder" on page 137](#)
5. Add the definition to content within the folder. See ["Adding Metadata to Content" on page 140](#)



6. Add a metadata control to every Web form (.aspx page) on which this content will appear.

To learn how to do this, see the Ektron CMS400.NET Developer Manual section “Custom Functions (for your server platform)” > “Metadata Function”, “MetaData Server Control” and “MetaDataList Server Control.”

## ***Creating and Deploying Search Tag Definitions***

1. While creating a metadata definition, in the **Name** field, enter a description of the kind of data to be searched. (See examples circled above.) This title describes the search data on the
  - **Metadata** tab of the Folder Properties screen
  - **Metadata** tab of the View Content Screen
  - Workarea search screen

### **NOTE**

Searchable metadata field names should not include a space. If they do, the search cannot find the metadata.

See Also: ["Adding a Metadata Definition" on page 125](#)

2. Reply to the standard fields. See ["Metadata Definition Fields" on page 127](#).
3. Respond to additional fields for Searchable Property definitions. See ["Searchable Additional Fields" on page 130](#).
4. Add the definition to a folder. See ["Assigning Metadata to a Folder" on page 137](#).
5. Add the definition to content within the folder. See ["Adding Metadata to Content" on page 140](#).
6. The next time you visit the Workarea search screen, you will see the new field.
7. If you want site visitors to use this field when searching your Web site, ask your developer to set the `ShowExtendedSearch` property of the Search Server Control to **true**. This value lets the searchable metadata get found by the Web site search.

See Also: **Ektron CMS400.NET Developer Manual** > “Introduction to Ektron CMS400.NET Server Controls” > “Search Server Control” > “Search Server Control Properties” > “ShowExtendedSearch”



## Related Content Metadata

You can associate the following types of content with a content item.

- a content item
- a collection
- a list summary
- one of the following types of library items
  - image
  - hyperlink
  - file

Then, you can set up a Web page so that whenever the source content item appears, the related information appears next to it. For example, your Web site sells motorcycle helmets. On a page that shows a particular helmet, the left column lists a collection of motorcycle drivers who wear that helmet.

### ***Related Content vs. MetadataList Server Control***

This capability is similar to the MetadataList Server control. The difference is that MetadataList shows a link to *every* content item with a selected term in the keywords or title. Also, a MetadataList is associated with a Web form (.aspx page), not a content item.

Related content lets you connect a content item with several types of related content (see list above), and is associated with a content item, not a web form. For example, you can display a library image of the company logo on a page whenever content in a certain folder appears. For content in a different folder, a different logo could appear.

### ***Creating and Deploying Related Content Definitions***

1. While creating a metadata definition, in the **Name** field, enter a title of this kind of data. This title describes the metadata on the
  - **Metadata** tab of the Folder Properties screen
  - **Metadata** tab of the View Content Screen



See Also: ["Adding a Metadata Definition" on page 125](#)

2. Reply to the standard fields. See ["Metadata Definition Fields" on page 127](#).

The **Type** must end with the word **Selector**. Choices are highlighted below.

The screenshot shows a web interface titled "Edit Metadata definition 'Related content'". It has a back arrow icon. The form contains the following fields:

- Name:** Related content
- ID:** 24
- Type:** A dropdown menu with "Searchable Property" selected. The dropdown is open, showing a list of options: "Searchable Property", "Meta Tag", "HTML Tag", "Collection Selector", "ListSummary Selector", "Content Selector", "Image Selector", "Hyperlink Selector", and "File Selector". The last five options are enclosed in a red rectangular box.
- Editable:** (This field is empty in the screenshot)

For example, if you choose **ListSummary Selector**, a specified List Summary will appear on the page along with its associated content item.

Your choices are

- Collection Selector
  - ListSummary Selector
  - Content Selector
  - Image selector (*associates a library image with content*)
  - Hyperlink Selector (*associates a library hyperlink with content*)
  - File Selector (*associates a library file with content*)
3. Add the metadata definition to all appropriate folders. See ["Assigning Metadata to a Folder" on page 137](#)



4. For each content item with which you want to associate related content, access its **Metadata** tab and identify the related item(s).

**WARNING!**

If you are using **Collection Selector** type, only users with permission to work with collections can select a collection. Also, if you are using **Image, Hyperlink or File Selector** type, only users with permission at least read-only Library permissions can select a library item. See Also: "Setting Permissions" on page 686

For example, a collection of pages describes motorcycle helmets. You want this collection to appear whenever a helmet is being viewed.

To set this up, you would

- edit the helmet content item
- click its **Metadata** tab
- find the metadata definition for the collection
- click **Change**
- select the Helmet Collection

**Edit Content in Folder "Content"**

Title: te **Select Collection**

**Content** X

| Title                | ID | Description                             | Path |
|----------------------|----|---|------|
| <u>Homepage Ads</u>  | 4  |   | \    |
| <u>Homepage News</u> | 6  |   | \    |
| <b>Helmets</b>       | 10 | List of Motorcycle Helmets that we Sell | \    |

Default current character count: 268 (500 max.)

**Related Collections:** None selected (ID: ) **Change** **Clear**



5. Have your Web developer add code to each page on which the related item appears. To learn how to do this, access the developer sample page (<http://localhost/cms400developer/default.aspx>) and read the **Metadata > Meta Associations** description.

## Simple Dublin Core Metadata

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

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

| Dublin Core Field Name | Ektron CMS400.NET Property                               |
|------------------------|--|
| DC.title               | Content block title                                      |
| DC.description         | Plain text version of a content summary                  |
| DC.contributor         | Content block last editor name                           |
| DC.date                | Content block last edit date                             |
| DC.format              | “text/html”  |
| DC.identifier          | URL of current page (from ASP.NET Server.Request object) |



| Dublin Core Field Name | Ektron CMS400.NET Property   |
|------------------------|--|
| DC.language            | CMS language cookie / current site language, expressed as a .NET System.Globalization Culture Name |

## Creating the Additional Eight Fields

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

### WARNING!

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

The remaining eight Simple Dublin Core fields are described below:

### NOTE

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

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



administrative entity). Examples: DC.coverage="1995-1996", DC.coverage="Boston, MA", DC.coverage="17th century" or DC.coverage="Upstate New York".

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

## Working with Metadata Definitions

### NOTE

Only members of the Administrator User Group and those defined in the Manage Members for Role: Metadata-Admin screen can view, add, or edit metadata definitions. See Also: ["Using the Roles Screens" on page 705](#)

Procedures for creating, updating and deleting metadata definitions are explained in the following sections.

- ["Adding a Metadata Definition" on page 125](#)
- ["Viewing Metadata Definitions" on page 135](#)
- ["Editing a Metadata Definition" on page 135](#)
- ["Deleting a Metadata Definition" on page 136](#)
- ["Assigning Metadata to a Folder" on page 137](#)
- ["Adding Metadata to Content" on page 140](#)

### Adding a Metadata Definition

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

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



**Add Meta Data definition**

Name:

Type:

Editable: ☒

Searchable Property

Publicly viewable: ☒

Style:


Default:

current character count: 0 (500 max.)

To define one instance of metadata, follow these steps.

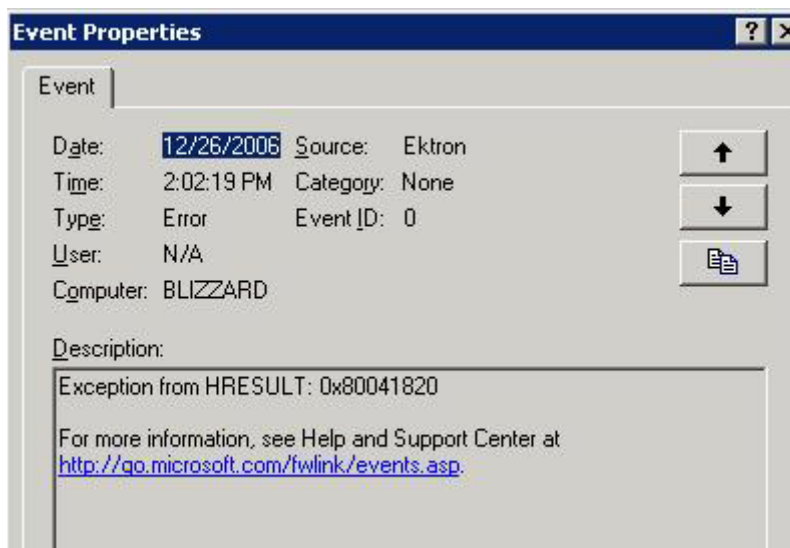
**WARNING!**

After creating a definition, you must assign it to all folders whose content should use it. You assign a metadata definition to a folder in the folder's properties. See ["Assigning Metadata to a Folder" on page 137.](#)

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

After you create a metadata definition, you may see the following error in the Windows Event Viewer Log.






To learn more about this problem and how to resolve it, see the following Microsoft KB article: <http://support.microsoft.com/kb/310680>.

### ***Metadata Definition Fields***

| Field | Description  |
|-------|--|
| Name  | Enter a name to identify this metadata.<br><u>Note: Searchable metadata field names should not include a space. If they do, the search cannot find the metadata.</u> |



| Field                      | Description  |
|----------------------------|--|
| Type                       | <p>From the drop-down list, select whether this tag is</p> <ul style="list-style-type: none"> <li>a searchable property - See Also: "Searchable Additional Fields" on page 130</li> <li>an HTML tag (for example, &lt;title&gt;) - See Also: "HTML Tag Additional Field" on page 128 and "Title Tag" on page 118</li> <li>a Meta tag (&lt;meta&gt;) - See Also: "Meta Tag Additional Fields" on page 129 and "Meta Tags" on page 116</li> <li>Collection Selector, ListSummary Selector, Content Selector, Image selector, Hyperlink Selector, File Selector - See Also: "Related Content Metadata" on page 120</li> </ul>   |
| Editable                   | <p>Check this box if you want to allow users to edit the contents of the metadata when creating or editing the metadata's content.</p> <p>Uncheck this box if you want uniform metadata text for each content item that uses this metadata.</p>  |
| Display in Ektron Explorer | <p>Check this box if you want this metadata to appear in Ektron Explorer. If you check the box, and this metadata is assigned to content, the metadata value appears within Ektron Explorer, below the last edited date. The additional information could help Explorer users find the right content.</p> <p>Examples might be a description of the content or the author. See illustration below.</p> <div data-bbox="482 1021 696 1228">  </div> <p><b>Sample Content Block</b><br/> "Sample Content Block Summary"<br/> Last edited by bob bob on 3/13/2006 5:14:11 PM</p> <div data-bbox="725 1106 1258 1210" style="border: 1px solid red; padding: 5px;"> description: Training presentation for new employees<br/> author: Xu Hi-Ling </div> |

## HTML Tag Additional Field

See Also: "Title Tag" on page 118



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

### Meta Tag Additional Fields

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

See Also: "Meta Tags" on page 116

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



| Field                   | Description  |
|-------------------------|--|
| Allowed Selectable Text | Enter standard metadata that can be selected by users. Separate each option by the separator specified for the metadata definition.<br>This field is only active if the <b>Selectable Metadata</b> box is checked. |
| Default Text            | Enter default content for the metadata tag.  |

### ***Searchable Additional Fields***

| Field             | Description  |
|-------------------|--|
| Publicly Viewable | <p>If you check the box, site visitors can find the metadata value when searching your Web site. Otherwise, site visitors cannot find the metadata value.</p> <p><u>Note: Regardless of whether this is checked, this metadata value can be found using the Workarea's Search Content Folder screen. Only logged-in users can access the Workarea.</u></p> |



| Field | Description   |
|-------|---|
| Style | <p>Select the style of the response field from these choices (available in a dropdown list). You are specifying the <i>kind</i> of information that a user adding searchable properties to content will enter to describe the data. Later, anyone using the search can search on that information.</p> <p>See Also: <a href="#">"Assigning Metadata to a Folder" on page 137</a></p> <ul style="list-style-type: none"> <li>• <b>Text</b> - The user enters free text to describe the content.</li> <li>• <b>Number</b> - The user enters a number to describe the content.</li> <li>• <b>Byte</b> - 1 byte. 0 through 255 (unsigned)</li> <li>• <b>Double</b> - 8 bytes. -1.79769313486231570E+308 through -4.94065645841246544E-324 † for negative values; 4.94065645841246544E-324 through 1.79769313486231570E+308 † for positive values</li> <li>• <b>Float</b> - (single-precision floating-point) 4 bytes. -3.4028235E+38 through -1.401298E-45 † for negative values; 1.401298E-45 through 3.4028235E+38 † for positive values</li> <li>• <b>Integer</b> - 4 bytes. -2,147,483,648 through 2,147,483,647 (signed)</li> <li>• <b>Long</b> - 8 bytes. -9,223,372,036,854,775,808 through 9,223,372,036,854,775,807 (9.2...E+18 †) (signed)</li> <li>• <b>Short</b> - 2 bytes. -32,768 through 32,767 (signed)</li> <li>• <b>Date</b> - The user enters a date to describe the content.</li> <li>• <b>Yes or No</b> - The user answers yes or no to describe the content. For example, if the content describes automobile parts, the user could answer <b>yes</b> to include new and used parts or <b>no</b> to search for new parts only.</li> <li>• <b>Select from a list</b> - The user picks a from a list to describe the content.<br/>For an illustration of this style on the Edit Content screen/Searchable Properties tab and the Web site search screen, see <a href="#">"Select from a List" on page 132</a>.</li> <li>• <b>Multiple selections</b> - The user selects an item from a dropdown list.<br/>For an illustration of this style on the Edit Content screen/Searchable Properties tab and the Web site search screen, see <a href="#">"Multiple Selections" on page 132</a>.</li> </ul> <p>See Also: <a href="#">"Converting the Style of a Metadata Definition" on page 133</a></p> |



| Field   | Description  |
|---------|--|
| Default | <p>If desired, enter the most common response to this definition.</p> <p>The default value is automatically applied to all existing content within folders to which this definition is assigned.</p> <p>While editing content that uses this definition, a user can accept the default value or change it.</p> <p>See Also: <a href="#">"Effect of a Default Value on Required Metadata" on page 139</a></p> |

### Select from a List

**NOTE** The following graphics depict searchable metadata when using the Site Search server control. They do not appear when using the Web Search server control.

#### Appearance on Edit Content Screen > Metadata Tab

Search Data

City of origin: Paris

Editor's name: No Selection

Top Stories: Montreal

Sydney

London

Paris

#### Appearance on Search Screen

☐ Match Partial Words

archive: Any

City of origin: Any

Editor's name: Any

Top Stories: Montreal

Sydney

London

Paris

### Multiple Selections

#### Appearance on Edit Content Screen > Metadata Tab



**Auto manufacturer:**

| Not Included:              |        | Included: |
|----------------------------|--------|-----------|
| Ford<br>Chevrolet<br>Mazda | >>     |           |
|                            | All >> |           |
|                            | <<     |           |
|                            | All << |           |

### Appearance on Search Screen

|                    |           |
|--------------------|-----------|
| archive:           | Any       |
| Auto manufacturer: | Ford      |
| City of origin:    | Any       |
| Editor's name:     | Ford      |
| Top Stories:       | Chevrolet |
|                    | Mazda     |

## Converting the Style of a Metadata Definition

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

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



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

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

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

#### Table legend

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

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

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



Searchable Property



Publicly viewable: ☒

Style: Date ▼

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

☒ Use existing data if possible, else default

☐ Use default value

Default: [None]  

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

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

## Viewing Metadata Definitions

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



1. From the Workarea's left frame, click the **Settings** folder.
2. Click the **Configuration** folder to expand the tree.
3. Click the **Metadata Definition** folder.
4. The View Metadata Definitions screen appears.
5. Select a language from the drop-down list.
6. Click the Metadata definition you want to view.
7. The View Metadata Definition screen appears. From here, you can edit and delete this definition.

See Also: "[Metadata Definition Fields](#)" on page 127

## Editing a Metadata Definition

To edit a metadata definition, follow these steps.



1. Access the View Metadata Definition screen whose definition you want to edit, as described in "[Viewing Metadata Definitions](#)" on page 135.
2. Click the Edit button ().
3. The Edit Metadata Definition screen is displayed.
4. Make the necessary changes to the definition.  
See Also: "[Metadata Definition Fields](#)" on page 127
5. Click the Update button (.

### ***What Happens When a Metadata Definition is Edited?***

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

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


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

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

## **Deleting a Metadata Definition**

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

To delete a definition, follow these steps.

1. Access the View Metadata Definition screen for the definition, as described in "[Viewing Metadata Definitions](#)" on page 135.
2. Click the Delete button (.
3. A confirmation message is displayed.



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

## Assigning Metadata to a Folder

After creating a metadata definition (see ["Adding a Metadata Definition" on page 125](#)), assign it to folders whose content will use it.

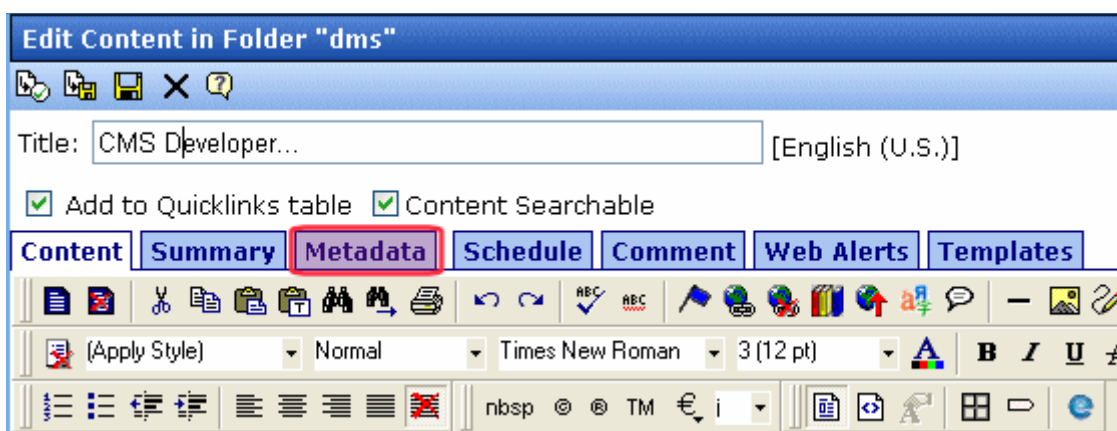
On each folder's properties screen, you determine which metadata definitions can be used. The section of the folder properties screen used to assign metadata appears below. Only metadata definitions whose **Assigned** box is checked can be completed by users working with content in the folder.

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

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

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

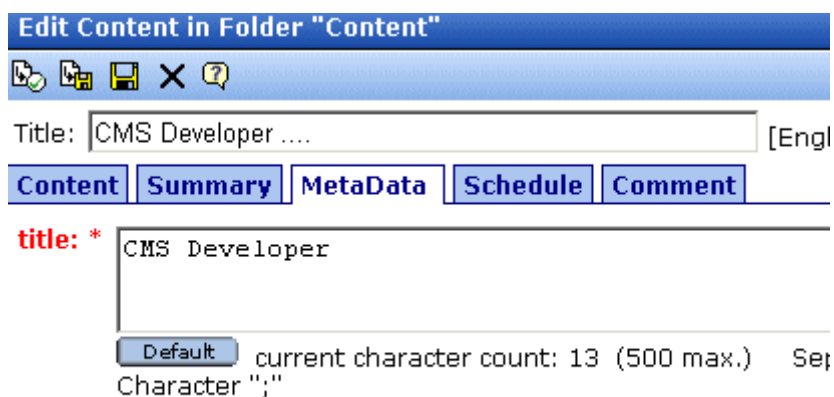




### Requiring Users to Enter Metadata

You can determine that a metadata value *must* be inserted before content can be saved (see the **Required** checkboxes in the illustration above). This occurs both when new content is added and existing content is edited.

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



**\* = Required fields**



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

### ***Effect of a Default Value on Required Metadata***

A default value can be defined when creating or editing a field within a metadata definition. See Also: ["Adding a Metadata Definition" on page 125](#)

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

## **Inheritance of Metadata by Folder**

Each folder can inherit metadata fields from its parent folder or have a unique set of them. The information includes the kinds of metadata that are *assigned* and which of those are *required*. For example, you could assign the top folder (Content) all metadata definitions, while you assign the Contacts folder (directly below it) none.

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

#### **Metadata/Custom-Fields available for folder 'Contacts':**

(Inherited from folder 'Content')

☐ Break Inheritance

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



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

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

## Adding Metadata to Content

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

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



---

# Adding Content Programmatically

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



## Add Content Programmatically To CMS

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

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



# Content Reports

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

This chapter explains how to access the reports folder in your Workarea, set criteria that determine the information on the reports, and actions you can perform on them.

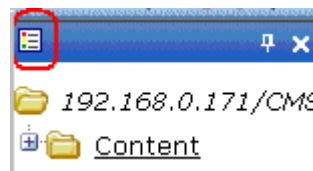
See Also:

- "Accessing the Reports Folder" on page 143
- "List of Standard Reports" on page 144
- "Common Report Topics" on page 145

## Accessing the Reports Folder

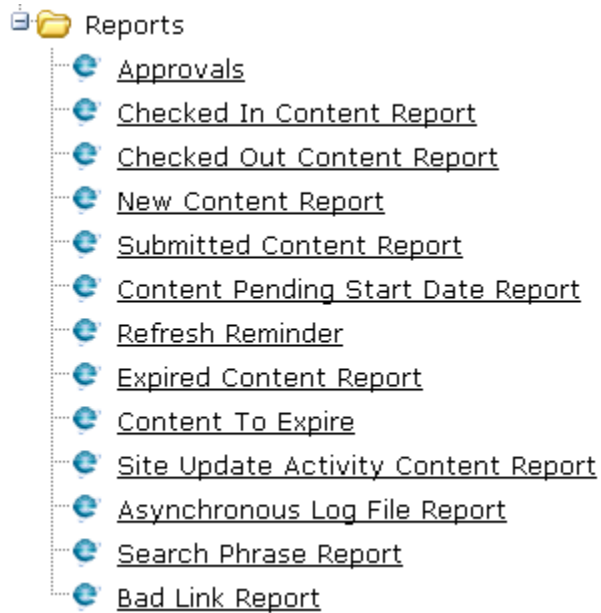
To access the Reports folder, follow these steps.

1. Log in to your Ektron CMS400.NET Web site and access the Workarea.
2. To access the Smart Desktop from anywhere in **Ektron CMS400.NET**, click the button in the top left corner (circled below).





3. Click the **Reports** folder.
4. A list of available reports appears.



**NOTE** The Approvals, Checked Out, and Content to Expire Reports are also available from the Workarea.

The reports are described below.

## List of Standard Reports

| Report             | Displays content in this status | For more information, see       |
|--------------------|---------------------------------|---------------------------------|
| Approvals          | Requiring your approval         | "Approvals Reports" on page 153 |
| Checked In Content | Checked in                      | "Checked In Report" on page 155 |



| Report                              | Displays content in this status   | For more information, see                                       |
|-------------------------------------|---|---|
| Checked Out Content                 | Checked out   | <a href="#">"Checked Out Report" on page 156</a>                |
| New Content                         | New (that is, created and saved but never published)                            | <a href="#">"New Content Report" on page 156</a>                |
| Submitted Content                   | Submitted for publication   | <a href="#">"Submitted Report" on page 157</a>                  |
| Content Pending Start Date          | Approved and pending a start date   | <a href="#">"Content Pending Start Date Report" on page 158</a> |
| Refresh Reminder Report             | End date has been reached   | <a href="#">"Refresh Reminder Report" on page 159</a>           |
| Expired Content                     | Expired date has been reached   | <a href="#">"Expired Content Report" on page 160</a>            |
| Content to Expire                   | Will expire within specified number of days                                     | <a href="#">"Content to Expire Report" on page 161</a>          |
| Site Update Activity Content Report | Content created or updated in selected folders and within a selected date range | <a href="#">"Site Update Activity Report" on page 162</a>       |
| Asynchronous Log File Report        | A log report of the Asynchronous process  | <a href="#">"Asynchronous Log File Reporting" on page 869"</a>  |
| Search Phrase Report                | Frequency of search terms   | <a href="#">"Search Phrase Report" on page 166</a>              |
| Preapproval Groups                  | User groups that have been assigned to folders in order to preapprove content   | <a href="#">"Preapproval Groups Report" on page 379</a>         |
| Bad Link Report                     | Invalid links to external URLs  | <a href="#">"Bad Links Report" on page 168</a>                  |

## Common Report Topics

The following topics apply to the reports.

- ["Information on the Reports" on page 146](#)
- ["Report Toolbar Options" on page 146](#)
- ["Selecting Content by Folder" on page 147](#)






- ["Selecting Content by Type" on page 148](#)
- ["Sorting and Filtering Content Reports" on page 149](#)
- ["Performing an Action on Several Content Items" on page 149](#)
- ["Viewing/Editing Content on the Report" on page 150](#)
- ["emailing Reports" on page 150](#)

## Information on the Reports

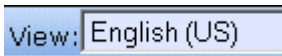
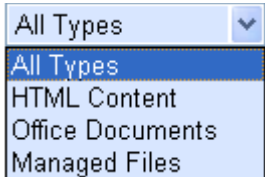
Each report displays the following information about its content.

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

## Report Toolbar Options

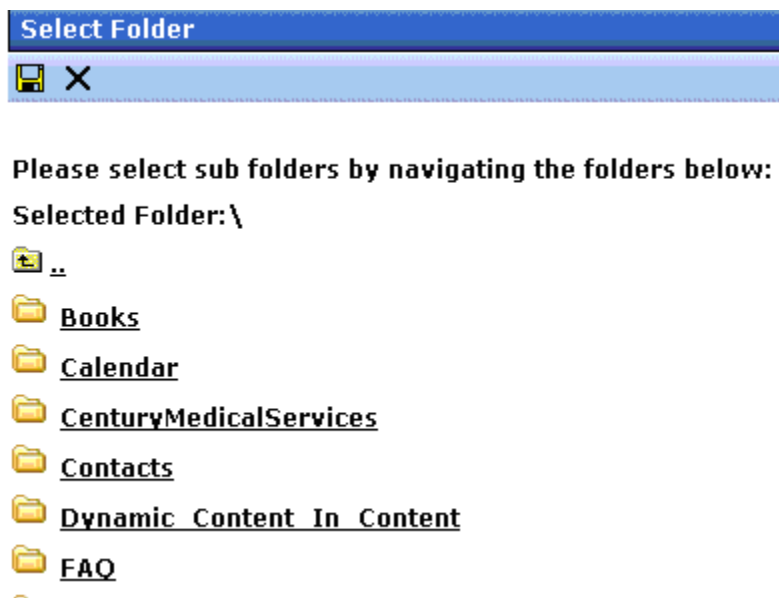
| Toolbar Button  | Description   | For more information, see                                 |
|---|---|---|
|  | email this report to selected users   | <a href="#">"emailing Reports" on page 150</a>            |
|  | Select a folder whose content appears on the report. Content in other folders is ignored. | <a href="#">"Selecting Content by Folder" on page 147</a> |
|  | Go to previous screen   |   |



| Toolbar Button  | Description  | For more information, see |
|---|--|---------------------------|
|  | Select the language of the content you want to see on the report |                           |
|  | Select the type of the content you want to see on the report     |                           |

## Selecting Content by Folder



You can select a folder and only view the content in that folder that satisfies the other report criteria. For example, the Checked in Content Report can show only content whose status is checked in and which resides in the Contacts folder.



Only content in the selected folder appears. The report does not include content from subfolders of the selected folder.



To select content by a folder, follow these steps.

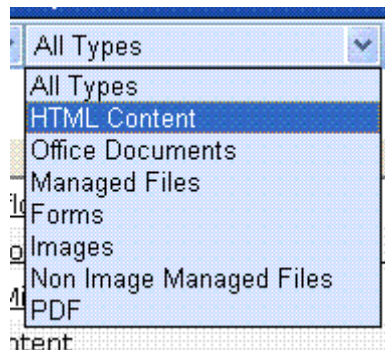
1. From the Smart Desktop, select a report.
2. Click the Select a Folder button (  ).
3. The top level folders appear.
4. If the folder you want is on the list, click the corresponding checkbox.  
If the folder you want is a subfolder, click the parent folder's name. A new screen appears, showing the selected folder's subfolders. Click the corresponding checkbox.
5. Click the Save button (  ) to finalize your folder selection.
6. The screen displays all content items in the selected folder that satisfy all report criteria.

## Selecting Content by Type

After viewing any report, you can select a content type and only view the content of that type that satisfies the other report criteria. For example, the Checked in Content Report can show only Office documents.

To select a content type, follow these steps.

1. From the Smart Desktop, select a report.
2. Use the file types pull-down to select a file type.
3. The screen refreshes and only displays files of that type.





## Sorting and Filtering Content Reports

Upon viewing a report's content, you have additional options for filtering report data by user and content folder.

The filtering options for each content report are identical. The following section uses the Checked-In Content report as an example.

### *Filter by User*

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

### *Filter by Content Folder*

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

**NOTE** You can also select a folder and view reports in that folder only. See Also: ["Selecting Content by Folder" on page 147](#)

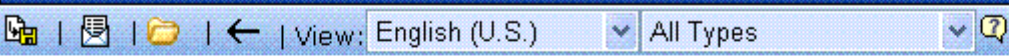
## Performing an Action on Several Content Items

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

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

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

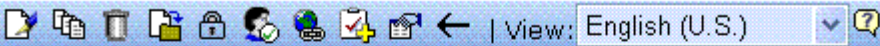


| Content Reports: Checked Out Content Report  |    |                                   |
|--|----|-----------------------------------|
|                                |    |                                   |
| Select All Clear All   |    |                                   |
| Title  | ID | Last Editor                       |
| <input type="checkbox"/> <a href="#">Ektron Introduces an Enhanced Workflow Suite</a>                            | 18 | <a href="#">Administrator, Ar</a> |
| <input type="checkbox"/> <a href="#">Ektron Supports Rapid and Efficient Globalization Strategies on the Web</a> | 19 | <a href="#">Administrator, Ar</a> |
| <input type="checkbox"/> <a href="#">Microsoft ASP.NET Programming with Microsoft Visual C#.NET</a>              | 25 | <a href="#">Administrator, Ar</a> |
| <input type="checkbox"/> <a href="#">Example of dynamic content within content</a>                               | 29 | <a href="#">Administrator, Ar</a> |

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

## Viewing/Editing Content on the Report

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

| View Content "Content Management Bible"  |                 |
|--|-----------------|
|  |                 |
| <b>Properties</b>  | <b>Content</b>  |
| <b>Summary</b>   | <b>Metadata</b> |
| <b>Comment</b>   | <b>Tasks</b>    |
| <b>Web Alerts</b>  |                 |
| <b>Title:</b> Content Management Bible   |                 |
| <b>Subject:</b> CMS <b>ISBN:</b> 0764573713  |                 |
| <b>Genre:</b> Non-Fiction <b>Publisher:</b> Wiley; John & Sons; Incorporated         |                 |
| <b>Author(s)</b><br><b>First Name:</b> Bob <b>Last Name:</b> Boiko                   |                 |

The View Content screen provides several toolbar options that you can perform on the content.

## emailing Reports

You can email any report. You might do this, for example, to notify a user that several content items are checked out to him. All



information in the report appears in the email. A sample appears below.

## Content To Expire in 70 Days


tsmith@ektron.com

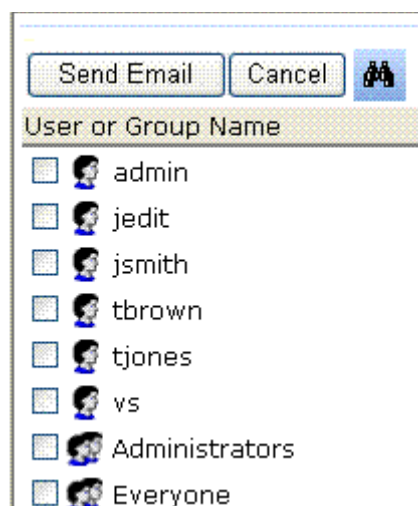
To: tsmith@ektron.com

| Title                              | ID | Last Editor                                | Email | End Date              | Pa |
|------------------------------------|----|--|-------|-----------------------|----|
| <a href="#">CMS Developer ....</a> | 12 | <a href="#">Edit, John</a>                 |       | 11/13/2005 9:45:00 PM | \  |
| <a href="#">CMS Entwickler ...</a> | 12 | <a href="#">Administrator, Application</a> |       | 11/13/2005 9:45:40 PM | \  |
| <a href="#">CMS Ralisateur ...</a> | 12 | <a href="#">Administrator, Application</a> |       | 11/13/2005 9:45:40 PM | \  |

You can click any content item on the report and proceed to that page of your Web site.

To email any report, follow these steps.

1. Display the report that you want to email.
2. Click the email button (.
3. A list of all users and user groups in your **Ektron CMS400.NET** appears.





**NOTE**



Users appear first in alphabetical order (by username), followed by user groups. The icon for user groups has two heads (see below).



4. Click inside the checkbox of every user or group to receive a copy of the report.

### ***Searching for Report Recipients***

If you cannot easily find a user, a search of all users and groups is available. To use it, follow these steps.

1. Display the report that you want to email.
2. Click the email button (  ).
3. A list of all users and user groups in your **Ektron CMS400.NET** appears.
4. Click the Search for User button (  ).
5. The following screen appears.

6. Enter whatever information you know about the users.
7. Click the **Send email** button.
8. All users that satisfy the search criteria appear on a new screen.
9. Click the checkbox of every user or group to receive the report.






## Approvals Reports

Each content item awaiting your approval appears on this report. Thus, you can quickly find all such content without searching through every folder.

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

| Field         | Description  |
|---------------|--|
| Title         | Title of content.  |
| Request Type  | Request made for the content. Either <b>Publish</b> or <b>Delete</b> .                         |
| Start Date    | Start date, if any, assigned to the content. Determines when content will go live on Web site. |
| Date Modified | Date the content was most recently changed   |
| Submitted By  | User who submitted content for approval.   |
| ID            | The ID number of the content.  |
| Language      | The language of the content.   |
| Path          | Path to content folder where content resides.  |

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

| View All Content Awaiting Approval  |              |                                   |                   |
|---|--------------|-----------------------------------|-------------------|
|    | View:        | English (U.S.)                    | All Types         |
| Title   | Request Type | Start Date                        | Date Modified     |
| <input type="checkbox"/> CMS Developer ...  | Publish      | Sunday, December 05, 2004 9:45 PM | 11/1/2005 1:29:27 |


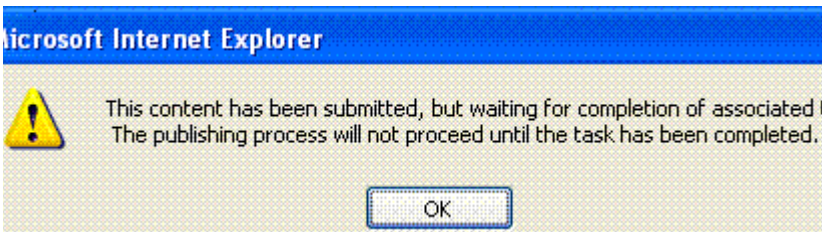




### Approving/Declining Content

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




## Approve/Decline One Content Item

1. Access your Approvals report in the Workarea (see "[Approvals Reports](#)" on page 153).
2. Click the content you want to approve or decline.
3. The View Content Awaiting Approval page is displayed.
4. Perform an action using the following table as a reference.

| Button   | Name                      | Description   |
|--|---------------------------|---|
|   | Publish                   | <p>Accept changes to content and publish it to site.</p> <p><u>Note: If there is a subsequent approver in the content's approval chain, this button is replaced by a Submit button.</u></p> <p>If you click <b>Publish</b> but the content item has an incomplete task assigned to another user, the content cannot be published. Instead, the following error message appears.</p>  <p>The user to whom the task is assigned must complete it before you can publish the content.</p> |
|   | Decline                   | <p>Reject changes and keep current version of content live on Web site. You are prompted to enter a comment that provides a reason for the decline. The author who made the change is notified by email of the decline.</p> <p>The content inserted by the last editor remains in the file. If you do not want it to remain, choose the <b>Edit</b> option.</p>   |
|   | Edit                      | Check out content and make changes to it if desired.  |
| <br> | View Published/<br>Staged | Toggle between published and submitted versions of content. This can help you compare differences.  |



| Button  | Name | Description                 |
|---|------|-----------------------------|
|  | Back | Go back to previous screen. |

## Approving Multiple Content Items

See ["Performing an Action on Several Content Items" on page 149.](#)

The selected content is either submitted to the next publisher, published immediately, or deleted, depending on the content's approval chain.

## Checked In Report


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

The report displays the following information.

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



## Submitting Multiple Content Items


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

## Checked Out Report

The Checked Out Content report displays all content currently in a checked out status.

The report displays the following information.

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

After selecting content, check it in using the Checkin button ()

## New Content Report

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



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

## Submitted Report

The Submitted Content report displays all content in a submitted state.

The report contains the following information.



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



## Viewing Position in Approval Chain

While viewing the Submitted Content report, you can view the content's position in its approval chain. You can use this information to contact the individuals in the chain and ask them to complete their approval. To do so, follow these steps.

1. From the Submitted Content Report, click the content's title.
2. The View Content page is displayed.
3. Click the **Properties** tab.
4. The content's position in the approval chain is indicated by red text on the **Approvals** line.

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

## Content Pending Start Date Report

The Pending Start Date Report displays all content that was approved, but whose start dates haven't occurred.

Each content item on the report contains the following information.

| Column      | Description   |
|-------------|---|
| Title       | Title of content.                                   |
| ID          | ID number assigned to content by Ektron CMS400.NET. |
| Last Editor | Last user to edit the content.                      |



| Column     | Description   |
|------------|---|
| Start Date | Date and time content will go live on Web site.           |
| Path       | Folder location of content in Ektron CMS400.NET Web site. |

## Editing Content with a Pending Start Date

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

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

## Refresh Reminder Report

The Refresh Report displays all content whose end date has passed and whose archive option is set to **Refresh Report**. This content is still visible on the Web site. Its appearance on this report indicates that it is due for review. See Also: "[Setting Archive Options](#)" on page 66

Each item on the report contains the following information.


| Column        | Description   |
|---------------|---|
| Title         | Title of content.                                   |
| ID            | ID number assigned to content by Ektron CMS400.NET. |
| Last Editor   | Last user to edit the content.                      |
| Date Modified | Date and time the content was last updated.         |



| Column | Description   |
|--------|---|
| Path   | Folder location of content in Ektron CMS400.NET Web site. |

## Removing Expired Content from Site

If you review content and decide it should no longer appear on your site, follow these steps to remove it. The content will be visible if you browse to it through the Workarea, but won't appear to site visitors.

1. From the Expired Content Report, click the content.
2. From the View Content screen, click the Edit button ().
3. Click the **Schedule** tab.
4. Under **Action on End Date:**, click **Archive and remove from site (expire)**.

## Expired Content Report

The Expired Content report displays all content whose end date has passed. Such content is no longer visible on the Web site.

Each item on the list contains the following information.

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



## Editing Expired Content

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

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

## Content to Expire Report

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

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


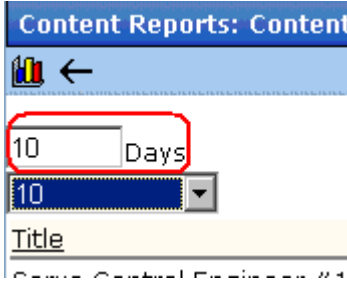
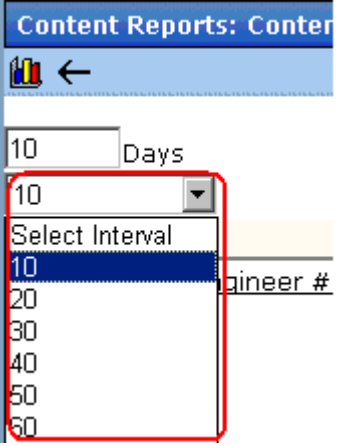
Each item on the list contains the following information.


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



## Selecting the Report's Date Range

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

| Option  | Illustration  |
|---|---|
| <p>Enter a number in the <b>Days</b> field. Then click the View Reports button .</p> |   |
| <p>Select a number from the dropdown list below the <b>Days</b> field</p>   |  |

After selecting a number of days, click the view icon () to see all content that will expire within that time frame.

## Site Update Activity Report

The Site Activity Report provides a snapshot of the freshness of the content on your Web site. Specifically, it lists how many content items were published within a folder and date range you select, broken down by folder.

A sample report appears below.



**Content Reports: Site Update Activity Report In Folder "Root"**

View: English (U.S.)

Start Date: [None]

End Date: [None]

Select [Root](#)

Report Type: Combined View

Exclude Users: [User\(None\)](#) : [User Group\(None\)](#)

Get Result

| Root                                      |         |                 |  |
|---|---------|-----------------|--|
| Total Updates                             |         | # Pages Updated | Total Pages  |
| 76  |         | 3               | 3  |
| Page Name                                 | Updates | Last Updated    | User Name  |
| asdfasdfsdf                               | 34      | 2006-04-19      | alpesh,billc,billr,bob,brian,bruce,cecilia,chad,chandra,chrish,dan,c |
| Best Practices for Developing With CMS400 | 34      | 2006-04-20      | alpesh,billc,billr,bob,brian,bruce,cecilia,chad,chandra,chrish,dan,c |
| Sample Content                            | 8       | 2006-02-13      | admin  |

## Selecting Information to Appear on the Report

To choose which content items will appear on the report, follow these steps.

1. By default, only content in the default language appears on the report. To change the language, use the language pull-down near the top of the screen.
2. Choose a **Start Date** by clicking the calendar icon (📅).



3. A calendar appears. You can move to another month or year by clicking it. When you get to the desired month, click inside the day. The selected date turns red (see below).



4. Click **Done**.
5. If desired, select an **End Date** using the same procedure.

**NOTE** If you do not select an end date, the report uses today as the end date.

6. At the **Select** field, choose a folder. The Root folder is the default selection.  
To change that selection, click the folder name. When you do, the Select Folder screen appears.



**Select Folder**

Please select sub folders by navigating the folders below:

☐ Select All

☒ Include Sub-folders

Selected Folder: ☐ \

☐ CMS400Demo

☐ Developer

To select all folders on the screen, click the **Select All** checkbox. Otherwise, select folders by clicking the corresponding checkbox. There is also an option to **Include Sub-folders** of the selected folders.

7. Choose the Report type, which determines the information you will see on the report. Options are explained below.

| Report Type    | Description   | Example  |               |                 |             |     |   |   |
|----------------|---|--|---------------|-----------------|-------------|-----|---|---|
| Executive View | <ul style="list-style-type: none"> <li>• folder name</li> <li>• how many times content in folder was published</li> <li>• how many pages were published</li> <li>• number of content items in folder</li> </ul> | <div> <a href="#">Root</a> <table> <tr> <th>Total Updates</th><th># Pages Updated</th><th>Total Pages</th></tr> <tr> <td>110</td><td>4</td><td>4</td></tr> </table> </div> | Total Updates | # Pages Updated | Total Pages | 110 | 4 | 4 |
| Total Updates  | # Pages Updated   | Total Pages  |               |                 |             |     |   |   |
| 110            | 4   | 4  |               |                 |             |     |   |   |



| Report Type   | Description  | Example  |         |              |           |    |            |  |    |            |  |
|---------------|--|--|---------|--------------|-----------|----|------------|--|----|------------|--|
| Detail View   | <ul style="list-style-type: none"> <li>name of each page that was published</li> <li>how many times it was published</li> <li>date it was last published</li> <li>users who published page</li> <li>total numbers are <i>not</i> provided</li> </ul> | <table> <tr> <th>Updates</th><th>Last Updated</th><th>User Name</th></tr> <tr> <td>34</td><td>2006-04-20</td><td>alpesh,billc,billr,bob,brian,bruce,cer</td></tr> <tr> <td>34</td><td>2006-04-21</td><td>alpesh,billc,billr,bob,brian,bruce,cer</td></tr> </table> | Updates | Last Updated | User Name | 34 | 2006-04-20 | alpesh,billc,billr,bob,brian,bruce,cer | 34 | 2006-04-21 | alpesh,billc,billr,bob,brian,bruce,cer |
| Updates       | Last Updated   | User Name  |         |              |           |    |            |  |    |            |  |
| 34            | 2006-04-20   | alpesh,billc,billr,bob,brian,bruce,cer   |         |              |           |    |            |  |    |            |  |
| 34            | 2006-04-21   | alpesh,billc,billr,bob,brian,bruce,cer   |         |              |           |    |            |  |    |            |  |
| Combined View | information from Executive and Detail views  |  |         |              |           |    |            |  |    |            |  |

8. If you would like to exclude users or use groups from the report, use the **Exclude Users** field. For example, you want to see all updates other than those you have completed.

When you click **Exclude Users**, an alphabetical list of users appears, followed by user groups. (User groups have a two-

headed icon (  Administrators )).


9. Click **Get Result**.

## Search Phrase Report

This report displays all terms that were entered into the Search Text Field within a selected range of dates. You can use it to discover the kind of information site visitors are searching for.





**Search Phrase Report**



← View: English (U.S.) ▼ 

Minimum Count:

☒ Include Site

☒ Include Workarea

Start Date: Wednesday, October 05, 2005 5:05 PM  

End Date: Tuesday, November 15, 2005 5:05 PM  

Get Result

| Phrase                | Use Count |
|-----------------------|-----------|
| Ektron                | 5         |
| Dreamweaver           | 3         |
| Acme                  | 1         |
| Providence Healthcare | 1         |
| WYSIWYG editor        | 1         |

## Selection Criteria

You can narrow down the search by selecting any combination of these criteria.

- language - the language of the *search page* (either Workarea or Web site search). The user performing the search can choose a language before inserting the search text. If he does not explicitly choose a language, the search uses the default one. This report can show results from all languages or any one that you select.
- a *minimum number of occurrences* of the word or phrase to return. For example, you only want words or phrases entered into the **Search Text** field at least 10 times during the last month.
- whether to include words or phrases entered into the *Web site search* (the search page that site visitors use)



- whether to include words or phrases entered into the *Workarea search* (accessed from the View Contents of Folder screen, this search page is used by authorized CMS users to find content)
- date range

## Display of Search Results

The search results show the number of times each word or phrase that satisfies the selection criteria appears. They are arranged in this order.

- words or phrases with the most occurrences appear first
- if several words or phrases have the same number of occurrences, they are arranged alphabetically

## Bad Links Report

The Bad Links Report notifies you of any invalid links to external URLs within your content. (An invalid link returns an error code to your browser.)

### NOTE

---

The report does not check quicklinks embedded in the content.

---

To accomplish this, the report scans the following types of content.

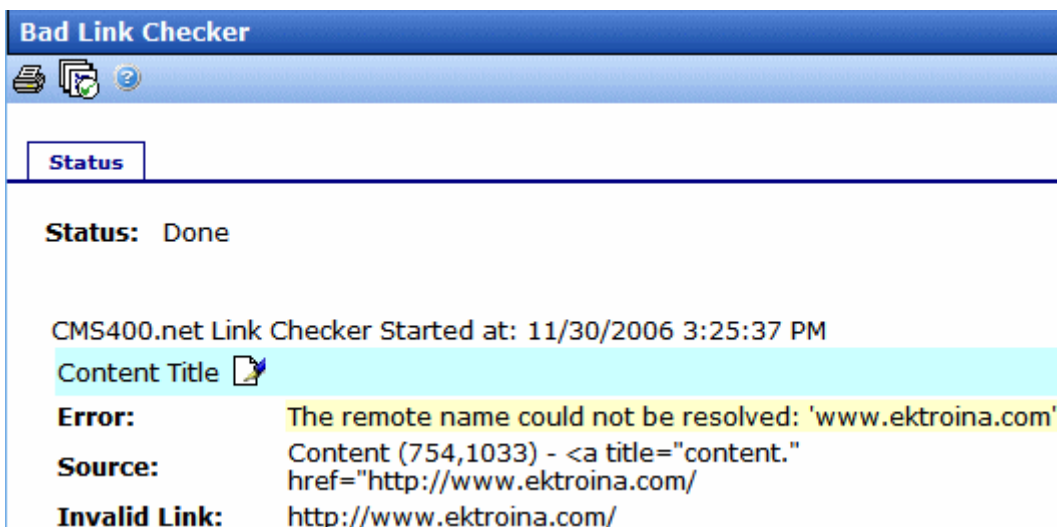
- published HTML content
- published XML content
- HTML forms
- XML Smart Forms
- menus
- active system templates


When the scan is complete, the report lists any item that includes an invalid URL. From the list, you can click a button to access the item, then update or remove the bad link.



## Running the Bad Links Report


To run the Bad Links Report, go to **Smart Desktop > Reports**. When you select Bad Link Report, you immediately see its status, either Done or Running.



To begin scanning for bad links, click the Check Links Now button () . When you do, existing data is replaced by new data being collected as the report progresses.

While the report scans content, you are free to work in other areas of **Ektron CMS400.NET**. You can even sign off **Ektron CMS400.NET**. These actions have no effect on the report's collection of data.

If you want to stop the Bad Links Report at any time, click the Cancel button () .

After all content is scanned, the report's status changes to **Done**. If desired, you can print the report by clicking the print button () .

You can also launch the broken link in a browser by moving the cursor over it then clicking when the cursor turns into a hand.



## Fixing Errors

The report lists the following information about each item that contains a bad link.

- title
- error description
- Source, that is, item type (content, menu, etc.) followed in parentheses by information about the item that has the error.

As examples


- if the error is in a content block, you see **Content** followed by its id number and language locale id
- if the error is in a Smart form, you see **Smart form** followed by its ID number
- If it's a menu, you see **Menu Item (11,0,1033)**. The three parameters are menu ID, menu item ID, and language ID.
- An error in a template looks like this:

ASPX Template (therapies.aspx)

Invalid Link: `http://localhost/websrc/WorkArea/therapies.aspx`

- The beginning of the bad link's source code. Use this to help you find the bad link from Source View.
- the anchor (<a>) tag to which the bad link is assigned
- URL that could not be resolved (labeled **Invalid Link**)

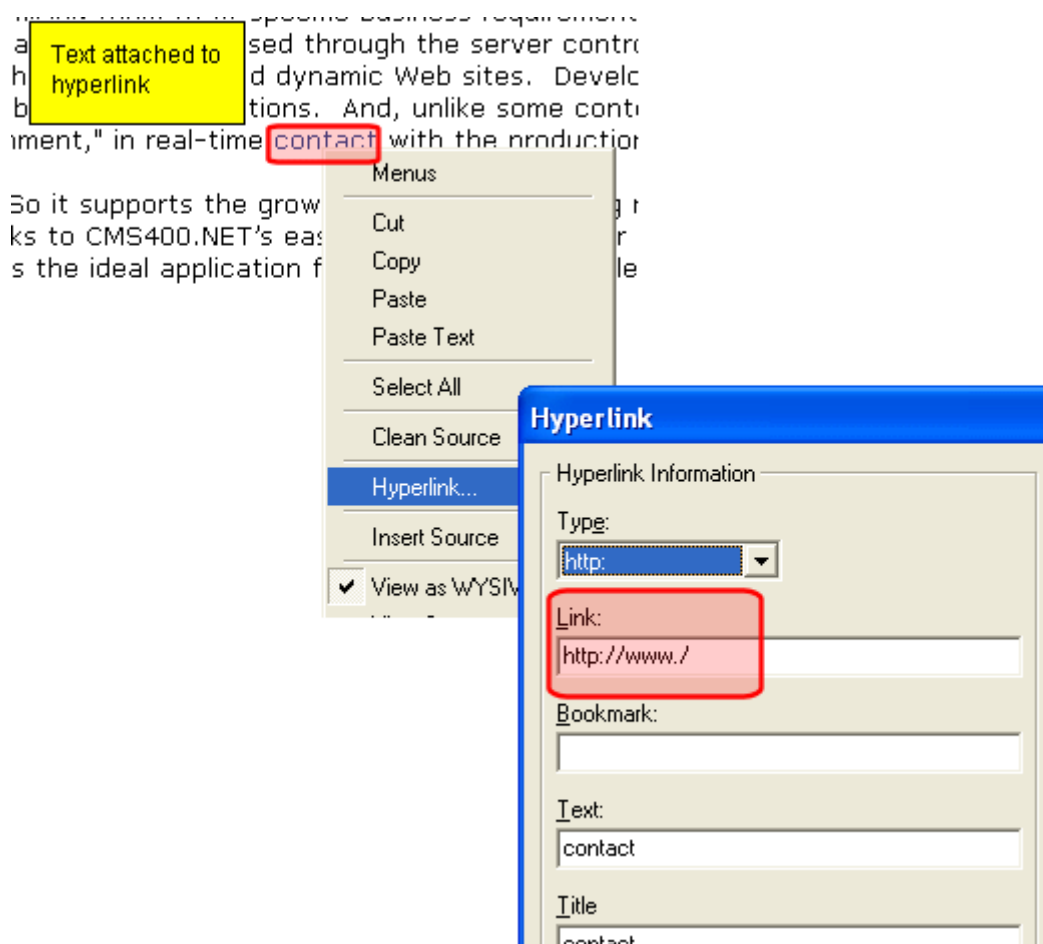
To fix an error, click the edit button next to the title (highlighted below). The item opens in edit mode, so you can fix the bad link.

|                      |   |
|----------------------|---|
| Content Title        |  |
| <b>Error:</b>        | The remote name could not be resolved: 'www.ektroina.com'                           |
| <b>Source:</b>       | Content (754,1033) - <a title='content' href='http://www.ektroina.com/'             |
| <b>Invalid Link:</b> | http://www.ektroina.com/  |

The error report's **Source:** field also indicates the text to which the bad link is assigned. See **content** highlighted in the above graphic.



Within the content, you select the indicated text, right click the mouse, and select **Hyperlink** to access the hyperlink dialog. From here, you can update or remove the bad link.



## Running the Bad Links Report on a Schedule

You can set the Bad Links Report to run in the background at predetermined times. If you do, you can view the report's latest results at your convenience without having to wait while it compiles.

To set up a schedule, follow these steps.



### 1. Open the following configuration file:

C:\Program Files\Ektron\EktronWindowsService\Ektron.ASM.EktronServices.exe.config

### 2. Within that file, go to the following line:

```
<add name="RunJob" type="Ektron.ASM.EktronServices.RunCMSJobManager.JobService,
Ektron.ASM.EktronServices" AbsoluteTime="Weekly|5, 2:27:00 PM" Enabled="true" />
```

### 3. Use the `absoluteTime` property to set the Bad Links Report's start time and frequency. By default, the report is scheduled to run every Thursday at 2:27 p.m. The following table lists ways to indicate a schedule.

| Frequency | How to indicate  | Example  |
|-----------|--|--|
| Hourly    | Comma-separated list of integers representing the number of minutes, seconds and ms between jobs   | 360,0,0 (every 360 minutes or 6 hours)                     |
| Daily     | A time in hh:mm:ss AM/PM format  | 11:30:00 PM (every day 11:30 pm)                           |
| Weekly    | <b>Weekly</b>   followed by an n is an integer that corresponds to a day of the week, followed by time. Use the time format described for the Daily frequency.<br><br>Use zero (0) to indicate Sunday, 1 for Monday, etc., through 7 for Saturday. | Weekly  0 12:00:00 PM (every Sunday at noon)               |
| Monthly   | <b>Monthly</b>   followed by an integer that corresponds to a day of the month, followed by time. Use the time format described for the Daily frequency.<br><br>Use zero (0) to indicate Sunday, 1 for Monday, etc., through 6 for Saturday.       | Monthly  15 11:30:00 (the 15th of every month at 11:30 PM) |



# Managing Library Items

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

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

## What's In This Chapter?

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

The following topics are covered in this chapter:

- ["Library Folders and Permissions" on page 173](#)
- ["Folder Properties" on page 174](#)
- ["Performing Actions on Library Items" on page 176](#)
- ["Load Balancing" on page 176](#)
- ["If You Have an Ektron WebImageFX License Key..." on page 180](#)

## Library Folders and Permissions

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

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






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

## Folder Properties


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

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

| Button   | Description             | For more information, see  |
|--|-------------------------|--|
|   | Folder properties       | <a href="#">"Accessing the Library Properties Screen" on page 174</a>            |
|   | Search                  | Ektron CMS400.NET User Manual section "Library Folder" > "Searching the Library" |
|  | Back to previous screen |  |

### Accessing the Library Properties Screen

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

1. Access a library folder, as explained in ["Folder Properties" on page 174](#).
2. Click the Properties button (.
3. The Library Management window appears, displaying the following settings.




## The Library Management Settings

| Field                                    | Description   |
|--|---|
| Image Extensions                         | The types of image files that a content contributor can upload to the library. You can add as many image file extensions as you want, or have none. If no extensions appear, no one can upload image files to the specified folder.   |
| Image Upload Directory                   | Specifies where the uploaded images are saved on the Web server. By default, the image upload directory is <code>Web root/ek_sitepath/uploadedimages</code> . The <code>ek_sitepath</code> value is set in the <code>Web.config</code> file.<br><i>See Also: Ektron CMS400.NET Setup Manual section "Managing the web.config File."</i>   |
| Make Directory Relative to this Web site | If you want to specify the image upload directory's location as relative to your Web site root, check this box. (Your Web site root's location appears to the right of <b>Make Directory Relative to this Web site.</b> )   |
| File Extensions                          | Specify the types of non-image files that a content contributor can upload to the library. You can add as many non-image file extensions as you want, or have none. If no extensions appear, no one can upload non-image files to the specified folder.   |
| File Upload Directory                    | Specifies where the uploaded files are saved on the Web server. By default, the file upload directory is <code>Web root/ek_sitepath/uploadedfiles</code> . The <code>ek_sitepath</code> value is set in the <code>Web.config</code> file.<br><u>Note: You must create the directory in your Web root manually, before adding it in CMS400.NET.</u><br><i>See Also: Ektron CMS400.NET Setup Manual section "Managing the web.config File."</i> |
| Make Directory Relative to this Web site | If you want to specify the file upload directory's location as relative to your Web site root, check this box. (Your Web site root's location appears to the right of <b>Make Directory Relative to this Web site.</b> )  |

## Editing Library Properties

To edit library properties, follow these steps.

































1. Go to the Library Properties screen, as explained in "[Accessing the Library Properties Screen](#)" on page 174.
2. Click the Edit button (.



Library properties are described in ["The Library Management Settings"](#) on page 175.

## Performing Actions on Library Items

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

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

Most actions can be performed by a user who is granted permission to do so. See Also: ["Setting Permissions"](#) on page 686

## Load Balancing

This section explains how to create load balancing paths in Ektron CMS400.NET. For further information about the steps needed to



set up load balancing outside of Ektron CMS400.NET, see "[Load Balancing](#)" on page 902.

## Load Balancing and Ektron CMS400.NET

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



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

### NOTE

See "[Configuring Load Balancing without Site Replication](#)" on page 904 for more information about this feature.

## Accessing Library Load Balancing Screen

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

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

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


| Column Title | Description   |
|--------------|---|
| Web Path     | The path of the folder under your server's Web site.  |
| Type         | <ul style="list-style-type: none"><li>• Images - load balance folder for uploaded images.</li><li>• Files - load balance folder for uploaded files.</li></ul> |

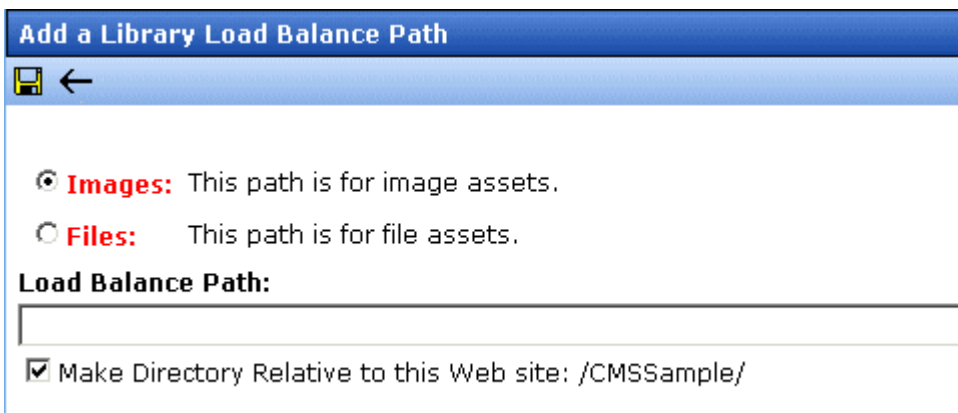


| Column Title  | Description  |
|---------------|--|
| Relative      | An <b>x</b> indicates if the folder is relative to your Ektron CMS400.NET Web site.  |
| Verified      | If the load balance folder exists in the proper location, a green check is used to verify that the folder exists. A red x is displayed when the folder does not exist in the specified location. |
| Physical Path | The physical location of the folder to which items will be uploaded.   |



## Adding a New Load Balancing Folder

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

1. Access the view load balance settings screen, as described in ["Accessing Library Load Balancing Screen" on page 177](#).
2. Click the Add button (  ) on View Library Load Balance Settings screen.
3. The Add a Library Load Balancing Path screen is displayed.



**Add a Library Load Balance Path**

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

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

**Load Balance Path:**

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

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

| Field        | Description  |
|--------------|--|
| Images/Files | Specify if the load balance path folder will be for images or files. |




| Field             | Description   |
|-------------------|---|
| Load Balance Path | Enter the path of the folder.   |
| Make Relative     | If the folder (or virtual folder) resides under your Ektron CMS400.NET site root, check off the box to make the path relative to that. Otherwise, remove the check. |

- Click the Save button ().

## Editing a Library Load Balance Path

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


To edit a load balance path, follow these steps.

- Access the View Library Load Balance Settings screen, as described in ["Accessing Library Load Balancing Screen" on page 177](#).
- Click the Web Path of the load balance path you want to edit.
- The Edit Library Load Balancing Path is displayed.
- Make the necessary changes to the load balance path.
- Click the Update button ().


## Deleting a Library Load Balance Path

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

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

- Access the View Library Load Balance Settings screen, as described in ["Accessing Library Load Balancing Screen" on page 177](#).
- Click the Remove () button.
- The Remove Library Load Balance Path is displayed.



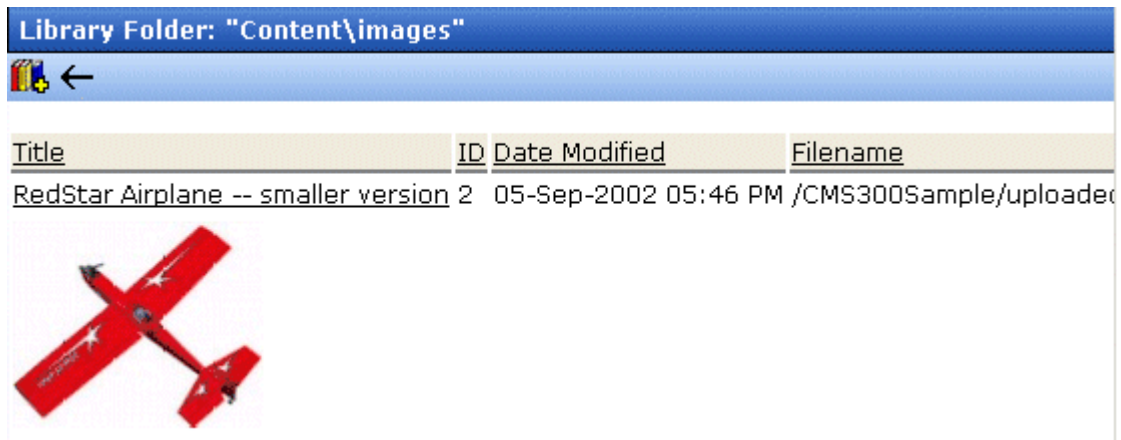
4. Check off the box(es) of the load balance paths you want to delete.
5. Click the Remove button (  ) to delete the load balance path.  
A confirmation message is displayed.
6. Click **OK**.

## If You Have an Ektron WebImageFX License Key...

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

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

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



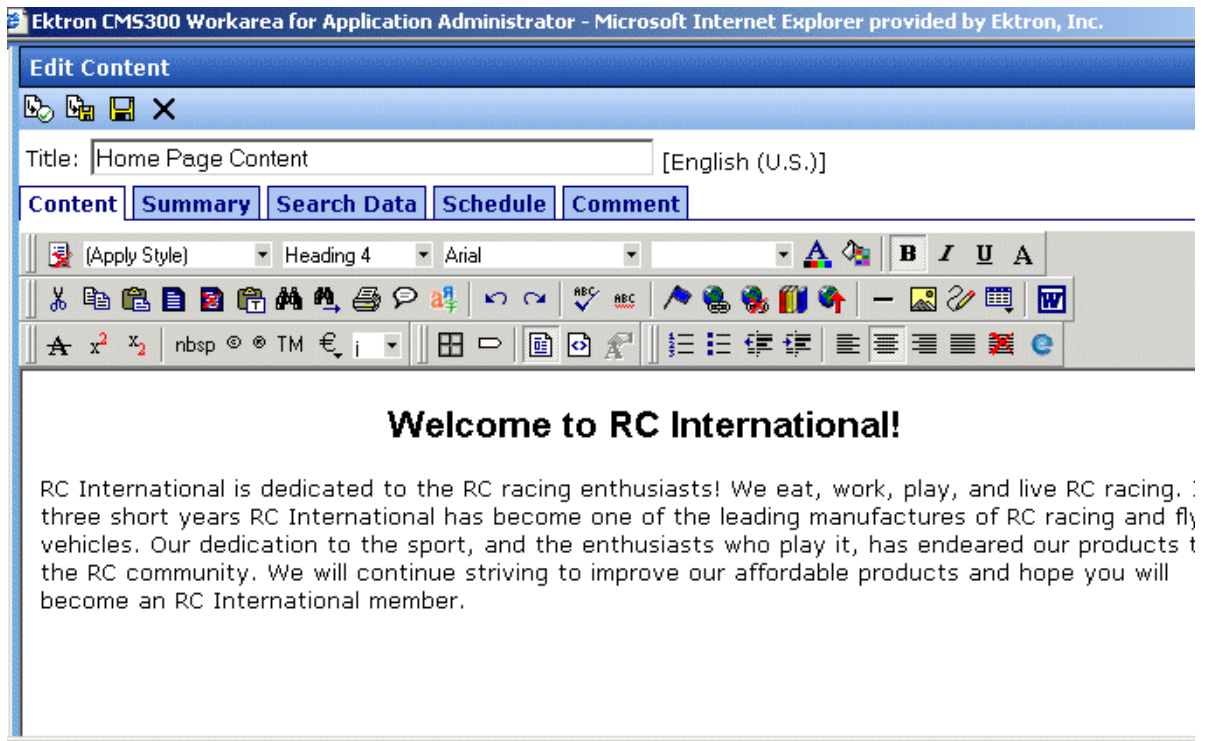
### NOTE

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



# Using eWebEditPro

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



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



# Working with Smart Forms

**Warning!**

The functionality described in this section is not supported when using an Apple Macintosh for editing content.

---

Ektron CMS400.NET's Smart Forms give you access to the power of XML by separating Web content from presentation. In addition to hiding the XML tags from users, Ektron CMS400.NET can serve content to various presentation devices (e.g., PDAs, mobile phones, WebTV), saving users from the tedium of creating duplicate content. Review and revision are drastically reduced because the accuracy and format of your Web content are managed using XML schema validation.

Using Smart Forms with Ektron CMS400.NET provides the following benefits:

- Strictly enforce content and page layout with Ektron's editor (Ektron eWebEditPro+XML), XSLT, and WYSIWYG templates for content contributors
- Deliver content to multiple devices (e.g., PDAs, mobile phones, WEB TV)
- Easily share content across B2B transactions
- Advanced XML authoring: Ektron's highly-acclaimed XML editor—Ektron eWebEditPro+XML—lets developers hide XML tags from content contributors and provides an easy-to-use WYSIWYG editing interface

Smart Forms are used in Ektron CMS400.NET to define the necessary files to display, save, and validate the content properly. This section explains how to take advantage of Ektron CMS400.NET's Smart Forms.

See Also:

- ["Benefits of Using XML Data" on page 183](#)
- ["Before You Manage Smart Forms" on page 184](#)
- ["Adding a New Smart Form" on page 186](#)



- ["Assigning Smart Forms" on page 191](#)
- ["Viewing Smart Forms" on page 192](#)
- ["Editing Smart Forms" on page 197](#)
- ["Creating Smart Forms Based on Existing Configurations" on page 200](#)
- ["Viewing Data Designer XSLTs" on page 201](#)
- ["Deleting Smart Forms" on page 202](#)
- ["XML Indexing" on page 204](#)

## Benefits of Using XML Data

This section explains why you should use XML as opposed to HTML content for your Web site. Because of XML's advantages, Ektron recommends using XML content whenever possible. Below are several reasons why XML is the preferred format for managing content.

- **Standardized format for capturing content**
  - You can create an XML Smart Form then require anyone creating content in a folder to use the form. The result is more uniform and consistent information.
  - Within an XML Smart Form, you can require authors to complete fields in a specified format. So, for example, if you want the author to enter a date, XML can ensure that it's captured in a standard format. Several standard formats are provided (email address, zip code), and you can create your own.
- **Superior control over content display**
  - Authors contribute XML content but have virtually no control over its format. The Web administrator determines the format through an XSLT file. By customizing the XSLT, you can exert maximum control over your Web site's appearance.
  - Since one file controls several (even hundreds of) pages, you can update just that file to efficiently change the look of all pages whose content is based on the Smart Form.
- **Improved search capabilities**



- Because XML data is captured in individual fields, you can focus a search on relevant fields. For example, if your XML content captures data about books, you can place an author search on your Web site. Since that search only looks through content in the **Author** field, it is much faster and returns more reliable results than a search of HTML content.

## Before You Manage Smart Forms

You must define each Smart Form that will be used in your Web site. Each form is assigned to a content folder or content item and lets you specify how XML content appears in the editor, is validated, and is displayed in an output device.




There are two ways to create a Smart Form.

- Using external XML files
- Using the WYSIWYG Data Designer







This section explains how to create and manage Smart Forms using both methods.

### The Smart Form Toolbar

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

| Button  | Name                       | Description   | More Information  |
|---|----------------------------|---|---|
|  | Add Smart Form             | Create a new Smart Form from scratch or based on properties of an existing one. | <a href="#">"Adding a New Smart Form" on page 186</a>   |
|  | Back                       | Return to previous screen   |   |
|  | Configure Full Text Search | Edit search screen labels   | <a href="#">"Editing the Search Labels" on page 212</a> |



| Button  | Name             | Description                                      | More Information                           |
|---|------------------|--|--|
|  | Delete           | Delete a Smart Form                              | "Deleting Smart Forms" on page 202         |
|  | Edit             | Edit a Smart Form created with external files    | "Editing Smart Forms" on page 197          |
|  | Edit Data Design | Edit a Smart Form created with the Data Designer | "Editing Data Design Packages" on page 197 |
|  | Save             | Save changes                                     |  |
|  | Update           | Save and update changes                          |  |
|  | View XSLT        | Display the XSLT for a Smart Form                | "Viewing Data Designer XSLTs" on page 201  |



## Accessing Smart Forms

**NOTE** Only members of the Administrators group or those defined in Manage Members for Role: Smart Forms Admin screen can create or edit Smart Forms. See Also: "Defining Roles" on page 704

To access the Smart Form section of the Workarea, follow these steps.

1. Access your Workarea, as described in "Accessing the Workarea" on page 11.
2. In the folder tree on the left side of the Workarea, follow the path **Settings > Configuration > Smart Form Configuration**.
3. The View Smart Forms screen is displayed.



| View Smart Form Configurations  |    |               |                  |
|---|----|---------------|------------------|
|   |    |               |                  |
| Title   | ID | Date Modified | Last Editor      |
| <a href="#">Ektron Medical Book Store</a>   | 10 | 3/15/2006     | PMAdministrator  |
| <a href="#">Search</a>  | 6  | 2/20/2006     | PMAdministrator  |
| <a href="#">Staff Profile Template</a>  | 7  | 3/6/2006      | AM Administrator |

From here, you can view, add, edit, and delete Smart Forms.

- See Also: ["Working with Smart Forms" on page 182](#)

## Adding a New Smart Form



When adding a new Smart Form, you have two options. The following sections explain both.

- ["Adding a Smart Form Using the Data Designer" on page 186](#) (recommended)
- ["Adding a Smart Form Using External XML Files" on page 188](#) (for example, XSLTs, schemas, etc.)

Note [To create a new Smart Form by copying and editing an existing one, see "Creating Smart Forms Based on Existing Configurations" on page 200.](#)

### Adding a Smart Form Using the Data Designer

To add a Smart Form using the WYSIWYG Data Designer, follow these steps.

1. Access the Smart Form screen, as described in ["Accessing Smart Forms" on page 185](#).
2. Click the Add Smart Form button ().
3. The Add Smart Form screen is displayed.
4. Enter a **Title** for the Smart Form.
5. Click the Save button (.



6. The Smart Form Data Designer screen appears.

**Title:** Job Postings

Select a style sheet that you wish to apply for this design

-- Select a style sheet --

Job Title:

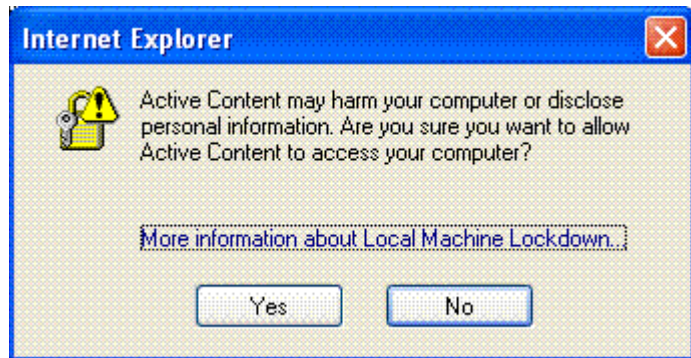
Job Number:

Description:

The successful candidate must possess following attributes:

7. You may get the following error dialog.





To learn about why the dialog is appearing and help decide whether to click **Yes** or **No**, click the link **More information about Local Machine Lockdown**. A Windows Help topic appears and explains your options.

8. If desired, you may specify a style sheet for the Smart Form. Use the field on the right above the editor.

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

9. Design your XSLT in the Data Designer.


See ["Using the Data Designer" on page 213](#) for information about creating XSLTs using the Data Designer.

10. Click the Update button (  ).



You are ready to assign the Smart Form to a folder or content item. See ["Assigning Smart Forms" on page 191](#) for more information.

## Adding a Smart Form Using External XML Files

To add a Smart Form using external XML files, follow these steps.

1. Access the Smart Form screen, as described in ["Accessing Smart Forms" on page 185](#).
2. Click the Add Smart Form button (  ).
3. The Add Smart Form screen is displayed.



4. Enter a **Title** for the Smart Form.
5. Click the Save button (  ).
6. The Smart Form Data Designer screen is displayed.
7. Click the Back arrow (  ) to exit.
8. The View Smart Form screen for the new Smart Form is displayed.



**Title:** Test using external XML files

**ID:** 18

**Description:**

**Editor Information:**

**Edit XSLT:**


**Save XSLT:**

**Advanced Configuration:**

**Validation Information:**

**XML Schema:**

**Target Namespace:**

9. Click the Edit button (  ).
10. The Edit Smart Form screen is displayed.
11. Enter the necessary information using the following table as a reference.

### **Smart Form Fields**

| Section             | Field             | Description  |
|---------------------|-------------------|--|
| Generic Information | Title             | Name given to Smart Form.  |
|                     | ID (display only) | ID number assigned when configuration is created.                          |
|                     | Description       | Detailed description given to configuration by its creator or last editor. |




| Section                | Field                  | Description   |
|------------------------|------------------------|---|
| Editor Information     | Edit XSLT              | XSLT applied to content while being edited.   |
|                        | Save XSLT              | XSLT used to transform the XML when saved to the database.                                  |
|                        | Advanced Configuration | XML file that contains display information, schema validation, and other advanced XML data. |
| Validation Information | XML Schema             | The .xsd file used to validate the XML content  |
|                        | Target Namespace       | The default namespace used for outgoing XML   |
| Display Information    | XSLT1                  | XSLT 1 applied to XML data when viewed on a device  |
|                        | XSLT2                  | XSLT 2 applied to XML data when viewed on a device  |
|                        | XSLT3                  | XSLT 3 applied to XML data when viewed on a device  |
|                        | XSLT Packaged          | XSLT package applied to XML data when viewed on a device                                    |

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

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


**Default:**

- ☐ **XSLT 1:**  
- ☒ **XSLT 2:**  
- ☐ **XSLT 3:**  
- ☐ **XSLT Packaged:**

13. Click the Save button ().



## XML File Verification



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

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

### NOTE

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

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

| Display   | Result       | Description  |
|---|--------------|--|
|  | Verified     | The file passes all verification parameters  |
|  | Not Verified | <p>The file either:</p> <ul style="list-style-type: none"> <li>• Does not exist in the location specified</li> <li>• Does not contain well-formed XML</li> </ul> <p>Review current settings. Ensure the file is in the proper location, and that it contains well-formed XML</p> |

## Assigning Smart Forms

After you create a Smart Form, you can assign it to a folder's Properties screen. (See Also: "[Smart Forms](#)" on page 58) All content in the folder then uses the configuration.



A Smart Form can be inherited from the parent folder, or you can assign a different one.





## Viewing Smart Forms

To view a Smart Form, follow these steps.

1. Access the Workarea, as described in ["Accessing the Workarea" on page 11](#).
2. In the folder tree on the left side of the Workarea, follow the path **Settings > Configuration > Smart Form Configuration**.
3. Click the form you want to view.

| View Smart Form Configurations  |    |               |                            |
|---|----|---------------|----------------------------|
|   |    |               |                            |
| Title   | ID | Date Modified | Last Editor                |
| <a href="#">Ektron Medical Book Store</a>   | 10 | 3/15/2006     | Administrator, Application |
| <a href="#">Event</a>   | 12 | 4/14/2006     | Administrator, Application |
| <a href="#">Search</a>  | 6  | 2/20/2006     | Administrator, Application |
| <a href="#">Staff Profile Template</a>  | 7  | 3/6/2006      | Administrator, Application |
| <a href="#">starterapps.pm.Milestones</a>   | 14 | 4/19/2007     | Administrator, Internal    |

| View Smart Form Configurations  |    |               |                  |
|---|----|---------------|------------------|
|   |    |               |                  |
| Title   | ID | Date Modified | Last Editor      |
| <a href="#">Ektron Medical Book Store</a>   | 10 | 3/15/2006     | PMAdministrator  |
| <a href="#">Search</a>  | 6  | 2/20/2006     | PMAdministrator  |
| <a href="#">Staff Profile Template</a>  | 7  | 3/6/2006      | AM Administrator |

The View Smart Forms screen appears with a more detailed description of the configuration.



| Smart Form Created with...   |  |
|--|--|
| Data Designer  | External Files   |
| <p>The screenshot shows the 'View Smart Form Configuration' window for 'Ektron Medical Book Store'. The window has a title bar with icons for file operations and a toolbar with icons for undo, redo, save, and help. Below the toolbar are three tabs: 'Properties', 'Display Information', and 'Preview'. The 'Properties' tab is selected, showing the following information:</p> <p><b>Title:</b> Ektron Medical Book Store<br/> <b>ID:</b> 10<br/> <b>Description:</b></p> | <p>The screenshot shows the 'View Smart Form Configuration' window for 'Test using external XSLT'. The window has a title bar with icons for file operations and a toolbar with icons for undo, redo, save, and help. Below the toolbar are three tabs: 'Properties', 'Display Information', and 'Preview'. The 'Properties' tab is selected, showing the following information:</p> <p><b>Title:</b> Test using external XSLT<br/> <b>ID:</b> 18<br/> <b>Description:</b><br/> <b>Editor Information:</b><br/> <b>Edit XSLT:</b><br/> <b>Save XSLT:</b><br/> <b>Advanced Configuration:</b><br/> <b>Validation Information:</b></p> |









The View Smart Form screen has three tabs.

- "Properties Tab" on page 194
- "Display Information Tab" on page 197
- "Preview Tab" on page 196

Each tab is explained below.

After viewing, you can perform the following actions on the Smart Form.



| Button   | Name                       | Description  | More Information   |
|--|----------------------------|--|--|
|   | Configure Full Text Search | Edit search screen labels  | <a href="#">"Editing Smart Forms" on page 197</a>          |
|   | Edit                       | Edit a Smart Form  | <a href="#">"Editing Smart Forms" on page 197</a>          |
|   | Edit Data Design           | Open the Data Designer   | <a href="#">"Editing Data Design Packages" on page 197</a> |
|   | Add Smart Form             | Create a new Smart Form from scratch or based on the properties of an existing one | <a href="#">"Adding a New Smart Form" on page 186</a>      |
|   | View XSLT                  | Display the XSLT for a Smart Form  | <a href="#">"Viewing Data Designer XSLTs" on page 201</a>  |
|   | Delete                     | Delete a Smart Form  | <a href="#">"Deleting Smart Forms" on page 202</a>         |
|   | Back                       | Return to previous screen  |  |
|  | View online help           | View online help   | <a href="#">"Accessing Online Help" on page 490</a>        |

## Properties Tab

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



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

- "Editor Information" on page 195
- "Validation Information" on page 195

## Editor Information

**NOTE** This section only appears if you do not use the Data Designer to create your Smart Form.

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

| Field                  | Description  |
|------------------------|--|
| Edit XSLT              | XSLT applied to the content when being edited.<br><a href="#">Note: If no edit XSLT is specified, the Edit Data Design option is enabled in the toolbar.</a> |
| Save XSLT              | XSLT used to transform the XML created in the editor when saved to the database.   |
| Advanced Configuration | XML file that contains display information, schema validation, and other advanced XML data.  |

## Validation Information

**NOTE** This section only appears if you do not use the Data Designer to create your Smart Form.

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



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

## Preview Tab

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

### RC Planes

**Product Name:**

**Description:**

### Specifications

Airfoil:  
Overall Length:  
Wingspan:  
Weight:  
Engine Size:  
Fuel Tank Size:  
Engine Run Time:  
Refill Time:  
Fuel Type:  
Color:



## Display Information Tab

The display information tab lists the XSLTs that are used when displaying XML in the respective environment.

| Field        | Description  |
|--------------|--|
| XSLT1        | Display XSLT 1   |
| XSLT2        | Display XSLT 2   |
| XSLT3        | Display XSLT 3   |
| XSLT Package | Display XSLT Package (created using the Data Designer) |

### NOTE

When a Smart Form is created using the Data Designer, a default display XSLT is also created which looks similar to the edit XSLT created in the editor. This default XSLT can be applied to the XML content.

The asterisk (\*) denotes the default XSLT for the Smart Form.

## Editing Smart Forms

After creating a Smart Form, you can modify it when files defined in the configuration have changed.

Since there are two ways to create a Smart Form, there are two ways to edit one.

- ["Editing Data Design Packages" on page 197](#)
- ["Editing a Smart Form Created with External Files" on page 199](#)

## Editing Data Design Packages

After you create a Smart Form, you can modify it.

### ***Before You Edit the Data Package!***

Before editing a Smart Form data package, it is important to realize the effects of the modifications. If an XML data package is edited, all content to which the configuration is applied is updated.




Information that was originally created may be lost, depending on the changes you make to the package.

To ensure that information is not lost, use the Create New Smart Form Based on Existing Smart Form option on the view Smart Form screen. See ["Creating Smart Forms Based on Existing Configurations" on page 200](#) for more information.

### ***Editing a Data Design Package***

To edit a data design package, follow these steps.

1. Access the View Smart Forms screen, as described in ["Accessing Smart Forms" on page 185](#).
2. Click the Smart Form you want to edit.
3. The View Smart Form screen appears with a more detailed description of the configuration.
4. Click the Data Design Mode button (  ) at the top of the screen.



5. The Edit Data Design Package screen displays the current package.

**Title:** Job Postings

Select a style sheet that you wish to apply for this design


— Select a style sheet — --

(Apply Style) Normal Times New Roman 3 (12 pt)


**Job Title:**

**Job Number:**


**Description:**

6. Make the necessary changes to the Data Design package in the editor. See ["Using the Data Designer" on page 213](#) for information about creating XSLTs using the Data Designer.
7. Click the Update button (  ).

## Editing a Smart Form Created with External Files

1. Access the View Smart Forms screen, as described in ["Accessing Smart Forms" on page 185](#).
2. Click the Smart Form you want to edit.
3. The View Smart Form screen is displayed.
4. Click the Edit button (  ).
5. The Edit Smart Form screen is displayed.



6. Edit the necessary fields to update the Smart Form. See ["Smart Form Fields" on page 189](#).
7. Click the Update button (.


Now, all content and folders that use the Smart Form take their properties from the updated configuration.

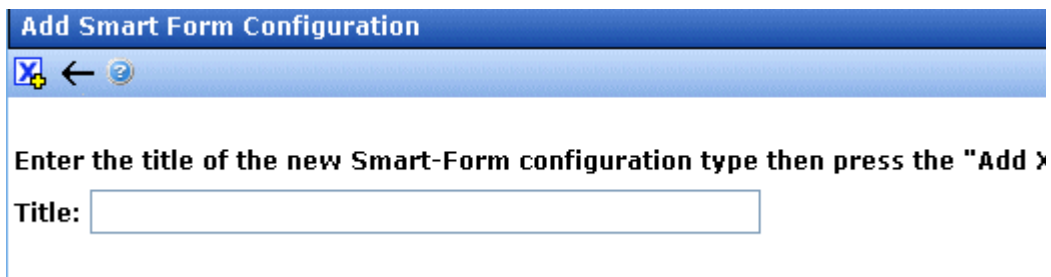
See Also: ["XML File Verification" on page 191](#)

## Creating Smart Forms Based on Existing Configurations

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

To create a new Smart Form based on an existing one, follow these steps.


1. Access the View Smart Forms screen, as described in ["Accessing Smart Forms" on page 185](#).
2. Click the Smart Form you want to view.
3. The View Smart Form screen appears with a more detailed description of the configuration.
4. Click the Create New Smart Form button (.
5. The Add Smart Form screen is displayed.



**Add Smart Form Configuration**

Enter the title of the new Smart-Form configuration type then press the "Add >

Title:

6. Enter a **Title** for the new Smart Form.
7. Click the Add Smart Form button (.



8. The View Smart Form screen for the new Smart Form is displayed. From here, you can perform the necessary actions on it.



## Viewing Data Designer XSLTs

When a Smart Form is created using the Data Designer, an XSLT is produced to assist you with creating your display XSLT. This XSLT includes the structure for your XML documents.


If a display XSLT is not applied to a Smart Form, content is displayed using the default XSLT displayed in the View XSLT screen.

To view the XSLT for a Smart Form, follow these steps.

1. Access the View Smart Forms screen, as described in ["Accessing Smart Forms" on page 185](#).
2. Click the Smart Form whose XSLT you want to view.

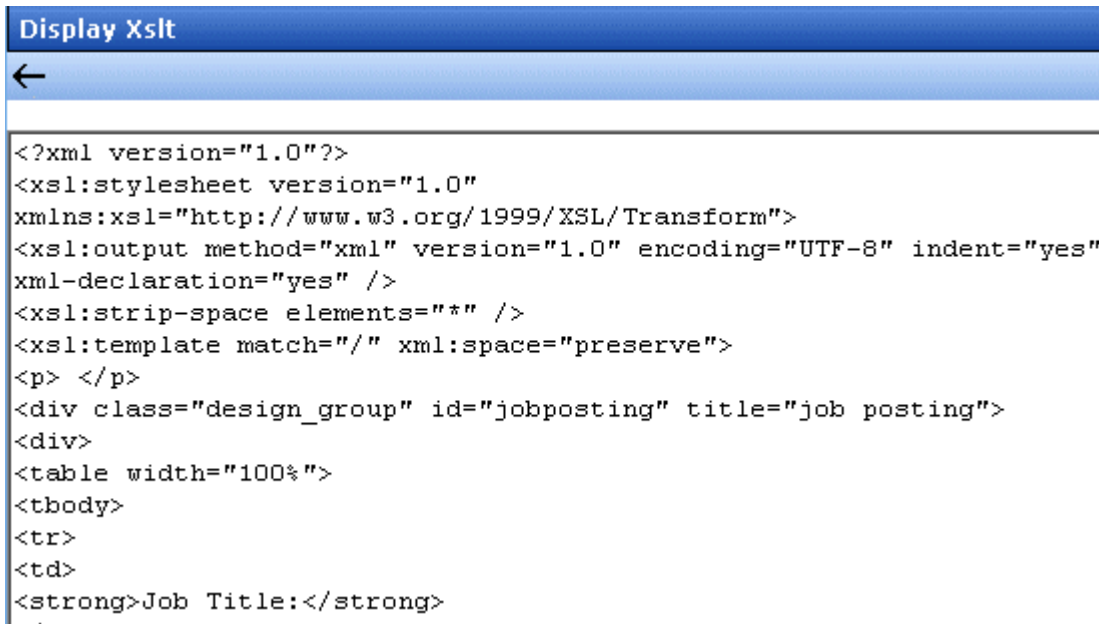
| View Smart Form Configurations  |    |               |                  |
|---|----|---------------|------------------|
|   |    |               |                  |
| Title   | ID | Date Modified | Last Editor      |
| <a href="#">Ektron Medical Book Store</a>   | 10 | 3/15/2006     | PMAdministrator  |
| <a href="#">Search</a>  | 6  | 2/20/2006     | PMAdministrator  |
| <a href="#">Staff Profile Template</a>  | 7  | 3/6/2006      | AM Administrator |

**NOTE** [The XSLT only appears if the Smart Form was created using the Data Designer.](#)

3. The View Smart Form screen appears with a more detailed description of the configuration.
4. Click the View XSLT button (  ).




5. The View XSLT screen is displayed.

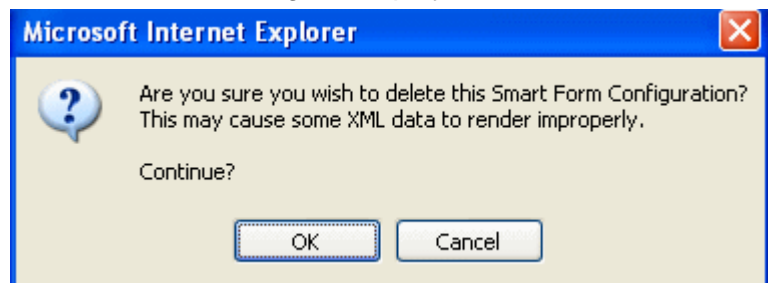


You can use this information to create your display XSLT.

## Deleting Smart Forms

You can delete Smart Forms that are no longer needed. To do so, follow these steps.

1. Access the View Smart Forms screen, as described in ["Accessing Smart Forms" on page 185](#).
2. Click the Smart Form you want to delete.
3. The View Smart Form screen is displayed.
4. Click the Delete button (  ).
5. A confirmation message is displayed.





6. Click **OK**.



# XML Indexing

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

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

## **NOTE**

---

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

---

- "User vs. Developer Selected Search Criteria" on page 204
- "Types of Search Criteria" on page 205
- "Displaying Search Results" on page 205
- "Setting up a User-Defined Search" on page 207
- "Setting up a Developer-Defined Search" on page 208
- "Specifying Which XML Elements are Indexed" on page 208
- "Search Dialog Setup" on page 209
- "Editing the Search Labels" on page 212

## User vs. Developer Selected Search Criteria

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



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

**NOTE**

The Ektron Windows Service manages the background processing that creates XML indexes. See Also: "Ektron Windows Service" on page 893.

---

## Types of Search Criteria

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

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

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

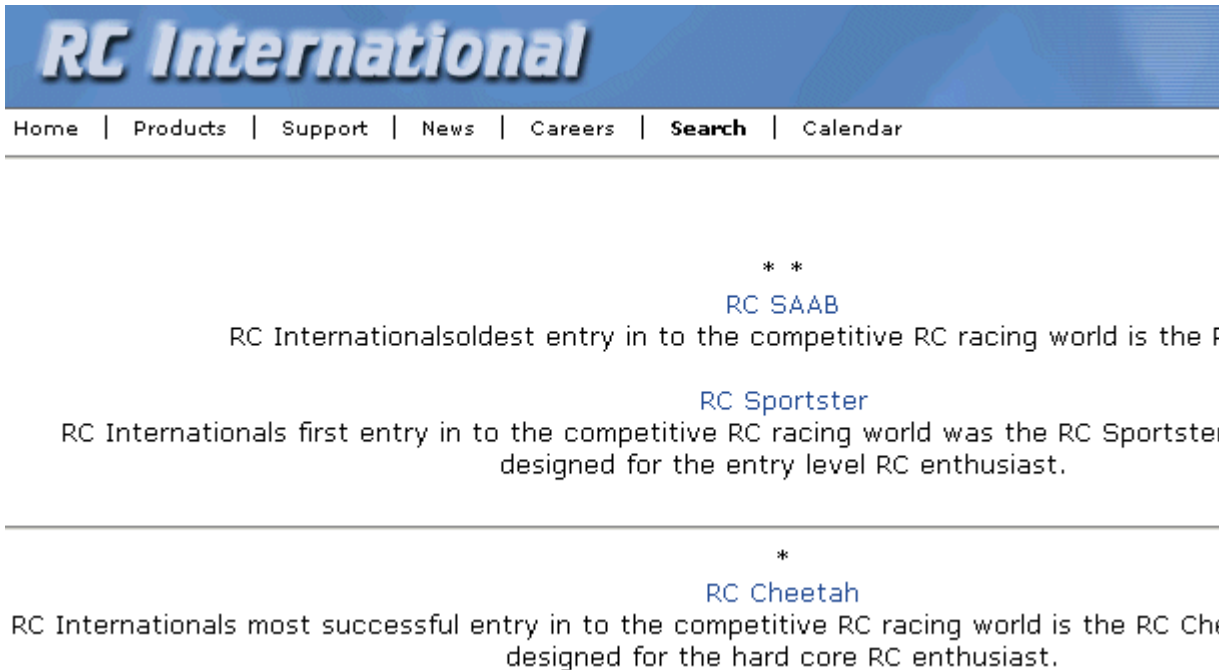
## Displaying Search Results

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



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

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



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

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



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

## Setting up a User-Defined Search

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

| Step   | For more information, see  |
|--|--|
| 1. Select a Smart Form   | <a href="#">"Accessing Smart Forms" on page 185</a>  |
| 2. For each field to be searched, assign indexing capability                             | <a href="#">"Specifying Which XML Elements are Indexed" on page 208</a>  |
| 3. Set up the search screen  | <a href="#">"Search Dialog Setup" on page 209</a> and <a href="#">"Editing the Search Labels" on page 212</a>  |
| 4. Have your Web developer set up a page to display a search screen and a results screen | <b>Ektron CMS400.NET</b> Developer's Manual section <a href="#">"Introduction to Ektron CMS400.NET Server Controls"</a> > <a href="#">"IndexSearch Server Control"</a> |



## Setting up a Developer-Defined Search

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

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

## Specifying Which XML Elements are Indexed

You can index the following types of fields:

- Checkbox
- Plain Text
- Choices
- List
- Calculated
- Calendar
- Image Only
- Link

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

1. Select a Smart Form that you want to index. See Also: ["Accessing Smart Forms" on page 185](#)
1. Open its Data Design. See Also: ["Using the Data Designer" on page 213](#)
2. Move the cursor to the field you want to index.
3. Right mouse click on the field and choose **Field Properties**.
4. On the dialog box that appears, check **Indexed**.



The screenshot shows a dialog box titled "Plain Text Field". It has three input fields: "Name" with the value "product-name", "Display name" with the value "product name", and "Default value" which is empty. To the right of the "Name" field is a checkbox labeled "Indexed" which is checked. A red rectangle highlights the "Indexed" checkbox.

## Validation

Validation ensures that the user completing the XML form enters the right type of data. You can decide if the user's input should be a number, boolean, date, string, zip code, etc. If you do not specify type attributes using validation data, the field is a string. See Also: ["Validation" on page 251](#)

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

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

## Search Dialog Setup

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

### NOTE

You can also edit the field labels using the Edit Index Search screen. However, on that screen, the **Dropdown** and **Multiple** checkboxes are not available. See Also: ["Editing the Search Labels" on page 212](#)



| XPath  | Label   |
|--|---|
| /root/products/product-name                    | Product Name <input checked="" type="checkbox"/> Dropdown <input checked="" type="checkbox"/> Multi |
| /root/products/specifications/length           | Length  |
| /root/products/specifications/mtbf             | MTBF <input checked="" type="checkbox"/> Multiple   |
| /root/products/specifications/datemanufactured | Date Manufactured   |

The information on this screen is explained below.

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



| Screen section | Description  |
|----------------|--|
| Label          | <p>Enter the text that describes the field on the search screen. Below is an example of how the labels appear on the Search screen.</p> <div data-bbox="582 347 1046 647" data-label="Form"> <p>Product Name <input type="text" value="No Selection"/><br/> Length <input type="text" value="No Selection"/><br/> MTBF <input type="text" value="No Selection"/><br/> Date Manufactured <input type="text" value="No Selection"/><br/> <input type="button" value="Submit Search"/></p> </div> <p>If the field type is</p> <ul style="list-style-type: none"> <li>• <i>checkbox</i>, a check box appears on the Search screen</li> <li>• <i>choices or list</i>, all values appear on the Search screen</li> <li>• <i>calendar</i>, the user can choose a specific date, any range of dates or beginning and end dates on the Search screen</li> <li>• <i>plain text</i> with a whole number specified in the validation criteria, the user can choose a specific number, any range of numbers or beginning and ending numbers on the Search screen</li> <li>• <i>plain text with no validation criteria</i>, the display is determined by the <b>Dropdown</b> and <b>Multiple</b> checkboxes (below). If Dropdown and Multiple are not checked, the search screen contains these values: <ul style="list-style-type: none"> <li>- No Selection</li> <li>- Exact phrase</li> <li>- Contains</li> </ul> </li> </ul> |
| Dropdown       | <p>If the field type is Choices or List, and you check this box, the user performing the search can choose from the choice or list values when selecting search criteria.</p> <p>If the field type is a plain text, and you check this box, the user performing the search can choose among any value stored in this field of the Data Design when selecting search criteria.</p>  |
| Multiple       | <p>Check this field if you want to allow the user performing the search to select more than one value. Only active with plain text, List, and Choices fields.</p>  |





## Editing the Search Labels

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


You can create a set of labels for every supported language by using the language dropdown list in the upper right corner of the screen. See Also: ["Working with Multi-Language Content" on page 779](#)

To change the search screen labels, follow these steps.

1. In the Workarea, go to **Settings > Configuration > Smart Form Configuration**.
2. Click a Smart Form.
3. Click the Edit Full Text Search button (.
4. The Edit Screen appears.



| XPath  | Label  |
|--|--|
| /root/products/specifications/tires            | <input type="text" value="Tires"/>             |
| /root/products/specifications/black            | <input type="text" value="Black"/>             |
| /root/products/specifications/mtbf             | <input type="text" value="MTBF"/>              |
| /root/products/specifications/datemanufactured | <input type="text" value="Date manufactured"/> |

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



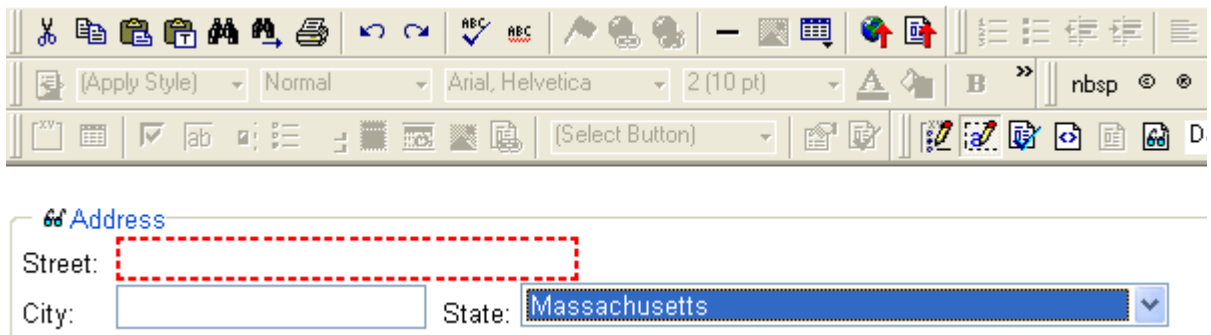
# Using the Data Designer

## Introduction

**eWebEditPro+XML**'s Data Designer feature lets you design a screen that collects information from users and stores it as XML data. Creating the screen is simple and requires no knowledge of XML.

**NOTE** When using the Data Designer feature, the following browsers are supported: Netscape 6.2 or later; Internet Explorer 5.5 or later.

For example, you may create the following screen.



The screenshot shows the eWebEditPro+XML Data Designer interface. At the top is a toolbar with various icons for editing and formatting. Below the toolbar is a form titled "Address". The form contains three fields: "Street:" with a text input field, "City:" with a text input field, and "State:" with a dropdown menu. The "State:" dropdown menu is currently set to "Massachusetts". The "Street:" field is highlighted with a red dashed border.

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

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

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

**NOTE** The samples installed with **eWebEditPro+XML** provide a good example of using the Data Designer. To try them out, click the Windows Start button (lower left



corner of the screen) and follow this path: **Start > Programs > Ektron > ewebeditpro5 > Samples > ASP > Data Design > ASP Data Design Sample.**

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

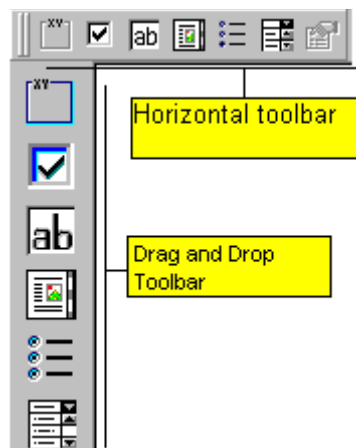
- "Differences in eWebEditPro+XML" on page 214
- "Design Mode vs. Data Entry Mode" on page 215
- "Designing a Screen" on page 216
- "Inserting a Field Type" on page 218
- "Sample Screen Design" on page 222
- "Data Designer Field Types" on page 231

## Differences in eWebEditPro+XML

When you use the Data Designer, **eWebEditPro+XML** changes in the following ways.

**NOTE** The design toolbar and the design mode and Data Entry mode buttons appear only if your site administrator has defined them in the configuration data.

- two toolbars appear, illustrated below. The toolbar buttons let you design the data entry screen. Each button represents a different kind of field.





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

When using the *drag and drop toolbar*, drag a button to desired screen location.

Note that a context-sensitive menu, available by right clicking the mouse, is also available to perform the commands. You can right click the mouse then select **Insert Field** to display a context-sensitive menu of all commands. To edit the properties of any field already on the screen, select the field, right click the mouse, and select **Field Properties**.

- two buttons appear on the regular (Edit) toolbar: Design mode and Data Entry mode. (For more information, see "[Design Mode vs. Data Entry Mode](#)" on page 215.)



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

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

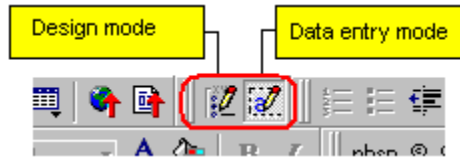
## Design Mode vs. Data Entry Mode

The Data Designer feature supplies two “modes,” which make it easier for you to design screens:

- *Data Design mode* - lets you insert and remove fields from the data entry screen
- *Data Entry mode* - simulates the screen’s appearance during data entry

Two toolbar buttons let you switch between modes. The buttons are located on the Edit toolbar.





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

## Designing a Screen

To design a screen that captures XML data, you

1. Ask your system administrator to enable a version of **eWebEditPro+XML** that includes the Data Designer. (The administrator should refer to the Data Designer chapter of the Developer's Reference Guide.)
2. For each field on the screen, select a field type, and place it on the screen. ["Inserting a Field Type" on page 218](#) explains the kind of field that each button represents.

You can also use **eWebEditPro+XML**'s rich formatting capabilities to design the screen. For example, you can format text, and use tables, images and hyperlinks to guide the user through the data entry process. Below is a sample screen created with the Data Designer.



The screenshot shows a web application window titled "Ektron Medical Book Store:". The window has a standard toolbar at the top with icons for undo, redo, save, and other editing functions. The main content area is divided into sections for entering book information. The "Book Information" section includes fields for "Book Title" (American Medical Association Complete Medical Ency), "Concentration" (General), "Author(s)" (First Name: Tom, Last Name: Smith), "Publisher(s)" (Name: Random House Reference), "Price" (28.35), and "Publish Date" (Tuesday, October 14, 2003). There are expandable sections for "authors" and "publisher". At the bottom, there is a logo for the American Medical Association.

## Ektron Medical Book Store:

**Book Information**

**Book Title:** American Medical Association Complete Medical Ency

**Concentration:** General

**Author(s)**

**First Name:** Tom **Last Name:** Smith

+ authors

**Publisher(s)**


**Name:** Random House Reference

+ publisher

**Price:** 28.35

**Publish Date:** Tuesday, October 14, 2003












American Medical Association

If you are familiar with XML and want to manually edit the page, use the View Source button (  ) to edit the page's source code. If the XML is not well-formed, you are notified and must remain in source view until you fix it.





## Inserting a Field Type

**eWebEditPro+XML** provides several options that let you insert or edit fields in the editor. Each field type is described below.

| Field type | Icon  | Description   | For more information, see                      |
|------------|---|---|--|
| Group Box  |    | Groups related fields, which can be surrounded by a box and have a caption  | <a href="#">"Group Box" on page 232</a>        |
| Tabular    |    | Same as group box, but fields can be presented in a table format  | <a href="#">"Tabular Data" on page 236</a>     |
| Checkbox   |    | User's response is either checked or unchecked  | <a href="#">"Checkbox" on page 245</a>         |
| Plain Text |    | Free text field; user cannot format text  | <a href="#">"Plain Text" on page 246</a>       |
| Rich Area  |    | Free text field; user can format text using the editor  | <a href="#">"Rich Area" on page 252</a>        |
| Choices    |   | Several choices appear on screen. User checks appropriate boxes. All user choices are inserted as values within single XML tag. | <a href="#">"Choices" on page 254</a>          |
| List       |  | Same as Choices except options appear in a drop-down box  | <a href="#">"Select List" on page 258</a>      |
| Calculated |  | Performs calculations using other fields on the screen  | <a href="#">"Calculated Field" on page 265</a> |
| Calendar   |  | Lets user insert a date by clicking a calendar  | <a href="#">"Calendar Field" on page 275</a>   |
| Image Only |  | Lets user insert an image   | <a href="#">"Image Only Field" on page 281</a> |
| File Link  |  | Lets user insert a link to a file, such as a PDF document   | <a href="#">"File Link Field" on page 284</a>  |

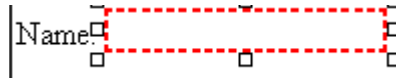


| Field type       | Icon  | Description   | For more information, see |
|------------------|---|---|---------------------------|
| Field Properties |  | Lets you change the properties of any field. Select the field then click this button.<br><br><u>Note: This option is also available on the right click menu, but not available on the drag and drop toolbar</u> |                           |
| Validate         |  | Ensure the screen contains valid XML.<br>This button is available in both data entry and data design modes.   |                           |

## Deleting a Field from the Screen

To remove a field from the screen, follow these steps.


1. Move the cursor to the field.
2. When the cursor changes to a four-headed arrow, click the mouse.
3. Small boxes surround the field.




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

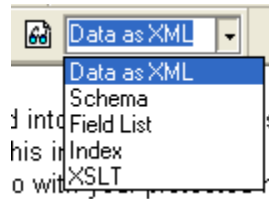
Usually, the field label is not deleted when you delete a field. To delete the label, use standard **eWebEditPro+XML** editing buttons.

## Previewing the Screen

If you want to view how the screen will appear to the person who will complete the screen, click the View Data Entry button ()  
(See Also: ["Design Mode vs. Data Entry Mode" on page 215.](#))

If you want to see an internal representation of the Data Design, click the Preview button () . Next to the Preview button is a drop-down list of internal formats in which you can view the data design.





The formats are described below.

| Format      | Description           | Example  |
|-------------|-----------------------|--|
| Data as XML | The XML data document | <pre> &lt;?xml version="1.0" ?&gt; - &lt;root&gt; - &lt;Information&gt;   &lt;LastName /&gt;   &lt;FirstName /&gt;   &lt;MiddleName /&gt;   &lt;Gender&gt;male&lt;/Gender&gt;   &lt;Address /&gt;   &lt;city /&gt;   &lt;state&gt;MA&lt;/state&gt;   &lt;Zip /&gt;   &lt;SSN /&gt;   &lt;BDate /&gt;   &lt;HomeTel /&gt;   &lt;WorkTel /&gt;   &lt;x-ray /&gt; - &lt;Dental_Insurance&gt;   &lt;Field1 /&gt;   &lt;OtherInsurance&gt;N/A&lt;/OtherInsurance&gt;   &lt;Account_Number&gt;N/A&lt;/Account_Number&gt; &lt;/Dental_Insurance&gt;   &lt;medication /&gt;   &lt;lastAppointment /&gt;   &lt;clinical /&gt; &lt;/Information&gt; &lt;/root&gt; </pre> |



| Format     | Description  | Example   |
|------------|--|---|
| Schema     | Defines the structure, content, and semantics of an XML document | <pre> &lt;?xml version="1.0" ?&gt; - &lt;xs:schema elementFormDefault="qualified"   attributeFormDefault="unqualified"   xmlns:xs="http://www.w3.org/2001/XMLSchema"&gt; - &lt;xs:element name="root"&gt; - &lt;xs:complexType&gt; - &lt;xs:sequence&gt; - &lt;xs:element name="Information"&gt; - &lt;xs:complexType&gt; - &lt;xs:sequence&gt; - &lt;xs:element name="LastName"&gt; - &lt;xs:simpleType&gt; - &lt;xs:restriction base="xs:string"&gt;   &lt;xs:minLength xmlns:xs="http://www.w3.org/     2001/XMLSchema" value="1" /&gt;   &lt;/xs:restriction&gt;   &lt;/xs:simpleType&gt;   &lt;/xs:element&gt; - &lt;xs:element name="FirstName"&gt; - &lt;xs:simpleType&gt; - &lt;xs:restriction base="xs:string"&gt;. . . . </pre> |
| Field List | A list of all fields and information about them (as XML)         | <pre> &lt;fieldlist&gt;   &lt;field name="LastName" datatype="string"     basetype="text" xpath="/root/Information/     LastName" title="Last Name"&gt;Last Name&lt;/field&gt;   &lt;field name="FirstName" datatype="string"     basetype="text" xpath="/root/Information/     FirstName" title="First Name"&gt;First Name&lt;/     field&gt;   &lt;field name="MiddleName" datatype="string"     basetype="text" xpath="/root/Information/     MiddleName" title="Middle Name"&gt;Middle Name&lt;/     field&gt;   &lt;field name="Gender" datatype="choice"     basetype="text" xpath="/root/Information/     Gender" title="" datalist="IDAPK3KC"&gt;Gender&lt;/     field&gt; . . . . . </pre>                                       |
| Index      | xpath information for any indexed field on the screen            | <pre> &lt;?xml version="1.0" ?&gt; - &lt;indexable&gt;   &lt;xpath type="string"&gt;/root/Information/SSN&lt;/     xpath&gt;   &lt;xpath type="string"&gt;/root/Information/     HomeTel&lt;/xpath&gt;   &lt;xpath&gt;/root/Information/WorkTel&lt;/xpath&gt; &lt;/indexable&gt; </pre>   |

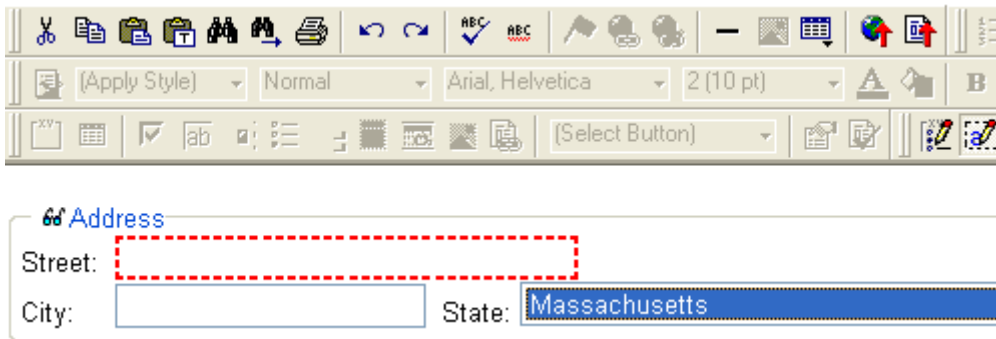


| Format | Description                                  | Example   |
|--------|--|---|
| XSLT   | The Data Design document's presentation XSLT | <pre> &lt;?xml version="1.0" ?&gt; - &lt;xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/ Transform"&gt;     &lt;xsl:output method="xml" version="1.0" omit- xml-declaration="yes" indent="yes" encoding="utf-8" /&gt;     &lt;xsl:strip-space elements="*" /&gt;     &lt;xsl:variable name="ektdesignns_fieldlist" select="/*/ektdesignpackage_list/fieldlist" /&gt; - &lt;xsl:template match="/" xml:space="preserve"&gt;      &lt;p&gt; &lt;/p&gt;  - &lt;fieldset id="Information" title="Demographic Information"&gt;      &lt;legend&gt;Patient Information&lt;/legend&gt;  - &lt;div&gt;  - &lt;p&gt;      &lt;strong&gt;Last Name&lt;/strong&gt;      &lt;xsl:text&gt; &lt;/xsl:text&gt;      &lt;xsl:value-of select="/root/Information/ LastName" /&gt;      &lt;strong&gt;First Name&lt;/strong&gt;      &lt;xsl:text&gt; &lt;/xsl:text&gt;      &lt;xsl:value-of select="/root/Information/ FirstName" /&gt; .. .. .. </pre> |

## Sample Screen Design


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



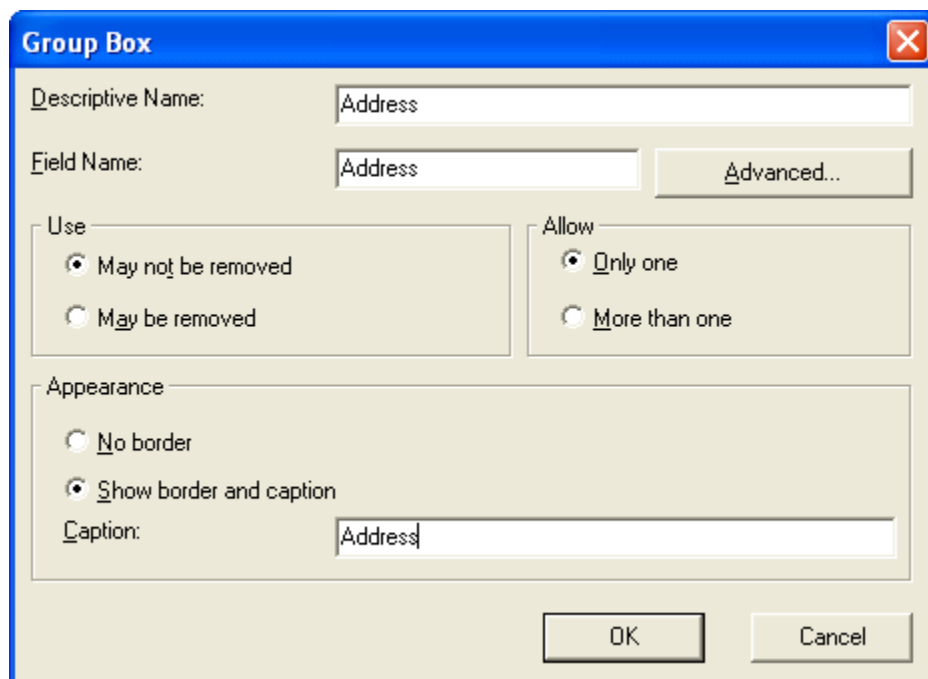


**NOTE** The following example helps you understand how to create a simple data entry screen. It does not explain how to save a screen so that a user can enter data into it. You can access a good sample by navigating to **Start > Programs > Ektron > eWebEditPro > Samples > ASP > Data Design > ASP Data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

To create such a screen, follow these steps.

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





**Group Box**

Descriptive Name: Address

Field Name: Address Advanced...

Use

- ☒ May not be removed
- ☐ May be removed

Allow

- ☒ Only one
- ☐ More than one

Appearance

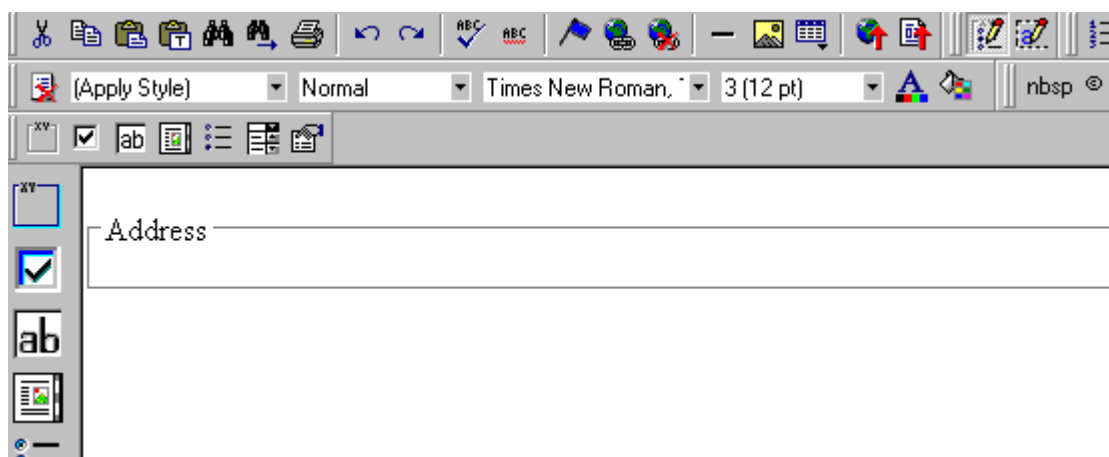
- ☐ No border
- ☒ Show border and caption

Caption: Address

OK Cancel

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

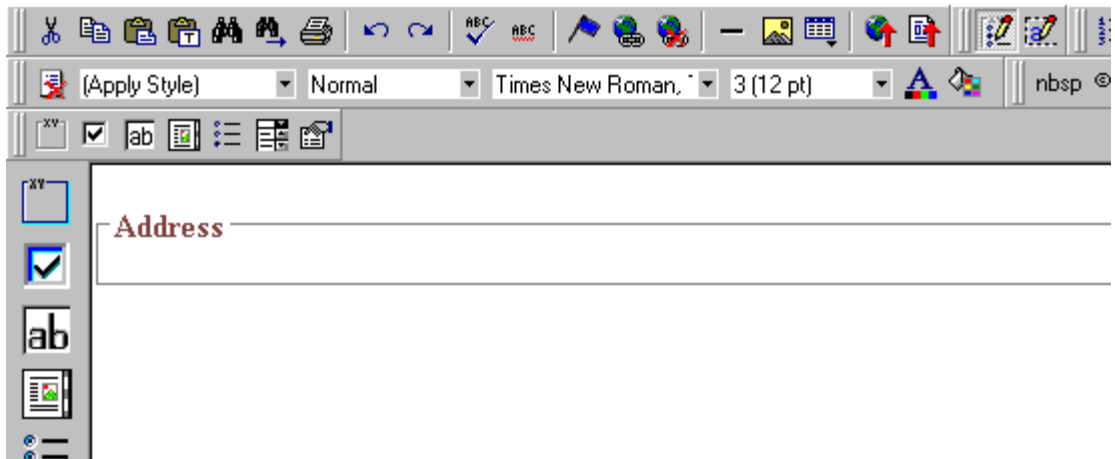
At this point, the screen looks like this.



The screenshot shows the Ektron CMS400.NET Administrator interface. The top toolbar includes icons for various functions like cut, copy, paste, undo, redo, and formatting. Below the toolbar, the text "Address" is displayed in a large, bold font. The interface also shows a sidebar with icons for different sections of the application.

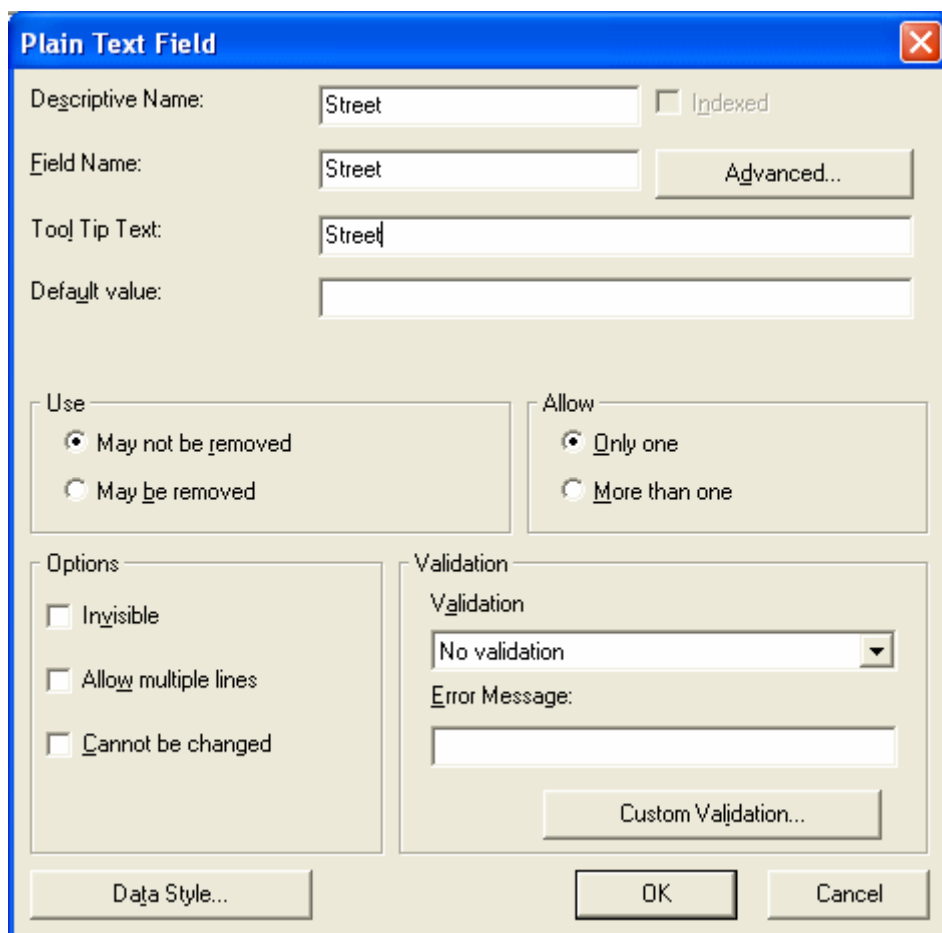


3. Select **Address** then apply bold and the custom color shown above. Now the screen looks like this.



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





The image shows a 'Plain Text Field' dialog box with a blue title bar and a close button. It contains several input fields and groups of options. The 'Descriptive Name' field is set to 'Street' with an 'Indexed' checkbox. The 'Field Name' field is also 'Street' with an 'Advanced...' button. The 'Tool Tip Text' field contains 'Street'. The 'Default value' field is empty. There are two groups of radio buttons: 'Use' with 'May not be removed' (selected) and 'May be removed'; and 'Allow' with 'Only one' (selected) and 'More than one'. An 'Options' group has three checkboxes: 'Invisible', 'Allow multiple lines', and 'Cannot be changed', all of which are unchecked. A 'Validation' group has a 'Validation' dropdown set to 'No validation', an 'Error Message' field, and a 'Custom Validation...' button. At the bottom are 'Data Style...', 'OK', and 'Cancel' buttons.

**Plain Text Field**

Descriptive Name: Street ☐ Indexed

Field Name: Street

Tool Tip Text: Street

Default value:

Use

- ☒ May not be removed
- ☐ May be removed

Allow

- ☒ Only one
- ☐ More than one

Options

- ☐ Invisible
- ☐ Allow multiple lines
- ☐ Cannot be changed

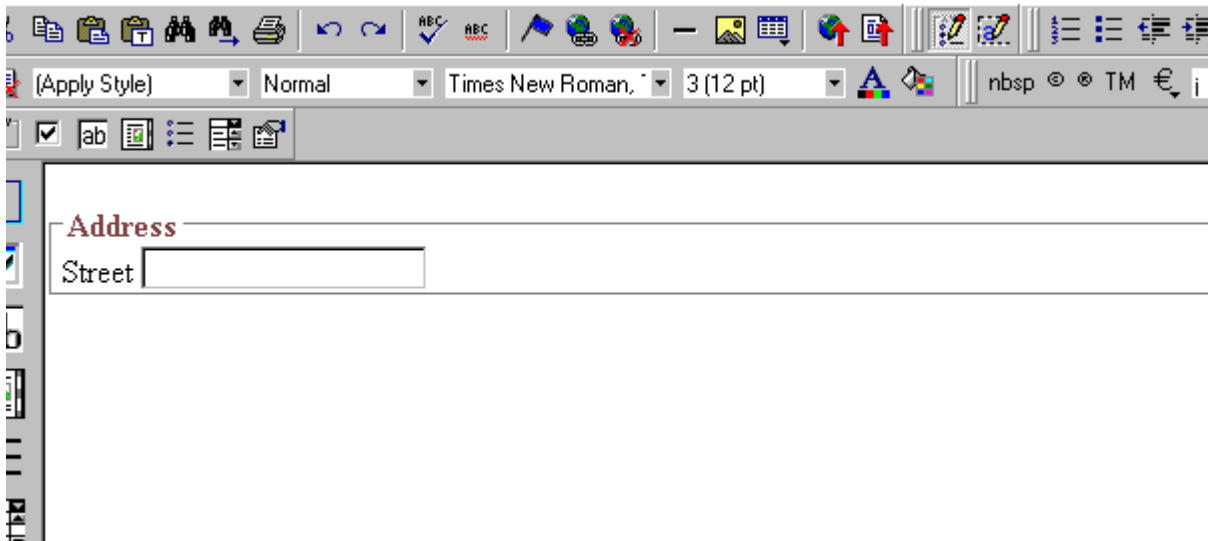
Validation

Validation: No validation

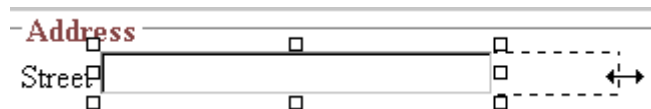
Error Message:

Now, the screen looks like this.



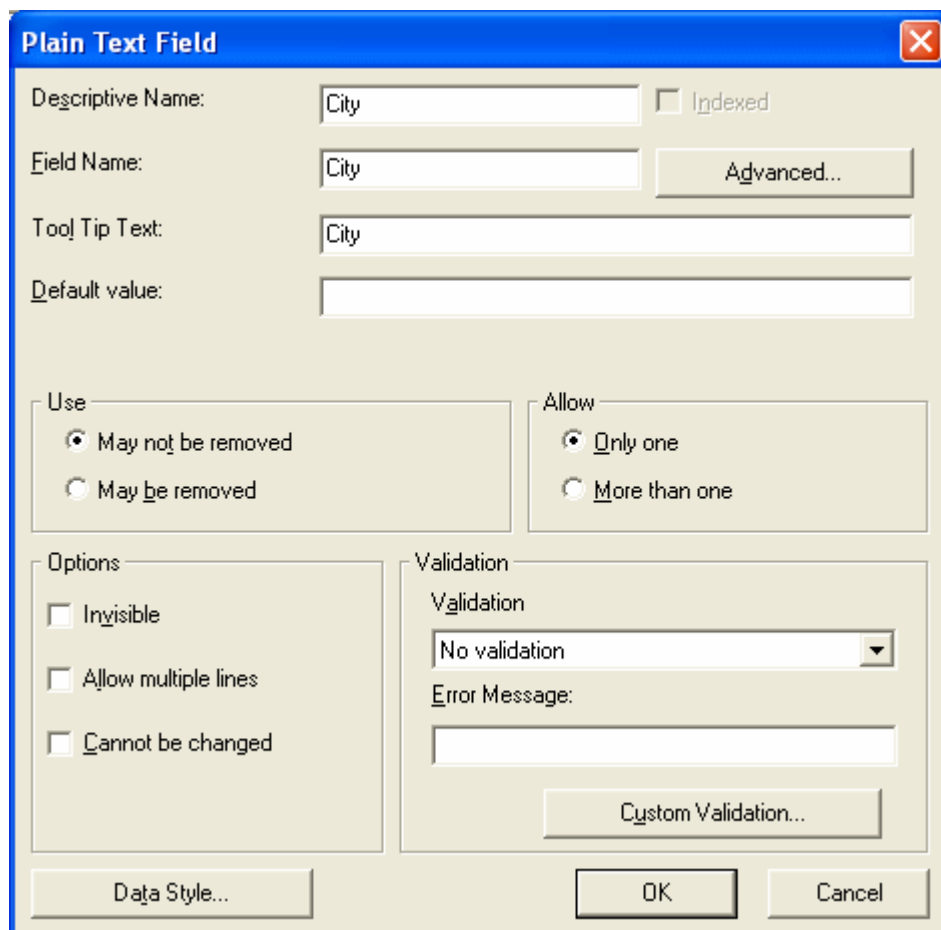


Note that the **Street** field is not wide enough. To widen it, click the field, move the cursor until you see a two-sided arrow, and drag the arrow to the right.



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





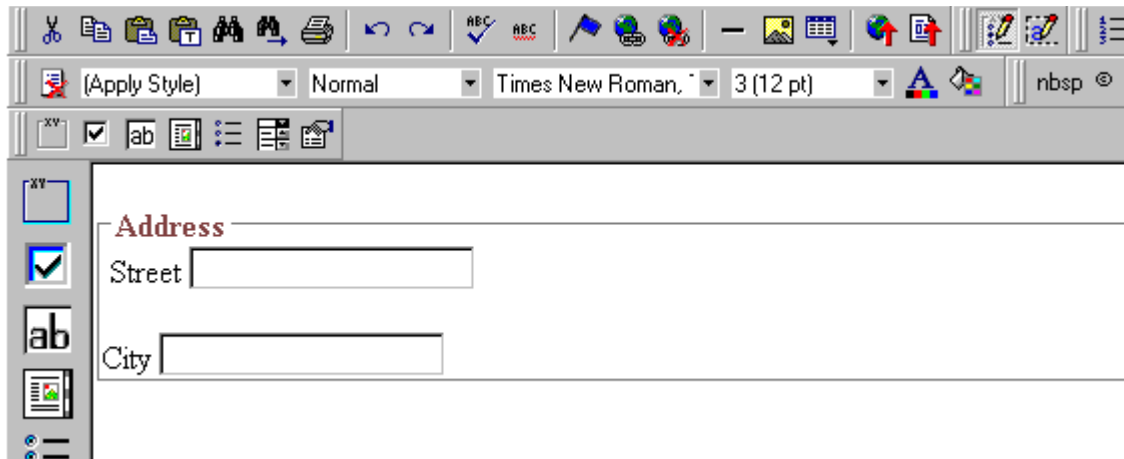
The image shows a 'Plain Text Field' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog is divided into several sections:


- Descriptive Name:** A text box containing 'City' and a checkbox labeled 'Indexed' which is unchecked.
- Field Name:** A text box containing 'City' and an 'Advanced...' button.
- Tool Tip Text:** A text box containing 'City'.
- Default value:** An empty text box.
- Use:** Two radio buttons: 'May not be removed' (selected) and 'May be removed'.
- Allow:** Two radio buttons: 'Only one' (selected) and 'More than one'.
- Options:** Three checkboxes: 'Invisible' (unchecked), 'Allow multiple lines' (unchecked), and 'Cannot be changed' (unchecked).
- Validation:** A section containing a 'Validation' dropdown menu set to 'No validation', an 'Error Message:' label with an empty text box below it, and a 'Custom Validation...' button.

At the bottom of the dialog are three buttons: 'Data Style...', 'OK', and 'Cancel'.

Now, the screen looks like this.





6. The next field, **State**, should let the user choose from several states. Assume that you want the state to appear to the right of **City**. Move the cursor to the end of the **City** field and drag the Select List Field field icon () into that space. Then, complete the dialog as shown below.



**Select List Field**

Descriptive Name:  ☐ Indexed

Field Name:  

Tool Tip Text:

List:

Item List

- ☐ [AL] Alabama
- ☐ [AK] Alaska
- ☐ [AS] American Samoa
- ☐ [AZ] Arizona
- ☐ [AR] Arkansas
- ☐ [AA] Armed Forces Americas
- ☐ [AE] Armed Forces Europe, C
- ☐ [AP] Armed Forces Pacific
- ☐ [CA] California
- ☐ [CO] Colorado

Item

Text

☐ No longer available (2)

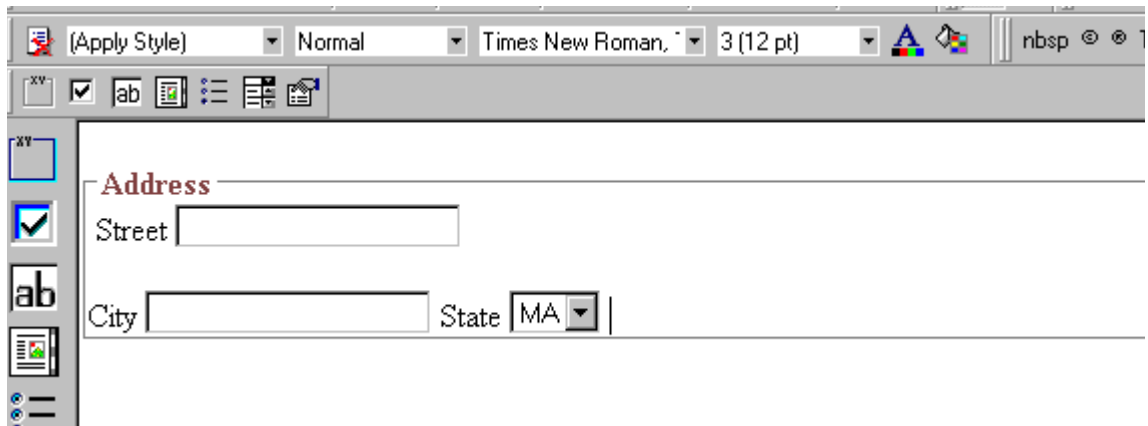
☒ Basic

Check item to be selected by default.

☒ First item is not a valid selection. For example, "[Select]"

Now, the screen looks like this.





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

## Data Designer Field Types

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

The Data Designer supports the following field types.

- "Group Box" on page 232
- "Tabular Data" on page 236
- "Checkbox" on page 245
- "Plain Text" on page 246
- "Rich Area" on page 252
- "Choices" on page 254
- "Select List" on page 258
- "Calculated Field" on page 265
- "Calendar Field" on page 275
- "Image Only Field" on page 281



- "File Link Field" on page 284

## Group Box

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

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

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

or

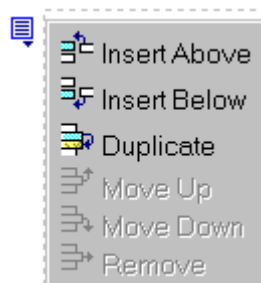
- place the cursor inside the box then select a field type button (if you are using the horizontal toolbar)

**NOTE** The tabular data field type might better accommodate your needs. See "Tabular Data" on page 236.

## Advantages of Grouping Fields

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

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

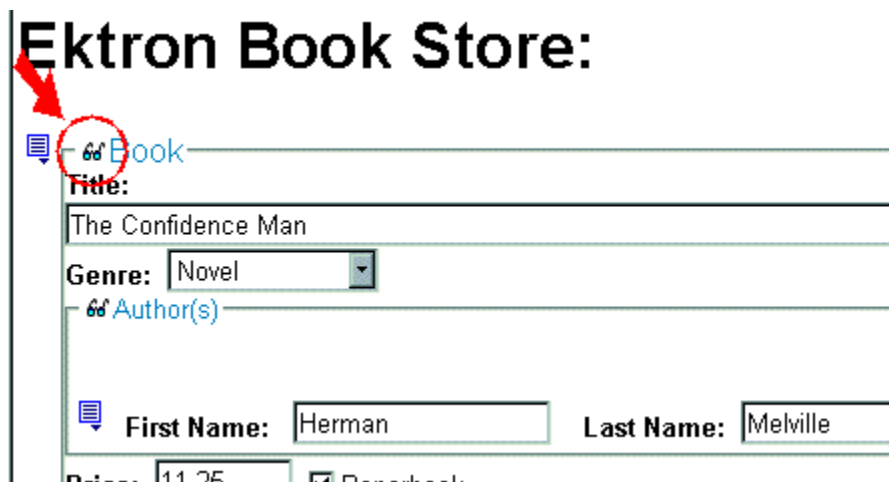





Another advantage of grouping fields is that you can suppress a group of irrelevant fields. For example, if a screen includes two groups of fields that collect information about hardcover and paperback books, and you are adding information about a hardcover book, you can collapse the paperback book questions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

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

### Expanded Group Field with glasses icon highlighted





**Ektron Book Store:**

 **Book**

**Title:** The Confidence Man

**Genre:** Novel

 **Author(s)**

 **First Name:** Herman **Last Name:** Melville

### Collapsed Group Field



**Ektron Book Store**

 **Book**

### Dialog Box



**Fields on the Group Box Dialog**

| Field            | Description  |
|------------------|--|
| Descriptive Name | <p>Enter the name of this field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&amp;*()+=&lt;&gt;.,:;""{}[]\`~) into this field. Internally, the name is used as the field's caption.</p> <p><b>The Name Field's Default Value</b></p> <p>By default, the Data Designer assigns a name made up of <b>Field</b> followed by the next available number. So, the first field's default name is <b>Field1</b>, the second field's default name is <b>Field2</b>, etc. You can change the default if you want.</p> |
| Field Name       | Enter the field's element name. This defines the field in the XML.   |
| Advanced         | See <a href="#">"Advanced Button" on page 287</a>  |



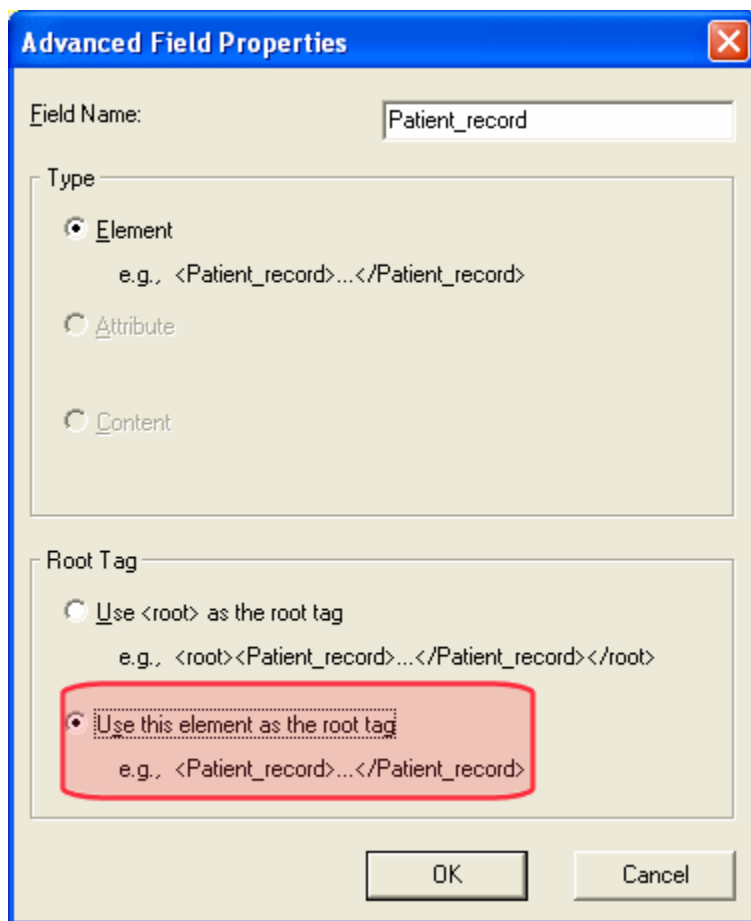
| Field      | Description   |
|------------|---|
| Use        | See "The Use Field" on page 291   |
| Allow      | See "The Allow Field" on page 292   |
| Appearance | <p>Click <b>Show border and caption</b> if you want to surround the fields in this group with a box. You can also create a caption to appear in the top line of the box.</p> <p>Click <b>No border</b> if you do not want to surround the fields in this group with a box.</p>  |
| Caption    | <p>If desired, enter text to describe this group of fields on the data entry screen. For example:</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Address _____</p> </div> <p>After you insert this field onto the screen, you can use <b>eWebEditPro+XML</b>'s formatting capabilities to modify its size, font, color, and other attributes.</p> <hr/> <p><u>Note: The Caption field only appears on this dialog when you create the Group Box field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit Caption text within the editor.</u></p> |

### Using a Tag Other Than <Root>

By default, **Ektron CMS400.NET** surrounds your Data Design with `<root>` tags. If you would like to replace the `<Root>` tags with another element name, follow these steps.

1. After creating a new Data Design screen, insert a Group Box as the first field.
2. In the Group Box Dialog's **Field Name** field, enter the root text.
3. On the Group Box Dialog box, click the **Advanced** button.
4. In the Root tag section of that dialog, select **Use this element as the Root tag** and press **OK**.





The image shows a dialog box titled "Advanced Field Properties" with a close button (X) in the top right corner. It contains two main sections: "Field Name" and "Type".

**Field Name:** A text box containing "Patient\_record".

**Type:** A group box containing three radio buttons:
 

- ☒ **E**lement  
e.g., <Patient\_record>...</Patient\_record>
- ☐ **A**tttribute
- ☐ **C**ontent

**Root Tag:** A group box containing two radio buttons:
 

- ☐ **U**se <root> as the root tag  
e.g., <root><Patient\_record>...</Patient\_record></root>
- ☒ **U**se this element as the root tag  
e.g., <Patient\_record>...</Patient\_record>

 The second option is highlighted with a red rounded rectangle.

At the bottom are "OK" and "Cancel" buttons.

5. Place all other screen elements within the Group Box field.

## Tabular Data

The Tabular data button inserts a table into which you can place other types of fields. It's similar to a group box.

Tabular data's main advantage over a group box is that it lets you place fields in columns (see below).



| Items       |  |     |                |      |
|-------------|--|-----|----------------|------|
| Description | In stock?  | Qty | Price per unit | Cost |
|             | <input type="radio"/> Yes<br><input checked="" type="radio"/> No |     |                | NaN  |

**NOTE** "Group Box" on page 232 describes many features that also apply to tabular data. Read that section to gain a full understanding of working with tabular data.

### Creating a Table

First you insert the table. Then, you insert an appropriate type of field into each column. As examples, in the table above, the **Description** field type would be plain text, while the **In Stock?** field type would be choices.

If you insert a field into a table and its caption appears to the left of the data entry region (see below), move the caption to the column header (see second illustration below).

Contact List

|      |        |          |
|------|--------|----------|
|      |        |          |
| ame: | Phone: | Address: |

Contact List

|              |               |                 |
|--------------|---------------|-----------------|
| <b>Name:</b> | <b>Phone:</b> | <b>Address:</b> |
|              |               |                 |



To access table commands (such as add row and add column), place the cursor inside a table cell, right click the mouse, and select **Table**.

**IMPORTANT!**

Only table cells into which you place a field are available to visitors of your Web page.

### ***Editing Tabular Data***

To edit tabular data, hover the cursor over a table border line until you see a four-headed arrow. Then, click the right mouse button and select **Field Properties**.

**NOTE**

You cannot reduce the number of columns by editing the Tabular Data dialog's **Columns** field. To delete a column, place the cursor in the column and select **Delete Column** from the table commands. The table commands are available in the table drop-down menu, the table toolbar (which is hidden by default), or the right-click context menu.

### ***How Tabular Data Forms XML Structure***

Tabular data creates three levels of XML tags:

- inner level: each field in the table
- middle level: each row in the table
- outer level: the entire set of table data

To explain how this works, we'll use the following contact list as an example.

| Name       | Phone    | Email                |
|------------|----------|----------------------|
| John Doe   | 555-1212 | john.doe@example.com |
| Mary Smith | 555-8765 | msmith@example.net   |

### **How XML Tags are Assigned to Field Names**

When you insert a field into a table, a dialog helps you define the field type. For example, when inserting a plain text field, the Plain



Text Field dialog appears. On that dialog, the value of the **Phone** field defines the tags that enclose that field's contents.

To continue our example, every contact is represented in XML as:

```
<Name>John Doe</Name>
<Phone>555-1212</Phone>
<Email>john.doe@example.com</Email>
```

and

```
<Name>Mary Smith</Name>
<Phone>555-8765</Phone>
<Email>msmith@example.net</Email>
```

## How XML Tags are Assigned to Table Rows

Each row of the table collects information for one contact. On the Tabular Data Box dialog, the **Row Name** field defines the XML tag that groups information for *each contact*. For example, the **Row Name** field value is **Contact**.



**Tabular Data Box**

Descriptive Name: AddressBook

Field Name: AddressBook Advanced...

Tool Tip Text: Address Book

Use

☒ May not be removed

☐ May be removed

Allow

☒ Only one

☐ More than one

Rows

Row Display Name: Contact

Row Name: Contact

```
<Contact>
  <Name>John Doe</Name>
  <Phone>555-1212</Phone>
  <Email>john.doe@example.com</Email>
</Contact>
<Contact>
  <Name>Mary Smith</Name>
  <Phone>555-8765</Phone>
  <Email>msmith@example.net</Email>
</Contact>
```

### How XML Tags are Assigned to the Entire Table

When you create a table, the name you give it (in the **Name** field of the Tabular Data Box dialog) defines the XML tag that groups *all contacts* on the table. In this example, the name is **AddressBook**.



**Tabular Data Box**

Descriptive Name: AddressBook

Field Name: AddressBook [Advanced...](#)

Tool Tip Text: Address Book

Use

☒ May not be removed

☐ May be removed

Allow

☒ Only one

☐ More than one

Rows

Row Display Name: Contact

```
<AddressBook>
  <Contact>
    <Name>John Doe</Name>
    <Phone>555-1212</Phone>
    <Email>john.doe@example.com</Email>
  </Contact>
  <Contact>
    <Name>Mary Smith</Name>
    <Phone>555-8765</Phone>
    <Email>msmith@example.net</Email>
  </Contact>
</AddressBook>
```

## Dialog Box



The screenshot shows a Windows-style dialog box titled "Tabular Data Box" with a standard close button (X) in the top right corner. The dialog is organized into several sections. The top section contains three text input fields: "Descriptive Name:" with the value "AddressBook", "Field Name:" with the value "AddressBook", and "Tool Tip Text:" with the value "Address Book". To the right of the "Field Name:" field is an "Advanced..." button. Below these fields are two groups of radio buttons. The first group, labeled "Use", has two options: "May not be removed" (which is selected) and "May be removed". The second group, labeled "Allow", has two options: "Only one" (which is selected) and "More than one". Below these is a section titled "Rows" which contains four fields: "Row Display Name:" with the value "Contact", "Row Name:" with the value "Contact", "Minimum Number:" with the value "0", and "Maximum Number:" which is empty. To the right of the "Maximum Number:" field is a checked checkbox labeled "Unlimited". Below the "Rows" section are two more fields: "Columns:" with the value "2" and "Caption:" with the value "Fields". At the bottom right of the dialog are two buttons: "OK" and "Cancel".

**Tabular Data Box**

Descriptive Name: AddressBook

Field Name: AddressBook [Advanced...](#)

Tool Tip Text: Address Book

Use

- ☒ May not be removed
- ☐ May be removed

Allow

- ☒ Only one
- ☐ More than one

Rows

Row Display Name: Contact

Row Name: Contact

Minimum Number: 0

Maximum Number:  ☒ Unlimited

Columns: 2

Caption: Fields

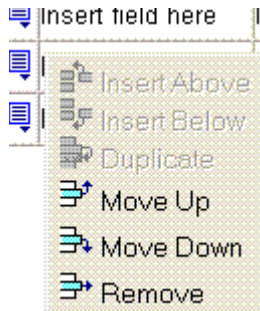
OK Cancel

### ***Fields on the Tabular Data Dialog***



| Field            | Description   |
|------------------|---|
| Descriptive Name | <p>Enter the name of this table.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&amp;*()+=&lt;&gt;.,:;'"{}[]\`~) into this field.</p> <p><b>The Name Field's Default Value</b></p> <p>By default, the Data Designer assigns a name made up of <b>Field</b> followed by the next available number. So, the first field's default name is <b>Field1</b>, the second field's default name is <b>Field2</b>, etc. You can change the default if you want.</p> |
| Field Name       | <p>Enter the table's element name. This will define the table in the XML. <i>See Also:</i> "<a href="#">How Tabular Data Forms XML Structure</a>" on page 238</p>   |
| Tool Tip Text    | <p>Enter the text that appears when a user hovers the cursor over the table's column headers.</p>   |
| Advanced         | <p>See "<a href="#">Advanced Button</a>" on page 287</p>  |
| Use              | <p>See "<a href="#">The Use Field</a>" on page 291</p>  |
| Allow            | <p>See "<a href="#">The Allow Field</a>" on page 292</p> <hr/> <p>Note: If you check <b>More than one</b> here, you are allowing the user to insert an entirely new table, not an additional table row.</p> <hr/>   |
| <b>Rows</b>      |   |
| Row display name | <p>Enter the text that appears when a user hovers the cursor over the table's cells. Use this field to describe the kind of information to be inserted into the table's cells.</p>  |
| Row name         | <p>Enter the name of the XML tag used to collect data for each entry in the table.</p> <p><i>See Also:</i> "<a href="#">How Tabular Data Forms XML Structure</a>" on page 238</p>   |



| Field          | Description  |
|----------------|--|
| Minimum number | <p>If desired, enter the minimum number of rows for this table.</p> <p>If you enter a number and the data entry user tries to save the screen without inserting at least the minimum number of rows, he is informed that <b>Element content is incomplete according to the DTD/Schema</b>.</p> <p>By default, the user is allowed to cancel or save the screen anyway. However, the system administrator determines whether or not the user can save an invalid document.</p>                      |
| Maximum number | <p>If desired, enter the maximum number of rows for this table. If you don't want to assign a maximum number, check the <b>Unlimited</b> check box.</p> <p><b>Result of Assigning a Maximum</b></p> <p>When this table appears on a data entry screen, and a user adds the maximum number of rows, the <b>Insert Above</b> and <b>Insert Below</b> options are grayed out on the menu (see example below).</p>  |
| Columns        | <p>Enter the number of columns to appear in the table.</p> <p>See Also: <a href="#">"Editing Tabular Data" on page 238</a></p>   |
| Caption        | <p>If desired, enter text to describe this table on the data entry screen. The caption appears centered above the table.</p> <p>After you insert this field onto the screen, you can use <b>eWebEditPro+XML</b>'s formatting capabilities to modify the caption's size, font, color, and other attributes.</p>   |

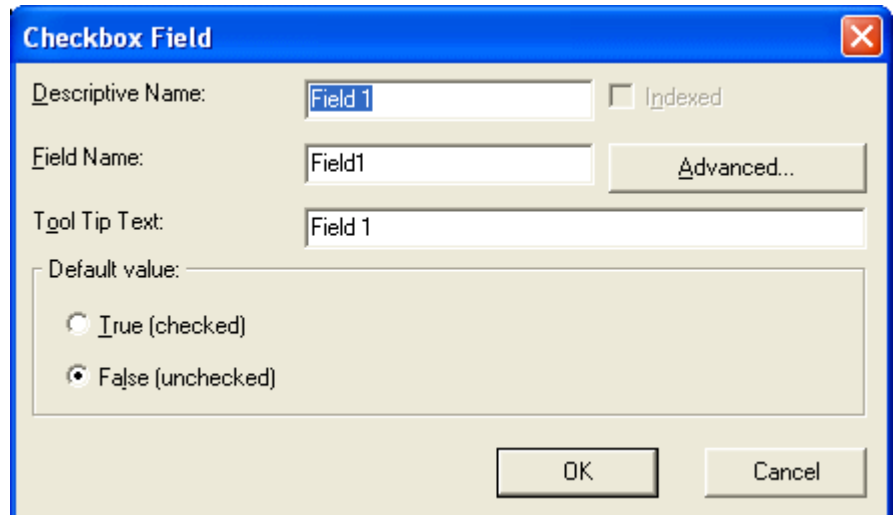


## Checkbox

A Checkbox field is only one character wide and accepts one of two possible values: checked or unchecked. For example

☐ Check if you are over 65

### Dialog Box



**Checkbox Field**

Descriptive Name:  ☐ Indexed

Field Name:  

Tool Tip Text:

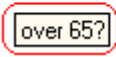
Default value:

☐ True (checked)

☒ False (unchecked)

### Fields on the Checkbox Dialog



| Field            | Description   |
|------------------|---|
| Descriptive Name | <p>Enter text to guide the user's response to this field. To continue the above example, the caption would be <b>Check if you are over 65</b>.</p> <p>After you insert this field onto the screen, the Descriptive Name appears to the right of the checkbox. You can use <b>eWebEditPro+XML</b>'s formatting capabilities to modify its size, font, color, and other attributes.</p> <hr/> <p><i>Note: The Descriptive Name field only appears on this dialog when you create the Check Box field. If you later try to edit the field, it is not on the dialog. However, you can edit the Descriptive Name text within the editor.</i></p> <hr/> |
| Indexed          | <p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The <b>Indexed</b> field may not appear, depending on how your administrator set up your system.</p>   |
| Field Name       | Enter the field's element name. This will define the field in the XML.  |
| Advanced         | See <a href="#">"Advanced Button" on page 287</a>   |
| Tool Tip Text    | <p>Enter text that appears when a user hovers the cursor over this field (circled in red below).</p> <p><input type="checkbox"/> Check if you are over 65</p>    |
| Default value    | <p>If you want this field to be checked when the screen first appears, click <b>True</b>.</p> <p>Otherwise, click <b>False</b>.</p>   |

## Plain Text

Use a plain text field when you want the user to enter an unformatted, free text response.



---

**NOTE** If a plain text field tries to perform a numerical calculation with a value that is blank or contains letters, NaN appears in the field. (NaN stands for “not a number.”) If a plain text field tries to divide by zero, Infinity appears.

---

### ***Plain Text Field vs. Rich Area Field***

The following capabilities are available with a plain text field but not a rich area field.

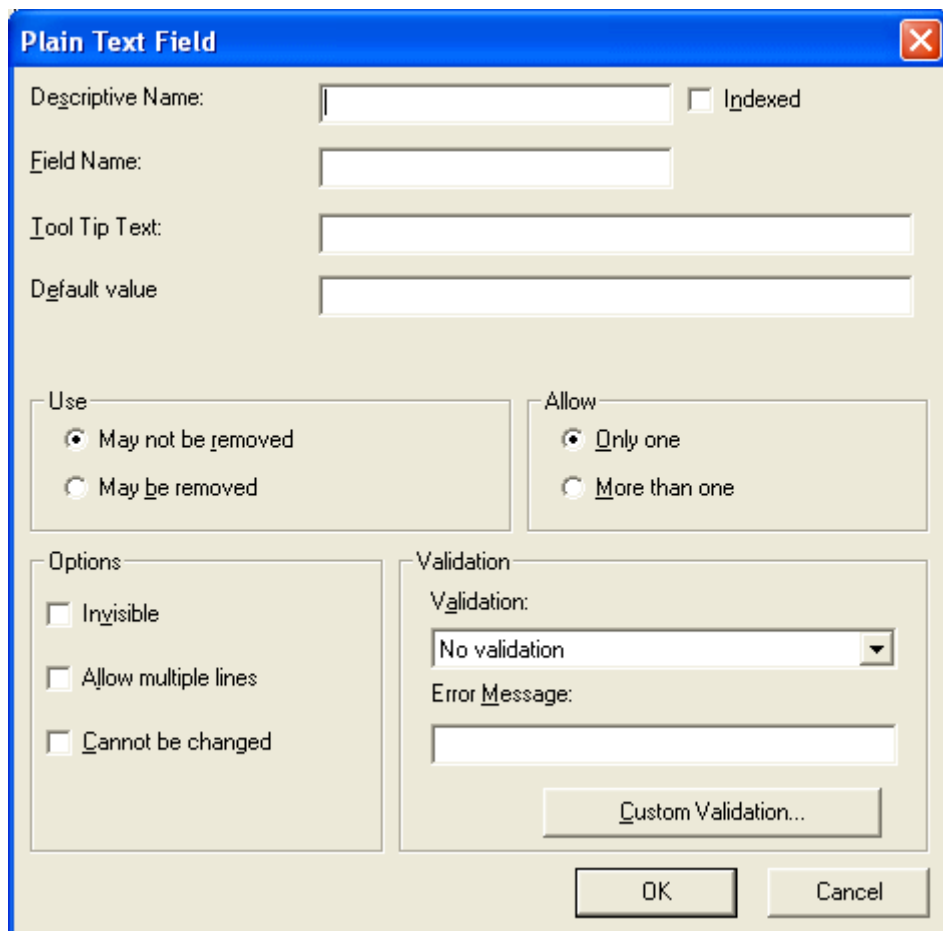
- You can adjust the field's width by dragging it. See ["Resizing a Plain Text Field" on page 252](#).
- The text can be read-only or hidden

The following capability is available with a rich area field but not a plain text field.

- In Data Entry mode, the user can change the text's format, size, style, etc. along with adding hyperlinks, using **eWebEditPro+XML**'s formatting capabilities.
- You can enter custom tags.



## Dialog Box



The dialog box is titled "Plain Text Field" and features a standard Windows-style title bar with a close button. It is organized into several sections:

- Top Section:** Contains four text input fields: "Descriptive Name:", "Field Name:", "Tool Tip Text:", and "Default value:". To the right of the "Descriptive Name:" field is a checkbox labeled "Indexed".
- Use Section:** A group box containing two radio buttons: "May not be removed" (selected) and "May be removed".
- Allow Section:** A group box containing two radio buttons: "Only one" (selected) and "More than one".
- Options Section:** A group box containing three checkboxes: "Invisible", "Allow multiple lines", and "Cannot be changed".
- Validation Section:** A group box containing a "Validation:" dropdown menu (currently set to "No validation"), an "Error Message:" text input field, and a "Custom Validation..." button.

At the bottom right of the dialog are "OK" and "Cancel" buttons.

### Fields on the Plain Text Dialog



| Field            | Description   |
|------------------|---|
| Descriptive Name | <p>Enter the name of this field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&amp;*()+=&lt;&gt;,:;"'{}[]\`~) into this field.</p> <p>See Also: <a href="#">"The Name Field's Default Value" on page 234</a></p>  |
| Indexed          | <p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The <b>Indexed</b> field may not appear, depending on how your administrator set up your system.</p> |
| Field Name       | Enter the field's element name. This defines the field in the XML.  |
| Advanced         | See <a href="#">"Advanced Button" on page 287</a>   |
| Tool Tip Text    | Enter the text that appears when a user hovers the cursor over this field.  |
| Default Value    | <p>If you want to set a default value for this field, enter that value here. The default value appears in Data Entry mode, where the user can accept, change, or delete it.</p> <p>For example, if this field collects a city, and most users enter New York, enter <code>New York</code> as the value.</p>   |
| Use              | See <a href="#">"The Use Field" on page 291</a>   |
| Allow            | See <a href="#">"The Allow Field" on page 292</a>   |



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



| Field      | Description   |
|------------|---|
| Validation | <p>Select the kind of validation to apply to this field. Your choices are:</p> <ul style="list-style-type: none"> <li>• <b>No validation</b> - the user's response is not checked</li> <li>• <b>Cannot be blank</b> - the user must enter a response</li> <li>• <b>Non-negative whole number or blank</b> - the user must enter a positive whole number or no response</li> <li>• <b>Non-negative whole number (required)</b> - the user must enter a positive whole number</li> <li>• <b>Decimal number or blank</b> - must be a decimal number (for example, 12.345 or 12) or blank . A leading minus sign "-" is allowed. The decimal point must be a period (.), even in locales that normally use a comma (,).</li> </ul> <hr/> <p><b>Note:</b> Decimal numbers include whole numbers because the decimal point is implied. That is, 12 is 12.0000.</p> <hr/> <ul style="list-style-type: none"> <li>• <b>Decimal number required</b> - must be a decimal number (it cannot be blank) of none, one, or two decimal places.<br/>A leading minus sign "-" is allowed. The decimal point must be period (.), even in locales that normally use a comma (,).</li> <li>• <b>Percent: (0-100) required</b> - the user must enter a whole number from 0 to 100</li> <li>• <b>Zip code (US only)</b> - the user's response must consist of 5 (nnnnn) or 9 digits separated by a dash after the fifth (nnnnn-nnnn)</li> <li>• <b>Social Security number (US only)</b> - the user's response must consist of nine digits in this pattern: nnn-nn-nnnn</li> <li>• <b>Custom</b> - You can create custom validation.</li> </ul> <p>For more information, see <a href="#">"Custom Validation" on page 294</a>.</p> <p>If you assign to this field any value other than <b>No validation</b>, the field is initially surrounded by red dashes in Data Entry mode. If the user's response does not meet the validation criterion, the field remains surrounded by red dashes. The system administrator determines whether or not the user can save an invalid document.</p> |

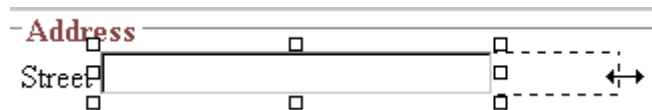


| Field      | Description  |
|------------|--|
| Data Style | See <a href="#">"The Data Style Field" on page 293</a> |

### Resizing a Plain Text Field

If you insert a plain text field and its width is too small or too large, you can easily resize it. To do so, follow these steps.

1. Place the cursor over the field and click. The cursor changes to a four-headed arrow, and small boxes surround the field.
2. Move the cursor to the far right of the field. (See illustration below). The cursor turns into a two-headed arrow.



3. Drag the arrow to adjust the width.

### Rich Area

Use a rich area field to let a user enter a free text response that can be formatted using the editor buttons.

See Also: ["Plain Text Field vs. Rich Area Field" on page 247](#)

### Adjusting the Width of a Rich Area Field

Note that, unlike a plain text field, the width of a rich area field cannot be adjusted. It occupies the entire screen width. If a user enters more text than fits on one line, the rich area field automatically adds more lines. To limit the width of a rich area field, place it in a table cell. In this case, the field is as wide as the cell.

If you want to insert default text into a rich area field, insert it after you place the field in the editor.

### Dialog Box



**Fields on the Rich Area Dialog**

| Field            | Description   |
|------------------|---|
| Descriptive Name | Enter the name of the field.<br>Note that you cannot enter spaces nor most special characters (!@#\$%^&*()+=<>,,:;"'{}[]\`~) into this field.<br><a href="#">See Also: "The Name Field's Default Value" on page 234</a>   |
| Indexed          | Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.<br><br>The <b>Indexed</b> field may or may not appear, depending on how your administrator set up your system. |
| Field Name       | Enter the field's element name. This defines the field in the XML.  |
| Advanced         | <a href="#">See "Advanced Button" on page 287</a>   |
| Use              | <a href="#">See "The Use Field" on page 291</a>   |
| Allow            | <a href="#">See "The Allow Field" on page 292</a>   |



| Field           | Description   |
|-----------------|---|
| Cannot be blank | If you want to require the user completing this field to enter a response, click inside this check box. |

## Choices

Use the Choices field when you want to give the data entry user several options. For example, you create a Choices field named **Interests** that lists these options.

- music
- art
- sports

The data entry user could check the first two and leave the third blank.

### **Choices Field vs. Select List Field**

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

- You can limit the user's choice to one item or many.
- All items appear on the screen, arranged horizontally or vertically

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

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





## Dialog Box

**Choices Field**

Descriptive Name: (2):  ☐ Indexed

Field Name:  

Tool Tip Text:

List:  ▾

Allow selection

- ☒ Only one
- ☐ More than one
- ☐ A selection is required

Appearance

- ☒ Vertical List
- ☐ Horizontal List
- ☐ List Box

Item List

Item

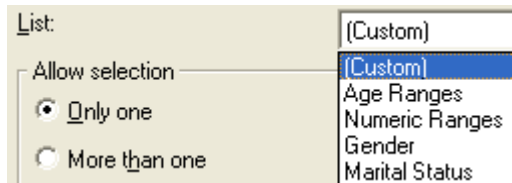
☐ No longer available (3)

☒ Basic

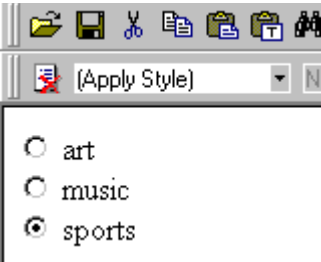
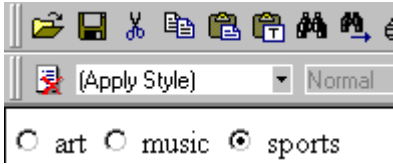

Check item to be selected by default.

### Fields on the Choices Dialog




| Field            | Description   |
|------------------|---|
| Descriptive Name | <p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&amp;*()+=&lt;&gt;,:;"'{}[]\`~) into this field.</p> <p>See Also: <a href="#">"The Name Field's Default Value" on page 234</a></p>   |
| Indexed          | <p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The <b>Indexed</b> field may or may not appear, depending on how your administrator set up your system.</p>  |
| Field Name       | Enter the field's element name. This defines the field in the XML.  |
| Advanced         | See <a href="#">"Advanced Button" on page 287</a>   |
| Tool Tip Text    | Enter the text that appears when a user hovers the cursor over this choice list.  |
| List             | <p><b>Using a Standard List</b></p> <p>If you want to use one of <b>Ektron CMS400.NET's</b> standard lists, click the black down arrow next to the field to see a list of options.</p>  <p>If you choose a standard list, it appears in the lower half of the screen. You cannot change its values.</p> <p><b>Creating a Custom List from Scratch</b></p> <p>To create your own set of list options, accept the default value, <b>Custom</b>. Then, enter the values using the <b>Item</b> field.</p> |



| Field           | Description  |
|-----------------|--|
| Allow selection | <p>Click <b>More than one</b> to let the data entry user select more than one item on the data entry screen. Otherwise, click <b>Only one</b>.</p> <p>For example, if you click <b>More than one</b>, and the choices are: music, art, sports, the user could select all three choices.</p> <p>If you click <b>Only one</b>, the user can only select one.</p> <p><b>A selection is required</b> - Check this box if the user must select at least one list item.</p>  |
| Appearance      | <p>Click <b>Vertical List</b> to arrange the choices vertically. The user selects items by clicking the radio button.</p>  <p>Click <b>Horizontal List</b> to arrange the choices horizontally.</p>  <p>Click <b>List Box</b> to arrange the choices vertically in a box. The user selects items by clicking inside the box.</p>  |



| Field               | Description   |
|---------------------|---|
| Item List           | <p>This section of the screen displays the items that you enter in the <b>Value</b> and <b>Text</b> fields.</p> <p>Buttons near the bottom of the screen let you remove and rearrange items from this list.</p>  <p>Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox. Note that if <b>Only One</b> is selected under <b>Allow selection</b> (above), only one item can be selected.</p> |
| Value               | <p>Enter the value that is collected when the data entry user selects this item.</p> <p>For example, if <b>Interests</b> appears in the Name field, and you want <code>music</code> to be collected when the data entry user selects this item and saves the page, enter <b>music</b> here.</p>   |
| No longer available | See <a href="#">"No longer available" on page 262</a>   |
| Basic               | <p>Check this box if you want this item's XML tag to be the same as its name on the screen.</p> <p>If you want the XML tag to be different from the screen name, uncheck this box. When you do, a new field appears, <b>Value</b>. Enter the XML tag into this field.</p>   |
| Data Style          | See <a href="#">"The Data Style Field" on page 293</a>  |

## Select List

A Select List field is similar to a Choices field. The biggest differences are

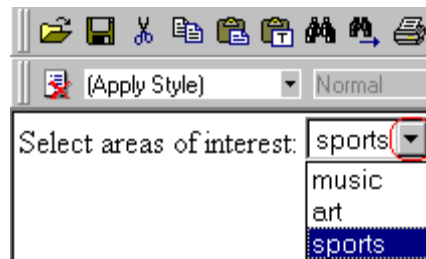
- all responses appear in a drop-down box instead of appearing separately
- the user can only select one response. If you want to allow the user to select more than one response, use a choice list instead. See Also: ["Choices" on page 254](#)



To see the choices, click the down arrow on the right side of the box (circled below).

See Also: ["Choices Field vs. Select List Field" on page 254](#)

For example:



### ***Dialog Box***



**Select List Field**

Descriptive Name:  ☐ Indexed

Field Name:  

Tool Tip Text:

List:  ▼

Item List

Item

Text

☐ No longer available (2)

☒ Basic


Check item to be selected by default.

☐ First item is not a valid selection. For example, "(Select)"

**Fields on the Select List Field Dialog**

| Field | Description  |
|-------|--|
| Name  | <p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&amp;*()+=&lt;&gt;,:;"{}[]\`~) into this field.</p> <p>See Also: <a href="#">"The Name Field's Default Value" on page 234</a></p> |



| Field         | Description   |
|---------------|---|
| Indexed       | <p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The <b>Indexed</b> field may not appear, depending on how your administrator has set up your system.</p>   |
| Field Name    | Enter the field's element name. This defines the field in the XML.  |
| Advanced      | See <a href="#">"Advanced Button" on page 287</a>   |
| Tool Tip Text | Enter the text that appears when a user hovers the cursor over this list.   |
| List          | <p><b>Using a Standard List</b></p> <p>If you want to use one of <b>Ektron CMS400.NET's</b> standard lists, click the black down arrow next to this field to see your choices.</p>  <p>The screenshot shows a dropdown menu for the 'List' field. The menu is open, displaying a list of standard lists. The first two items are '(Custom)' and '(Custom)', both of which are highlighted in blue. Below these are several standard lists: 'Languages', 'Countries', 'U.S. States &amp; Territories', 'Canadian Provinces', 'Age Ranges', 'Numeric Ranges', and 'Years'.</p> <p>If you choose a standard list, it appears in the lower half of the screen. You cannot change its values.</p> <p>See Also: <a href="#">"Creating Your Own Predefined List" on page 263</a> and <a href="#">"Creating a Dynamically Populated Choice List" on page 264</a></p> <p><b>Creating a Custom List from Scratch</b></p> <p>To create your own set of list options, accept the default value, <b>Custom</b>. Then, enter the values using the <b>Item</b> field.</p> |



| Field               | Description   |
|---------------------|---|
| Item List           | <p>This section of the screen displays the items that you enter in the <b>Value</b> and <b>Text</b> fields.</p> <p>Buttons let you remove items from this list as well as rearrange them.</p> <p>Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox.</p>  |
| Value               | <p>Enter the value that is collected when the data entry user selects this item.</p> <p>For example, if <b>Interests</b> appears in the Name field, and you want <code>music</code> to be collected when the data entry user selects this item and saves the page, enter <b>music</b> here.</p>   |
| Text                | <p>Enter text to describe this item on the data entry screen.</p> <p>After you insert this field onto the screen, you can use <b>eWebEditPro+XML</b>'s formatting capabilities to modify its size, font, color, and other attributes.</p>   |
| No longer available | <p>Use this field to indicate that an item can no longer be selected by a user in data entry mode. For example, you have a list of team members. If one member leaves, check <b>No longer available</b> rather than removing the member.</p> <p>If checked, the item only appears in data entry mode <i>if</i> a document contained the item when the check is applied.</p> <p>This field lets you render a value obsolete without invalidating an existing XML document.</p> <p><b>Exception!</b> -- If multiple selections are allowed in a Choices Field and the item is selected in design mode, it appears in data entry mode but is disabled (grayed-out). This lets you force an item's value into the XML document.</p> |
| Basic               | <p>Check this box if you want this item's XML tag to be the same as its name on the screen.</p> <p>If you want the XML tag to be different from the screen name, uncheck this box. When you do, a new field appears, <b>Value</b>. Enter the XML tag into this field.</p>   |



| Field   | Description   |
|---|---|
| First item is not a valid selection.<br>For example, "(Select)" | Check here if the first item on the list is not a valid value but instead text that prompts the user to respond to the field. An example of such text for a list of states would be <b>Select a state</b> .<br><br>If you check this box and the user selects the first value on the list (most likely by default), an error message appears when he tries to save the screen.  |
| Caption   | Enter text to guide the user's selection. For example, if the user needs to select an area of interest, the caption could be <b>Choose your interests</b> .<br><br><hr/> <b>Note:</b> The <b>Caption</b> field only appears on this dialog when you create the Select List field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor. |
| Data Style  | See "The Data Style Field" on page 293  |

## Creating Your Own Predefined List

An administrator can create a predefined list of options to appear when a user is inserting a **Select List** field.

### Advantage of Creating Custom List in Configuration File

Although a user can create a custom list of choices via the **Item List** area of the Select List Field dialog, that list is only available in that field of that screen. If the user wants to insert the same list in another section of the screen or a different screen, he must re-enter all options.

However, if you create a list according to the steps below, your custom list is stored in the configuration file (along with the standard choice lists, such as **Countries**). As a result, any user connected to your server can insert the list into any **Select List** field on any screen.

### Creating the List

To insert a custom list of choices, follow these steps.



1. Open the eWebEditPro+XML configuration file. If you are working with eWebEditPro+XML, this is `webroot/ewebeditpro5/config.xml`.  
If you are working with CMS400, this is `webroot/Workarea/ewebeditpro/cms_config.aspx`.
2. Insert the name of your list into the following section of the configuration file. In the sample below, the custom list is `MyNewList`.

```
<selections name="datalists">
  <listchoice data="MyNewList">My New List</listchoice>
  <listchoice data="languages" localeRef="sLanguages" />
  <listchoice data="countries" localeRef="sCountries" />
  <listchoice data="USPS-US" localeRef="sUSState" />
  <listchoice data="USPS-CA" localeRef="sCaPrvnc" />
  <listchoice data="ageRange" localeRef="sAgeRng" />
  <listchoice data="numRange" localeRef="sNumRng" />
  <listchoice data="years" localeRef="sYrs" />
</selections>
```

3. Find the `<dataentry>` element of the configuration file.
4. Insert the new list within that element. Below is an example of such a list.

```
<datalist name="MyNewList">
  <schema datatype="string" />
  <item default="true" value="Green" />
  <item value="Red" />
  <item value="Blue" />
</datalist>
```

Note that

- the `<datalist>` element contains the list
- its name must match the `listchoice data` value you entered in Step 2
- you can specify a data type. Values are string, nonNegativeInteger, date, decimal.
- as shown in the third line above, you can specify a default value

## Creating a Dynamically Populated Choice List

You specify the elements of the custom options list described above in the configuration data. You can also create a dynamically-populated list from any XML source. The source can be on your



server or on a remote Web site. Follow these steps to add a dynamic data list to the **Select List** field.

1. Follow steps 1 through 3 in "Creating the List" on page 263.
2. Insert a new datalist item according to this pattern.

```
<datalist name="MyNewList" src="{url to xml data source}" select="{xpath to data item element}" captionxpath="{relative xpath to data item's display text}" valuexpath="{relative xpath to data item's value}">
```

### **WARNING!**

The datalist name must match the listchoice data attribute.'

### For example

```
<datalist name="USPS-CA" src="[eWebEditProPath]/uspsca.xsd" select="/xsd:schema/
xsd:simpleType/xsd:restriction/xsd:enumeration" captionxpath="xsd:annotation/
xsd:documentation" valuexpath="@value" namespaces="xmlns:xsd='http://www.w3.org/2001/
XMLSchema'" validation="select-req">
```

In this example, the data list is stored in the uspsca.xsd file, located within the ewebeditpro folder. However, it could be in any XML data source.

## Calculated Field

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

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

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

### **IMPORTANT!**

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

## Dialog Box



**Calculated Field**

Descriptive Name:  ☐ Indexed

Field Name:  

Tool Tip Text:

Calculation

Formula:

Examples 

Validation

Validation:

Error Message:

**Fields on the Calculated Field Dialog**

| Field            | Description   |
|------------------|---|
| Descriptive Name | <p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#%\$^&amp;*()+=&lt;&gt;,:;"'{}[]\`~) into this field.</p> <p>See Also: <a href="#">"The Name Field's Default Value" on page 234</a></p> |



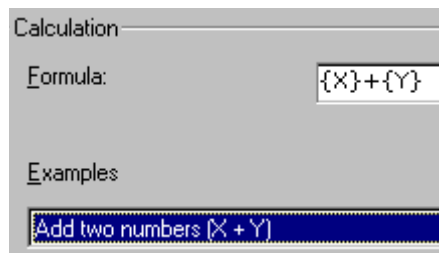
| Field         | Description  |
|---------------|--|
| Indexed       | <p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The <b>Indexed</b> field may or may not appear, depending on how your administrator has set up your system.</p>   |
| Field Name    | Enter the field's element name. This defines the field in the XML.   |
| Advanced      | See <a href="#">"Advanced Button" on page 287</a>  |
| Tool Tip Text | Enter the text that appears when a user hovers the cursor over this field.   |
| Formula       | Enter the calculation that this field will perform. See <a href="#">Also: "Using the Formula Field" on page 268</a>  |
| Select Field  | Click this button to select a field to reference in the calculation. For more information, see <a href="#">"Using the Formula Field" on page 268</a> .   |
| Examples      | <p>Click the down arrow to the right of this field to see examples of calculations you can perform. When you select an example, it is copied into the <b>Formula</b> field.</p> <hr/> <p><a href="#">Note: Your system administrator can customize the examples. Instructions are provided in "The &lt;cmddsgcalc&gt; Command" in the Data Designer chapter of the Developer Reference Guide.</a></p> <hr/> <p><a href="#">See Also: "Explanation of Examples" on page 270</a></p> |



| Field             | Description   |
|-------------------|---|
| Validation        | <p>Select the kind of validation to apply to this field. Your choices are:</p> <ul style="list-style-type: none"> <li>• <b>No validation</b> - the user's response is not checked</li> <li>• <b>Non-negative number (required)</b> - the result of the calculation must be a positive number</li> </ul> <p>If you assign to this field any value other than <b>No validation</b>, the field is surrounded by red dashes in Data Entry mode. If the user's response does not meet the validation criteria, the field remains surrounded by red dashes. Your system administrator determines if a user can save a screen with invalid data.</p> |
| Error message     | If you select <b>Non-negative number</b> above, insert text that appears on the screen if the user's response does not meet this criterion.   |
| Custom Validation | See <a href="#">"Custom Validation" on page 294</a>   |
| Data Style        | See <a href="#">"The Data Style Field" on page 293</a>  |

### Using the Formula Field

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



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



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

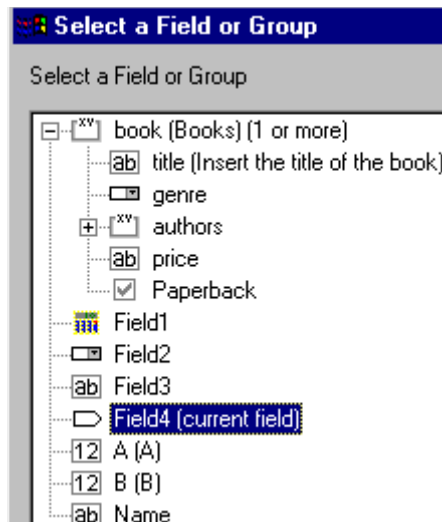
If a calculated field tries to divide by zero, Infinity appears.

### WARNING!

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

To do this, follow these steps.

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



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

### WARNING!

If a variable appears more than once in a formula (for example, {X} \* number( {X} &lt;= {Y} ) + {Y} \* number( {X} &gt; {Y} )), you only need to replace the first occurrence - **eWebEditPro+XML** replaces subsequent occurrences for you.

4. Continue replacing all variables in the formula.

### Notes



- If an XML document contains several occurrences of a field that is referenced in a formula, the value is derived as follows:
  - When using the XPath functions `sum()` and `count()`, all values with the field name are considered. For example, a document includes three books whose prices are \$10, \$20 and \$30. In this case, `sum`'s value is \$60.
  - When using all other functions, the first value is used. For example, a document includes three books whose prices are \$10, \$20 and \$30. If a calculation formula refers to `<price>`, its value is \$10.
- You can replace a variable with a number instead of a field. For example, replace `{X} * {Y}` with `../price * 1.15`.
- The expression can be complex, such as `(round(Field1 * 0.80) + (1 div Field2)) - 2`.
- You can use a string expression that creates a text message. For example, to calculate a full name from its parts: `concat(title, ' ', givenname, ' ', familyname)`, which could produce "Dr. Jonathan Smythe".

## Referencing Other Calculated Fields

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

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

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

## Explanation of Examples

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



| Example Field Text                                | Example Field Formula  | Description   |
|---|--|---|
| Add two numbers                                   | $\{X\} + \{Y\}$  | Add the value in the first field (X) to the value in the second field (Y).  |
| Subtract two numbers                              | $\{X\} - \{Y\}$  | Subtract the value in the second field (Y) from the value in the first field (X).   |
| Multiply two numbers                              | $\{X\} * \{Y\}$  | Multiply the value in the first field (X) by the value in the second field (Y).   |
| Divide two numbers                                | <code>format-number( {X} div {Y} , '0.###')</code>                               | Divide the value in the first field (X) by the value in the second field (Y).   |
| Format as a percentage                            | <code>format-number({X} div {Y} , '#0%')</code>                                  | Determine what percentage one number (X) is of another (Y).<br>For example, if {X}=10 and {Y}=100, the result of the calculation is 10%.  |
| Absolute value of a number                        | $\{X\} * (\text{number}(\{X\} \geq 0) * 2 - 1)$                                  | The number regardless of the sign (negative or positive).   |
| Minimum of two numbers                            | $\{X\} * \text{number}(\{X\} \leq \{Y\}) + \{Y\} * \text{number}(\{X\} > \{Y\})$ | The smaller of two field values.  |
| Maximum of two numbers                            | $\{X\} * \text{number}(\{X\} \geq \{Y\}) + \{Y\} * \text{number}(\{X\} < \{Y\})$ | The larger of two field values.   |
| Zero if subtraction is negative                   | $(\{X\} - \{Y\}) * \text{number}((\{X\} - \{Y\}) \geq 0)$                        | Subtract one number (Y) from another (X). If the difference is less than zero, insert zero.   |
| Multiply by another number if checkbox is checked | <code>{X} * ( {Y} * number( {Z} = 'true' ) + number( {Z} != 'true' ) )</code>    | X is a numeric field.<br>Y is another numeric field to multiply by X if a checkbox is checked.<br>Z is the checkbox.<br>For example, {X}=2 and {Y}=3 <ul style="list-style-type: none"> <li>if the checkbox is checked, the result is 2 * 3, which is 6</li> <li>If the checkbox is not checked, the result is 2</li> </ul> |



| Example Field Text                        | Example Field Formula                                       | Description   |
|---|---|---|
| Round a decimal number                    | <code>round({X})</code>                                     | Rounds the number to the nearest integer. For example, <code>round(3.14)</code> . The result is 3.  |
| Round up a decimal number                 | <code>ceiling({X})</code>                                   | Returns the smallest integer that is greater than the number. For example, <code>ceiling(3.14)</code> . The result is 4.<br><br>For negative numbers:<br><code>ceiling(-3.14) = -3</code>           |
| Round down a decimal number               | <code>floor({X})</code>                                     | Returns the largest integer that is not greater than the number argument. . For example, <code>floor(3.14)</code> . The result is 3.<br><br>For negative numbers:<br><code>floor(-3.14) = -4</code> |
| Format decimal number 0.00                | <code>format-number( {X} ,'0.00')</code>                    | Rounds a value either up or down to the hundredth place. As examples, 100 becomes 100.00, and 3.14159265 becomes 3.14.  |
| Total numeric values from multiple fields | <code>sum( {X}[text()]   {Y}[text()]   {Z}[text()] )</code> | Add the values in all referenced fields.<br><br>Only elements that contain a value are summed. Empty elements are excluded.   |



| Example Field Text             | Example Field Formula | Description  |
|--------------------------------|-----------------------|--|
| Total a list of numeric values | sum( {X}[text()] )    | <p>Total all values in a single repeating field. Here's an example.</p> <p>Plain Text Field properties</p> <p>Name: Miles</p> <p>Allow: more than one</p> <p>Validation: non-negative whole number</p> <p>XML Data</p> <pre>&lt;root&gt;   &lt;Miles&gt;89&lt;/Miles&gt;   &lt;Miles&gt;12&lt;/Miles&gt;   &lt;Miles&gt;23&lt;/Miles&gt;   &lt;Miles&gt;19&lt;/Miles&gt; &lt;/root&gt;</pre> <p>sum(Miles) equals<br/>89+12+23+19=143</p> <p>Only elements that contain a value are summed. Empty elements are excluded.</p> |



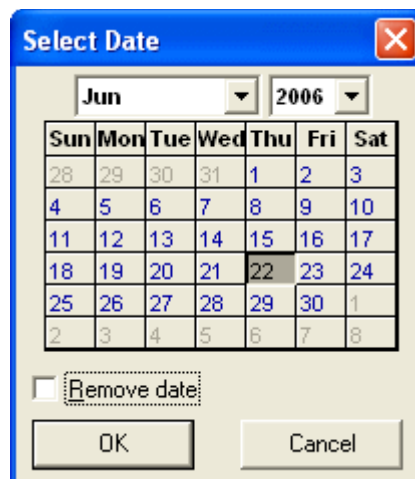
| Example Field Text                   | Example Field Formula  | Description  |
|--------------------------------------|--|--|
| Average a list of numeric values     | <code>format-number(sum( {X}[text()])<br/>div count( {X} ),'0.###')</code> | <p>Calculate the average of all values in a single repeating field.</p> <p>To continue the example from the <b>Total a list of numeric values field</b> (above):</p> <p>Plain Text Field properties</p> <p>Name: Miles</p> <p>Allow: more than one</p> <p>Validation: non-negative whole number</p> <p>XML Data</p> <pre>&lt;root&gt;   &lt;Miles&gt;89&lt;/Miles&gt;   &lt;Miles&gt;12&lt;/Miles&gt;   &lt;Miles&gt;23&lt;/Miles&gt;   &lt;Miles&gt;19&lt;/Miles&gt; &lt;/root&gt;</pre> <p>Average=89+12+23+19=143<br/>divided by the number of values (4)=<br/>35.75</p> <p>Only elements that contain a value are summed. Empty elements are excluded.</p> |
| Count the number of values in a list | <code>count( {X} )</code>  | <p>Calculate the number of values in a single repeating field.</p> <p>To continue the example from the <b>Total a list of numeric values field</b> (above):</p> <p>Plain Text Field properties</p> <p>Name: Miles</p> <p>Allow: more than one</p> <p>Validation: non-negative whole number</p> <p>XML Data</p> <pre>&lt;root&gt;   &lt;Miles&gt;89&lt;/Miles&gt;   &lt;Miles&gt;12&lt;/Miles&gt;   &lt;Miles&gt;23&lt;/Miles&gt;   &lt;Miles&gt;19&lt;/Miles&gt; &lt;/root&gt;</pre> <p>Count = 4</p>  |



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

## Calendar Field

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





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

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

### ***Dialog Box***

The screenshot shows the "Calendar Field" dialog box with the following fields and options:

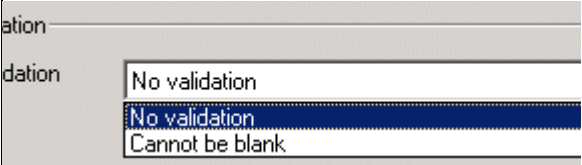
- Descriptive Name:** BDate
- Field Name:** BDate
- Tool Tip Text:** BDate
- Default value:** (empty text box)
- Indexed:** ☐
- Advanced...** button
- Use:**
  - ☒ May not be removed
  - ☐ May be removed
- Allow:**
  - ☒ Only one
  - ☐ More than one
- Validation:**
  - Validation:** No validation (dropdown menu)
  - Error Message:** (empty text box)
  - Custom Validation...** button
- Data Style...** button
- OK** and **Cancel** buttons

### ***Fields on the Calendar Field Dialog***



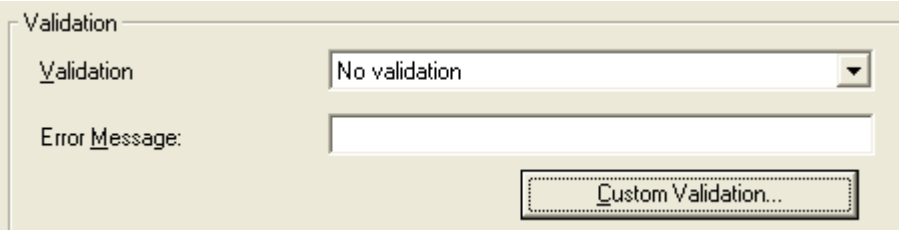
| Field            | Description   |
|------------------|---|
| Descriptive Name | <p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&amp;*()+=&lt;&gt;,;:"{}[]\`~) into this field.</p> <p>See Also: <a href="#">"The Name Field's Default Value" on page 234</a></p>  |
| Indexed          | <p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The <b>Indexed</b> field may or may not appear, depending on how your administrator has set up your system.</p>  |
| Field Name       | Enter the field's element name. This defines the field in the XML.  |
| Advanced         | See <a href="#">"Advanced Button" on page 287</a>   |
| Tool Tip Text    | Enter the text that appears when a user hovers the cursor over this field.  |
| Default value    | <p>If you want this screen to have a default date when the user first sees it, click the calendar icon to the right and select a date. The user can change the date in Data Entry mode.</p> <hr/> <p><b>Note:</b> If you enter a default date, you cannot later remove it. You can change it. If necessary, you can delete the field and enter a new one.</p> <hr/> |
| Use              | See <a href="#">"The Use Field" on page 291</a>   |
| Allow            | See <a href="#">"The Allow Field" on page 292</a>   |



| Field             | Description   |
|-------------------|---|
| Validation        | <p>If you want to require the user using the calendar to enter a response, click the down arrow to the right of this response field and select <b>Cannot be blank</b>.</p>  |
| Error Message     | If you select <b>Cannot be blank</b> above, insert text that appears on the screen if the user's response does not meet this criterion.   |
| Data Style        | See <a href="#">"The Data Style Field" on page 293</a>  |
| Custom Validation | See <a href="#">"Custom Validation with a Calendar Field" on page 278</a>   |
| Data Style        | See <a href="#">"The Data Style Field" on page 293</a>  |

### **Custom Validation with a Calendar Field**

The Calendar Field dialog features a Custom Validation button (illustrated below).

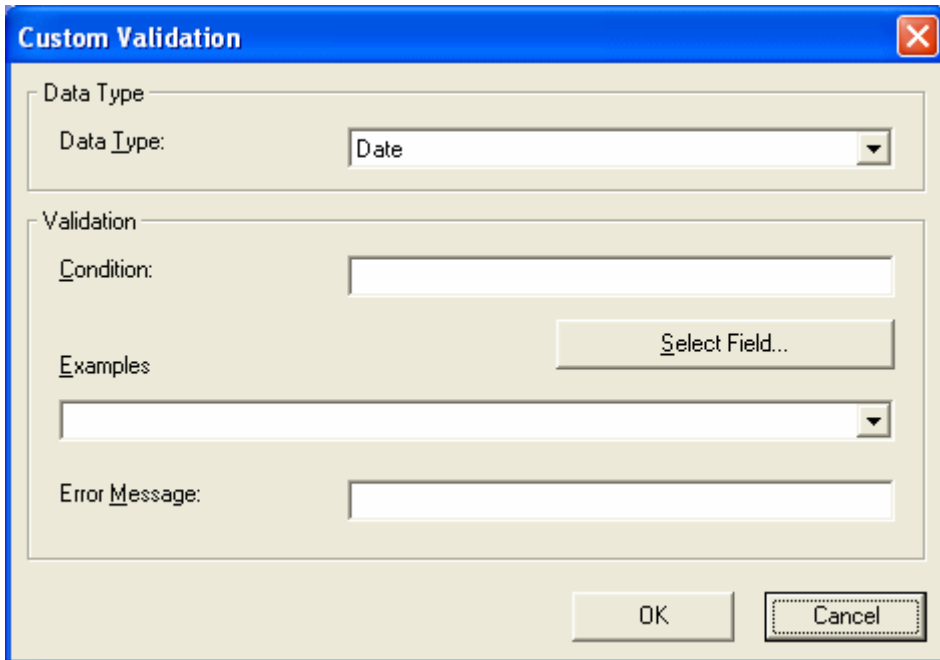


When you click the button, the Custom Validation screen appears. The screen can ensure the user's input is greater or less than the date you are inserting on the Data Design screen.

You can compose an error message that appears if the user's response fails to meet the criteria. Your system administrator determines if a user can save the invalid data.



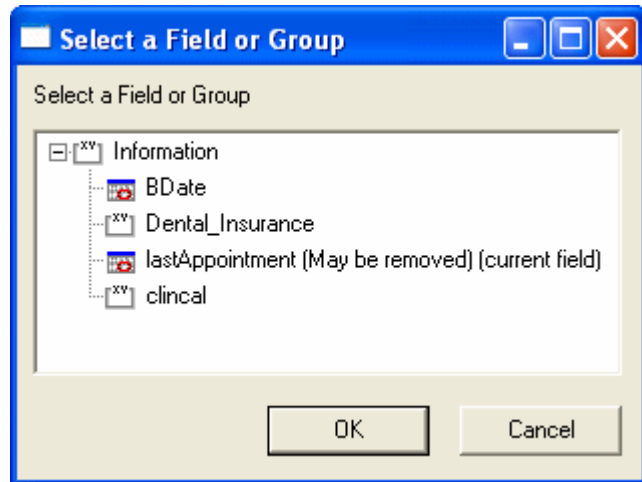
When the **Custom Validation** button is clicked, the Custom Validation dialog appears.

The image shows a 'Custom Validation' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog is divided into two main sections: 'Data Type' and 'Validation'. The 'Data Type' section contains a label 'Data Type:' followed by a dropdown menu currently showing 'Date'. The 'Validation' section contains a label 'Condition:' followed by a text input field. Below this is a label 'Examples' followed by a dropdown menu. To the right of the 'Examples' dropdown is a button labeled 'Select Field...'. At the bottom of the 'Validation' section is a label 'Error Message:' followed by a text input field. At the bottom right of the dialog are two buttons: 'OK' and 'Cancel'.

- The **Data Type** field shows **Date**.
- The **Condition** field displays the validation logic.
- The **Examples** drop-down list shows validation expressions that you can apply to the field.
- Any **Error Message** displays in Data Entry mode when the user inserts an invalid value.

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



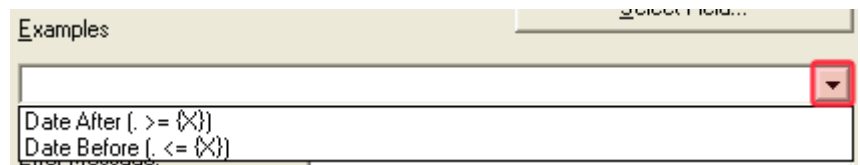


This dialog displays fields that can be inserted into the **Condition** field. Not all field types are listed. You must choose calendar type field (note the calendar to the left of these fields.)

### ***Example of Creating Custom Validation***

As an example of custom validation, assume that a field collects the date when a patient's health insurance policy expires. You want to make sure the date is later than today. To accomplish this, follow these steps.

1. Create a calendar field that prompts for today's date.
2. Create another calendar field that prompts for a patient's health insurance policy expiration date.
3. While creating the second field, in the **Validation** section, click **Custom Validation**.
4. The Custom validation screen appears.
5. Click the down arrow to the right of the **Examples** field to see sample logic.



6. Click **Date After (. >={X})**. This option lets you specify that the user's response must be later than a specified date.



7. In the **Condition** field, select **{X}** and click the **Select Field** button.
8. The Select Field or Group screen appears.
9. Select the field that prompts for today's date, which you created in Step 1.
10. That field replaces **{X}** in the **Condition** field.
11. Move the cursor to the **Error Message** field and compose an error message. For example: `Must be after today`.
12. Your screen should look like this.

The screenshot shows a 'Custom Validation' dialog box. It has a blue title bar with the text 'Custom Validation' and a red close button. The dialog is divided into several sections. The 'Data Type' section has a label 'Data Type:' and a dropdown menu currently showing 'Date'. The 'Validation' section contains a 'Condition:' label followed by a text field with the expression '. >= .../today'. To the right of this field is a button labeled 'Select Field...'. Below the condition field is an 'Examples' section with a dropdown menu showing 'Date After (. >= {X})'. At the bottom of the dialog is the 'Error Message:' label followed by a text field containing the text 'Must be after today'. At the very bottom of the dialog are two buttons: 'OK' and 'Cancel'.

13. Press **OK** and return to the **Plain Text** field dialog.
14. Press **OK** to save that dialog and test the validation on the date field. To do this, switch to Data Entry mode and enter a date earlier than today to verify that validation works as expected.


## Image Only Field

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



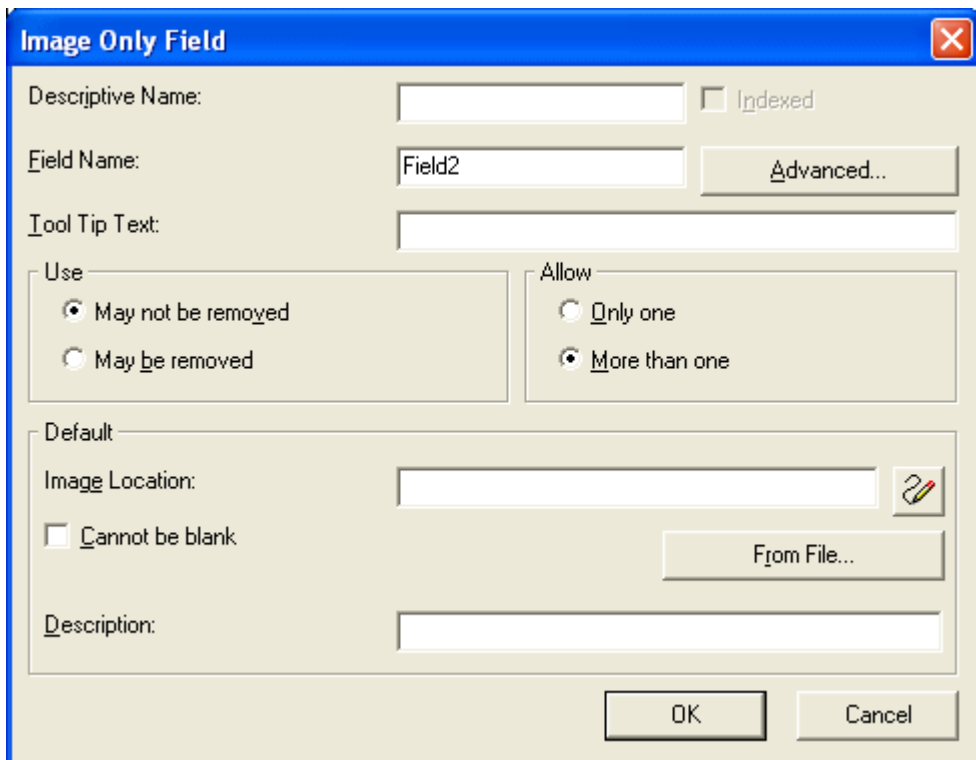
To let the user insert any file, such as a Microsoft Word document, use a File Link field. See Also: ["File Link Field" on page 284](#)

### Using an Image Only Field in Data Entry Mode

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

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

### Dialog Box



**Image Only Field**

Descriptive Name:  ☐ Indexed

Field Name:  

Tool Tip Text:


Use

- ☒ May not be removed
- ☐ May be removed

Allow

- ☐ Only one
- ☒ More than one

Default

Image Location:  

☐ Cannot be blank 

Description:

### Fields on the Image Only Dialog




| Field                  | Description   |
|------------------------|---|
| Descriptive Name       | <p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&amp;*()+=&lt;&gt;,:;"'{}[]\`~) into this field.</p> <p>See Also: <a href="#">"The Name Field's Default Value" on page 234</a></p>   |
| Indexed                | <p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The <b>Indexed</b> field may or may not appear, depending on how your administrator has set up your system.</p>  |
| Field Name             | Enter the field's element name. This defines the field in the XML.  |
| Advanced               | See <a href="#">"Advanced Button" on page 287</a>   |
| Tool Tip Text          | Enter the text that appears when a user hovers the cursor over this field.  |
| Use                    | See <a href="#">"The Use Field" on page 291</a>   |
| Allow                  | See <a href="#">"The Allow Field" on page 292</a>   |
| Default Image Location | <p>If desired, you can insert a default image, which might be the most common image or simply a reminder that an image needs to be inserted.</p> <p>To help find the image, click the <b>From File</b> button and navigate to image file.</p> <p>You can only insert an image file whose extension appears between the &lt;validext&gt; tags in the configdatadesign.xml file. For example:</p> <pre>&lt;validext&gt;gif,jpg,png,jpeg,jpe,doc,txt &lt;/validext&gt;</pre> |
| Cannot be blank        | If you want to require the user completing this field to enter a response, click inside this check box.   |
| Description            | Enter the image's alt text. The Alt text appears when the user hovers the cursor over the image on the screen   |



## File Link Field

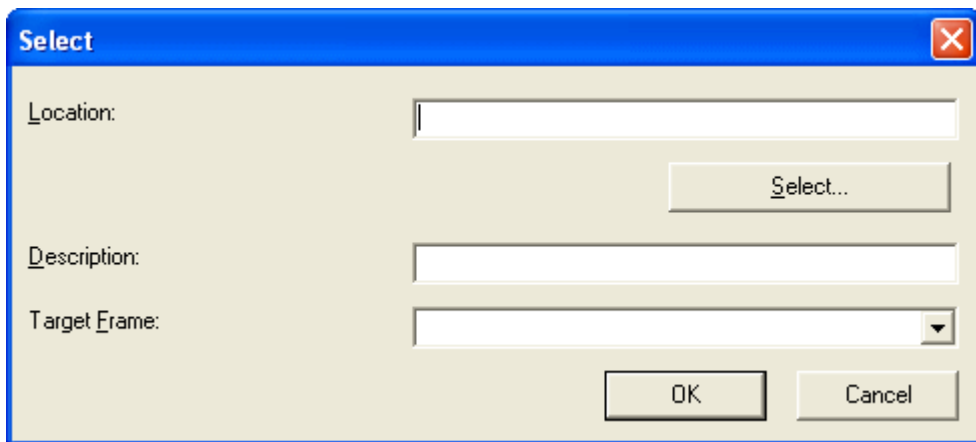
Use a File Link field to place an icon on the screen which the user in Data Entry mode can use to link to any file, such as a Microsoft Word document or a .gif image file. (You can also use an Image Only field to let the user insert an image. See Also: "Image Only Field" on page 281)

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

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

#### NOTE

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



The image shows a Windows-style dialog box titled "Select". It has a blue title bar with a close button (X) in the top right corner. The dialog box contains three input fields: "Location:" with a text box and a "Select..." button to its right; "Description:" with a text box; and "Target Frame:" with a dropdown menu. At the bottom right, there are "OK" and "Cancel" buttons.

**Dialog Box**



**Link Field**

Descriptive Name:  ☐ Indexed

Field Name:

Tool Tip Text:

Use

☒ May not be removed

☐ May be removed

Allow

☒ Only one

☐ More than one

Default

Location:

☐ Cannot be blank

Description:

Target Frame:

**Fields on the File Link Field Dialog**

| Field            | Description   |
|------------------|---|
| Descriptive Name | <p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&amp;*()+=&lt;&gt;,:;"'{}[]\`~) into this field.</p> <p>See Also: <a href="#">"The Name Field's Default Value" on page 234</a></p> |



| Field            | Description   |
|------------------|---|
| Indexed          | <p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The indexed field may or may not appear, depending on how your administrator has set up your system.</p>   |
| Field Name       | Enter the field's element name. This defines the field in the XML.  |
| Advanced         | See <a href="#">"Advanced Button" on page 287</a>   |
| Tool Tip Text    | Enter the text that appears when a user hovers the cursor over this field.  |
| Use              | See <a href="#">"The Use Field" on page 291</a>   |
| Allow            | See <a href="#">"The Allow Field" on page 292</a>   |
| Default Location | <p>If desired, you can insert a default link, which can be the most common link or simply an example.</p> <p>To help find the link, click the <b>Select</b> button and navigate to a file. You can only insert a file whose extension appears between the <code>&lt;validext&gt;</code> element of the <code>configdatadesign.xml</code> file. For example:</p> <pre>&lt;validext&gt;gif,jpg,png,jpeg,jpe,pdf,doc &lt;/validext&gt;</pre> |
| Cannot be blank  | If you want to require the user completing this field to enter a response, click this check box.  |
| Description      | If desired, enter text that the user can click to access the linked file.   |

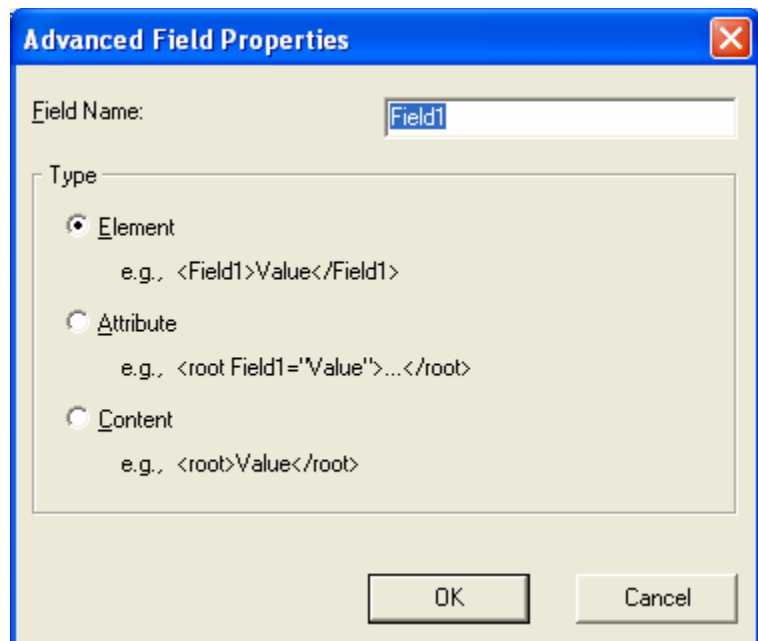


| Field        | Description  |
|--------------|--|
| Target Frame | <ul style="list-style-type: none"> <li>• New Window(_blank) - In a new browser window, on top of the current browser.</li> <li>• Same Window(_self) - In the same position within the browser window. The new window replaces the current one.</li> <li>• Parent Window(_parent) - If your page contains frames, in the frame that contains the frame with the hyperlink.</li> <li>• Browser Window(_top) - If your page contains frames, in the full display area, replacing the frames.</li> </ul> |
| Data Style   | See <a href="#">"The Data Style Field" on page 293</a>   |

## Fields that Appear on Several Dialogs

### *Advanced Button*

The **Advanced** button opens a dialog that lets you control the XML that the field produces.





The dialog lets you generate XML microformats made up of standard XHTML tags and attributes that contain a specific structure and values. The types are described below.

| Type      | This field defines   | Example   |
|-----------|--|---|
| Element   | A unique tag. The user's response to the field becomes its value.  | <code>&lt;Lastname&gt;Rogers&lt;/Lastname&gt;</code>                            |
| Attribute | An attribute of the containing field. The containing field is typically a Group Box.<br>If you insert an <b>Attribute</b> field type, the Field Name field on the dialog box is grayed out. The field name and type can only be edited on the Advanced Field properties screen.  | <code>&lt;PtInformation Lastname="Rogers"&gt;<br/>&lt;/PtInformation&gt;</code> |
| Content   | <p>The content of the containing field, typically a Group Box.</p> <p>Note that, in this case, field name is not used. As a result, the <b>Field Name</b> field is grayed out.</p> <p>Since most fields define their own content, this option is typically used to define a value to a Group Box that contains other fields defined as attributes.</p> <hr/> <p><b>IMPORTANT!</b> Only one Content type field is valid within a containing field.</p> <hr/> <p>If you insert an <b>Content</b> field type, the Field Name field on the dialog box is grayed out. The field name and type can only be edited on the Advanced Field properties screen.</p> | <code>&lt;PtInformation&gt;Rogers&lt;/PtInformation&gt;</code>                  |



| Type   | This field defines  | Example |
|--|---|---------|
| Value<br>(Only appears if field type is Image Only or File Link) | <p>Whether the value is an element or plain text.</p> <p><b>Value is an element</b> renders the field as</p> <ul style="list-style-type: none"> <li>• <code>&lt;a href="url" title="text" target="frame"&gt;text&lt;/a&gt;</code> for a file link</li> <li>• <code>&lt;img src="url" alt="text" /&gt;</code> for an image</li> </ul> <p><b>Value is plain text</b> renders the field as just the url.</p> |         |

### Sample Microformat

For example, the microformat of an event looks like this.

```
<span class="event">
<a class= "url"href="https://www.lisa.org/events/2006nyc/package_registration.html?from=fn1206"
">LISA Global Strategies Summit</a>
</span>
```

The Data Entry view looks like this.

### Edit Document

Title: attributes

Save

Body:

The screenshot shows the 'Edit Document' window. At the top, there's a title field with 'attributes' and a 'Save' button. Below is a 'Body:' label. A rich text editor toolbar is visible, containing various icons for editing text and images. Below the toolbar, there are two form fields. The first field is labeled 'URL to the event:' and contains the text 'https://www.lisa.org/events/2006nyc/package\_registration.html?from=fn1206'. The second field is labeled 'Description:' and contains the text 'LISA Global Strategies Summit'.

The Data Design view looks like this.



## Edit Document

Title:

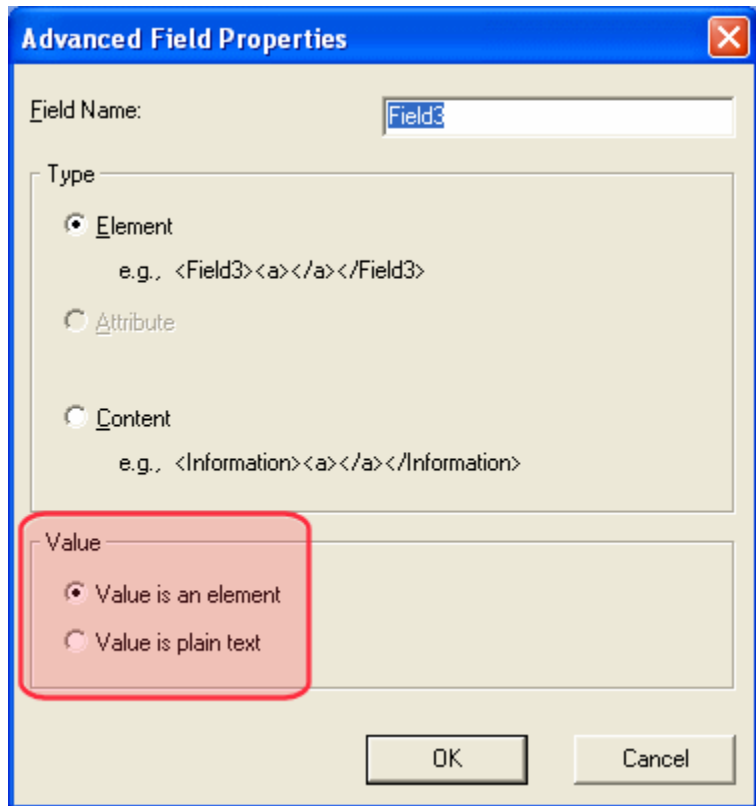
Body:

The screenshot shows the 'Edit Document' interface. At the top, there's a 'Title' field containing 'attributes'. Below it is the 'Body' section, which is a rich text editor. The editor contains the following text: 'event', 'url', 'URL to the event: [https://www.lisa.org/events/2006nyc/package\\_registration.html?from=fn120](https://www.lisa.org/events/2006nyc/package_registration.html?from=fn120)', and 'Description: LISA Global Strategies Summit'. The editor has a toolbar with various icons for formatting and editing. On the left side of the editor, there's a sidebar with icons for different field types like text, image, link, etc.

### ***Additional Notes about Advanced Field Properties***

- If the element is a group box or table, its type must be **Element** because it surrounds other elements.
- If the element is a Rich Area field, its type must be **Element** or **Content**.
- If the element is a link to an external file (either image or link filed), the Advanced Field Properties dialog has an additional field, **Value**. For more information, see "[Value](#)" on page 289.





The image shows a dialog box titled "Advanced Field Properties" with a blue title bar and a close button (X) in the top right corner. The dialog has a light beige background. At the top, there is a text field labeled "Field Name:" containing the text "Field3". Below this is a section titled "Type" with three radio button options: "Element" (selected), "Attribute", and "Content". Each option has an example text below it: "e.g., <Field3><a></a></Field3>" for Element, and "e.g., <Information><a></a></Information>" for Content. Below the "Type" section is another section titled "Value" with two radio button options: "Value is an element" (selected) and "Value is plain text". This "Value" section is highlighted with a red rounded rectangle. At the bottom right of the dialog are two buttons: "OK" and "Cancel".

### ***The Use Field***


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


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

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






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

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


#### NOTE

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

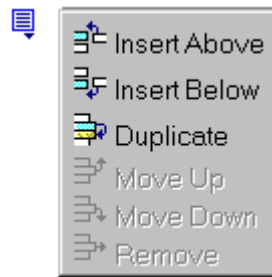
### The Allow Field


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


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

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



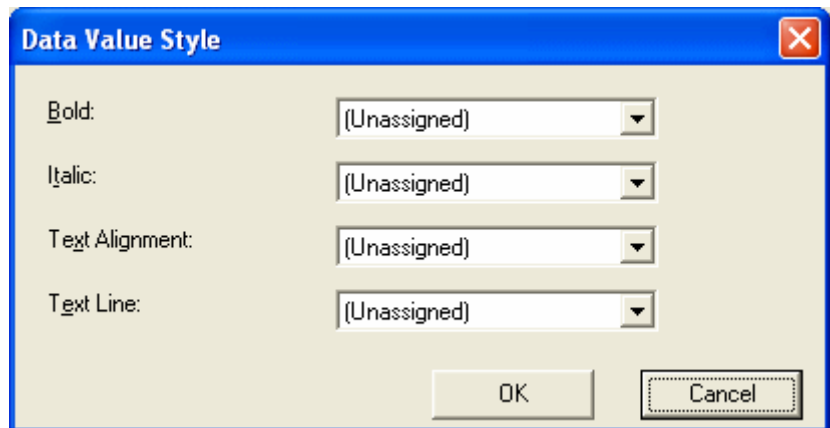


If the user entering data clicks , a menu appears (shown above), which lets the user add instances of the field to the screen.

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

### ***The Data Style Field***

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



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

- Font style and size
- Bold and italic

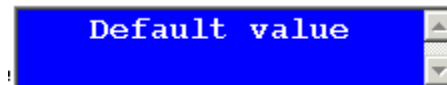


- Text alignment (especially helpful for formatting dollar amounts in a plain text field)
- Underline or strikethrough
- Font color and/or background color

**NOTE**

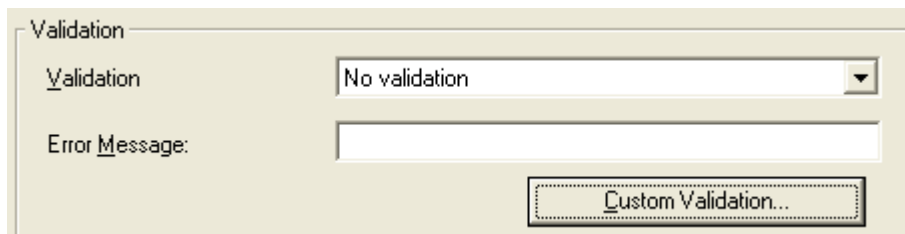
The configuration data controls a command's appearance on the toolbar and on the Data Style dialog. For example, if `<button command="cmdfontname" />` is removed from `configdatadesign.xml`, it disappears from the toolbar and the Data Style dialog.

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



## Custom Validation

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



You can use the validation feature to ensure the following about the user's input.

- The data type - the default types are
  - text
  - URL
  - whole number
  - decimal number



- floating point number (Floating point includes scientific notation, so is appropriate for scientific numbers. Decimals usually suffice for business numbers.)

---

**NOTE** Your system administrator may customize the choices.

---

- The field value has one of the following relationships with another field, a number, or an expression - the default expressions are
  - between two values (either another field or a number that you specify)
  - less than
  - equal to
  - not equal to
  - maximum length (usually for text responses)

---

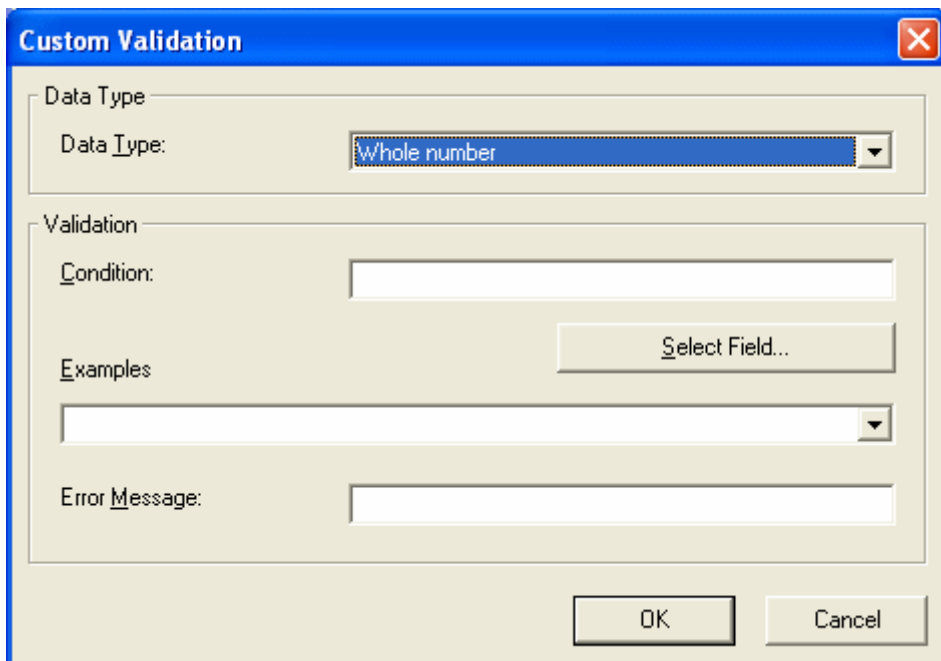
**NOTE** Your system administrator may customize the choices.

---

If the user's response fails to meet the criteria, you can compose an error message that appears when that happens. Your system administrator determines if a user can save the invalid data.

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

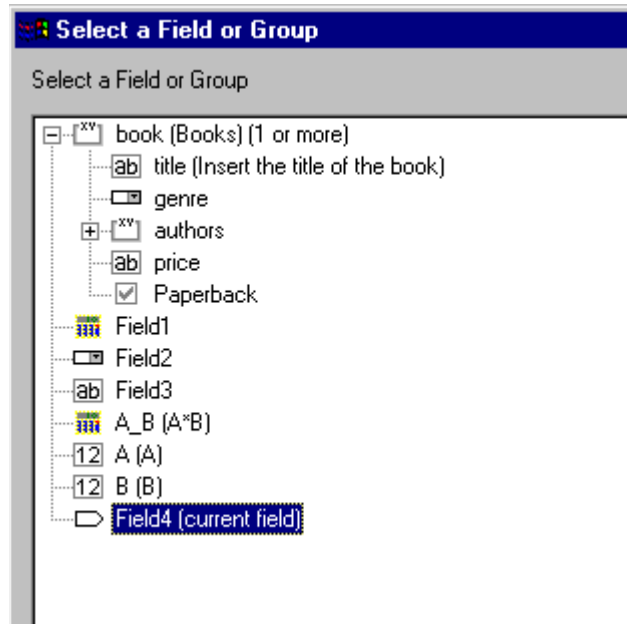


The image shows a 'Custom Validation' dialog box with a blue title bar and a close button. It contains three main sections: 'Data Type' with a dropdown menu showing 'Whole number'; 'Validation' which includes a 'Condition' text field, an 'Examples' dropdown menu, and a 'Select Field...' button; and an 'Error Message' text field. At the bottom are 'OK' and 'Cancel' buttons.

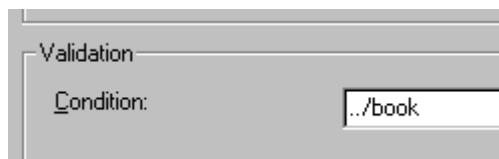
- The **Data Type** field is the value's basic type, for example, text number or URL.
- The **Condition** field displays the validation logic.
- The **Examples** drop-down list shows validation expressions that the data design creator can apply to the field.
- Any **Error Message** displays in Data Entry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

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





This dialog displays fields that can be inserted into the **Condition** field. Some field types, like the RichArea field, are not listed. See Also: ["Referencing Other Calculated Fields" on page 270](#)



### **Example of Creating Custom Validation**

As an example of custom validation, assume that a field collects telephone numbers, and you want to make sure the user enters 10 digits. To accomplish this, follow these steps.

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



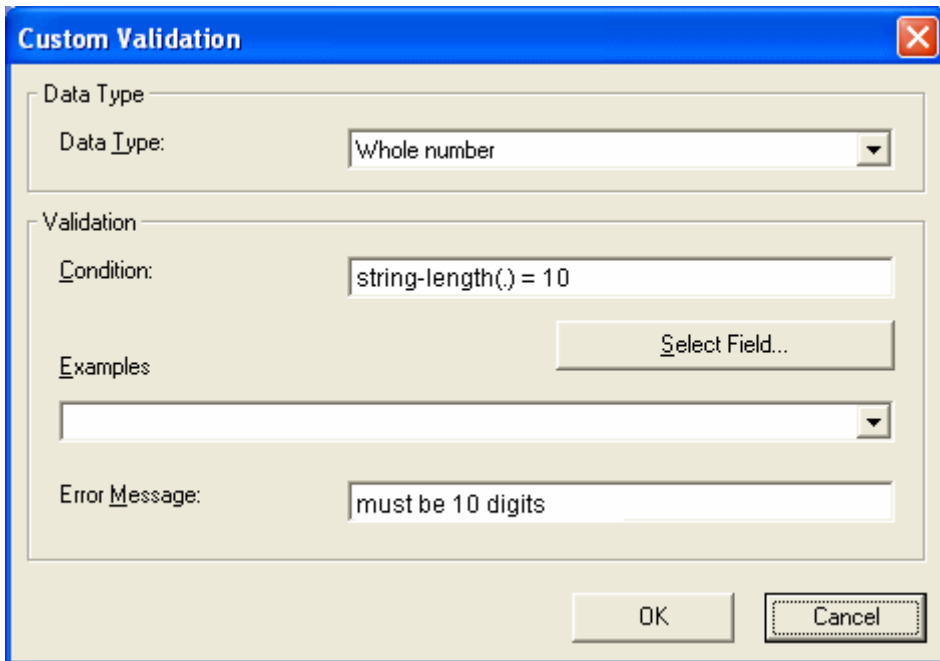
3. In the **Data Type** field, select **Whole Number** from the drop down list. This ensures that the user can only enter digits.

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

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



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



The screenshot shows a 'Custom Validation' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog is divided into two main sections: 'Data Type' and 'Validation'. In the 'Data Type' section, the 'Data Type:' label is followed by a dropdown menu currently showing 'Whole number'. In the 'Validation' section, the 'Condition:' label is followed by a text box containing the expression 'string-length(.) = 10'. To the right of this text box is a button labeled 'Select Field...'. Below the 'Condition' section is an 'Examples' section with a text box and a dropdown arrow. At the bottom of the 'Validation' section, the 'Error Message:' label is followed by a text box containing the message 'must be 10 digits'. At the bottom right of the dialog are two buttons: 'OK' and 'Cancel'.

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



---

# Managing HTML Forms

**Ektron CMS400.NET**'s HTML Forms feature lets users create and maintain HTML forms to collect information from visitors to your Web site.

This section only describes the following technical topics relating to forms. For more information about using HTML forms, see the **Ektron CMS400.NET** User Manual.

- ["Form Permissions" on page 300](#)
- ["Forms Must Use Template with FormBlock Server Control" on page 301](#)
- ["Preparing the Server to Send email" on page 302](#)
- ["Implementing a Form on a Web Page" on page 303](#)
- ["Sending Data as XML" on page 304](#)
- ["Redirecting Submitted Form Data" on page 311](#)

## Form Permissions

### Folder Permissions

By default, form permissions are inherited from a form's folder. To customize permissions for any folder that contains forms, access the corresponding folder under Content and assign permission as described in ["Setting Permissions for a Content Folder" on page 690](#).

### Administrator Permissions

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



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

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

## User Permissions

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

## Forms Must Use Template with FormBlock Server Control

HTML forms *must* reside in a folder whose template uses the FormBlock server control or function. In the Intranet sample site supplied with **Ektron CMS400.NET**, the Contact Information folder uses such a template, `contactinformation.aspx` (illustrated below).



**View Properties for the folder "Contact Information"**

English (U.S.)

**Properties** | **Metadata** | **Web Alerts** | **Smart Forms**

**Foldername:**  
Contact Information

**ID:**  
22

**Description:**

**Style Sheet filename for this folder:**  
[None Specified]  
**The inherited style sheet for this folder is: /CMS400Demo/default.css**

**Page Templates**

☐ Inherit Parent Template Configuration

| Default                          | Page Template Name      |
|----------------------------------|-------------------------|
| <input checked="" type="radio"/> | contactinformation.aspx |
| <input type="radio"/>            | dynamic.aspx            |

You can modify this template as needed or create your own form template and assign it to any folder on its Folder Properties screen.

Since, by default, folders inherit properties from their parent folder, any new folders created under a parent folder use the correct template. Of course, you can break inheritance and assign a custom template for any folder.

## Preparing the Server to Send email

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



## Implementing a Form on a Web Page

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

### NOTE

The use of server controls or functions to manage templates is documented in the [Ektron CMS400.NET Developer's Manual](#).

1. Open the Web form template on which you want the Form content to appear. (This example uses support.aspx.)
2. Place the FormBlock server control or custom function for a Form content within the body of the template. Below is an example of what the form might look like.

### IMPORTANT!

Ektron recommends using the Poll server control when displaying a form that is being used as a form or a survey.

Home | Products | **Support** | News | Careers | Search | Calendar

## Support Request Form

This is a sample support request form for RC International. Validation is set for most fields for t

Name:  *cannot be blank*

Email:  *format as email@yourcompany.xx*

Product:  *must select product from list*

Purchase Date:  *format as MM/DD/YYYY*

Purchase Price:  *format as \$DDD.CC*

Visa / Mastercard:  *format as 4111111111111111*

Notes:

3. Save and close the new Web form.
4. To test your form, navigate to your Web site then to the new page.
5. Complete the form.



6. Click the Submit Form button.
7. The screen is refreshed and displays the post back message that you created.

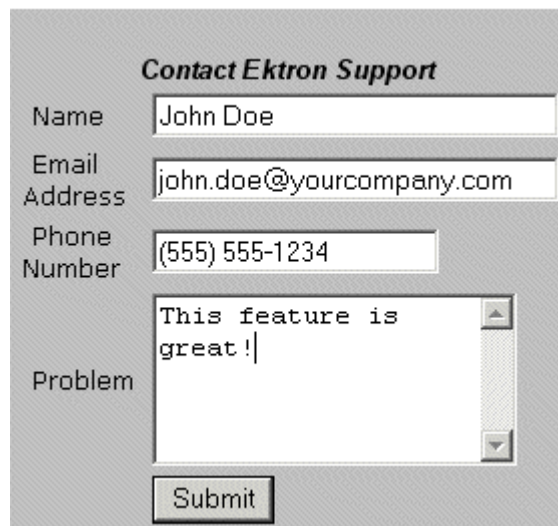
## Sending Data as XML

While creating a form that generates email, you can specify that the email be sent as XML data or plain text.

XML has the following advantages over plain text.

- Because XML data is structured, you can easily parse the content to store and retrieve important information.
- If you download the form data to an Excel spreadsheet, the XML tags become the spreadsheet's column headers. See *Also: Ektron CMS400.NET User Manual Section "Working with HTML Forms" > "Viewing Form Reports" > "Exporting Form Reports"*.









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



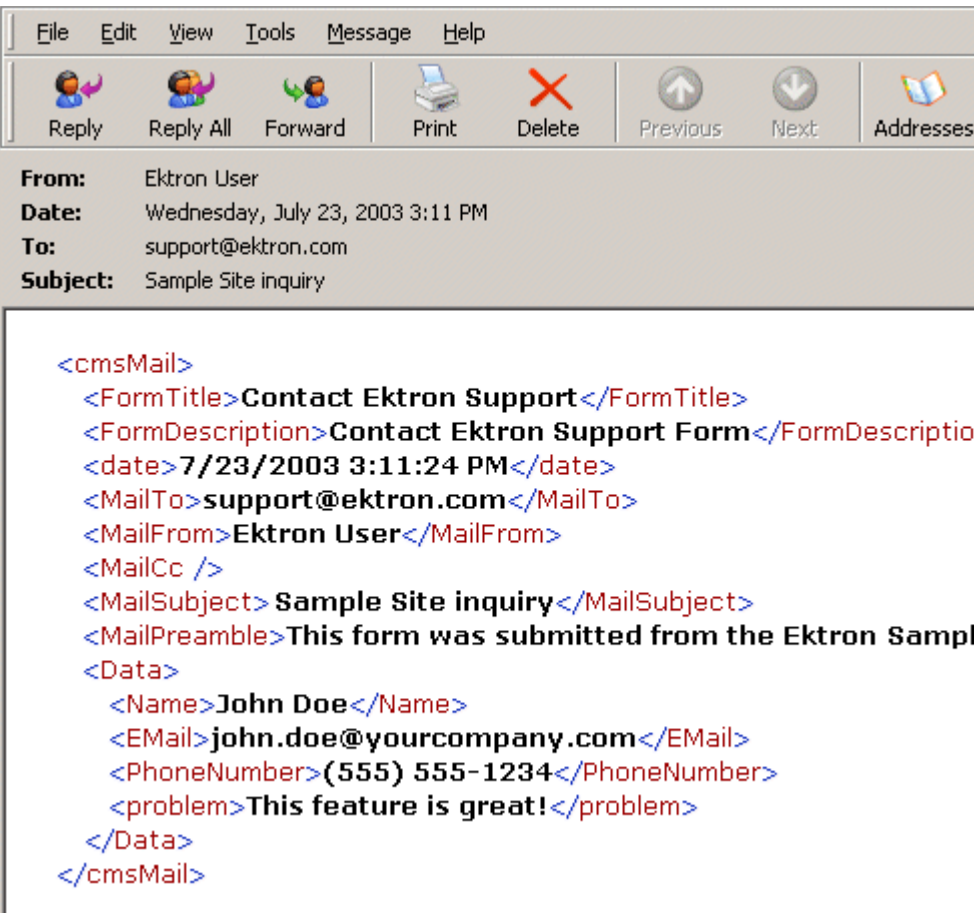
The screenshot shows a web form titled "Contact Ektron Support". It contains four input fields: "Name" with the value "John Doe", "Email Address" with the value "john.doe@yourcompany.com", "Phone Number" with the value "(555) 555-1234", and "Problem" with the value "This feature is great!". Below the "Problem" field is a "Submit" button.



The following table displays the resulting email, depending on the method used.

| Form sent as | Generated email   |      |          |       |  |             |                |         |                        |
|--------------|---|------|----------|-------|--|-------------|----------------|---------|------------------------|
| Plain Text   | <div> <div>File Edit View Tools Message Help</div> <div>  Reply            Reply All            Forward            Print            Delete            Previous            Next            Addresses         </div> </div> <div> <b>From:</b> Ektron User<br/> <b>Date:</b> Wednesday, July 23, 2003 3:19 PM<br/> <b>To:</b> support@ektron.com<br/> <b>Subject:</b> Sample Site inquiry         </div> <p>This form was submitted from the Ektron CMS Sample Web site.</p> <p>7/23/2003 3:19:08 PM</p> <table> <tr> <td>Name</td><td>John Doe</td></tr> <tr> <td>Email</td><td><a href="mailto:john.doe@yourcompany.com">john.doe@yourcompany.com</a></td></tr> <tr> <td>PhoneNumber</td><td>(555) 555-1234</td></tr> <tr> <td>problem</td><td>This feature is great!</td></tr> </table> | Name | John Doe | Email | <a href="mailto:john.doe@yourcompany.com">john.doe@yourcompany.com</a> | PhoneNumber | (555) 555-1234 | problem | This feature is great! |
| Name         | John Doe  |      |          |       |  |             |                |         |                        |
| Email        | <a href="mailto:john.doe@yourcompany.com">john.doe@yourcompany.com</a>  |      |          |       |  |             |                |         |                        |
| PhoneNumber  | (555) 555-1234  |      |          |       |  |             |                |         |                        |
| problem      | This feature is great!  |      |          |       |  |             |                |         |                        |



| Form sent as | Generated email   |
|--------------|---|
| XML          |  <pre> &lt;cmsMail&gt;   &lt;FormTitle&gt;Contact Ektron Support&lt;/FormTitle&gt;   &lt;FormDescription&gt;Contact Ektron Support Form&lt;/FormDescription&gt;   &lt;date&gt;7/23/2003 3:11:24 PM&lt;/date&gt;   &lt;MailTo&gt;support@ektron.com&lt;/MailTo&gt;   &lt;MailFrom&gt;Ektron User&lt;/MailFrom&gt;   &lt;MailCc /&gt;   &lt;MailSubject&gt; Sample Site inquiry&lt;/MailSubject&gt;   &lt;MailPreamble&gt;This form was submitted from the Ektron Sampl   &lt;Data&gt;     &lt;Name&gt;John Doe&lt;/Name&gt;     &lt;EMail&gt;john.doe@yourcompany.com&lt;/EMail&gt;     &lt;PhoneNumber&gt;(555) 555-1234&lt;/PhoneNumber&gt;     &lt;problem&gt;This feature is great!&lt;/problem&gt;   &lt;/Data&gt; &lt;/cmsMail&gt; </pre> |

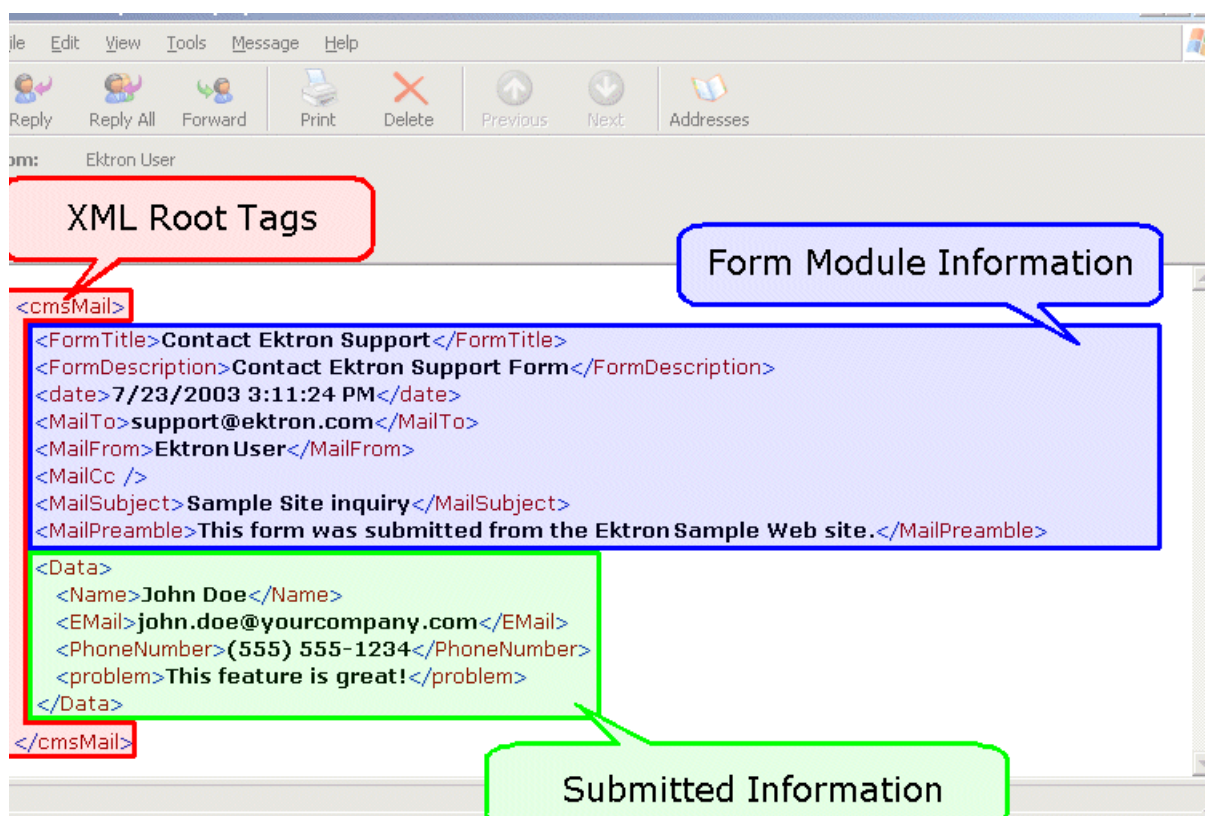
## XML email Structure

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

- Form and mail elements
- Data elements

The following image illustrates the sections of XML email structure.





The following explains the sections of the XML email.

### **Root Tag**

The XML email is wrapped in `<cmsMail>` root tags.

### **Form and Mail Tags**

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

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



The screenshot shows a web browser window with a sidebar on the left containing links like 'Content', 'Library', 'Rules', 'Collections', 'Calendars', 'Forms', 'Ports', 'Groups', and 'Configuration'. The main content area displays form information in a light blue box. A callout box labeled 'Form information in Workarea' points to this section. Below the form information, there is a green checkmark and the text 'Send data in XML format'. A second callout box labeled 'Form information in XML Email' points to the XML code block below.

**Form information in Workarea**

**Title:** Contact Ektron Support  
**Description:** Contact Ektron Support Form  
**ID:** 1

**Mail Properties**

**To:** support@ektron.com  
**From:** Ektron CMS300 User  
**CC:**  
**Subject:** CMS300 Sample Site inquiry  
**Preamble:** This form was submitted from the Ektron CMS300 Sample Web site.

✓ Send data in XML format

**Form information in XML Email**

```
<cmsMail>
<FormTitle>Contact Ektron Support</FormTitle>
<FormDescription>Contact Ektron Support Form</FormDescription>
<date>7/23/2003 3:11:24 PM</date>
<MailTo>support@ektron.com</MailTo>
<MailFrom>Ektron CMS300 User</MailFrom>
<MailCc />
<MailSubject>CMS300 Sample Site inquiry</MailSubject>
<MailPreamble>This form was submitted from the Ektron CMS300 Sample Web site.</MailPreamble>
</cmsMail>
```

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

| XML Tag           | Description                                       |
|-------------------|---|
| <FormTitle>       | Title given to the form that was submitted.       |
| <FormDescription> | Description given to the form that was submitted. |
| <date>            | Date and time the form was submitted.             |
| <MailTo>          | To email address(es) defined in the form.         |
| <MailFrom>        | From email address(es) defined in the form.       |
| <MailCc>          | CC address(es) defined in the form.               |



| XML Tag        | Description   |
|----------------|---|
| <MailSubject>  | Subject for the generated email defined in the form.  |
| <MailPreamble> | Preamble for the generated email defined in the form. |

## ***Data Tags***

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

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



**Form on Web Page**

```

<table width="100%" bgcolor="#c0c0c0">
<tr>
<td>Name</td>
<td><input size="15" name="Name" /></td>
</tr>
<tr>
<td>Email Address</td>
<td><input size="15" name="Email" /></td>
</tr>
<tr>
<td>Phone Number</td>
<td><input size="15" name="PhoneNumber" /></td>
</tr>
<tr>
<td>Problem</td>
<td><textarea name="Problem" rows="5" cols="15"></textarea></td>
</tr>
<tr>
<td></td>
<td><input type="submit" value="Submit" /></td>
</tr>
</table>

```

**Form in eWebEditPro**

**Sample Site Inquiry**

From: Ektron CMS300 User  
 Date: Wednesday, July 23, 2003 3:11 PM  
 To: support@ektron.com  
 Subject: CMS300 Sample Site Inquiry

**Data Submitted by Form**

```

<cmsMail>
<FormTitle>Contact Ektron Support</FormTitle>
<FormDescription>Contact Ektron Support Form</FormDescription>
<date>7/23/2003 3:11:24 PM</date>
<MailTo>support@ektron.com</MailTo>
<MailFrom>Ektron CMS300 User</MailFrom>
<MailCc />
<MailSubject>CMS300 Sample Site inquiry</MailSubject>
<MailPreamble>This form was submitted from the Ektron CMS
<Data>
<Name>John Doe</Name>
<Email>john.doe@yourcompany.com</Email>
<PhoneNumber>(555) 555-1234</PhoneNumber>
<problem>This feature is great!</problem>
</Data>

```

As shown in the graphic, the content is comprised of four form elements that are converted to XML tags:

- Name
- Email
- PhoneNumber
- Problem



## Redirecting Submitted Form Data

This section explains how to set up the ability to redirect submitted form data to an action page. Because the data is redirected via server transfer, you can easily customize the handling of a multi-page form.

Users can select this option when creating or editing a form response, as illustrated below.

**Response**

Step 4 of 5    4    5    Back    Next    Cancel    ?

**Choose the type of response to display when form data is submitted. You can change later if you wish.**

☒ Display a message  
☐ Redirect to a file or page  
☐ **Redirect form data to an action page**  
☐ Report on the form    Same Window    Bar Chart

Rich text editor toolbar: (Apply Style), Normal, B, I, U, A, A, x<sup>2</sup>, x<sub>2</sub>, nbsp, ©, ®, TM, €, i, [Insert Field], [Image], [Table], [Link], [Unlink], [Find], [Print], [Help]

Instructions for how a user chooses a hyperlink to an action page are in the **Ektron CMS400.NET** User Manual section “Working with HTML Forms” > “Creating a New Form” > “Redirecting to an Action Page and Forwarding Form Data”.

**NOTE** [If a form's specifications indicate that its data is saved to a database, the data is saved before being forwarded to an action page.](#)

The following section explains how an administrator sets up a hyperlink to the action page in preparation for a user's selection.




## Setting Up the Action Page

1. Create the action page. It must
  - load and use the form variables
  - have an .aspx extension
  - reside in the same web application as your Web site

### IMPORTANT!

If your site is using URL Aliasing, the action page's header must include the following: `EnableEventValidation="false" EnableViewStateMac="false"`

2. Place the action page in your Web site's root folder.
3. Set up a library hyperlink to the .aspx page. Here's how to do that:
  - In **Ektron CMS400.NET**, go to the Library.
  - Select **Hyperlinks** from the file type dropdown.
  - Click the Add button (.
  - In the **URL Link** field, enter the path relative to the Web root to the .aspx file you created in Steps 1 and 2. For example:  
`http://localhost/siteroot/ServerVariables.aspx`
  - Give the hyperlink a title and save it.
4. Inform your users of the hyperlink. They will select it when selecting the form response.



# Managing Assets

This section explains the administration of the Document Management functionality in **Ektron CMS400.NET**. It includes the following sections:

- ["Document Management Configuration" on page 313](#)
- ["Checking Document Management Permissions" on page 317](#)
- ["Managing Multimedia Assets" on page 325](#)
- ["PDF Generation" on page 332](#)
- ["Troubleshooting" on page 344](#)

## Document Management Configuration

This section explains configuring Document Management. By changing these settings, you can:

- update Document Management server settings
- change which file types are allowed on the Document Management server
- set the View Type

There are two ways you can configure an Document Management server:

- the Asset Server Setup screen in the Workarea See Also: ["Updating Asset Configuration Settings" on page 314](#)
- the AssetManagement.Config file See Also: ["The AssetManagement.Config File" on page 315](#)

In either case, you are editing the AssetManagement.Config file. While the Workarea screen provides a simple way to update this information, some tags can only be updated in the AssetManagement.Config file. The table in ["The](#)



[AssetManagement.Config File](#) on page 315 indicates which tags can be edited in the Workarea.




## Updating Asset Configuration Settings



You can update some AssetManagement.Config tags from the Ektron CMS400.NET Workarea. To do that, follow these steps.

**NOTE** Only members of the Administrator User Group can view, add, or edit the Asset Server Setup.

1. In the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. The **Asset Management Configuration** screen appears.



|  | Tag             | Value             | Description  |
|--|-----------------|-------------------|--|
|   | CatalogLocation | c:/assetcatalog// | Index Server catalog location used to keep indexing info |
|   | CatalogName     | 680819212Asset    | Index Server catalog name used for indexing Assets       |
|  | DomainName      | . . .             | AppDomain under which CMS is                             |









3. Click the Edit button () for the tag you want to edit.
4. The **Value** field for that tag changes to a text box.
5. Change the information in the text box.
6. Click the Save button ()

For more information on each tag, see ["The AssetManagement.Config File" on page 315](#)




## The AssetManagement.Config File

The following table describes the AssetManagement.Config file's tags.

| Element                 | Description  | Editable within Workarea?   |
|-------------------------|--|---|
| <b>CatalogLocation=</b> | The folder location of the Asset Catalog. This location is used when setting up the index service. For example:<br>"C:\assetcatalog\".   |    |
| <b>CatalogName=</b>     | The name of the Asset Catalog. This name is used when setting up the index service.  |    |
| <b>DomainName=</b>      | Can be Domain Name, IP Address or Machine Name. An example is: localhost. This is the address a Web client system uses to open managed documents through HTTP.   |    |
| <b>FileTypes=</b>       | Files types that users are allowed to upload to Document Management. For more information, see <a href="#">"Allowing File Types" on page 316</a> . The default file types installed are *.doc, *.xls, *.ppt, *.pdf, *.gif, *.jpg, *.jpeg, *.txt, *.log, *.vsd, *.dot, *.zip, *.swf, *.wma, *.wav, *.avi, *.mp3, *.rm, *.wmv, *.ra, *.mov, *.odt, *.odf, *.odp, *.odg, *.ods, *.odb |    |
| <b>LoadBalanced=</b>    | Enables Load Balancing for assets. Set to "1" to enable. See Also: <a href="#">"Load Balancing Assets" on page 917</a>   |  |
| <b>Password=</b>        | The password for the user created during the install. This password is encrypted during the install. If you are changing the user and need to encrypt a new password, use the dms400encryptpassword.exe encryption tool located in C:\Program Files\Ektron\CMS400versionnumber\Utilities\DMS.  |  |
| <b>ServerName=</b>      | The name of the server that hosts <b>Ektron CMS400.NET</b> .   |   |
| <b>StorageLocation=</b> | The folder location where published assets are stored. For example: "C:\assetslibrary".  |  |
| <b>UserName=</b>        | The user created during the install. If you let <b>Ektron CMS400.NET</b> install create the user, the default is EKT_ASSET_USER.   |  |



| Element             | Description   | Editable within Workarea?   |
|---------------------|---|---|
| <b>WebShareDir=</b> | The folder where temporary data files that are waiting to be checked in, saved, or published are stored. For example: "dmdata". |  |

## Allowing File Types

Administrators control which file types are allowed in the Document Management functionality by editing the AssetManagement.config file. Reasons for limiting the file types include:

- Security - For example, you do not want users to load .exe files to your Document Management server
- Ease of Management - For example, you want your Document Management server to store .doc files only

The `<FileTypes>` tag in the AssetManagement.config file contain the file types users can upload. The default file types are:

```
*.doc,*.xls,*.ppt,*.pdf,*.gif,*.jpg,*.jpeg,*.txt,*.log,*.vsd,*.dot,
*.zip,*.swf,*.wma,*.wav,*.avi, *.mp3, *.rm, *.wmv, *.ra, *.mov,
*.odt, *.odf, *.odp, *.odg, *.ods, *.odb.
```

## Steps to Add or Remove a File Type

To add or remove a file type from the list, follow these steps.

1. Edit in the **Workarea > Settings > Configuration > Asset Server Setup > Update Asset Configuration Settings** screen.
- Or
1. Open the AssetManagement.config file. The default location is (webroot)/(site root).
2. Find the `FileTypes=""` element. All file types must appear between the quotes. For example, `FileTypes="*.doc,*.xls"`.

### NOTE

Use a comma to separate file types. Also, file types must be formatted as wildcard.extension. For example, adding an .mp3 file type to the list after \*.zip looks like this: \*.zip,\*.mp3



3. Add or remove any file type.
4. Save and close the `AssetManagement.config` file.

## Checking Document Management Permissions

If you are having any problems with permissions, use this section to verify that your user and folder settings are assigned properly.

*See Also:*

- ["User Permissions" on page 317](#)
- ["User Settings" on page 319](#)
- ["Folders Used by Document Management" on page 319](#)

### User Permissions

When the Document Management functionality is installed, permissions are granted to several users for the following folders:

- `webroot\site root\AssetManagement\dmdata`
- `webroot\site root\Assets`
- `root\assetlibrary`

The assigned permissions vary depending on your server's operating system.

*See Also:* ["The assetCatalog Folder" on page 324](#)

The following table lists users and their permissions. Scan down the column of your server's operating system to determine which users and permissions should be enabled for the folders listed above.

You can use this information to help troubleshoot potential permission problems.



| User  | Needs these permissions                                    | Windows 2000 Pro or XP Pro | Windows 2003 Server | Windows 2003 Enterprise Edition |
|---|--|----------------------------|---------------------|---------------------------------|
| IIS_WPG User  | See "Advanced Permissions" on page 318                     |                            | ✓                   | ✓                               |
| IUSR_<br>(The IUSR_ account is required only if <code>Impersonate</code> is set to <code>True</code> in <code>web.config</code> , and its username and password attributes are not specified. If <code>impersonate</code> is set to <code>false</code> (default setting), the IUSR_ account may be harmlessly removed from the folders listed.) | See "Advanced Permissions" on page 318                     | ✓                          | ✓                   |                                 |
| IUSR_Group  | See "Advanced Permissions" on page 318                     |                            |                     | ✓                               |
| EKT_ASSET_USER  | <code>webroot/dmdata</code> folder only: write only access | ✓                          | ✓                   | ✓                               |
| ASP.NET User  | See "Advanced Permissions" on page 318                     | ✓                          |                     |                                 |
| SYSTEM  | See "Advanced Permissions" on page 318                     | ✓                          | ✓                   | ✓                               |
| User Defined (The User Defined user account is required only if <code>Impersonate</code> is set to <code>True</code> in <code>web.config</code> , and its username and password attributes are specified)   | See "Advanced Permissions" on page 318                     | ✓                          | ✓                   | ✓                               |

## Advanced Permissions



The following are extended permissions for use with the Document Management functionality.

- Traverse Folder / Execute File
- List Folder / Read Data
- Read Attributes
- Read Extended Attributes
- Create Files / Write Data
- Create Folders / Append Data
- Write Attributes
- Write Extended Attributes
- Delete Subfolder and Files
- Read Permissions

## User Settings

1. Right click **My Computer**, go to **Manage**, choose **Local Users and Groups**, and select the **Users** folder.
2. Right click the user defined within the <Username> tags of the AssetManagement.config. (By default, EKT\_ASSET\_USER.) Make sure this user's account is not disabled or locked out.

## Folders Used by Document Management

| Folder       | Set by | Description   |
|--------------|--------|---|
| assetCatalog | User   | Defined by user during installation. The path to this folder can be viewed and changed in the Workarea under <b>Settings &gt; Configuration &gt; Asset Server Setup &gt; Catalog Location</b> . See Also: "The assetCatalog Folder" on page 324 |



| Folder       | Set by                   | Description  |
|--------------|--------------------------|--|
| assetLibrary | User                     | Defined by user during installation. The path to this folder can be viewed and changed in the Workarea under <b>Settings &gt; Configuration &gt; Asset Server Setup &gt; Storage Location</b> . See Also: " <a href="#">The assetLibrary Folder</a> ," on page 325 |
| dmdata       | <b>Ektron CMS400.NET</b> | Defined during <b>Ektron CMS400.NET</b> installation. Located in the AssetManagement folder. See Also: " <a href="#">"</a> ," on page 320  |
| assets       | <b>Ektron CMS400.NET</b> | Defined during <b>Ektron CMS400.NET</b> installation. Located in site root folder.   |

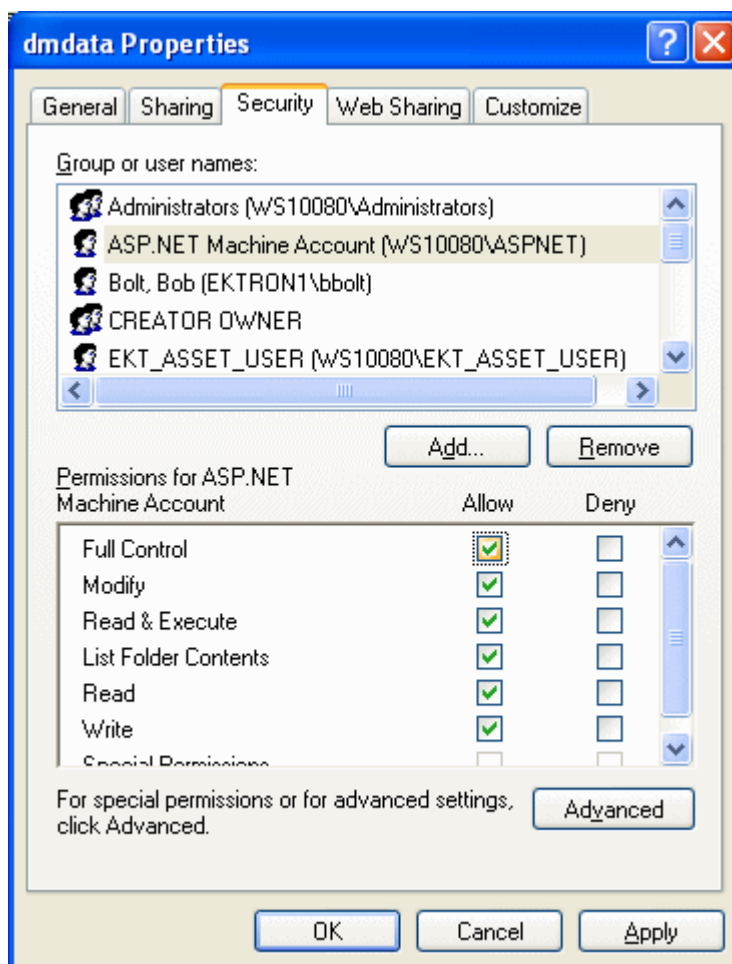
## The Dmdata Folder

The `dmdata` folder has settings for both the File System and IIS.

## Dmdata File System Settings

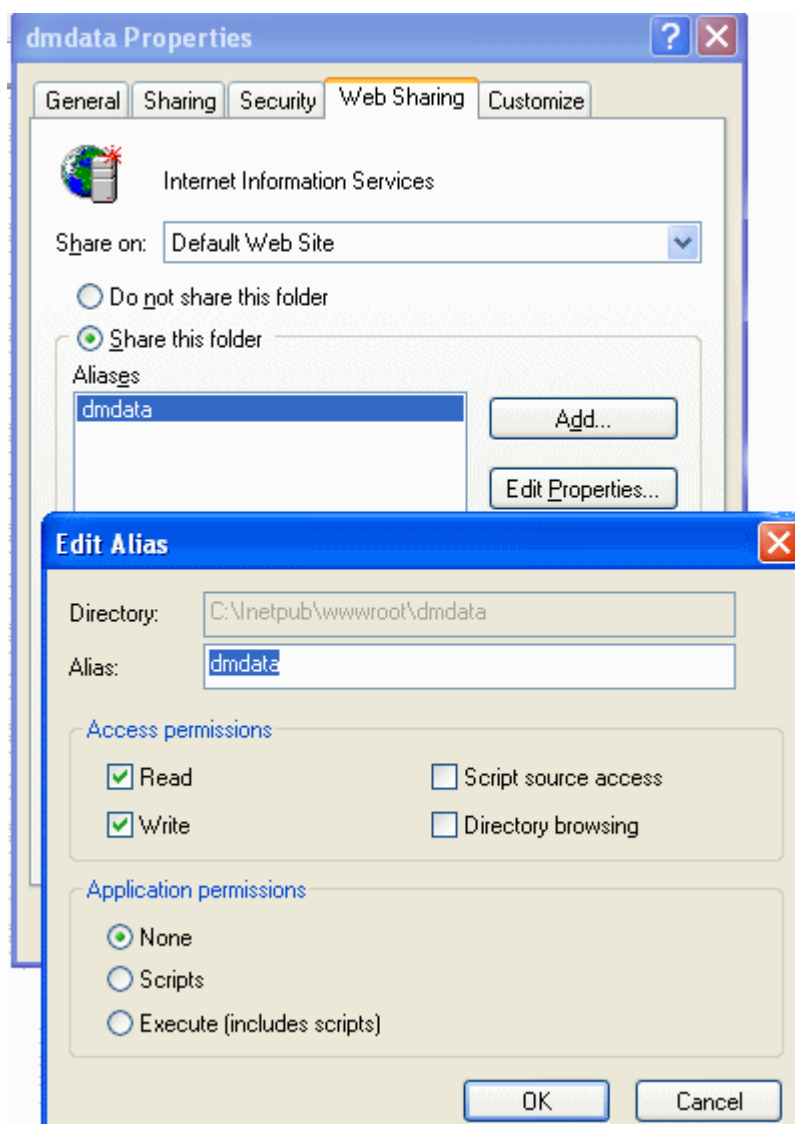
1. Locate the `webroot\siteroot\AssetManagement\dmdata` folder.
2. Right click it and select **Properties**.
3. On the **Security** tab, make sure the user defined in `AssetManagement.config` (the default is `EKT_Asset_User`) has at least write permission. DMS uses the `EKT_Asset_User` to upload files to the server.
4. On the same tab, make sure the `ASPNET` user has full control. DMS uses this user to transfer files to the correct folder, and delete them from the `dmdata` folder after the transfer.





5. On the **Web Sharing** tab, make sure this folder is being shared, and that the correct site is selected from the dropdown menu.
6. Click **Edit Properties**. On this screen, make sure **Read and Write** are checked, and that **Application Permissions** is set to **None**.

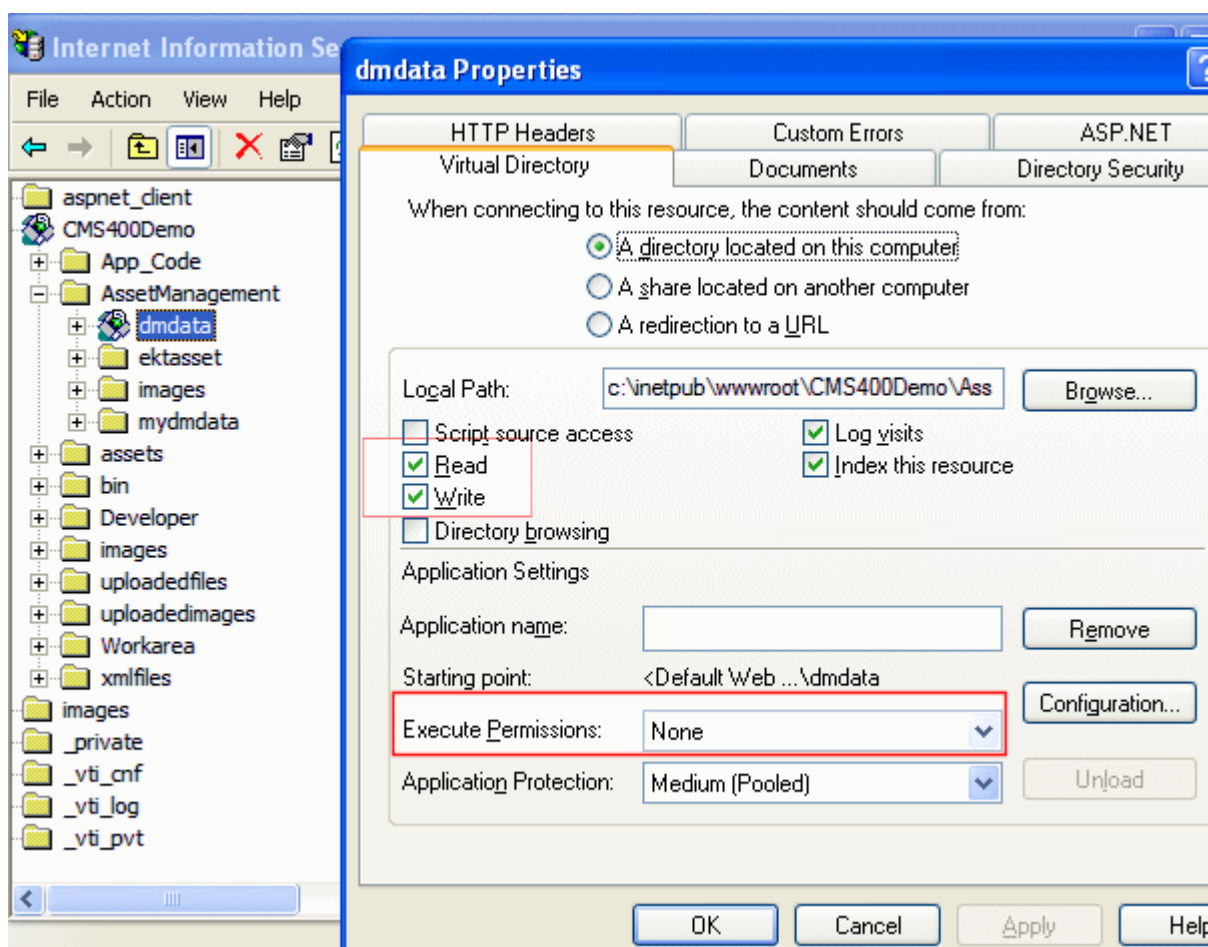




### ***Dmdata Settings within IIS***

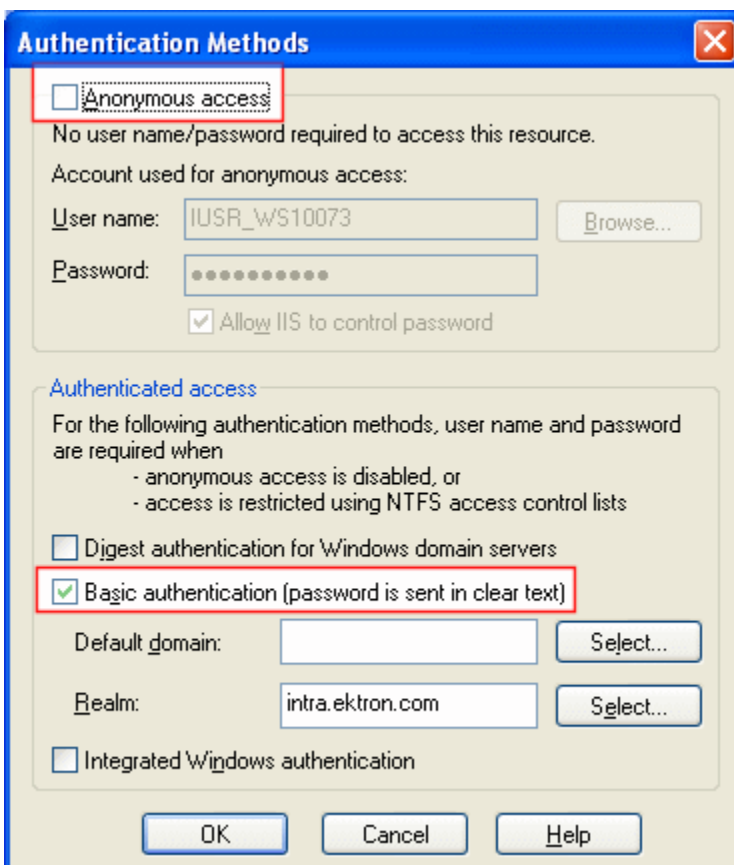
1. Right click the `dmdata` folder and display its **Properties**.
2. On the **Virtual Directory** tab, make sure checkboxes for **read** and **write** are checked. Also, the **Execute Permissions** dropdown must be set to **None**.





3. On the **Directory Security** tab, click the **Edit** button for **Anonymous Access and Authentication Control**. Ensure that **Anonymous Access** for this folder is turned off, and that **Basic Authentication** is turned on.





## The assetCatalog Folder

The Asset Catalog folder contains a hidden file, catalog.wsi, which maintains index files created by the Windows Indexing Service. You can view and update the path to this folder in the Workarea under **Settings > Configuration > Asset Server Setup > Catalog Location**.

The system account must have full control over this folder. The asset catalog is created by the Windows Indexing Service, and the permission noted above is set by default.

If you need to recreate the asset catalog, delete it and create a new one using the Windows Indexing Service Manager. Use the catalog name set in the Ektron CMS400.NET Workarea under **Settings > Configuration > Asset Server Setup > Catalog**



**Name.** The manual creation process is described in ["Setting Up the Indexing Service"](#) on page 345.

## The assetLibrary Folder

The Asset Library folder contains file assets uploaded to and managed by DMS. You can view and update the path to this folder in the Workarea under **Settings > Configuration > Asset Server Setup > Storage Location**.

## Managing Multimedia Assets

Multimedia files contain audio, video, or both. File types include .wav, .mpeg.,avi and .wma.

Because of these unique characteristics, they warrant special treatment within **Ektron CMS400.NET**. This section explains how multimedia files are handled through the following subtopics.

- ["Supported Multimedia Players"](#) on page 325
- ["Multimedia File Types"](#) on page 326
- ["Working with Multimedia Files in Ektron CMS400.NET"](#) on page 328

## Supported Multimedia Players

**Ektron CMS400.NET** supports the following media players.

- WindowsMedia®
- Quicktime®
- Realplayer®
- Flash®

This means that **Ektron CMS400.NET** only supports multimedia files that can run on one of these players. If you import a multimedia file that cannot play on any supported player, it is treated like any other asset but cannot be played within **Ektron CMS400.NET**.



## Downloading Media Players

If a **Ektron CMS400.NET** user within the Workarea, or a site visitor, tries to play a file and no supporting media player exists on the user's computer, the user is prompted to download and install the player.

If the file uses the *Quicktime* or *Flash* media player, the web.config file contains information that prompts the user to immediately download and install the player.

If the file uses the *Realplayer* or *WindowsMedia* media player, the user must go to the host Web site and download them.

## Multimedia File Types

Every multimedia file type has a corresponding MIME type. For example, an mp3 file's MIME Type is audio/mpeg.

All supported MIME types are defined within the `mediasettings` element of the web.config file. That section of the web.config file is reproduced below.

```
<add key="application/x-shockwave-flash" value="Flash" />
<add key="audio/x-wav" value="WindowsMedia, Quicktime, Realplayer" />
<add key="audio/x-wav-default" value="WindowsMedia" />
<add key="audio/x-pn-realaudio" value="WindowsMedia, Quicktime, Realplayer" />
<add key="video/x-avi" value="WindowsMedia, Quicktime, Realplayer" />
<add key="video/x-avi-default" value="Quicktime" />
<add key="video/x-msvideo" value="WindowsMedia, Quicktime"/>
<add key="video/x-msvideo-default" value="WindowsMedia"/>
<add key="audio/x-ms-wma" value="WindowsMedia"/>
<add key="audio/mpeg" value="WindowsMedia, Quicktime"/>
<add key="video/x-realvideo" value="Realplayer"/>
<add key="video/x-ms-wmv" value="WindowsMedia"/>
<add key="audio/x-realaudio" value="Realplayer"/>
<add key="video/quicktime" value="Quicktime"/>
```

**NOTE** A good reference of file and corresponding MIME types is [http://www.w3schools.com/media/media\\_mimeref.asp](http://www.w3schools.com/media/media_mimeref.asp).

To determine if a multimedia file type is supported, go to the Web site listed above to find its MIME type. Then, go to the web.config file section show above to see if the MIME type exists and, if so, the supported media players.

## Adding Players for a MIME Type



You can add to the list of supported media players for any MIME Type. To do so, open the web.config file, find the MIME type, and add the player name within the value element.

Consider this example:

```
<add key="audio/mpeg" value="WindowsMedia"/>
```

As shown, `WindowsMedia` is the only supported player for mp3 files. If you know that other players can run mp3 files, insert additional media players after `WindowsMedia`. To get the exact name of the player, review the `value` elements in web.config file section shown above.

## ***Adding MIME Types***

If you want Ektron CMS400.NET to support additional MIME Types, add them within the `<mediaSettings>` element using the following syntax:

```
<add key="MIME type/subtype" value="supported media player(s)"/>
```

For example

```
<add key="video/x-ms-asf" value="WindowsMedia"/>
```

You must also add the file type to the list of supported file types in the assetmanagement.config file. See Also: ["Allowing File Types" on page 316](#)

## ***Adding a MIME Type's Default Player***

To identify a player as the default for a MIME type, use the following syntax within web.config.

```
<add key="MIME Type/subtype" value="default player"/>
```

For example

```
<add key="video/x-msvideo-default" value="WindowsMedia"/>
```



## Working with Multimedia Files in Ektron CMS400.NET

### Importing Multimedia Files into Ektron CMS400.NET

You import multimedia files into **Ektron CMS400.NET** the same way you import other assets. See the **Ektron CMS400.NET** User Manual chapter “Using the Document Management Functionality,” sections “Working with Managed Files” and “Importing Files via Drag and Drop.”

Once imported into Ektron CMS400.NET, a document proceeds through the same workflow as any other type of content. See [Also: “Setting Approval Chains” on page 695](#)

### Changing Supported Media Players

After a multimedia file is imported into **Ektron CMS400.NET**, you can view supported media players properties on the **Content** tab of the Edit Content screen. All players defined for the file's MIME type are checked. You can uncheck any media players that you do not want to operate a particular file.

**Edit Content in Folder "Bobtest"**

Title: Same Kinda Crazy [Eng]

**Content** | Summary | Metadata | Schedule | Comment | Web

☒ WindowsMedia ☒ Quicktime ☒ Realplayer

**Quicktime**

Width: 100 Height: 100

Autostart: ☒ Loop: ☐

**Real Player**

Center: ☐ NoLogo: ☐

Maintain Aspect: ☐

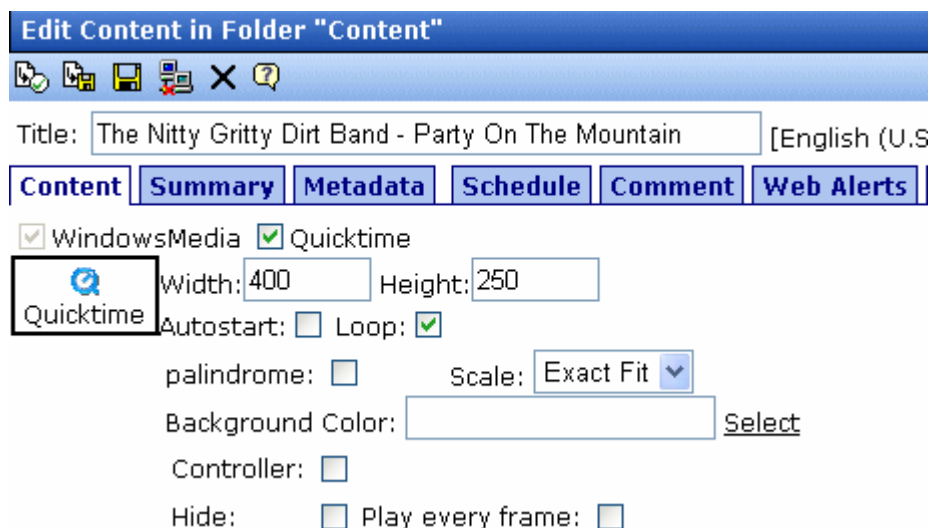
Number of Loops:  Controls: All (Default)



If a default media player is defined for a MIME type in web.config, you cannot uncheck its checkbox. In the above graphic, WindowsMedia is the default player.

## Changing File Properties

After a multimedia file is imported into **Ektron CMS400.NET**, you can edit its properties on the **Content** tab of the Edit Content screen.



Edit Content in Folder "Content"

Title: The Nitty Gritty Dirt Band - Party On The Mountain [English (U.S)]

**Content** Summary Metadata Schedule Comment Web Alerts

☒ WindowsMedia ☒ Quicktime

**Quicktime** Width: 400 Height: 250

Autostart: ☐ Loop: ☒

palindrome: ☐ Scale: Exact Fit

Background Color:  [Select](#)

Controller: ☐

Hide: ☐ Play every frame: ☐

If the file is supported by several players, first check the player whose properties you want to modify, then edit its properties.

The **Width** and **Height** fields determine the size (in pixels) of the media player when it appears in the Workarea and on your Web site. The remaining properties are determined by the media player (QuickTime in the example above).

## Inserting a Multimedia File into Content

To insert a multimedia file into content, follow these steps.



1. Either create a new HTML content item or edit an existing one.
2. Within the content, type text or insert an image that you want site visitors to click to launch the multimedia file. For example: **Click here to begin playing.**
3. Select the image or text you inserted in Step 2.
4. Apply a quicklink to the multimedia file to the selection. This procedure is described in the **Ektron CMS400.NET** User Manual section "Library Folder" > "Quicklinks and Forms."

## Replacing Multimedia Files

If you want to replace a multimedia file but maintain all CMS information about that file (for example, its properties, summary, metadata, etc.), follow these steps.

1. Browse to the multimedia content item and edit it.
2. Note that the bottom of the Edit screen has a gray rectangle with the text **Drag files into this window and drop to add.**

The screenshot shows the 'Edit Content in Folder "Content"' window. The title is 'The Nitty Gritty Dirt Band - Party On The Mountain'. The 'Content' tab is selected, showing a 'Windows Media' icon and a 'Quicktime' checkbox. The 'Width' is 100 and 'Height' is 100. The 'Autostart' checkbox is unchecked, and the 'Loop' checkbox is checked. The 'ContextMenu' is enabled, and the 'PlayCount' is 9999. The 'fullScreen' checkbox is checked, and the 'windowlessVideo' checkbox is unchecked. The 'uiMode' is set to 'none'. At the bottom, there is a gray rectangle with the text 'Drag files into this window and drop to add'.



3. Open Windows Explorer and navigate to the folder that contains the updated multimedia file.
4. Drag and drop the file into the lower section of the Edit Content screen.
5. Save, Check In, or Approve the content.

Note that after you complete the replacement, you can play and restore older versions of the file through the content's history. For more information, see the **Ektron CMS400.NET** User Manual chapter "Viewing and Restoring Previous Content."

## ***Viewing and Listening to Multimedia Files***

Users in the Workarea and visitors to your Web site play interact with multimedia files in the same way.

When either type of user visits a page that hosts a multimedia file, **Ektron CMS400.NET** tries to match media players on the user's computer with those defined in the web.config file for the file's MIME type. **Ektron CMS400.NET** then displays a list of choices for every supported media player for the file. The user selects the preferred one.

## ***Modifying Style Properties of the Multimedia Player***

You can change the multimedia player's style properties by modifying the EKTTab.css style sheet. This file is installed to site folder/Workarea/csslib.

For example, you can change the color of the text that selects a player to red by changing the property highlighted below.

```
.EktTabActive
{
    padding: 2px 2px 2px 2px;

    top:10px;

    text-decoration:none;
```



```
position: relative;

background-color:white;

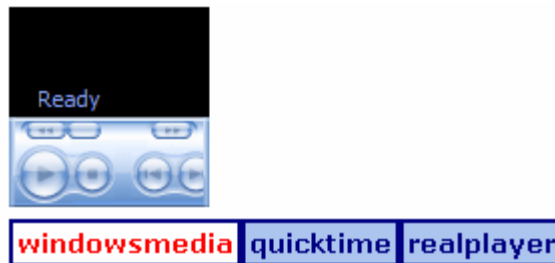
border: solid thin navy;

color:Red;

font-weight:bolder;

}
```

Here is the result.



## PDF Generation

PDF (Portable Document Format) is a type of file developed as a means of distributing compact, platform-independent documents. Each document is self-contained, packing text, graphics, and fonts into a file.

Office documents stored in **Ektron CMS400.NET** can be automatically converted to PDF format. Then, when adding the Office document to a Web page, a visitor sees the PDF version of the document.

### Why use PDF?

- Files easily cross multiple platforms, including Microsoft, Apple, Linux, and Unix.
- Documents keep their formatting and appear the same on a computer screen or when printing.



- File size is typically smaller, which means less bandwidth usage.
- Free viewing application that allows any Office documents, once converted, to be viewed by anyone with a PDF viewer.
- Eliminates the need for a different viewer for each file type.

The following sections explain creating PDFs with the Document Management feature:

- ["PDF Conversion Process" on page 333](#)
- ["Local PDF Generation" on page 335](#)
- ["Enabling or Disabling PDF Generation" on page 335](#)
- ["Designating a Folder to Generate PDFs Automatically" on page 336](#)

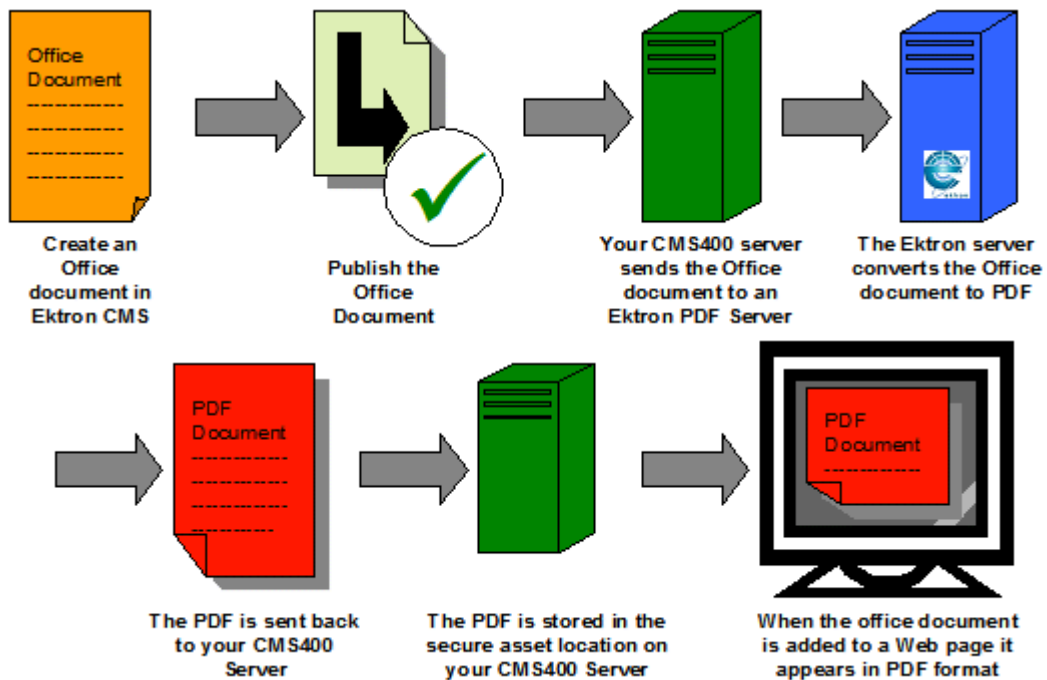
## PDF Conversion Process

The PDF conversion of an Office document starts when it is published. At that point, a copy of the file is sent to an Ektron server for PDF generation. After the server generates the PDF, it returns the PDF to your Document Management server.

When the PDF returns, it doesn't appear in the CMS400.NET Workarea -- only the originally-published Office document appears. The Ektron CMS400.NET stores the PDF file in a secure location.



Subsequent editing is done in the original Office document. Each time it's published, a new PDF is generated.



Once the Office document is added to a Web page, the Web page shows the PDF version of the it. This means visitors of the site only need a PDF viewer to view any Office document on your site.

The Ektron Windows Service runs the background process that converts Office documents to PDF. See Also: ["Ektron Windows Service" on page 893](#)

See Also:

- ["Local PDF Generation" on page 335](#)
- ["Enabling or Disabling PDF Generation" on page 335](#)
- ["Designating a Folder to Generate PDFs Automatically" on page 336](#)



## Local PDF Generation

If you purchase software from a PDF generation software vendor, you can create PDF documents on a local network. Reasons for generating a PDF locally include:

- Speed: Office documents take less time to be converted to PDF format
- Security: Office documents never leave the local network
- Quality: You can configure the output quality of the Office documents

The following sections explain setting up local PDF generation.

### ***Modifying the PdfGenerator Information in AssetManagement.config***

When setting up local PDF generation, use the `PdfGenerator` parameter in the `AssetManagement.Config` file to provide the location of the local PDF generator.

To modify the file, follow these steps.

1. Open the `AssetManagement.Config` file located in your site root folder.
2. Change the location of the PDF generator.

For example:

```
PdfGenerator="http://aspnet20.ektron.com/PdfManager/PdfGeneratorService.aspx"
```

might become

```
PdfGenerator="http://localhost/PdfManager/PdfGeneratorService.aspx"
```


3. **Save and Close** the file.

## Enabling or Disabling PDF Generation

Administrators decide if this feature is enabled and to which folders it applies. After enabling this feature, administrators can change any folder's properties to allow PDF generation.

Follow these steps to enable or disable this feature.



1. In the CMS Workarea, click **Settings > Configuration > Setup**.
2. Click the **Edit Properties** button (.
3. Click the **Enable Office documents to be published as PDF** checkbox.

**Publish as PDF:**

☒ **Enable Office documents to be published as PDF**



4. Click the **Save** button (.

## Designating a Folder to Generate PDFs Automatically

By setting a folder's properties to allow PDF generation, all Office documents published in that folder have a PDF created for them. For an introduction to PDF generation, see ["PDF Generation" on page 332](#).

The steps below explain how to change the folder property for PDF generation.

**NOTE** Existing subfolders do not inherit PDF generation. Each subfolder needs to be set individually. However, a new subfolder inherits the PDF generation setting from its parent folder. Administrators can change the setting while creating a new subfolder.

1. In the Workarea, click the **Content folder button**.
2. Click the folder for which you want to enable PDF generation.
3. Click the **View Properties** button (.
4. Click the **Edit Properties** button (.
5. Click the **Publish Office Documents as PDF** checkbox.

**Should Office documents added to this folder be published as PDF?**

☒ **Publish Office documents as PDF**

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



---

## Adding Assets Automatically

The Auto Add Asset feature automatically transfers assets placed in a specified folder into **Ektron CMS400.NET**.

It's a very helpful feature if, for example, several users work with assets, you want to manage the files with **Ektron CMS400.NET**, but the users creating or updating the files have neither **Ektron CMS400.NET** licenses nor the client software installed. The users simply place the files in a folder, and the Auto Add Asset feature moves them into **Ektron CMS400.NET**.

The Auto Add Asset feature is very flexible. While setting it up, you can determine the following aspects of how it works.

- whether it uploads a single file, multiple files, a folder, or a folder and its subfolders
- the location of the uploaded files
- if subfolders are included, do you want to mirror that structure within **Ektron CMS400.NET**?
- the file types that can be uploaded
- how frequently the specified files or folders are checked for new content

The rest of this section explains the details of using the Auto Add Asset feature through the following topics.

- "Installing the Auto Add Asset Feature" on page 337
- "Updating the Configuration File" on page 338
- "Start the Auto Add Asset Service" on page 342
- "Testing the Auto Add Asset Feature" on page 343

### Installing the Auto Add Asset Feature

Follow these steps to install the Auto Add Asset Feature.

1. Verify that **Ektron CMS400.NET** is running basic authentication in IIS. For information on how to do this, see <http://www.microsoft.com/technet/prodtechnol/WindowsServer2003/Library/IIS/abbca505-6f63-4267-aac1-1ea89d861eb4.mspx?mfr=true>.



2. Create the following directories in the file system of the computer that will be used to transfer the files to CMS400.
  - **Input** - place files in this directory before uploading them to **Ektron CMS400.NET**
  - **Backup** - files are moved to this directory after they are uploaded to **Ektron CMS400.NET**
  - **Error** - files are moved to this directory if there was a problem moving them to the `input` folder
3. To each computer that will run the Auto Add Asset Feature, copy the `C:\Program Files\Ektron\CMS400versionnumber\Utilities\AssetWorkerSetup.msi` file and run it.  
 This program creates a new folder, `C:\Program Files\Ektron\AssetWorkerSetup`.
4. Test that the Web Services are working. To do that, browse to the following page:  
<http://localhost/cms400min/workarea/webservices/assetservice.asmx>

**NOTE** Replace **localhost** with your server name.

The page displays two Web services: **AddAsset** and **MakeFolderIfNoExists**.

## Updating the Configuration File

After installing the Auto Add Asset feature, you can modify the configuration file, which lets you customize the feature to fit your particular needs.

The file's name and folder path is `C:\Program Files\Ektron\AssetWorkerSetup\maindata.config`. The following table describes its elements.

| Element     | Description  |
|-------------|--|
| DmsUserName | The user created during the install. If you let <b>Ektron CMS400.NET</b> install create the user, the default is EKT_ASSET_USER. |



| Element       | Description   |
|---------------|---|
| DmsPassword   | The password for the user created during the install. This password is encrypted during the install. If you are changing the user and need to encrypt a new password, use the <code>dms400encryptpassword.exe</code> encryption tool located in <code>C:\Program Files\Ektron\CMS400versionnumber\Utilities\DMS</code> .  |
| DmsUserDomain | The domain for the user created during the install.   |
| DmsServer     | The name of the server on which DMS is running.   |
| CmsUserName   | By default, <b>Ektron CMS400.NET</b> inserts the user name <b>vs</b> . This is a special user that lets you work in Visual Studio.net while signing into CMS as an administrator.<br><br><u>Note: "Securing Ektron CMS400.NET," on page i advises you to remove the VS user. If you do, you must create a new user, assign him to the Administrators groups, and enter his username and password in these fields.</u> |
| CmsPassword   | By default, <b>Ektron CMS400.NET</b> inserts the password of the VS user. If you change the VS user's password, or change the CMS UserName, enter the new password here.<br><br><u>Note: "Securing Ektron CMS400.NET," on page i advises you to remove the VS user. If you do, you must create a new user, assign him to the Administrators groups, and enter his username and password in these fields.</u>          |
| CmsUserDomain | Enter the Domain Name, IP Address or Machine Name. An example is <code>localhost</code> .<br>A Web client system uses this address to open managed documents through HTTP.  |
| Protocol      | Enter the protocol used to transfer the assets: <code>http</code> or <code>https</code> .   |
| CmsSite       | Enter the path to your Web site root. For example, the sample site's root is <code>http://localhost/CMS400min</code> .  |
| DmsSite       | Enter the path to your Asset Management folder. For example, the sample site's Asset Management folder is <code>http://localhost/CMS400min/AssetManagement</code> .   |



| Element  | Description   |
|--|---|
| ConfigType   | <p>Enter the type of file upload you want. Choices are:</p> <ul style="list-style-type: none"> <li>• file</li> <li>• multifile</li> <li>• folder</li> <li>• autofile</li> <li>• autofolder</li> <li>• autofoldercreate</li> <li>• multifolder</li> <li>• automultifolder</li> <li>• automultifoldercreate</li> </ul> <p>These choices are explained in <a href="#">"File Upload Types" on page 341</a>.</p>       |
| Folder: <ul style="list-style-type: none"> <li>• Input</li> <li>• Backup</li> <li>• Error</li> </ul> | <p>Enter paths to the folders you created in Step 2 of <a href="#">"Installing the Auto Add Asset Feature" on page 337</a>. An example is below.</p> <pre>&lt;Input&gt;C:\Test\Input&lt;/Input&gt; &lt;Backup&gt;C:\Test\Backup&lt;/Backup&gt; &lt;Error&gt;C:\Test\Error&lt;/Error&gt;</pre>   |
| MultiFolder  | <p>If your choice at the ConfigType element is listed below, use this element to specify the folders.</p> <ul style="list-style-type: none"> <li>• multifolder</li> <li>• automultifolder</li> <li>• automultifoldercreate</li> </ul> <p>Separate each folder with the pipe character ( ). Here is an example.</p> <pre>C:\AutoAddAsset\InputPhotos C:\AutoAddAsset\InputWorddocs C:\AutoAddAsset\InputPDFs</pre> |
| CreateFolder   |   |



| Element   | Description  |
|-----------|--|
| FileTypes | <p>Enter all file types that can be added using the Auto Add Asset feature.</p> <p>To identify a file type, enter an asterisk(*), a period (.) and the file's extension. Separate each file type with a comma. Here is the sample list that appears by default:</p> <pre>*.doc,*.xls,*.ppt,*.pdf,*.gif,*.jpg,*.jpeg,*.txt,*.log,*.vsd,*.dot,*.zip</pre> <p><a href="#">Note: The FileTypes field in the Assetmanagement.config file determines which files can be used within Ektron CMS400.NET. You should not enter file types here that are not listed in AssetManagement.config. See Also: "Allowing File Types" on page 316</a></p> |

### File Upload Types

There are nine methods for uploading files from the input folder into **Ektron CMS400.NET**. The following table explains the options and how each works.

| File Upload Type | What is uploaded                              | If folder, are subfolders also scanned for assets? | Are new files uploaded automatically? | CMS folder structure set up to match your file system? |
|------------------|---|--|---------------------------------------|--|
| File             | One file                                      | na   | no                                    | no   |
| Multifile        | Multiple individual files separated by a pipe | na   | no                                    | no   |
| Folder           | One folder                                    | no   | no                                    | no   |
| Autofile         | One folder                                    | no   | yes                                   | no   |



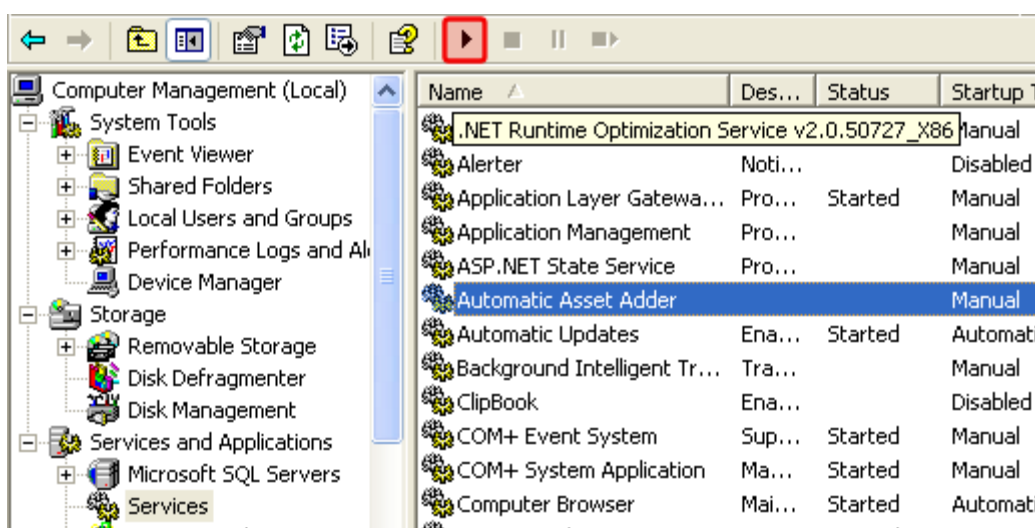
| File Upload Type      | What is uploaded  | If folder, are subfolders also scanned for assets? | Are new files uploaded automatically? | CMS folder structure set up to match your file system?                              |
|-----------------------|---|--|---------------------------------------|---|
| Multifolder           | All specified folders<br><br><u>Note: Specify the folders at the Multifolder element. See "MultiFolder" on page 340</u>           | yes  | yes                                   | no  |
| Autofolder            | All files in specified folder   | yes  | yes                                   | no  |
| Autofoldercreate      | All files in specified folder   | yes  | yes                                   | yes   |
| Automultifolder       | All files all specified folders<br><br><u>Note: Specify the folders at the Multifolder element. See "MultiFolder" on page 340</u> | yes  | yes                                   | no  |
| Automultifoldercreate | All files all specified folders<br><br><u>Note: Specify the folders at the Multifolder element. See "MultiFolder" on page 340</u> | yes  | yes                                   | Yes<br><br><u>Note: Changes to files already uploaded are considered new assets</u> |

## Start the Auto Add Asset Service

The Auto Add Asset feature uses a Windows Service to transfer assets to **Ektron CMS400.NET**. You must begin the service manually every time you start Windows. Follow these steps to start the Auto Add Asset Service.



1. Go to Windows **Control Panel** > **Administrative Tools** > **Computer Management**.
2. Click **Services and Applications** > **Services**.
3. Click the start button (circled below) to start the Automatic Asset Adder service.



## Testing the Auto Add Asset Feature

After completing the above steps, you should verify that the Auto Add Asset feature is working. To do this, follow these steps.

1. Place files of the appropriate type into the specified input folder
2. Open `C:\Program Files\Ektron\AssetWorkerSetup\AssetWorker.exe.config` with a text editor such as Notepad.
3. Change the value of the `PollInterval` element to 10000. Save and close the file.
4. The input folders will be checked for files every 10 seconds. They should appear within the **Ektron CMS400.NET** shortly.



## Troubleshooting

This section explains how to fix problems that may occur with **Ektron CMS400.NET** assets.

| Symptom  | See this section   |
|--|--|
| Error message: Install Indexing Service  | <a href="#">"Setting Up the Indexing Service" on page 345</a>  |
| A search of asset files finds no assets on your Web site   | <a href="#">"Turning on the Asset Indexing Service" on page 358</a>  |
| The server running <b>Ektron CMS400.NET</b> is running slowly; much of its resources are being used even though the computer is idle         | <a href="#">"Disabling the System Indexing Service" on page 353</a>  |
| Error message after trying to upload documents: <b>Failed with error - 2147217911</b>  | <a href="#">"Removing aspnet_isapi.dll from the List of Wildcard Application Maps" on page 356</a>   |
| Error message: Windows Server 2003 no longer ships MSDAIPP.DLL, thus connecting to an FPSE server through Webfolders, is no longer possible. | <a href="#">"Using Microsoft Windows Server 2003 as a Client (Web Folders Setup)" on page 359</a>  |
| While trying to drag and drop an asset, an error message appears: <b>The target directory already exists.</b>                                | Check the <code>impersonate</code> element of the <code>web.config</code> file. If it is set to <code>true</code> , make sure the anonymous access account has at least write access to the <code>dmdata</code> and <code>assets</code> directories. |
| When you try to publish DMS documents, <b>Ektron CMS400.NET</b> sometimes does not allow them to update.                                     | Make sure your production server is not running Windows XP. You cannot use XP as a production server for DMS.  |



| Symptom   | See this section   |
|---|--|
| <p>After recently moving the ASM database to a new SQL server that has never hosted an ASM database, the following error appears while adding a DMS asset:</p> <p>AssetManagement error: Failed to save asset. Internal Message: RAISERROR could not locate entry for error 2000000002 in sysmessages. at Ektron.ASM.Documents.Asset.Create(en AssetStatus state) at ... ..</p> | <p>"ERRMSG: AssetManagement error: Failed to save asset" on page 362</p> |

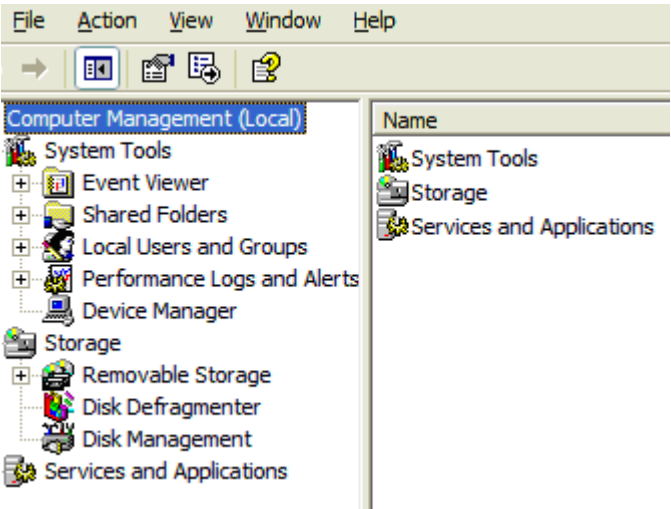

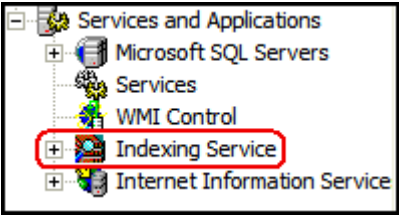
## Setting Up the Indexing Service

If you see the following error during installation, you need to set up the indexing service manually.

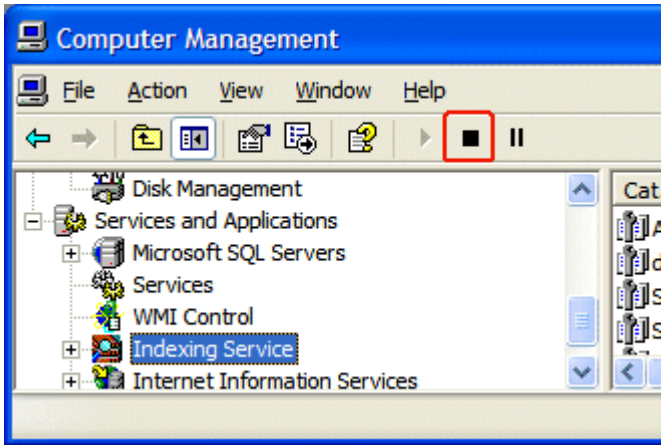
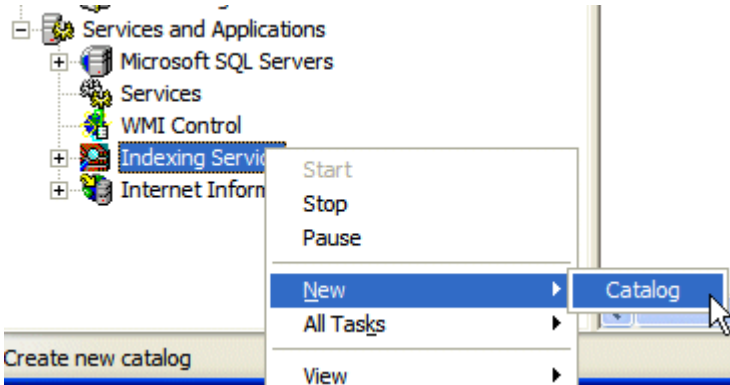
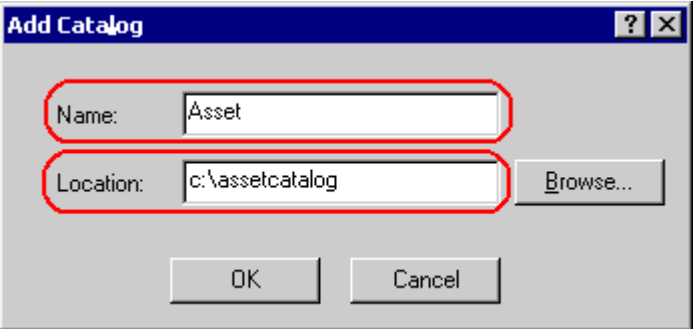


The following steps explain how to do that.

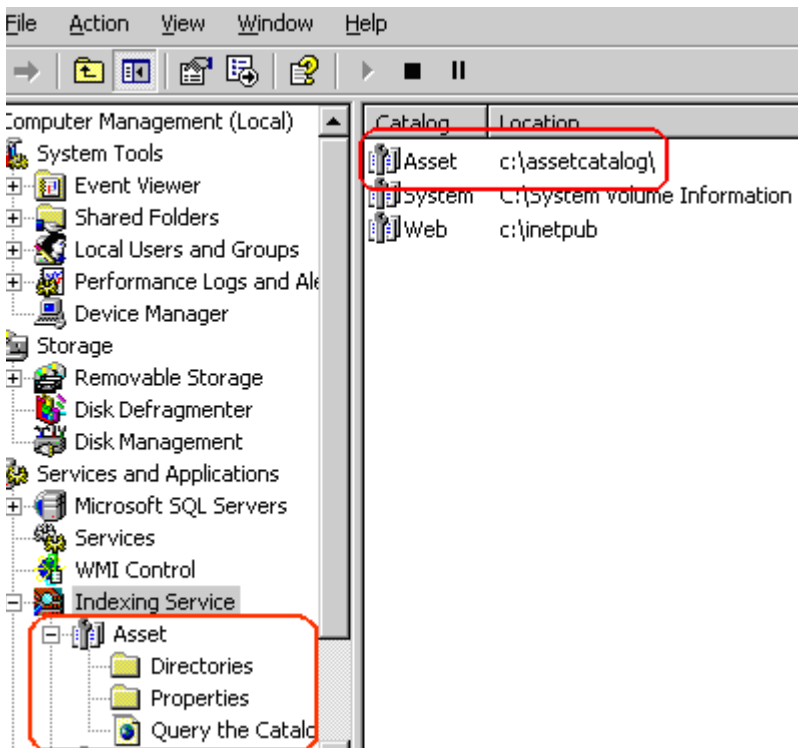
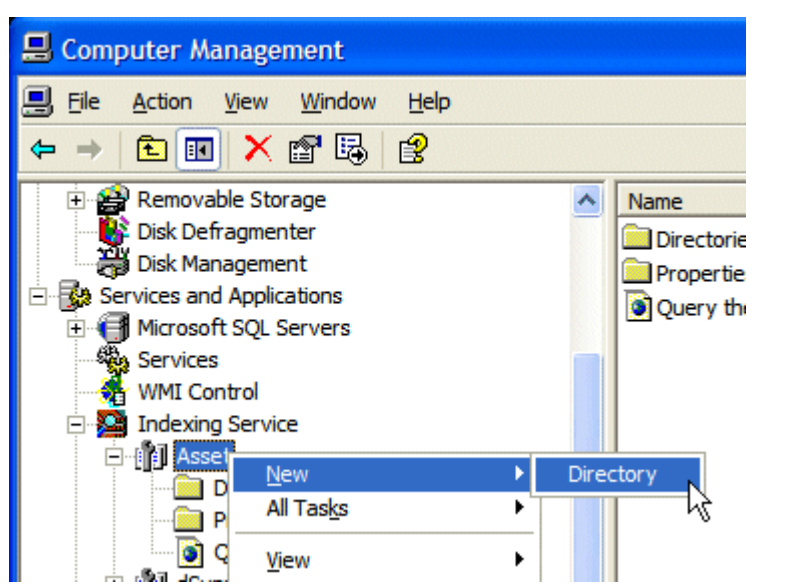


| Step   | Screen  |
|--|---|
| <p>1. Click <b>Start &gt; Control Panel &gt; Administrative Tools &gt; Computer Management</b>.</p> <p>The Computer Management screen appears.</p> |   |
| <p>2. Click the plus sign (+) next to <b>Services and Applications</b>.</p>  |   |
| <p>3. Click <b>Indexing Service</b>.</p>   |  |

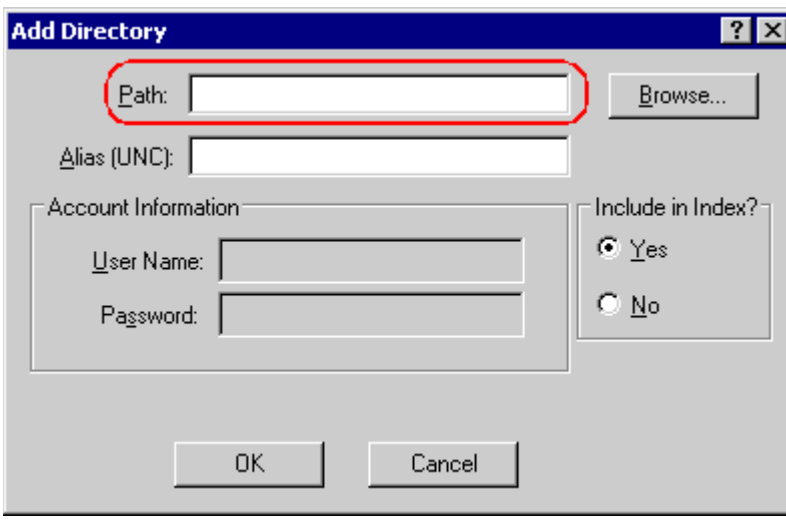
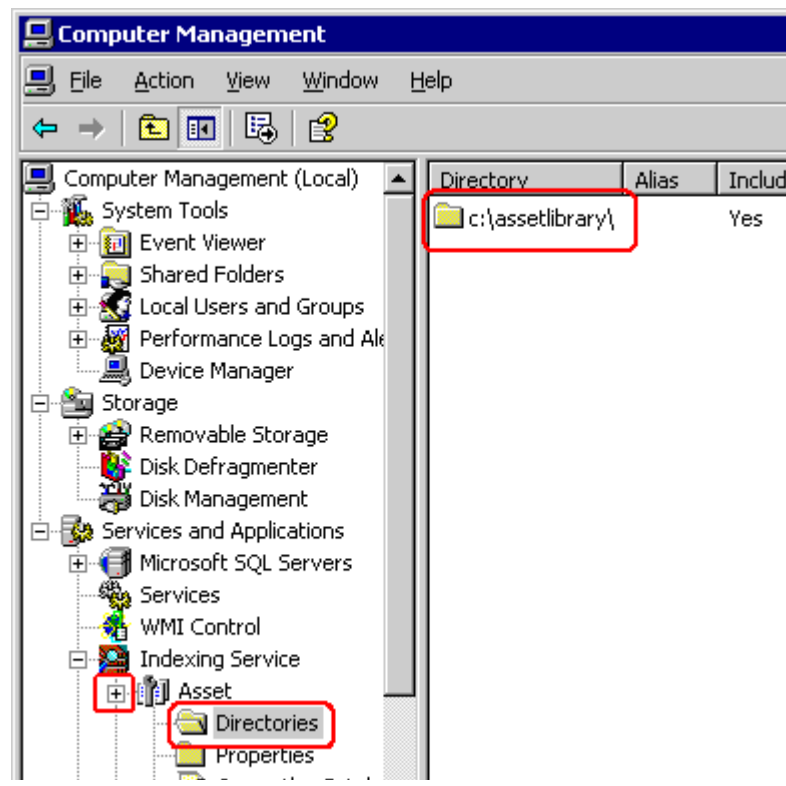


| Step  | Screen   |
|---|--|
| <p>4. Click the stop button to halt the indexing service if it is running.</p> <p><u>Note: If the Index service is running, the start button is grayed out.</u></p>   |    |
| <p>5. Right click <b>Indexing Service</b>, then click <b>New &gt; Catalog</b>.</p>  |   |
| <p>6. At the Add Catalog Screen:</p> <ul style="list-style-type: none"> <li>• In the <b>Name</b> field, add the catalog name.</li> <li>• In the <b>Location</b> field, identify the folder that will store the asset catalog.</li> </ul> <p><u>Note: By default, during installation, Ektron CMS400.NET names the catalog <b>Asset</b> and associates it with the location <code>c:\assetcatalog</code>. The installer can change the default location.</u></p> |  |

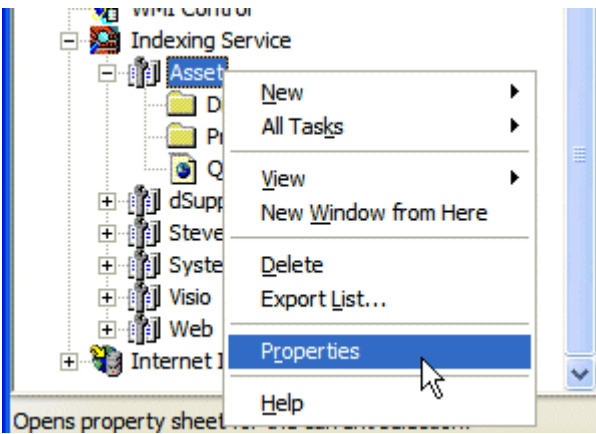
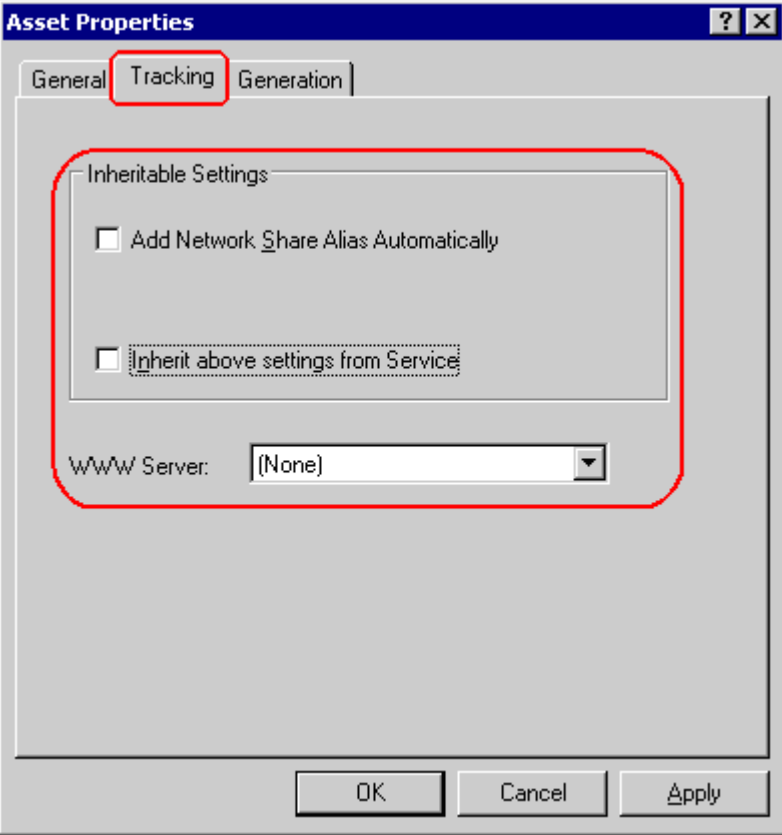


| Step  | Screen   |         |          |       |                  |        |                              |     |            |
|---|--|---------|----------|-------|------------------|--------|------------------------------|-----|------------|
| <p>7. Click <b>OK</b>.</p> <p>The Computer Management screen shows your new Indexing Service.</p>                                       |  <p>The screenshot shows the Computer Management console. In the left-hand tree view, the 'Indexing Service' is expanded, and the 'Asset' folder is selected. In the right-hand pane, a table lists the assets:</p> <table border="1"> <thead> <tr> <th>Catalog</th> <th>Location</th> </tr> </thead> <tbody> <tr> <td>Asset</td> <td>c:\assetcatalog\</td> </tr> <tr> <td>System</td> <td>C:\system volume Information</td> </tr> <tr> <td>Web</td> <td>c:\inetpub</td> </tr> </tbody> </table> | Catalog | Location | Asset | c:\assetcatalog\ | System | C:\system volume Information | Web | c:\inetpub |
| Catalog   | Location   |         |          |       |                  |        |                              |     |            |
| Asset   | c:\assetcatalog\   |         |          |       |                  |        |                              |     |            |
| System  | C:\system volume Information   |         |          |       |                  |        |                              |     |            |
| Web   | c:\inetpub   |         |          |       |                  |        |                              |     |            |
| <p>8. Right click the <b>Asset</b> catalog, then click <b>New &gt; Directory</b>.</p> <p>This is the directory the service indexes.</p> |  <p>The screenshot shows the Computer Management console with the 'Asset' folder selected in the left-hand tree view. A right-click context menu is open, and the 'New &gt; Directory' option is highlighted. The right-hand pane shows a list of items: 'Directory', 'Propertie', and 'Query th'.</p>   |         |          |       |                  |        |                              |     |            |

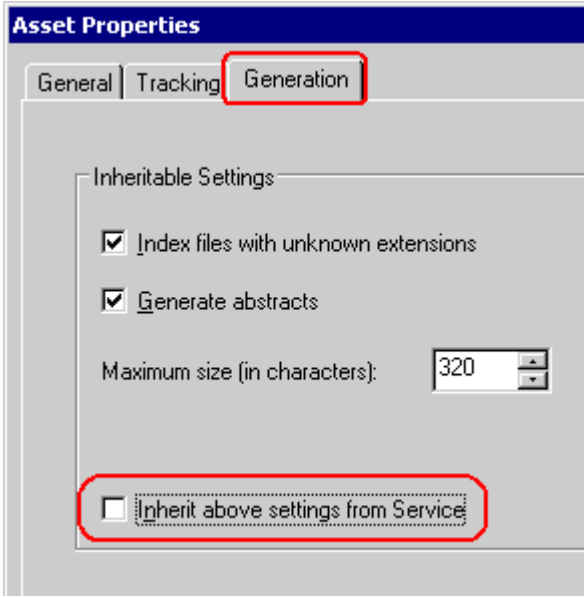
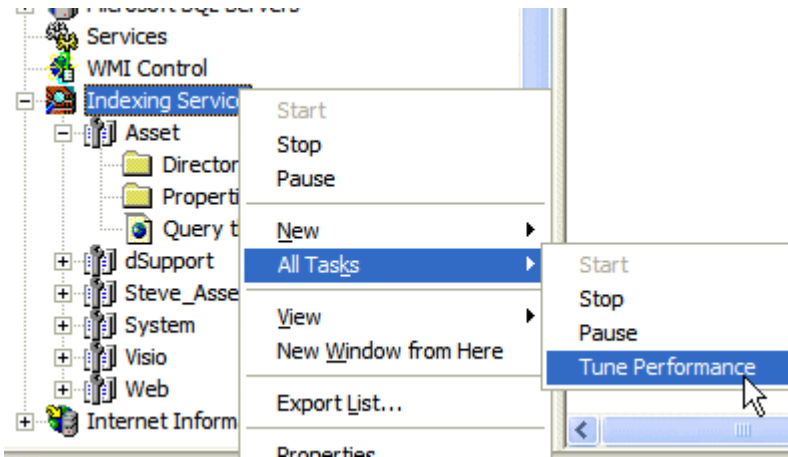


| Step   | Screen   |
|--|--|
| <p>9. In the <b>Path</b> text box, add the folder of the secure storage location. Make sure the <b>Include in Index</b> radio button is marked <b>Yes</b>.</p> <p><u>Note:</u> By default, during installation, Ektron CMS400.NET uses <code>c:\(Domain Name, IP Address or Machine Name)\assetlibrary</code>.</p> |  <p>The 'Add Directory' dialog box is shown. The 'Path' text box is highlighted with a red rectangle. The 'Alias (UNC)' text box is empty. The 'Account Information' section has 'User Name' and 'Password' text boxes. The 'Include in Index?' section has two radio buttons: 'Yes' (selected) and 'No'. The 'OK' and 'Cancel' buttons are at the bottom.</p> |
| <p>10. Click <b>OK</b>. Then, click the plus sign (+) next to <b>Asset</b> to view the Directories folder.</p> <p>In the Directories folder, the new directory is displayed.</p>   |  <p>The 'Computer Management' console is shown. The 'Asset' folder is expanded, and the 'Directories' folder is highlighted with a red rectangle. The 'Directories' folder contains a new directory entry with the path 'c:\assetlibrary\' and the 'Include' column set to 'Yes'.</p>   |

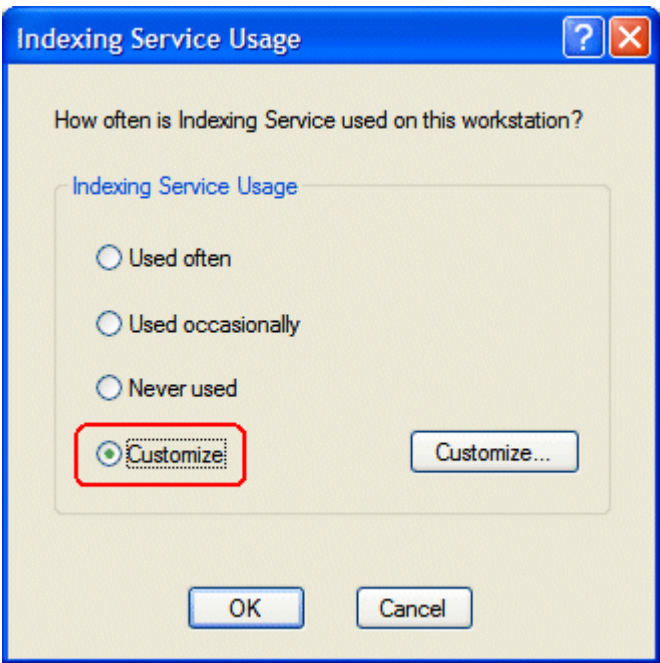
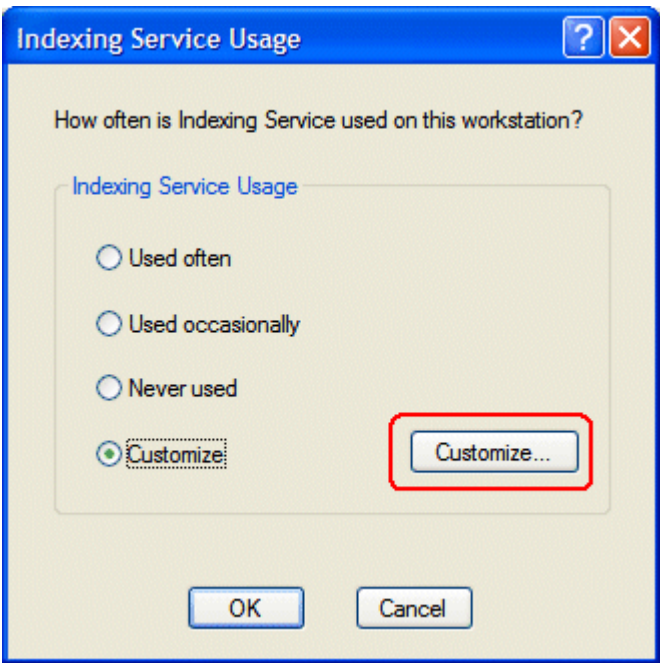


| Step   | Screen   |
|--|--|
| 11. Right click <b>Assets</b> , then click <b>Properties</b> .                                   |  <p>Opens property sheet</p> |
| 12. On the <b>Tracking</b> tab, uncheck all boxes and choose <b>None</b> for <b>WWW Server</b> . |                             |

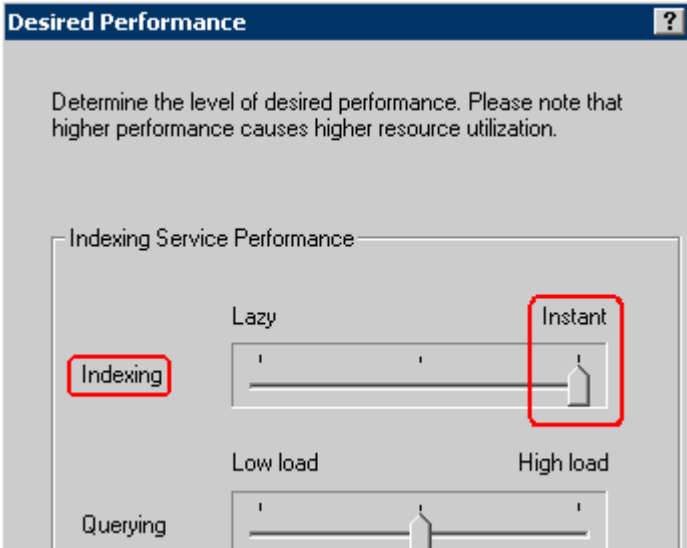
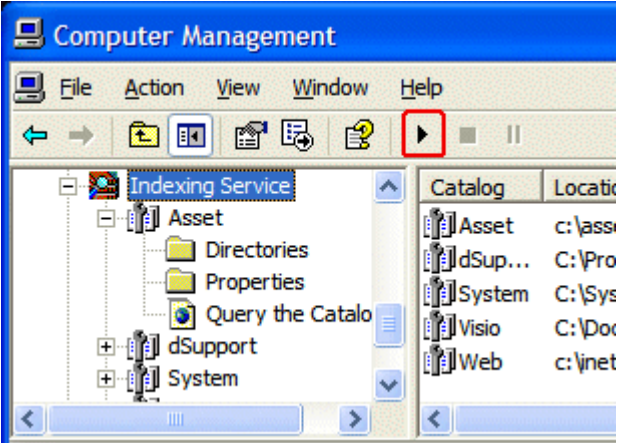


| Step   | Screen  |
|--|---|
| <p>13. On the <b>Generation</b> tab, uncheck <b>Inherit above settings from Service</b>. Then click <b>OK</b>.</p> <p>The <b>Index files with unknown extensions</b> and <b>Generate abstracts</b> check boxes can be checked or empty. It is your choice.</p> |  <p>The screenshot shows the 'Asset Properties' dialog box with the 'Generation' tab selected. The 'Inherit above settings from Service' checkbox is unchecked and highlighted with a red rectangle. Other settings include 'Index files with unknown extensions' and 'Generate abstracts' checked, and 'Maximum size (in characters):' set to 320.</p>   |
| <p>14. Right click <b>Indexing Service</b>, then click <b>All Tasks &gt; Tune Performance</b>.</p>   |  <p>The screenshot shows the Windows Services console with the 'Indexing Service' selected. A right-click context menu is open, showing options like 'Start', 'Stop', 'Pause', 'New', 'All Tasks', 'View', 'New Window from Here', 'Export List...', and 'Properties'. The 'All Tasks' option is expanded, showing a sub-menu with 'Start', 'Stop', 'Pause', and 'Tune Performance'. The 'Tune Performance' option is highlighted by the mouse cursor.</p> |



| Step   | Screen  |
|--|---|
| 15. Click the <b>Customize</b> radio button. |  The screenshot shows the 'Indexing Service Usage' dialog box. It has a blue title bar with a question mark and a close button. The main text asks 'How often is Indexing Service used on this workstation?'. Below this is a group box titled 'Indexing Service Usage' containing four radio buttons: 'Used often', 'Used occasionally', 'Never used', and 'Customize'. The 'Customize' radio button is selected and highlighted with a red rectangle. To the right of the radio buttons is a 'Customize...' button. At the bottom are 'OK' and 'Cancel' buttons.        |
| 16. Click the <b>Customize</b> button.       |  The screenshot shows the 'Indexing Service Usage' dialog box. It has a blue title bar with a question mark and a close button. The main text asks 'How often is Indexing Service used on this workstation?'. Below this is a group box titled 'Indexing Service Usage' containing four radio buttons: 'Used often', 'Used occasionally', 'Never used', and 'Customize'. The 'Customize' radio button is selected. To the right of the radio buttons is a 'Customize...' button, which is highlighted with a red rectangle. At the bottom are 'OK' and 'Cancel' buttons. |



| Step  | Screen  |
|---|---|
| 17. Change <b>Indexing</b> to <b>Instant</b> .                      |   |
| 18. Click <b>OK</b> and <b>OK</b> again to close both dialog boxes. |   |
| 19. Click the <b>Start</b> button to start the service again.       |  |

## Disabling the System Indexing Service

### Symptom

The server running **Ektron CMS400.NET** is running slowly; much of its resources are being used even when the computer is idle.



## Cause

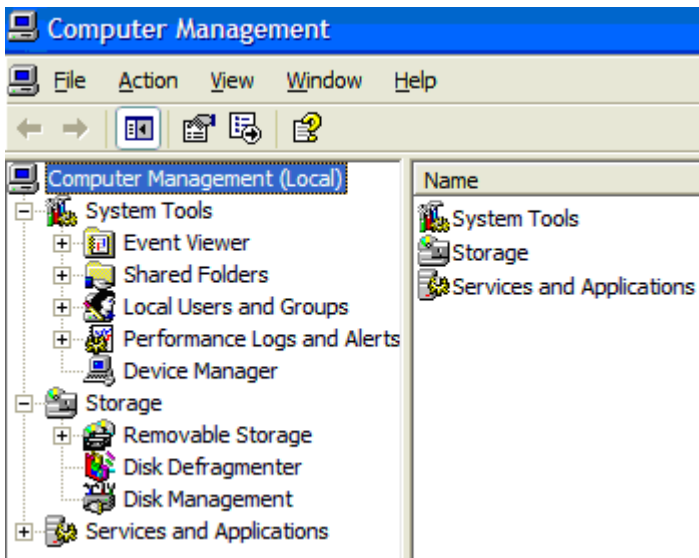
The Microsoft Windows Indexing service is turned on during installation. This service indexes every file on the server, and the resources required to carry out that task slow down other activities.

## NOTE

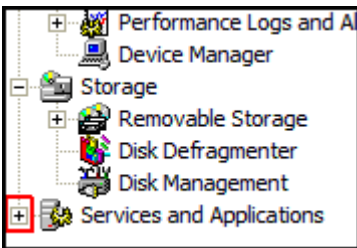
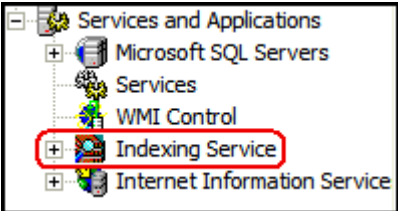
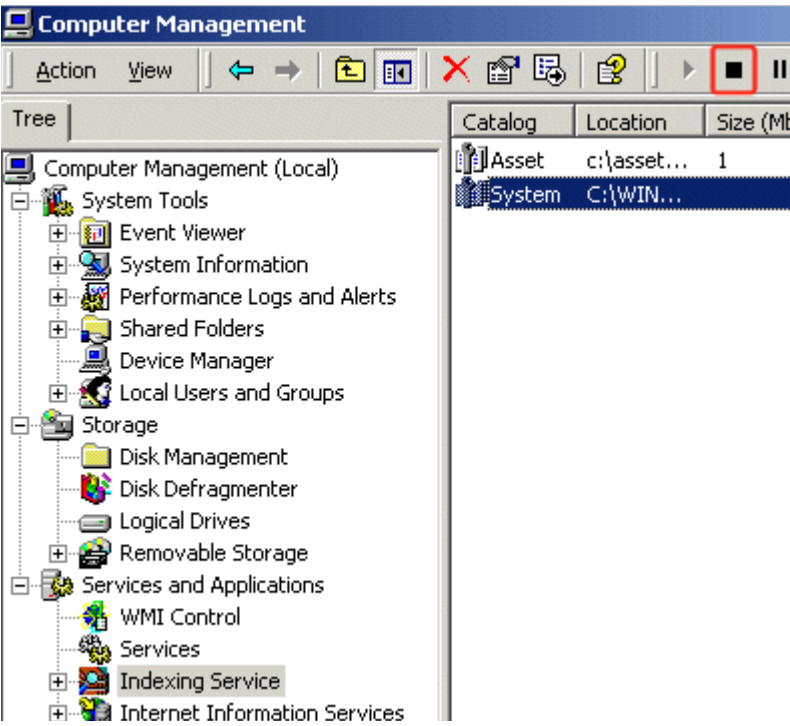
Ektron recommends turning off *all* indexing services other than the DMS Asset indexing service.

## Resolution

Follow these steps to disable the Windows indexing service. This change does not affect DMS's ability to find files because it uses a different indexing service.

| Step  | Screen  |
|---|---|
| <p>1. Click <b>Start &gt; Control Panel &gt; Administrative Tools &gt; Computer Management</b>.<br/>The Computer Management screen appears.</p> |  |



| Step  | Screen  |
|---|---|
| 2. Click the plus sign (+) next to <b>Services and Applications</b> . |    |
| 3. Click <b>Indexing Service</b> .                                    |    |
| 4. Click the Stop button to stop the indexing service.                |  |



## Removing aspnet\_isapi.dll from the List of Wildcard Application Maps

### Symptom

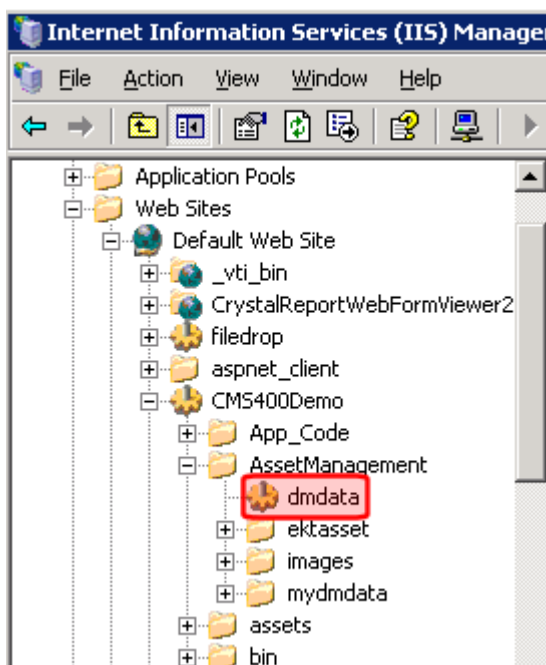
When you try to upload an asset, you get the error message "Failed to upload documents."

### Cause

Remove the aspnet\_isapi.dll from the list of Wildcard Application Maps.

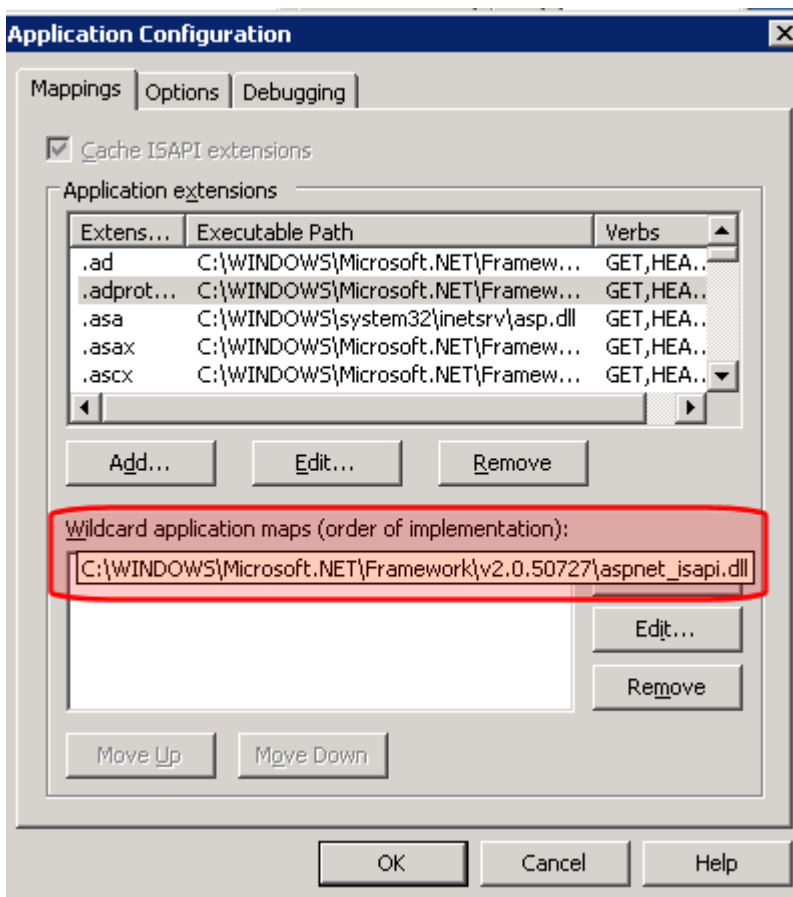
### Resolution

1. Open IIS.
2. Go to your **Ektron CMS400.NET** Web site.
3. Underneath the Web site, click **Asset Management** > **dmdata**.





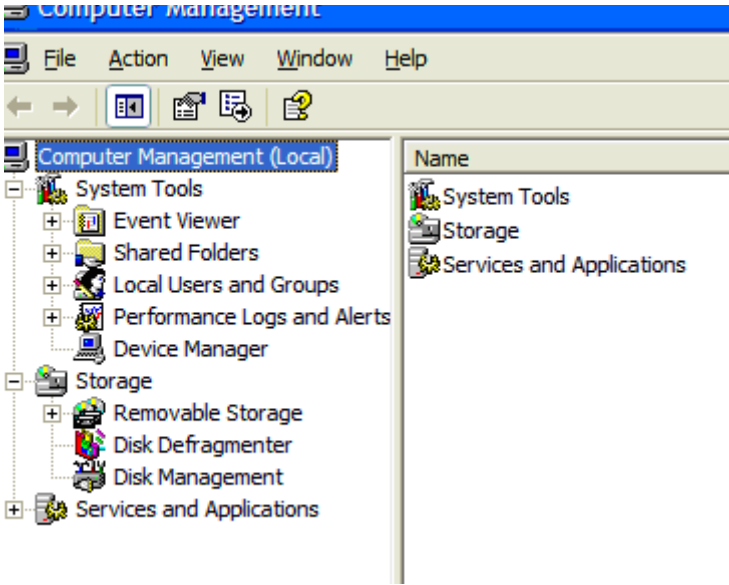

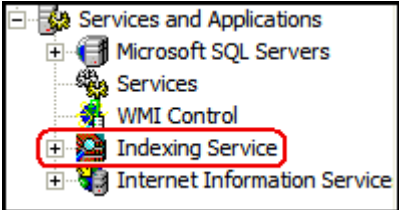
4. Right click **dmdata** and choose **Properties**.
5. Click the **Virtual Directory** tab.
6. Click the **Configuration** button.
7. Look in the **Wildcard Application Maps** area. If aspnet\_isapi.dll appears, remove it.



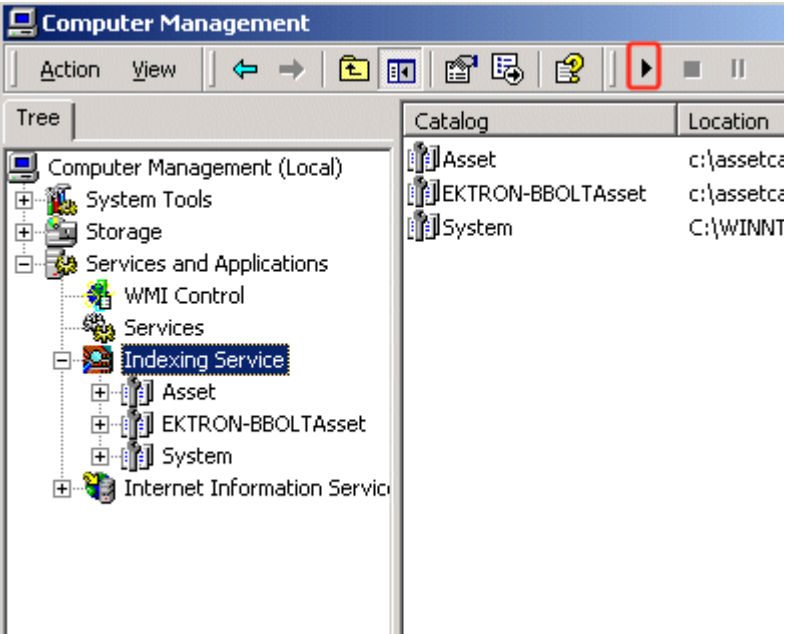
8. Click **OK**.



## Turning on the Asset Indexing Service

| Step  | Screen   |
|---|--|
| <p>1. Click <b>Start &gt; Control Panel &gt; Administrative Tools &gt; Computer Management</b>.<br/>The Computer Management screen appears.</p> |    |
| <p>2. Click the plus sign (+) next to <b>Services and Applications</b>.</p>   |  |
| <p>3. Click <b>Indexing Service</b>.</p>  |  |



| Step   | Screen   |
|--|--|
| 4. Click the Start button to start the indexing service. |  |

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

### Symptom

You receive the following error message:

- Windows Server 2003 no longer ships MSDAIPP.DLL, thus connecting to an FPSE server through Webfolders, is no longer possible.

### Resolution

Per MS Licensing, you can obtain webfldrs.msi from any down-level OS, or any Office product that shipped before Windows2003



(not Office 2003) and install the WebFolders client. Doing so will keep you compliant with licensing.

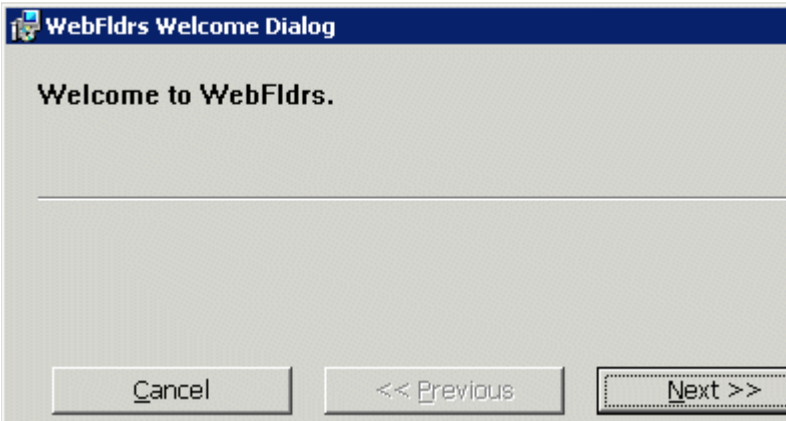
Installing WebFolders from Office 2003 is only allowed if you have an Office 2003 license for each Windows2003 server you plan to install WebFolders on.

## Web Folders Setup for Microsoft Windows Server 2003

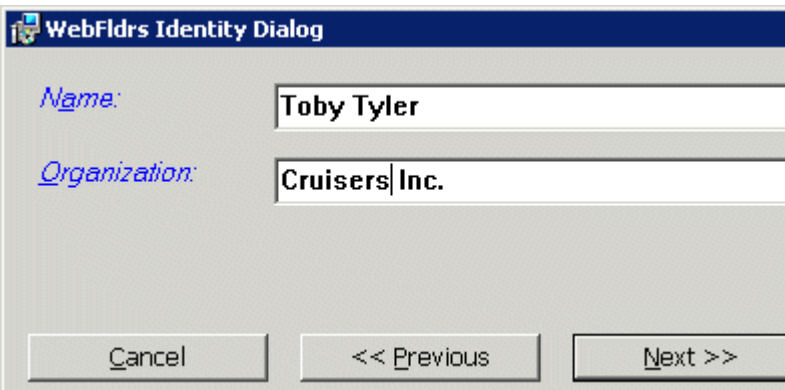
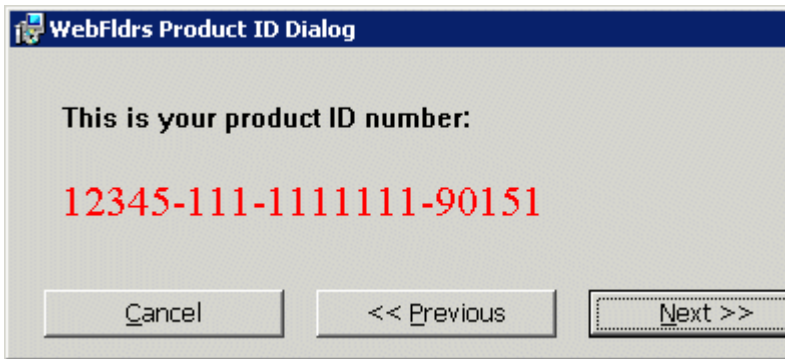
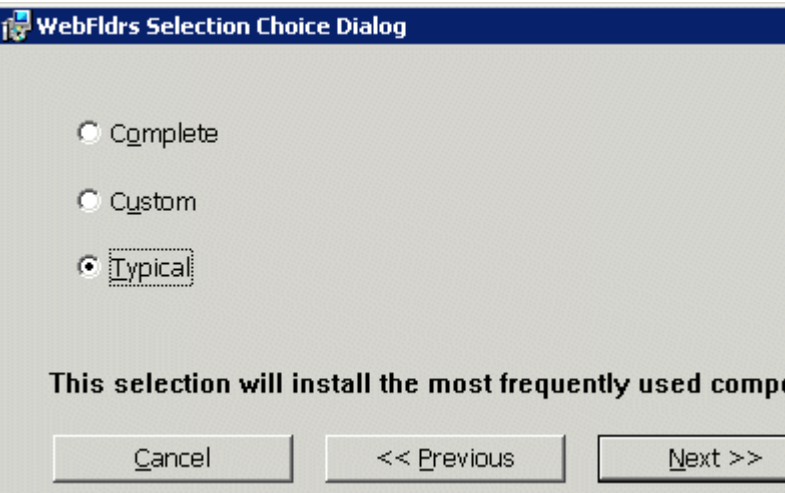
**NOTE** You only need to run the Web Folders Setup if there is a problem during the install. The **Ektron CMS400.NET** install performs the setup when needed.

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.

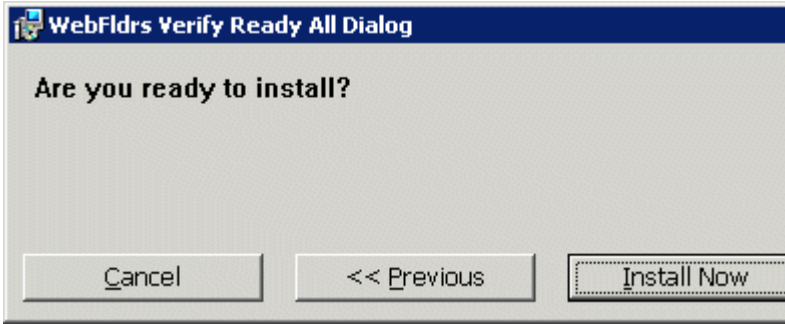
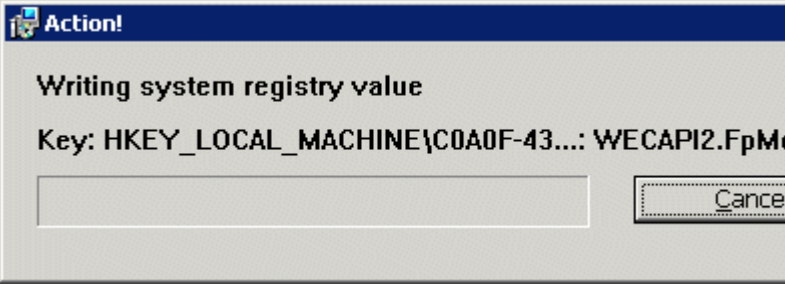
The following steps explain installing Web Folders. You will need to obtain a copy of the webfldrs.msi file.

| Step  | Setup Screen   |
|---|--|
| 1. Double click the <b>webfldrs.msi</b> file.                             |  |
| 2. The Web Folders install screen appears. Click <b>Next</b> to continue. |  <p>The image shows a Windows-style dialog box titled "WebFldrs Welcome Dialog". Inside the dialog, it says "Welcome to WebFldrs." followed by a horizontal line. At the bottom of the dialog, there are three buttons: "Cancel", "&lt;&lt; Previous", and "Next &gt;&gt;". The "Next &gt;&gt;" button is highlighted with a dashed border, indicating it is the recommended action.</p> |



| Step   | Setup Screen   |
|--|--|
| <p>3. The Web Folders Identity dialog box appears.</p> <ul style="list-style-type: none"> <li>• Add your <b>Name</b>.</li> <li>• Add your <b>Organization</b>.</li> <li>• Click <b>Next</b>.</li> </ul>  |  <p>The WebFldrs Identity Dialog box is shown. It has a title bar with a folder icon and the text 'WebFldrs Identity Dialog'. Inside, there are two text input fields. The first is labeled 'Name:' in blue italicized text, and the second is labeled 'Organization:' in blue italicized text. The 'Name' field contains the text 'Toby Tyler' and the 'Organization' field contains 'Cruisers Inc.'. At the bottom, there are three buttons: 'Cancel', '&lt;&lt; Previous', and 'Next &gt;&gt;'.</p> |
| <p>4. The Web Folders Product ID dialog box appears. This dialog box displays the your product ID number.</p> <ul style="list-style-type: none"> <li>• Click <b>Next</b>.</li> </ul>   |  <p>The WebFldrs Product ID Dialog box is shown. It has a title bar with a folder icon and the text 'WebFldrs Product ID Dialog'. The main area contains the text 'This is your product ID number:' followed by a large red number '12345-111-1111111-90151'. At the bottom, there are three buttons: 'Cancel', '&lt;&lt; Previous', and 'Next &gt;&gt;'.</p>   |
| <p>5. The Web Folders Selection Choice dialog box appears.</p> <ul style="list-style-type: none"> <li>• <b>Complete</b> - installs all components.</li> <li>• <b>Custom</b> - you choose the components to install.</li> <li>• <b>Typical</b> - installs the most frequently used components.</li> </ul> <p>After making a selection, click <b>Next</b>.</p> |  <p>The WebFldrs Selection Choice Dialog box is shown. It has a title bar with a folder icon and the text 'WebFldrs Selection Choice Dialog'. Inside, there are three radio button options: 'Complete', 'Custom', and 'Typical'. The 'Typical' option is selected. Below the options, there is a line of text: 'This selection will install the most frequently used components'. At the bottom, there are three buttons: 'Cancel', '&lt;&lt; Previous', and 'Next &gt;&gt;'.</p>                    |



| Step   | Setup Screen   |
|--|--|
| 6. The Verify Ready All dialog box appears. Click <b>Install Now</b> . |  <p>The screenshot shows a dialog box titled "WebFldrs Verify Ready All Dialog". It contains the text "Are you ready to install?". At the bottom, there are three buttons: "Cancel", "&lt;&lt; Previous", and "Install Now".</p> |
| 7. The Action dialog box appears. The Setup is installing Web folders. |  <p>The screenshot shows a dialog box titled "Action!". It contains the text "Writing system registry value" and "Key: HKEY_LOCAL_MACHINE\COA0F-43...: WECAP12.FpMe". There is a text input field and a "Cancel" button.</p>     |
| 8. The We Are Done dialog box appears. Click <b>OK</b> .               |  |

## ERRMSG: AssetManagement error: Failed to save asset

### Symptom

After recently moving the ASM database to a new SQL server that has never hosted an ASM database, the following error appears while adding a DMS asset.

```
AssetManagement error: Failed to save asset. Internal Message: RAISERROR could not locate entry
for error 2000000002 in sysmessages. at Ektron.ASM.Documents.Asset.Create(enAssetStatus state)
at Ektron.ASM.Documents.AbstractAssetManagement.Create(AssetMetaData assetMetaData,
enAssetStatus state) at Ektron.ASM.PluginManager.PluginHandler.Create(AssetMetaData
assetMetaData, enAssetStatus state) at
AssetManagement.AssetManagementService.Create(AssetMetaData assetMetaData, enAssetStatus
state) at Mojave.AssetManagementProxy.Create(AssetMetaData assetMetaData, enAssetStatus state)
at Ektron.Cms.DataIO.EkContentRW.AddContentv2_0(Collection ContObj) at
Ektron.Cms.EkException.ThrowException(Exception ex) at
Ektron.Cms.DataIO.EkContentRW.AddContentv2_0(Collection ContObj) at
Ektron.Cms.Content.EkContent.AddNewContentv2_0(Collection ContObj)
```



## Cause

During the creation of the ASM database, a total of 7 messages are written to the sysmessages table in SQL Server's master database. Each installation of SQL Server has its own master database and, in a typical move from one location to another, changes to the master database are not brought over.

If the ASM database was moved, and these messages are not in the sysmessages table in the new location's master table, the above error appears instead of a standard error message.

## Resolution

Run this set of SQL scripts against your database. They add appropriate messages to the sysmessages table in the master database.

```

/
*****
***/
sp_addmessage 2000000001, 10, N'Error in %s: Error %d inserting into %s. %s', US_ENGLISH,
FALSE, REPLACE
go

/
*****
***/
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
go

/
*****
***/

```



```
sp_addmessage 2000000005, 10, N'Error in %s: Update into %s returned %d rows. %s', US_ENGLISH,
FALSE, REPLACE
go

/
*****
***/
sp_addmessage 2000000007, 10, N'Error in %s: Error %d deleting into %s. %s', US_ENGLISH, FALSE,
REPLACE
go

/
*****
***/
sp_addmessage 2000000008, 10, N'Error in %s: Delete into %s returned %d rows. %s', US_ENGLISH,
FALSE, REPLACE
go
```

This snippet utilizes the sp\_addmessage stored procedure from the master database, which adds the appropriate messages to the correct table.

**NOTE**

---

Although it is possible to recode these as an INSERT statement that can run directly against the sysmessages table, that procedure is not recommended.

---



# Managing Tasks

**NOTE**

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

---

Tasks are typically assigned to content to help you monitor and manage changes to your Web site. Within Ektron CMS400.NET, users can assign tasks to themselves and other users. Tasks may include updating content, publishing content, updating an image and reordering a collection.

There are two kinds of tasks:

- Tasks not assigned to content
- Tasks assigned to content

A standard Ektron CMS400.NET user only sees tasks that are either assigned to or by himself. However, an administrator can view all tasks regardless of who they are assigned to or by.

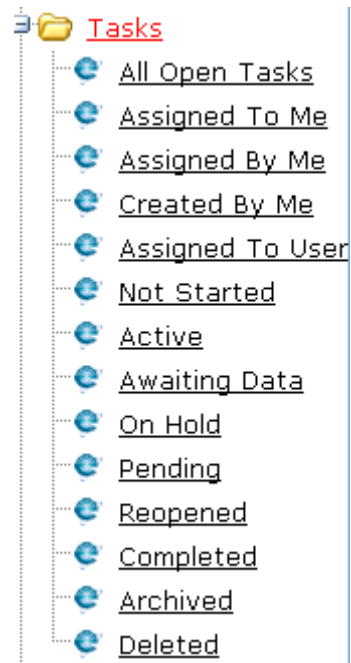
This chapter explains how to access, manage, and assign tasks via the following topics:

- “The Tasks Folder” on page 366
- “Task Permissions” on page 366
- “Task Categories and Types” on page 367
- “Automatic Creation of Tasks Associated with Content” on page 376
- “Task States” on page 384
- “Task View Options” on page 387
- “Email Notification” on page 391
- “Archiving a Task” on page 391
- “Deleting a Task” on page 393
- “Purging a Task” on page 393



## The Tasks Folder

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



## Task Permissions

Assign task-related permissions on the screens indicated below.

| Permission                                      | Where assigned                         |
|---|--|
| Create task                                     | Manage Members for Role: Task-Create   |
| Redirect task (that is, assign to another user) | Manage Members for Role: Task-Delete   |
| Delete task                                     | Manage Members for Role: Task-Redirect |



For more information about the screens listed above, see ["Using the Roles Screens" on page 705](#).

## Task Categories and Types

Tasks can be assigned a Task Category, then a Task Type. This gives users an additional way to filter their tasks.

Task Categories and Task Types have a hierarchical relationship: the Task Category is the parent, and the Task Type is the child. So, several types can be assigned to each category.

Some examples of Task Categories might be Engineering, Sales, Documentation, or Web Design. Examples of Task Types might be Edit Content, Update Documents, or Contact Customer.

### NOTE

---

Only members of the Administrator User Group or users assigned the following roles can view, add, or edit task categories and types: Task-Create, Task-delete, Task-Redirect. See *Also*: ["Defining Roles" on page 704](#)

---

You can create Task Categories and Task Types from these locations.

- When adding a task. See *Also*: **Ektron CMS400.NET User Manual** section "Managing Tasks" > "Creating a Task via the Task Folder" When editing a task.
- When working in the View Categorization screen.

## View Categorization Screen



The View Categorization screen allows administrators to work with Task Categories and Task Types. From this screen you can create, edit, and delete them.

To access the View Categorization Screen, access the **Workarea > Settings > Configuration > Task Types**.


The following screen appears.




**View Categorization**


☐ Check to Delete Task Category

☐  Content

| Check to Delete          | Task Type Title | Availability |
|--------------------------|-----------------|--------------|
| <input type="checkbox"/> | New Content     | Available    |
| <input type="checkbox"/> | Review          | Available    |
| <input type="checkbox"/> | Spelling        | Available    |

cannot delete  Form Submission Task Category



| Check to Delete | Task Type Title      | Availability |
|-----------------|----------------------|--------------|
| cannot delete   | Form Submission Task | Automatic    |

☐  Images

| Check to Delete          | Task Type Title | Availability |
|--------------------------|-----------------|--------------|
| <input type="checkbox"/> | Edit Images     | Available    |
| <input type="checkbox"/> | New Image       | Available    |

## Viewing Task Categories

**Note** The View Categorization screen has a system-defined category (Form Submission Task) that can only be used with forms. You can change its name but cannot delete it. For more information, see the Forms chapter of the Ektron CMS400.NET User Manual.

While in the View Categorization screen, you can collapse and expand Task Categories. To collapse a Task Category, click the (  ) button next to the Task Category name. To expand one, click the (  ) button next to the Task Category name.



The following example shows the View Categorization screen with one Task Category minimized.

| Check to Delete          | Task Category                  |
|--------------------------|--------------------------------|
| <input type="checkbox"/> | <a href="#">Administration</a> |



| Check to Delete          | Task Type Title                             |
|--------------------------|---|
| <input type="checkbox"/> | <a href="#">Add New User Email</a>          |
| <input type="checkbox"/> | <a href="#">Set Up Email Accounts For I</a> |

|                          |                      |
|--------------------------|----------------------|
| <input type="checkbox"/> | <a href="#">Docs</a> |
|--------------------------|----------------------|

### ***Creating Task Categories and Task Types***

From the View Categorization screen, you can create Task Categories and Task Types by clicking the Add Task Button (📄+). When you do, the following screen appears.



Add Task Type



☒ Add Task Type to Existing Task Category

Administration
▼

☐ Add Task Type to New Task Category

Task Type:

Task Type Description


Task Type Availability:
☐ Not Available

From this screen, you can perform these tasks.

- "Adding a New Task Category and Task Type" on page 370
- "Adding a New Task Type to an Existing Task Category" on page 371
- "Editing Task Category" on page 372
- "Editing a Task Type" on page 373
- "Task Type Availability" on page 374

### ***Adding a New Task Category and Task Type***

To add new Task Category and Task Type, follow these steps.

1. Click the **Add Task Type** button (.
2. The Add Task Type Screen appears.



3. Click the **Add Task Type to New Task Category** radio button or in the text box.
4. Enter a name in the **New Task Category** field.

**Add Task Type**

☐ Add Task Type to Existing Task Category

☒ Add Task Type to New Task Category

Task Type:

Task Type I

Task Type ,

☐ Not Av


5. Add a Task Type name in the **Task Type** field.
6. Enter a **Task Type Description**.
7. Choose a Task Type Availability. See Also: ["Task Type Availability" on page 374](#)
8. Click **Save** (💾).
9. Your new Task Categories and Task Types appear on the View Categorization screen.

### ***Adding a New Task Type to an Existing Task Category***

To add a new Task Type to an existing Task Category, follow these steps.

1. Click the **Add Task Type** button (🔍).
2. The Add Task Type Screen appears.






3. Click the **Add Task Type to New Task Category** radio button or click the drop down box.
4. Choose a category from the drop down box.
5. Add a Task Type name in the **Task Type** field.
6. Enter a **Task Type Description**.
7. Choose a Task Type Availability. See Also: "[Task Type Availability](#)" on page 374
8. Click **Save** (.
9. Your new Task Categories and Task Types appear on the View Categorization screen.

### Editing Task Category

You can edit a Task Category names. To edit a Task Category, click the Task Category link.

**View Categorization**




| <input type="checkbox"/> Check to Delete | Task Category  |
|--|--|
| <input type="checkbox"/>                 |  <a href="#">Administration</a> |


| Check to Delete          | Task Type Title                                     | Availability |
|--------------------------|---|--------------|
| <input type="checkbox"/> | <a href="#">Add New User Email</a>                  | Available    |
| <input type="checkbox"/> | <a href="#">Set Up Email Accounts For New Users</a> | Available    |

A text box screen appears next to the category name. Use the text box to change the name.

**Task Category**

 Administration   



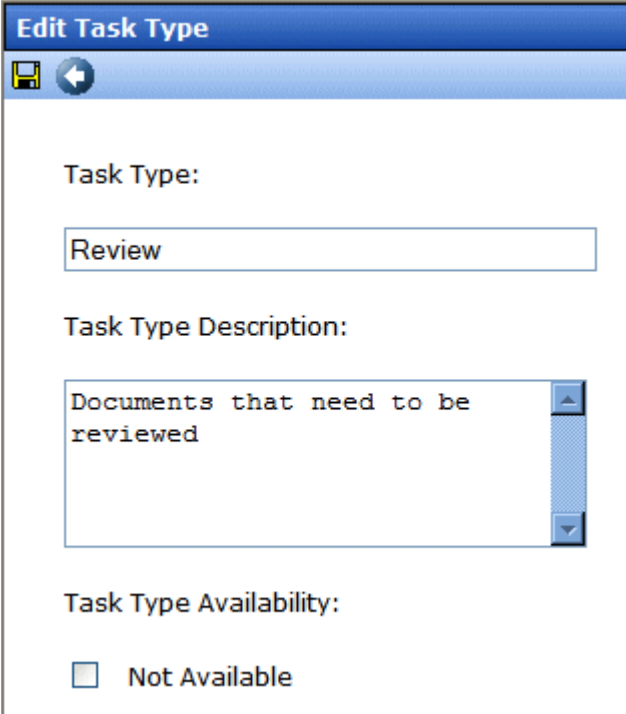
You can either save (  ) the changes, or cancel (  ) the edit.

## Editing a Task Type

From the View Categorization screen, you can edit a Task Type. This allows you to change the Task Type name, Task Type description, and Task Type availability.

To edit a Task Type, follow these steps.

1. On the View Categorization screen, click a Task Type.
2. The Edit Task Type screen appears.



**Edit Task Type**

Task Type:

Review

Task Type Description:

Documents that need to be reviewed


Task Type Availability:

☐ Not Available

From this screen you can edit the following:

- Task Type
- Task Type Description

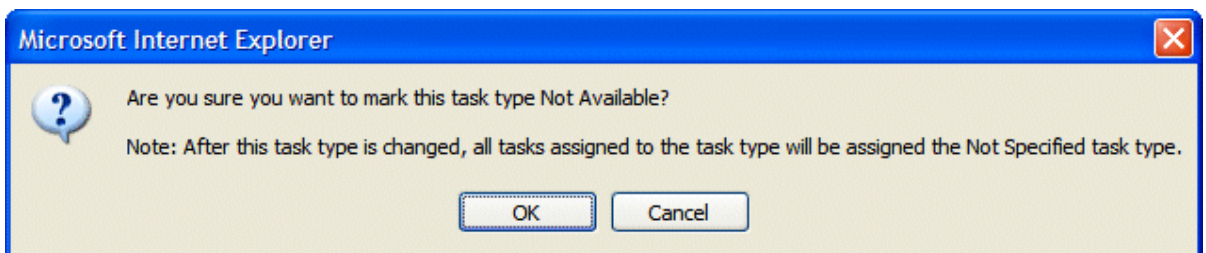


- Task Type Availability. See Also: "[Task Type Availability](#)" on [page 374](#)
3. Edit the information.
  4. Click Save (.
  5. The Task Type information is changed.

## ***Task Type Availability***

Task Types can be hidden from users by clicking the Not Available check box in the Add Task Type and Edit Task Type screens. By making a Task Type not available, you can suppress without deleting it.


When you make a Task Type not available, you see the following warning.



After you make a Task Type not available, the assigned tasks' Type and Category are changed to **Not Specified**.

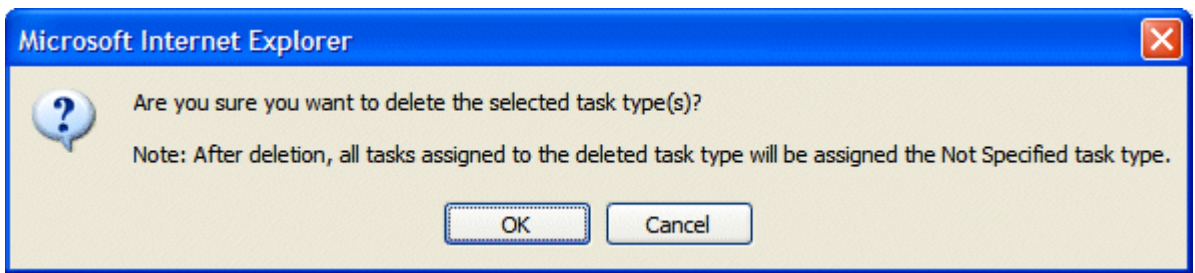
## ***Deleting Task Categories and Task Types***

You can delete Task Types by Task Category or individually.

To delete a Task Type, click the check box next to the Task Type, then click the Delete () button.



When you delete a Task Type, the following appears.





To delete all Task Types, check the **Delete all** check box.

The following example shows which check boxes on the screen are associated with All Task Types, Task Categories, and individual Task Types.



**View Categorization**

☐ Check to Delete Task Category

☐ Administration

These checkboxes select a Category and all of its Types

| Check to Delete          | Task Type Title                                     | Availability |
|--------------------------|---|--------------|
| <input type="checkbox"/> | <a href="#">Add New User Email</a>                  | Available    |
| <input type="checkbox"/> | <a href="#">Set Up Email Accounts For New Users</a> | Available    |

☐ Docs

| Check to Delete          | Task Type Title        | Availability |
|--------------------------|------------------------|--------------|
| <input type="checkbox"/> | <a href="#">Edit</a>   | Available    |
| <input type="checkbox"/> | <a href="#">Review</a> | Available    |

These checkboxes select individual Task Types

☐ Moving

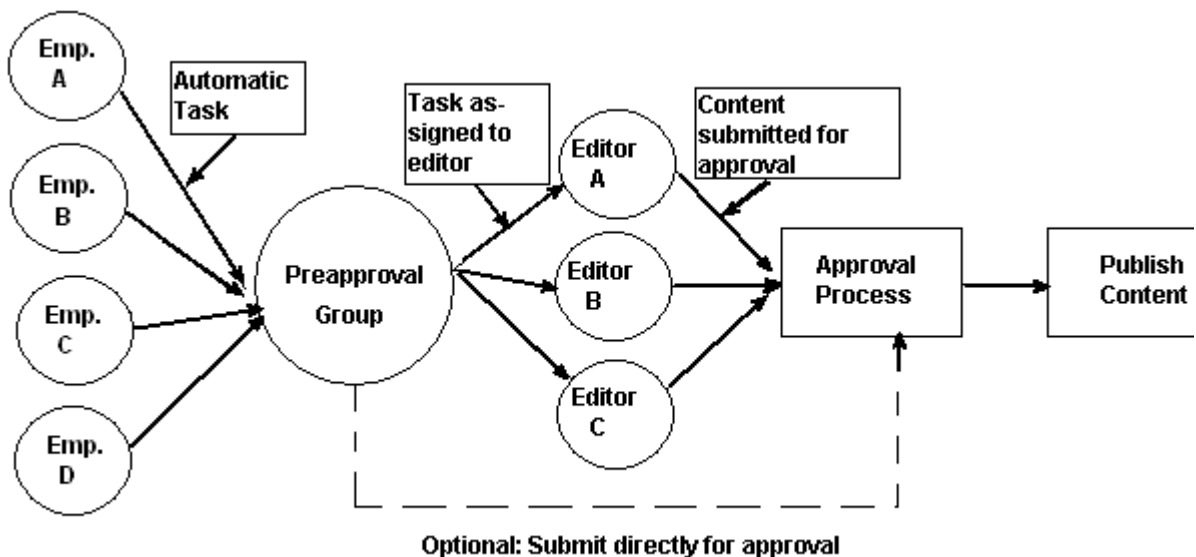
| Check to Delete          | Task Type Title      | Availability |
|--------------------------|----------------------|--------------|
| <input type="checkbox"/> | <a href="#">Move</a> | Available    |
| <input type="checkbox"/> | <a href="#">Prep</a> | Available    |

## Automatic Creation of Tasks Associated with Content

In addition to the manual assignment of tasks, they can be automatically generated whenever content, an asset, or a form is created. You would enable and use the Automatic Task Creation feature if you want to set up a *preapproval* process, which requires one or more users to review and approve content before it enters the regular approval process. (The regular approval process is described in "[Setting Approval Chains](#)" on page 695.)



The most common scenario illustrated below.



In this example, an automatically-generated task assigns the content to a preapproval group. When any member of that group reviews his tasks, he inspects the corresponding content and assigns it to an editor. After the editor reviews and possibly edits the content and submits it for approval, it enters the normal approval process.

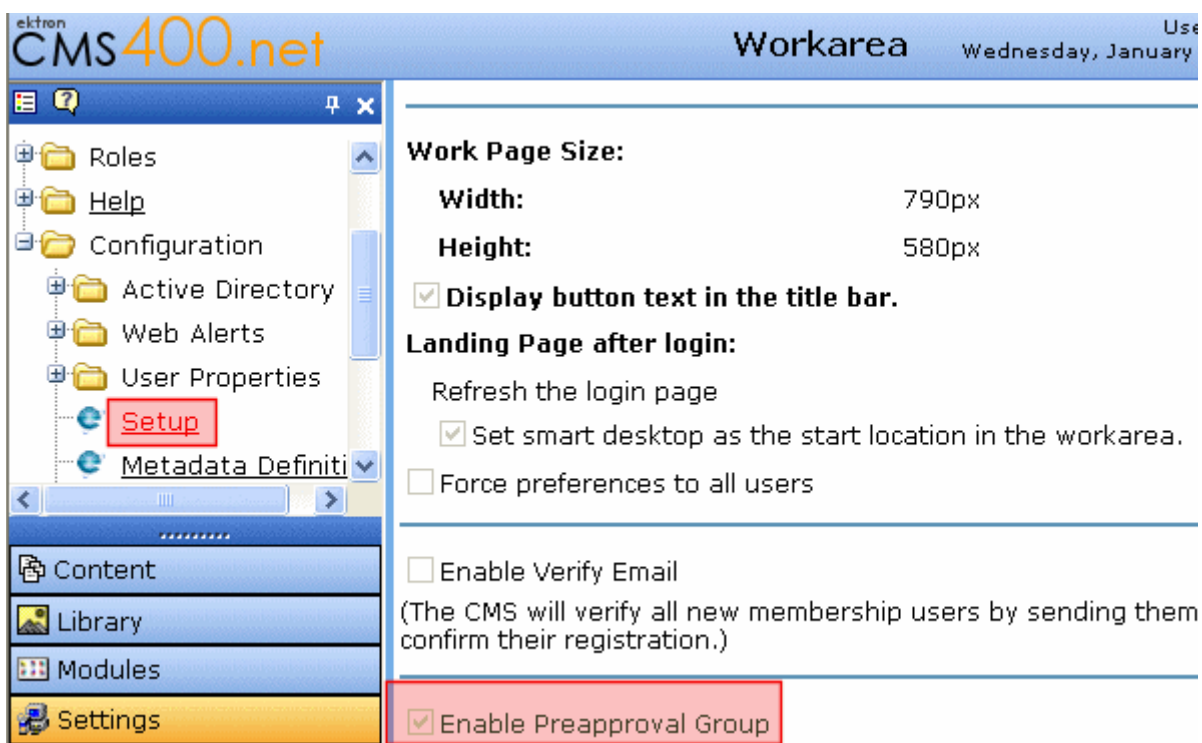
This section explains the automatic task creation process through the following subtopics:

- ["Enabling Automatic Task Creation" on page 377](#)
- ["Assigning a Preapproval Group to a Folder" on page 378](#)
- ["How Automatic Task Creation Works" on page 380](#)

## Enabling Automatic Task Creation

The Settings > Configuration > Application Setup screen's **Enable PreApproval Group** field controls Ektron CMS400.NET's Automatic Task feature. Check this box to turn Automatic Tasks on.





Next, you create user groups and assign them to folders whose content must complete the preapproval process before it enters the regular approval process. See ["Managing User Groups" on page 641](#) and ["Assigning a Preapproval Group to a Folder" on page 378](#).

## Assigning a Preapproval Group to a Folder

The ability to select or update a folder's preapproval group is determined by the advanced permission **Modify Preapproval**. Only users with this permission can see the Modify Preapproval button (🔑) when viewing the Folder Properties screen. See Also: ["Standard & Advanced Permissions" on page 688](#)



### Permissions for Folder "Books"

object to inherit permissions.

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

| <a href="#">Permissions</a> |             |             |              |                |                 |                    |  | <a href="#">View Membership users</a> |
|-----------------------------|-------------|-------------|--------------|----------------|-----------------|--------------------|--|---------------------------------------|
| Name                        | Collections | Add Folders | Edit Folders | Delete Folders | Traverse Folder | Modify Preapproval |  |                                       |
|                             | x           | x           | x            | x              | x               | x                  |  |                                       |
|                             |             | x           | x            |                | x               |                    |  |                                       |

If you have permission to modify a folder's preapproval group, go to the Folder Properties screen and click the Modify Preapproval button (👤) to access the **PreApproval Group** field. (The field only appears if you have enabled the Preapproval Feature. See ["Enabling Automatic Task Creation" on page 377.](#))

If you assign a user group, an automatic task can be assigned to that group whenever content in that folder is created or updated.

### Edit Properties for the folder "Content"



#### Preapproval Group:

Select User Group: Administrators ▼

(Inherit)  
(None)  
Administrators  
Everyone

If you select **Inherit**, this folder gets its preapproval group from the parent folder. If you select **None**, you disable the preapproval feature for the folder.

### Preapproval Groups Report



The Preapproval Groups Report lists all preapproval groups assigned to folders within **Ektron CMS400.NET**. To access it, go to **Smart Desktop > Reports > Preapproval Groups**. See Also: **Ektron CMS400.NET User Manual > “The Workarea and Smart Desktop” > “Understanding the Smart Desktop.”**



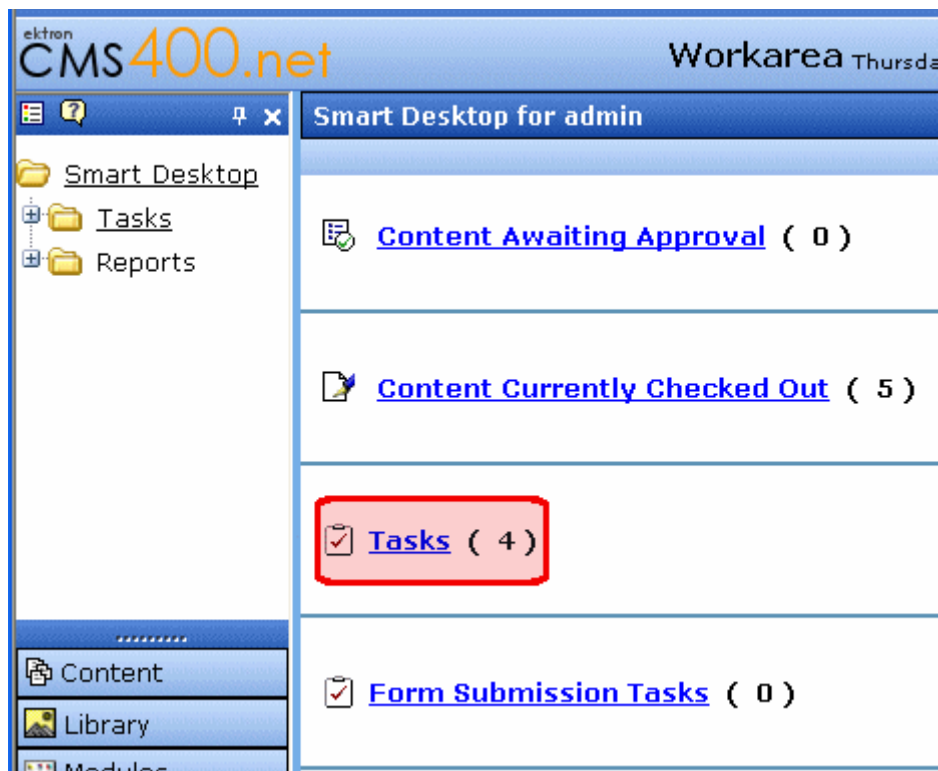
| Folder                  | Folder ID | Preapproval Group              | Group ID |
|-------------------------|-----------|--------------------------------|----------|
| <a href="#">Content</a> | 0         | <a href="#">Administrators</a> | 1        |

## How Automatic Task Creation Works

When a user submits a content item for approval, **Ektron CMS400.NET** checks to see if an open task exists for it. (An open task is one whose state is Not Started, Active, Awaiting Data, on Hold, or Pending.) If none exists and a preapproval group is assigned to its folder, a task is created and associated with the content.

At this point, all members of the folder's preapproval group see the task on their Smart Desktop.





A task has the following information.

| Field       | Value  |
|-------------|--|
| Title       | <p>A string formulated by joining the</p> <ul style="list-style-type: none"> <li>• content title</li> <li>• content ID number</li> <li>• underscore</li> <li>• Task</li> </ul> <p>For example, Private Content2_Task</p> |
| Assigned to | The preapproval group  |



| Field       | Value                                    |
|-------------|--|
| Assigned by | The user who submitted the content       |
| Content     | The content being submitted for approval |
| Priority    | Normal                                   |
| State       | Not Started                              |
| Due date    | none                                     |
| Start date  | none                                     |
| Created by  | User who submitted content               |
| Description | none                                     |

Next, the task can be reviewed by any member of the preapproval group. The member then has two choices.

- review the content and submit it for publishing. This action completes the preapproval process and submits the content into the regular approval chain.
- assign the task to another user, such as an editor. (The user to whom the task is being assigned must have permission to edit the content.) The editor reviews the content, updates it as needed, and submits it into the regular approval chain.

#### NOTE

The user submitting the content does not need permission to create tasks. Also, the user assigned to the task should not change its state using the task system. Instead, he should review and approve content using the regular content workflow mechanism. That mechanism automatically changes the task's state.

The tables below explain the sequence of changes to content and its associated task. All changes are logged into the task's history. See *Also*: **Ektron CMS400.NET User Manual** > "Managing Tasks" > "Viewing a Task's History"

Also, email is automatically generated for automatic tasks as it is for manually-created tasks. See *Also*: "Email Notification" on page 391



### ***Sequence of Task/Content Statuses (Author Lacks Permission to Approve Content)***

| <b>Event</b>   | <b>Content Status</b>                      | <b>Task Status</b>    |
|--|--|-----------------------|
| Content is created and checked in  | Checked In                                 | No auto task assigned |
| Content is submitted for approval<br><u>Note: The above action creates the automatic task for the content.</u>   | Waiting for completion of associated tasks | Not Started           |
| Content is assigned by a member or preapproval group to an editor  | Waiting for completion of associated tasks | Not Started           |
| Editor updates content then checks it in   | Checked In                                 | Active                |
| Content is submitted for approval; it enters any approval chain set for the folder<br><u>Note: Since the task requires an approval, it appears in the task list of the current approver. When the content is approved, the task is moved to the next approver's task list.</u> | Submitted for Approval                     | Pending               |
| Approver denies request  | Checked In                                 | Reopened              |
| Approver approves content  | Approved                                   | Complete              |

### ***Sequence of Task/Content Statuses (Author Can Approve Content)***



| Event   | Content Status                             | Task Status           |
|---|--|-----------------------|
| Content is created then checked in  | Checked In                                 | No auto task assigned |
| Content is edited then checked in   | Checked In                                 | Active                |
| Content is submitted for approval<br><u>Note: Although an author can approve content, he must click publish twice: once to change content status to Awaiting Completion of Associated Task, and a second time to change it to Approved.</u> | Waiting for completion of associated tasks | Not Started           |
| Content is published  | Approved                                   | Complete              |

## Task States

During the life of a task assigned to content, it normally progresses through a series of states. The state helps track a task's progress from creation to completion and even removal from the database. When reviewing the history of a task, the state can be used to review which actions changed the task's state by whom and when.

### User-Assigned versus System-Assigned States

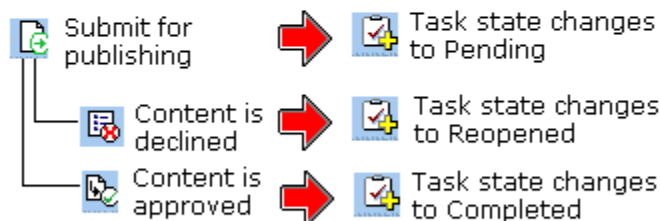
Some states can only be assigned by users while others are only assigned when an event occurs to the associated content. For example, when content is first submitted for approval, the associated task's state changes to Not Started.


#### **IMPORTANT!**

The administrator user can always change a task's state to any other state.

The following graphic illustrates the sequence of user and system actions that change a task's state.





 Admin changes task state to archived, and when no longer needed, to deleted

## Progression of Task States

| State         | Description  | Assigned by |
|---------------|--|-------------|
| Not Started   | Assigned when task is created.   | User        |
| Active        | The task's content is checked out.   | System      |
| Awaiting Data | The task is started but the assigned-to user is awaiting data from an external source. You can use comments to indicate the data being waited for. | User        |
| On Hold       | Task cannot be worked on at this time.   | User        |



| State     | Description  | Assigned by  |
|-----------|--|--|
| Pending   | <p>The content is submitted for approval.</p> <p>A task remains pending while its content is in the approval process. When the last person in the approval chain approves the content, the task's state changes to Completed.</p> <p>If any approver declines the content, the task's state changes to Reopened.</p> <p>If an editor edits the content and then checks it back in, the task's state changes to Reopened.</p> | System   |
| Reopened  | <p>Content is declined by an approver in the approval process. Also, if someone edits content whose task state is pending, the task's state changes to Reopened.</p>   | System   |
| Completed | <p>The last user in the approval chain approves the content and it is being published.</p>   | System   |
| Archived  | <p>After a task is completed, administrators can assign this state. It no longer appears on open task lists but is kept for reviews and reports.</p> <p>Only the administrator can view Archived tasks.</p> <p>See Also: <a href="#">"Archiving a Task" on page 391</a></p>  | User   |
| Deleted   | <p>When an archived task is no longer needed for reporting or reviewing, administrators can assign this state. While in this state, the task remains in the database. See Also: <a href="#">"Deleting a Task" on page 393</a></p> <p>When you purge the task, it and all of its transactions are removed from the database. See Also: <a href="#">"Purging a Task" on page 393</a></p>                                       | User (user with delete permission can delete; only admin and user with Task-Delete role can purge) |

## Restrictions on the Task Flow Process

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



- An administrator can assign a task to any state at any time.

## Task View Options

Beneath the main task module folder, 14 view screens display all tasks filtered by specified categories. The categories appear in ["The Tasks Folder" on page 366](#).

After viewing tasks in any category, most screens let you perform an action on the tasks (the actions are included in the table below). For example, you can redirect your tasks to another user. To select all tasks on a screen, click the check box in the header row (illustrated below).

| Folder | Displays these tasks  | Action you can perform from view screen   |
|--------|---|---|
| Tasks  | Open tasks assigned to yourself, and open tasks you have assigned to other users. | <ul style="list-style-type: none"> <li>• Create a new task</li> <li>• Delete a task</li> <li>• View a task</li> <li>• Sort tasks by column</li> </ul> |



| Folder           | Displays these tasks   | Action you can perform from view screen  |
|------------------|--|--|
| All Open Tasks   | <p>All open tasks (that is, tasks in one of these states) for all users</p> <ul style="list-style-type: none"> <li>not started</li> <li>active</li> <li>awaiting data</li> <li>on hold</li> <li>reopened</li> <li>pending</li> </ul> | <ul style="list-style-type: none"> <li>Edit a task</li> <li>Sort tasks by column</li> </ul>  |
| Assigned To Me   | All open tasks assigned to you   | <ul style="list-style-type: none"> <li>Assign tasks to a different user</li> <li>View a task</li> <li>Sort tasks by column</li> </ul>  |
| Assigned By Me   | All open tasks you assigned to yourself or others  | <ul style="list-style-type: none"> <li>Assign tasks to a different user</li> <li>View a task</li> <li>Sort tasks by column</li> </ul>  |
| Created by Me    | All open tasks you created   | <ul style="list-style-type: none"> <li>View a task</li> <li>Sort tasks by column</li> </ul>  |
| Assigned to User | All open tasks assigned to a user you select   | <ul style="list-style-type: none"> <li>Select any user and view all tasks assigned to that user.<br/>To do so, select new user from <b>Assign to User</b> drop down list and click <b>Get Tasks</b>.</li> <li>View a task</li> <li>Sort tasks by column</li> </ul> |
| Not Started      | <p>All whose state is Not Started</p> <p>See Also: <a href="#">"Task States" on page 384</a></p>   | <ul style="list-style-type: none"> <li>Change to any other state</li> <li>View a task</li> <li>Sort tasks by column</li> </ul>   |



| Folder        | Displays these tasks             | Action you can perform from view screen   |
|---------------|----------------------------------|---|
| Active        | All whose state is Active        | <ul style="list-style-type: none"> <li>• Change to any other state</li> <li>• View a task</li> <li>• Sort tasks by column</li> </ul>                        |
| Awaiting Data | All whose state is Awaiting Data | <ul style="list-style-type: none"> <li>• Change to any other state</li> <li>• View a task</li> <li>• Sort tasks by column</li> </ul>                        |
| On Hold       | All whose state is On Hold       | <ul style="list-style-type: none"> <li>• Change to any other state</li> <li>• View a task</li> <li>• Sort tasks by column</li> </ul>                        |
| Pending       | All whose state is Pending       | <ul style="list-style-type: none"> <li>• Change to any other state</li> <li>• View a task</li> <li>• Sort tasks by column</li> </ul>                        |
| Reopened      | All whose state is Reopened      | <ul style="list-style-type: none"> <li>• Change to any other state</li> <li>• View a task</li> <li>• Sort tasks by column</li> </ul>                        |
| Completed     | All whose state is Completed     | <ul style="list-style-type: none"> <li>• Change to any other state</li> <li>• View a task</li> <li>• Sort tasks by column</li> </ul>                        |
| Archived      | All whose state is Archived      | <ul style="list-style-type: none"> <li>• Change to any other state</li> <li>• View a task</li> <li>• Sort tasks by column</li> </ul>                        |
| Deleted       | All whose state is Deleted       | <ul style="list-style-type: none"> <li>• Change to any other state</li> <li>• Purge tasks</li> <li>• View a task</li> <li>• Sort tasks by column</li> </ul> |



## Determining Which Tasks a User Can View

To provide security, **Ektron CMS400.NET** restricts which users can use the task views. These restrictions are listed on the following table.

| View option      | Administrator group member   | User or group to whom task assigned            | User who assigned task | User who created task | All users |
|------------------|------------------------------|--|------------------------|-----------------------|-----------|
| All Open *       | X                            |  |                        |                       |           |
| Assigned by Me   |                              | X  | X                      |                       |           |
| Assigned to Me * |                              | X  |                        |                       |           |
| Created by Me *  |                              |  |                        | X                     |           |
| Assigned to User | X                            | X  | X                      | X                     | X         |
| Not Started      | all tasks in specified state | only tasks assigned to user in specified state |                        |                       |           |
| Active           |                              |  |                        |                       |           |
| Awaiting data    |                              |  |                        |                       |           |
| On hold          |                              |  |                        |                       |           |
| Pending          |                              |  |                        |                       |           |
| Reopened         |                              |  |                        |                       |           |
| Completed        |                              | V  |                        |                       |           |



| View option | Administrator group member | User or group to whom task assigned | User who assigned task | User who created task | All users |
|-------------|----------------------------|-------------------------------------|------------------------|-----------------------|-----------|
| Archived    | I                          |                                     |                        |                       |           |
| Deleted     | V                          |                                     |                        |                       |           |

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

## Email Notification

email notification is sent on these occasions.

- A task is assigned to a user.
- A task is redirected to a user.
- A task is submitted for content approval. Sent to the first user in the approval chain.
- The approval process moves on to the next approver.
- The content is declined at an approval stage. This is sent to the assigned user.
- The content is published. This goes to the creator, assigned user, and the approvers.

See Also: “Configuring E-Mail Notifications” in the **Ektron CMS400.NET** Setup Manual

## Archiving a Task

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

Archived tasks are typically kept for a predetermined time period, at which point an administrator deletes them (depending on your organization’s policies).

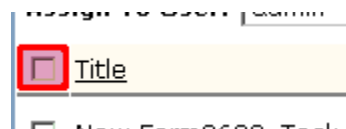


To archive a task, follow these steps.

1. From the Smart Desktop, open the Tasks folder.
2. Click the view option corresponding to the state of tasks you want to archive. Typically, you would archive completed tasks.



3. A list of Completed tasks appears. Select tasks one at a time, or click the check box on the top left corner to select all.



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



## Deleting a Task

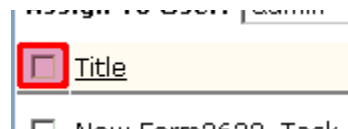
You can easily delete tasks no longer needed on the Web site. Although an administrator can change a task's state to deleted at any time, you typically do so after it is completed or archived, depending on your organization's policies.

Note that a deleted task remains in the system until you purge it. It is only visible on the View Deleted Tasks option. See *Also: "Deleted" on page 386.*

Tasks can be deleted either one at a time, or several at once.

To delete tasks, follow these steps.

1. From the Smart Desktop, click the **Tasks** folder.
2. Click the view option corresponding to the state of tasks you want to delete. Typically, you would delete archived tasks.
3. Select tasks one at a time, or click the check box on the top left corner to select all.



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

## Purging a Task

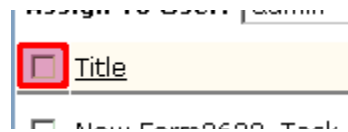
If you want to remove deleted tasks from the system, you purge them. Upon purging, a task and its history are removed from the database.

To purge one or more tasks, follow these steps.

1. From the Smart Desktop, click the Tasks folder.
2. Click the **Deleted** view option.



3. Select tasks one at a time, or click the check box on the top left corner to select all.



4. Click the Purge button.



# Searching Your Web Site

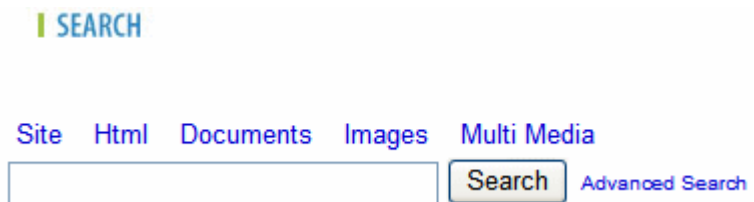
**NOTE**

This chapter describes the operation of the Web Search server control, which was introduced by the 7.0 Release. To learn about the operation of the Search server control (the search available prior to 7.0), see <http://www.ektron.com/manuals/cms400/v61/useradmin/search.62.1.html>.

**Ektron CMS400.NET** provides two kinds of searches:

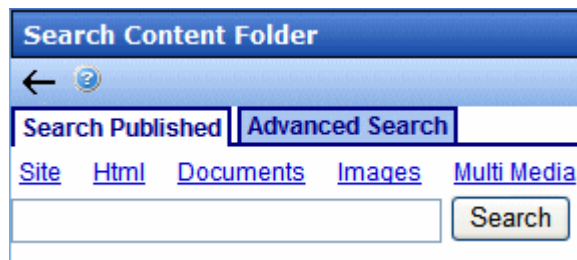
- the *Web site search* helps site visitors find published content on your Web site.

Your Web developer determines where to place the Web site search. The **Ektron CMS400.NET** sample site provides a link to it from every page. When a site visitor clicks the link, he sees the search screen.



For more information, see "[Web Site Search](#)" on page 396.

- the *Workarea search* helps anyone signed into **Ektron CMS400.NET** to find content. To access the Workarea search, go to the folder whose content you want to search and click **Action > Search**. The following screen appears.





The left tab lets you access the default version of the Web site search, while the right tab lets you search content by properties (title, comments, creation date, status, etc.).

To learn more about the Workarea search, see the **Ektron CMS400.NET** User Manual section “Searching the Workarea.”

---

**NOTE** This section explains how to use the search function on a browser page. For information about inserting the search function into an Ektron CMS400.NET Web template, see the Ektron CMS400.NET Developer Manual.

---

## Web Site Search

**Ektron CMS400.NET's** Web site search provides extremely fast results without impacting the load on your database. To accomplish these goals, **Ektron CMS400.NET** stores a separate copy of all published content in local index files (also known as a catalog). The Microsoft Windows Indexing service constantly indexes the catalog so that search results are returned with lightning speed.

---

**NOTE** Actually, two catalogs are created: one for public content, and another for private content.

---

Another advantage of the indexing service is its robust query language. Site visitors can use it to find Web site content by combining a rich collection of search criteria, including

- boolean and proximity operators
- wildcards
- free text queries
- vector space queries
- property value queries

These are explained in “[Query Language](#)” on page 431.

A third benefit of this architecture is scalability. If the amount of content or number of hits begins to affect performance, you can move the catalog to a separate server to handle the increased workload.

See *Also*:



- ["The Catalog and Index Files" on page 397](#)
- ["Basic versus Advanced Web Site Search" on page 409](#)
- ["Using the Integrated Search" on page 414](#)
- ["Setting up a Multiple Site Search Using Virtual Directories" on page 421](#)
- ["Searching for Metadata" on page 425](#)
- ["Installing the Visio IFilter" on page 427](#)
- ["Display of Search Results" on page 427](#)
- ["Query Language" on page 431](#)
- ["Search Troubleshooting" on page 443](#)

## The Catalog and Index Files

### NOTE

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Be sure that your Web server is running Indexing Service 3.0. Earlier versions of the service do not work properly.

---

The Microsoft Windows Indexing Service uses catalogs to index **Ektron CMS400.NET** content. The catalogs read copies of content that are saved to the local file system whenever they are published.

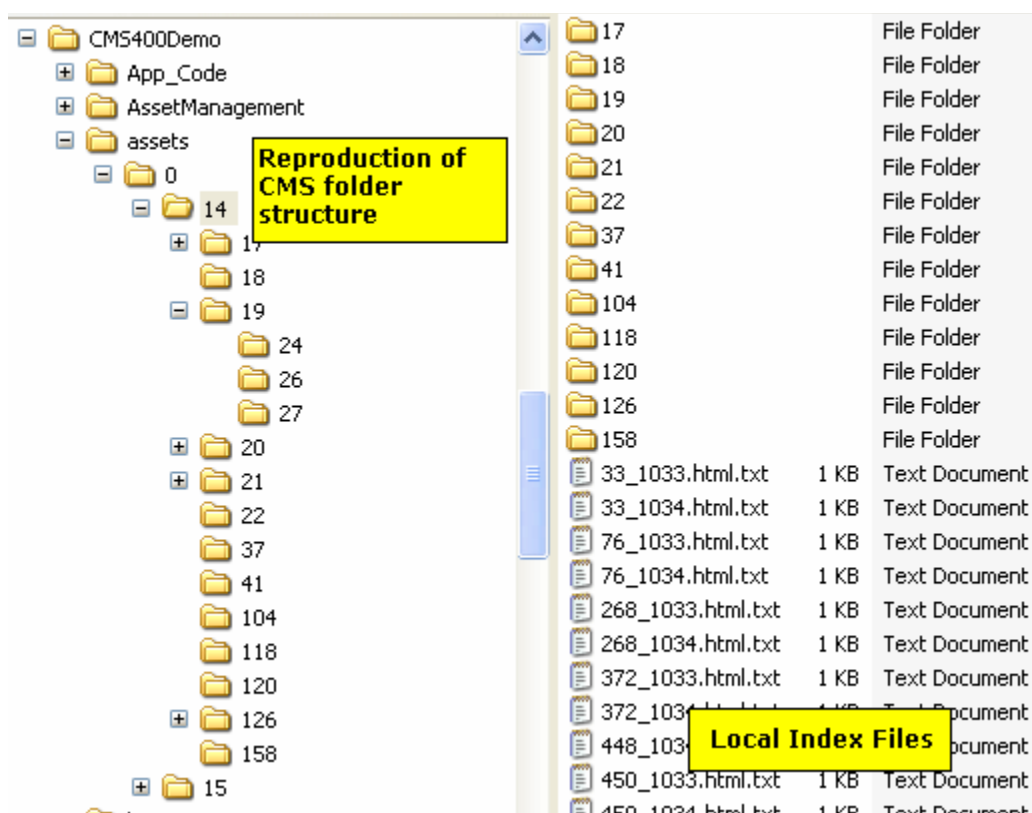
This section explains the following topics about working with the Indexing Service and catalogs.

- ["Local Index Files" on page 397](#)
- ["The Catalogs" on page 398](#)
- ["Recreating a Catalog" on page 400](#)
- ["Restarting the Indexing Service" on page 405](#)

### Local Index Files

A separate copy of all published content is maintained in local index files (whose extension is .txt), which are stored in the `siteroot/assets` folder. Within that folder is a reproduction of the CMS folder structure. However, it uses the folder ID number, not name, to represent folders. The following graphic illustrates this structure.





Notice that each content item is saved as a .txt file for indexing. The file name is derived from the content item's

- ID number
- underscore (\_)
- language ID
- file extension (content items have an .html extension)
- .txt file extension

## The Catalogs

**Ektron CMS400.NET** stores a copy of all published content in two catalogs that can be queried. Their default names are below.



- *siteroot uniqueID* Publish
- *siteroot uniqueID* Private

As indicated, the second catalog stores private assets. See Also: ["Private Content" on page 660](#)

To access these catalogs within the indexing service, go to **Computer Management > Services and Applications > Indexing Service**.

Within the file system, these catalogs reside in the `c:\program Files\Ektron\Catalogs\siteroot unique identifier` folder. For example, `C:\Program Files\Ektron\Catalogs\CMS400Min312007131255`.

View a catalog's properties to see the fields you can use in queries. See Also: ["Property Value Queries" on page 436](#)

| Property Set | Property       | Friendly Name         | Data Type   |   |
|--------------|----------------|-----------------------|-------------|---|
| 20001801...  | dav:getcon...  |                       |             |   |
| d5cdd502...  | 0xe            | DocManager            |             |   |
| d5cdd502...  | 0xf            | DocCompany            |             |   |
| d5cdd502...  | 0x2            | DocCategory           |             |   |
| d5cdd505...  | ektcontentl... | ContentLanguage       | VT_I4       | 4 |
| d5cdd505...  | ektassociat... | AssociatedCollection  |             |   |
| d5cdd505...  | ektcmsize      | CMSSize               | VT_I4       | 4 |
| d5cdd505...  | ektcontentr... | ContentRelation       |             |   |
| d5cdd505...  | ektdescription | description           |             |   |
| d5cdd505...  | ektinperm      | InPerm                | VT_I4       | 4 |
| d5cdd505...  | ektuserregion  | UserRegion            |             |   |
| d5cdd505...  | ektwellness... | wellness_es           |             |   |
| d5cdd505...  | ektassociat... | Associated_Collection |             |   |
| d5cdd505...  | ektdatemo...   | DateModified          | VT_FILETIME | 8 |
| d5cdd505...  | ektkeywords    | Keywords              | VT_LPWSTR   | 1 |
| d5cdd505...  | ekttaxcate...  | TaxCategory           | VT_LPWSTR   | 1 |
| d5cdd505...  | ektcontentt... | ContentType           | VT_I4       | 4 |
| d5cdd505...  | ektlatitude    | MapLatitude           | VT_R8       | 8 |
| d5cdd505...  | ektexpirydate  | ExpiryDate            | VT_FILETIME | 8 |
| d5cdd505...  | ektmetainfo    | MetaInfo              | VT_LPWSTR   | 1 |
| d5cdd505...  | ektaddress     | MapAddress            | VT_LPWSTR   | 1 |
| d5cdd505...  | ektwellness    | wellness              |             |   |



## Changing a Catalog's Name

To change a catalog's name, open the `siteroot/web.config` file with an editor such as Notepad. Then, update the `catalogName` element for the published catalog name, and the `privateCatalogName` element for the private catalog name.

```
<webSearch defaultProvider="MSIndexDialectServer">
<providers>
<add name="MSIndexDialectServer"
type="Ektron.Cms.WebSearch.SearchProviders.MSIndexDialectProvider, Ektron.Cms.WebSearch"
catalogName="localhostPublished" privateCatalogName="localhostPrivate" pageSize="10"
description="MS Index Server Dialect2 Provider"/>

<add name="MSIndexServer"
type="Ektron.Cms.WebSearch.SearchProviders.MSIndexProvider, Ektron.Cms.WebSearch"
catalogName="localhostPublished" privateCatalogName="localhostPrivate" pageSize="10"
description="MS Index Server SQL Provider"/>
</providers>
</webSearch>
```

## Recreating a Catalog

If a catalog is accidentally deleted or becomes corrupted, follow these steps to recreate one. There are two ways to do this.

- ["Manually Recreating a Catalog" on page 400](#)
- ["Automatically Recreating a Catalog" on page 402](#)

### Manually Recreating a Catalog

#### Part 1: Create a New Catalog and Copy Metaconfig.doc File to it

1. Open the `C:\Program Files\Ektron\Catalogs` folder.
2. Create a folder for the new catalog.
3. From the Computer Management screen, select **Services and Applications > Indexing Service**.
4. If the indexing service is running, right click **Indexing Service** and click **Stop**.
5. Right click the mouse and select **New > Catalog**.
6. Assign the catalog a name. At the **Location** field, browse to the folder you created in Step 2.



7. Navigate to the `C:\Program Files\Ektron\CMS400releasenumbers\Utilities` directory and find the `metaconfig.doc` file.
8. If you are creating a public catalog, copy that file to the `site root/Assets` folder.  
If you are creating a private catalog, copy `metaconfig.doc` to the `site root/PrivateAssets` folder.
9. From the Computer Management screen, click the new catalog you created in step 5. Underneath it, a Directories folder appears.
10. Select the Directories folder and click **New > Directory**.
11. The Add Directory Screen appears. If you are creating a public catalog, browse to the `site root/Assets` folder. If you are creating a private catalog, browse to the `site root/PrivateAssets` folder.
12. Right click **Indexing Service** and click **Start**.
13. From the Computer Management screen, view the new indexing service. Make sure a number appears in new catalog's **Total Docs** column, and the **Docs to Index** number is zero (0) before proceeding.

## Part 2: Update Metaconfig.reg

1. Navigate to the `C:\Program Files\Ektron\CMS400releasenumbers\Utilities` directory
2. Open the `metaconfig.reg` file with an editor like Notepad.
3. Update the first line of that file with the location of the new catalog relative to the `C:\Program Files\Ektron\Catalogs` folder.  
For example, if the new folder within the catalog folder is named `mytest`, the first line of the `metaconfig.reg` file looks like this.

```
[HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\ContentIndex\Catalogs\mytest\Properties]
```

4. Save the file.
5. Double click the file. This action updates your Windows Registry with the new information.
6. Stop and restart Windows Indexing Service. Both commands are available from the menu that appears when you hover over the Indexing Service and right click the mouse.
7. View the new Indexing Service to verify that all properties exist as in the original service.



### Part 3: Update web.config

Follow the directions in "[Changing a Catalog's Name](#)" on page 400 to update the catalogs that are updated as content is updated.

### ***Automatically Recreating a Catalog***

If you don't want to perform the manual steps listed above, **Ektron CMS400.NET** provides a utility that automatically creates a new catalog. You would typically use this if a catalog were corrupted or accidentally deleted.

To launch the utility, click the following file: `C:\Program Files\Ektron\CMS400vversionnumber\Utilities\SOFTWARE\SearchConfig\searchconfigUI.exe`. When you do, the following screen appears.



Search Data Configuration

Site: /CMS400Demo

Action: Make All Items available for Search

Configuration

Connection String: server=ENIGMA;database=CMS400Demo;Integrated Security=TRUE;user=;pwd=;

Assets Path: c:\inetpub\wwwroot\CMS400Demo\Assets [Browse]

Private Assets Path: c:\inetpub\wwwroot\CMS400Demo\PrivateAssets [Browse]

Published Catalog: CMS400DemoPublish

Private Catalog: CMS400DemoPrivate

Progress:

Status: Not Started

Buttons: Cancel, OK, Help

To create a new published asset catalog, follow these steps.

1. From the **Action** dropdown list, select **Create Index Server Catalog and update content**.
2. Place the cursor in the **Published Catalog** field and enter the name of the new catalog.
3. Do the same to create a new **Private Catalog**.
4. Press **OK**.
5. **Ektron CMS400.NET** creates a new catalog and index files for your content.



After you run this utility, the old catalog remains but no new content is written to it. All subsequent changes are written to the new catalog.

See Also: "[SearchConfigUI.exe crashes while building search indexes and catalogs](#)" on page 445

## ***The SearchConfig Log***

All activity generated by the Search Data Configuration screen is tracked by a log. You can view the log to obtain a history of these changes.

The log is located in the `C:\Program Files\Ektron\CMS400\versionnumber\Utilities\SOFTWARE\SearchConfig` folder. Its name is *date time*.LOG.

## **Search Data Configuration Screen**

Use this screen to perform the following actions.

- make all **Ektron CMS400.NET** content searchable (do this if you recently switched to a new database)
- make any of the following kinds of content searchable (do this if the search cannot find this content)
  - HTML only
  - documents only
  - metadata only
  - custom metadata only
- create a new catalog and index it (do this if a catalog was corrupted or accidentally deleted)

The following table explains the fields on the screen.

See Also: "[The SearchConfig Log](#)" on page 404



| Field               | Description  |
|---------------------|--|
| Site                | Select the <b>Ektron CMS400.NET</b> site that you want to work with  |
| Action              | Select the action you want to perform  |
| Connection String   | Review the connection string to your <b>Ektron CMS400.NET</b> database. Update if needed.                                |
| Assets Path         | Review the path to your site's <i>Assets</i> folder. Update if needed.   |
| Private Assets Path | Review the path to your site's <i>Private Assets</i> folder. Update if needed.   |
| Published Catalog   | Review the name of your published catalog. Update if needed. <i>See Also:</i> <a href="#">"The Catalogs" on page 398</a> |
| Private Catalog     | Review the name of your private catalog. Update if needed. <i>See Also:</i> <a href="#">"The Catalogs" on page 398</a>   |
| Progress, Status    | After you click <b>OK</b> , these fields change to indicate the progress of the update.                                  |

## Restarting the Indexing Service

Use the Indexing Service screen to restart Windows' Indexing Service. You can also use the screen to rescan the catalogs.

To access the Indexing Service screen, go to **Workarea > Settings > Configuration > Indexing Service**.

**Indexing Service**

Service Status: Started

Restart Service

Catalogs:

|                               |                         |                        |                         |
|-------------------------------|-------------------------|------------------------|-------------------------|
| CMS400Demo262007121551Private | <a href="#">Restart</a> | <a href="#">Update</a> | <a href="#">Rebuild</a> |
| CMS400Demo262007121551Publish | <a href="#">Restart</a> | <a href="#">Update</a> | <a href="#">Rebuild</a> |

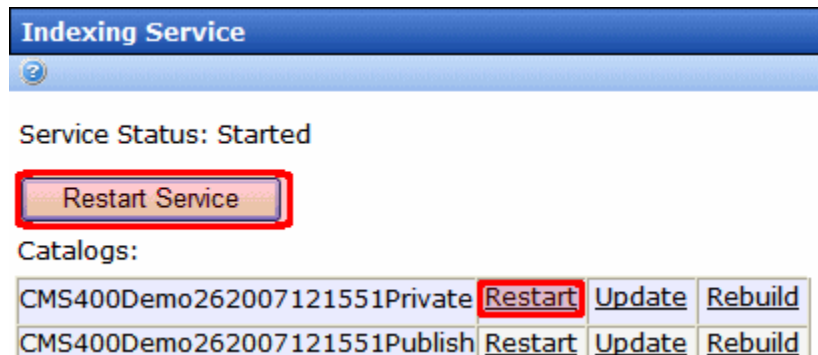


From this screen, you can

- "Restart the Indexing Service" on page 406
- "Run a Full Scan of a Catalog" on page 407
- "Run an Incremental Scan of a Catalog" on page 408

### ***Restart the Indexing Service***

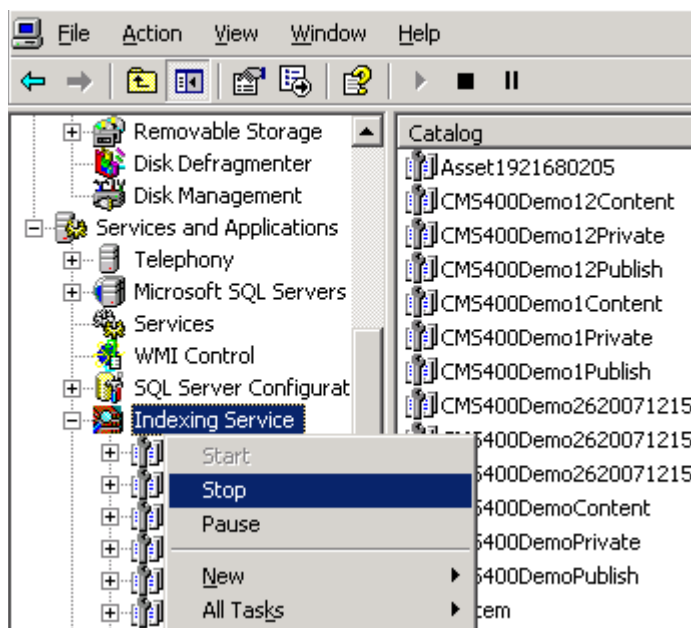
Sometimes, when resolving issues with your search, you must stop and restart the indexing service. To restart it via the Indexing Service screen, click the **Restart Service** button.



To restart the indexing service for a particular catalog only, click **Restart** to the right of the catalog name.

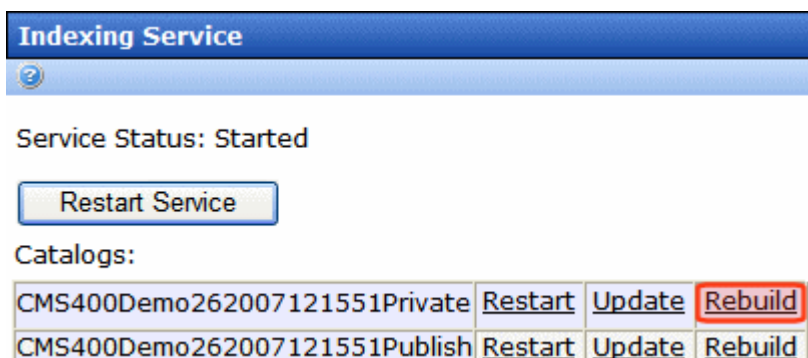
Alternatively, you can stop and restart the Indexing service from the Computer Management screen, as shown below.





### Run a Full Scan of a Catalog

Sometimes, when resolving issues with your search, you need to run a full scan of a catalog. To do this, access the **Settings > Configuration > Indexing Service** screen. Then, click **Rebuild** next to the affected catalog.





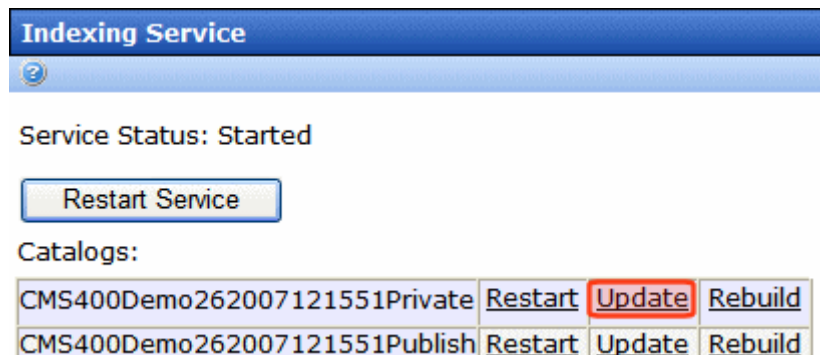
The following text explains the full scan. *(Copied from Microsoft Management Console help)*

A full scan takes a complete inventory of all documents in the cataloged folders and adds them to the list of documents to be indexed. The Indexing Service does a full scan of disk drives attached to your computer (except for removable devices) in the following situations:

- When it is run for the first time after installation
- When a folder is added to the catalog
- As part of recovery if a serious error occurs

### ***Run an Incremental Scan of a Catalog***

Sometimes, when resolving issues with your search, you need to run an incremental scan of a catalog. To do this, access the **Settings > Configuration > Indexing Service** screen. Then, click **Update** next to the affected catalog.



The following text explains the incremental scan. *(Copied from Microsoft Management Console help)*

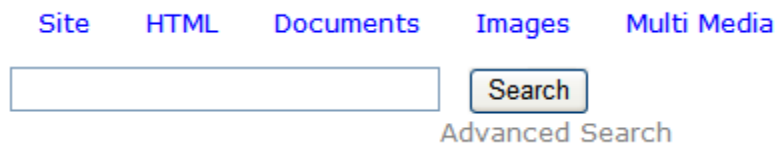
Microsoft Windows Indexing Service cannot track changes to documents when it is shut down. When Indexing Service restarts, it does an *incremental scan* to detect all documents that were modified while it was inactive so it can update its index.



An incremental scan may also be performed if Indexing Service loses change notifications. This can happen if the update rate of documents is very high and the buffer used to get change notifications from Windows XP overflows.

## Basic versus Advanced Web Site Search

When your developer places a Web Search server control on any page, and a site visitor browses to it, he sees the following.



This section now divides into two sections:

- Basic Search (shown above)
- Advanced Search (access this by clicking **Advanced Search** from the Basic Search screen)

This section also explains the following search-related topics.

- ["The Content Searchable Field" on page 413](#)
- ["Using the Integrated Search" on page 414](#)
- ["Setting up a Multiple Site Search Using Virtual Directories" on page 421](#)
- ["Searching for Metadata" on page 425](#)
- ["Installing the Visio IFilter" on page 427](#)

See Also: ["The Advanced Search" on page 411](#)

### The Basic Search

**NOTE** [You can also create a folder with content outside of Ektron CMS400.NET that is searched. For more information, see "Using the Integrated Search" on page 414.](#)

The Basic Search finds content that satisfies these criteria.



- published
- active (archived content is ignored)
- its **Searchable** check box is checked (see ["The Content Searchable Field" on page 413](#))
- public. However, private content is available to those with permission to view it, such as membership users after logging in. See Also: ["Private Content" on page 660](#).  
If a user has no permissions for the content's folder, he can find private content and view its abstract. However, when he proceeds to the content page, nothing appears.
- resides in the CMS folder specified in the Web search server control, or in one of that folder's subfolders if the control's `recursive` property is set to `true`
- matches selected language, if site is multi-lingual
- satisfies text and/or query entered in the search box (no value returns nothing) See Also: ["Query Language" on page 431](#)
  - The text inserted in the search field can appear in the content or metadata (See Also: ["Searching for Metadata" on page 425](#))
- satisfies content type criterion selected on screen, if chosen (see below)

The screenshot shows a search interface. At the top left is a "SEARCH" button. Below it, there's a "Content type criteria" dropdown menu. Underneath that is a "Site" label followed by four tabs: "Html", "Documents", "Images", and "Multi Media". Below the tabs is a search input field. To the right of the input field is a "Search" button and a link to "Advanced Search".

**NOTE**

The search does not find documents inside compressed files, such as \*.zip, \*.cab, etc.

### Search Results by Content Type



| Search Screen Option                           | Finds submitted text in these content types  |
|--|--|
| Site   | Content from all options below plus Forums   |
| HTML   | <ul style="list-style-type: none"> <li>• HTML</li> <li>• Smart Form (XML)</li> </ul> <hr/> <p>Note: Finds XML field values but not field labels. This has not changed since prior releases.</p> <hr/> <ul style="list-style-type: none"> <li>• HTML Form</li> <li>• Blog entries (not comments)</li> </ul>   |
| Documents                                      | <ul style="list-style-type: none"> <li>• MS Office document (includes Powerpoint, Excel)</li> </ul> <hr/> <p>Note: The search finds text within Visio documents if the Visio IFilter has been installed. See "Installing the Visio IFilter" on page 427.</p> <hr/> <ul style="list-style-type: none"> <li>• PDF file</li> <li>• .txt file</li> </ul> |
| Images added as assets and through the library | .gif, .jpeg, etc.  |
| Multi Media                                    | Flash, .mp3, etc.  |

**NOTE** [The search cannot find calendar events.](#)

## The Advanced Search

The Advanced Search uses nearly all the same search criteria as the Basic Search. (See "[The Basic Search](#)" on page 409). The differences are the additional options (explained below) and the fact that you cannot use queries.



with **all** of the words

with the **exact phrase**

**at least one** of the words

**without** the words

**Advanced Result Filters**

Author

Basic Search

### Advanced Search Options



| Search Option             | Finds these pages  |
|---------------------------|--|
| with all of the words     | Web page must include all submitted terms; their position on the page does not matter.<br>You cannot enter queries into this field.  |
| with the exact phrase     | Web page must include the exact phrase. For example, if you enter <b>Ektron healthcare</b> , a page with the term <b>Ektron provides healthcare</b> is not found because it is not an exact match. |
| at least one of the words | Web page can include any one of the submitted terms  |
| without the words         | Web page contains none of the submitted terms.<br>Only use this option if you also reply to one of the three fields above.   |

### Advanced Result Filters

Below the Advanced Search Options is a list of additional fields you can use to refine the search. These are titled **Advanced Result Filters**.



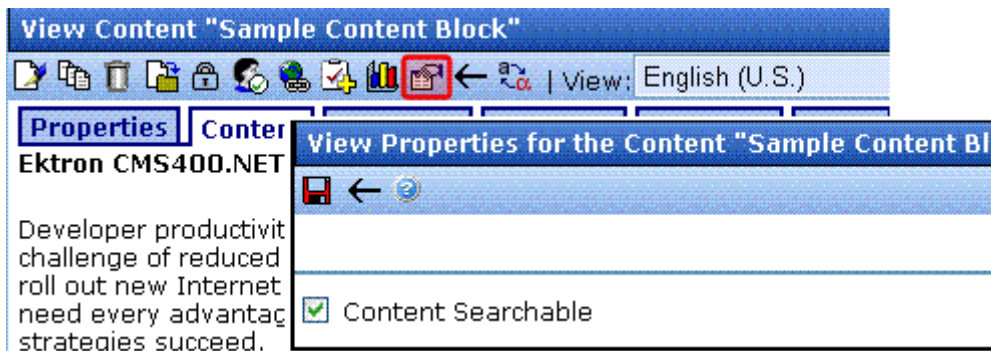
| Result Filter   | Prompts site visitor to enter   |
|-----------------|---|
| Created Before  | All content created before date entered by user.<br>Date format is YYYY/MM/DD.  |
| Created After   | All content created after date entered by user.<br>Date format is YYYY/MM/DD.   |
| Modified Before | All content updated before date entered by user.<br>Date format is YYYY/MM/DD.  |
| Modified After  | All content updated after date entered by user.<br>Date format is YYYY/MM/DD.   |
| Author          | Enter firstname<space>last name.<br>Can abbreviate by entering part of either name surrounded by asterisks (*). For example, *Jo* finds any author whose first or last name contains those letters. |
| File Size       | Enter file size in kilobytes. You can use greater and less than operators (>, <) to find content greater or less than a value. For example, > 10000.  |

To add a filter, click the plus button (  ). To remove a filter, click the minus button (  ).

## The Content Searchable Field

Each content item includes a **Content Searchable** field. The search only considers content whose field is checked. See illustration below.





By default, this field is checked when content is created.

## Using the Integrated Search

You can expand the Web search to any Web-accessible files on your server, even if they are not part of **Ektron CMS400.NET**. This feature is called *Integrated Web Search*.

**NOTE** The Integrated Search only works with a Web Search server control that is placed on a Web page. It does not work with the Workarea search or any other search server control.

Use an Integrated Search if your site's search should include non-**Ektron CMS400.NET** files which, nevertheless, need to be searchable by site visitors. For example, a folder of personnel policy documents should be searchable on your intranet but you do not want to add them to **Ektron CMS400.NET**.

As another example, you have a Web site of static HTML pages, and are now deploying **Ektron CMS400.NET** for certain parts of the site, such as job listings or a discussion forum. You can create a page with an Integrated Search that encompasses your entire site.

The following topics explain the Integrated Search in more detail.

- ["Integrated Search Overview" on page 415](#)
- ["Setting up a Virtual Directory" on page 415](#)
- ["Setting up an Integrated Search" on page 416](#)
- ["Searching for non-Ektron CMS400.NET Content" on page 420](#)



- ["Integrated Search Content in Search Results" on page 421](#)

## Integrated Search Overview

To set up an Integrated Search, create one or more Windows folders underneath the site root folder. Place files to be searched within them or their subfolders.

Alternatively, Integrated Search can find content in any Web-accessible folder on the server's file system. In this case, create one or more *virtual directories* that point to the site root folder. Then, identify the Integrated Search folder and, if desired, file types to include or exclude when searching. The procedure for doing this is explained in ["Setting up a Virtual Directory" on page 415](#).

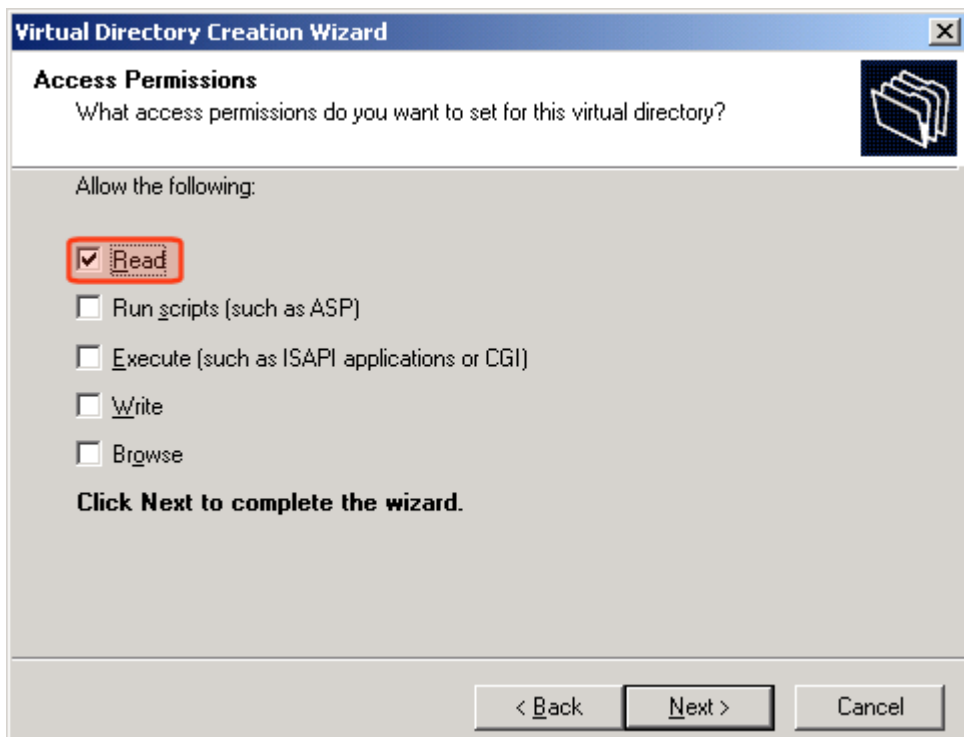
## Setting up a Virtual Directory

The Integrated Search's starting folders can reside anywhere on your server's file system. If you want a folder to reside somewhere other than under the site root folder, follow these steps to set up a virtual directory. A virtual directory resides in the site root folder, but contains no content -- instead, it points to a Web-accessible folder anywhere in the file system.

Since creating a virtual folder is a Windows procedure, the procedure is explained in <http://support.microsoft.com/kb/301392/en-us?FR=1&PA=1&SD=HSCH>.

On the Access Permissions screen that appears during the setup, only check **Read** (see below).





## Setting up an Integrated Search

There are three parts to setting up an Integrated Search.

- ["Creating an Integrated Search Folder Structure" on page 416](#)
- ["Assign the Integrated Search folder to the WebSearch Server Control" on page 417](#)
- ["Identifying Integrated Search Folder Information in the Workarea" on page 417](#)

After setting up an Integrated Search, you might want to do these things:

- ["Viewing All Integrated Search Folders" on page 419](#)
- ["Viewing an Integrated Search Folder" on page 420](#)
- ["Editing an Integrated Search Folder" on page 420](#)

### ***Creating an Integrated Search Folder Structure***



1. In the site root folder, create one or more folders for non-**Ektron CMS400.NET** files to be searched. You can create child folders in as many levels as needed underneath these folders.

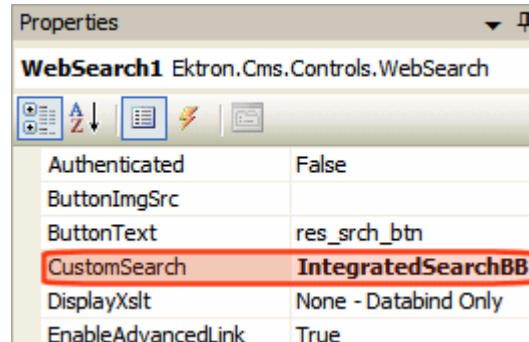
Alternatively, create a virtual folder that points to any folder in your file system. See Also: "[Setting up a Virtual Directory](#)" on page 415

2. Place all files to be searched in the parent or child folders.

### ***Assign the Integrated Search folder to the WebSearch Server Control***

To find Integrated Search content, users must access a Web page that contains a WebSearch server control. Further, you must assign to that control's **CustomSearch** property the names of all top-level Integrated Search folders (see illustration below). If there are more than one, separate each with a comma.

If child folders exist under the top-level folders, their content is included in the search.




### ***Identifying Integrated Search Folder Information in the Workarea***




Follow this procedure for every folder that contains Integrated Search content.

1. Open the CMS Workarea.
2. Go to **Settings > Configuration > Integrated Search Folders**.



3. Click the Add button (  ).
4. The Add Integrated Search Folder screen appears.

**Add Integrated Search Folder**

**Site Directory:**  - Directory or virtual directory relative to site root

Please make sure you create virtual directory first before adding the virtual directory name.

**Exclude Extensions:**  - Extensions not to include \*.aspx,\*.ascx

**Include Extensions:**  - \*.html,\*.doc exclude extensions is ignored if include is specified

**Recursive:** ☒

**Exclude Directories:**  - Sub directories not to include in search

5. Complete the fields as described in the table below.  
To include *all* files in the folder (except those that would typically not be searched, such as .exe and .dll files), do not modify the **Include Extensions** and **Exclude Extensions** fields.

| Field          | Description  |
|----------------|--|
| Site Directory | Enter the name of the parent folder (or virtual folder) that contains the searchable, non-Ektron CMS400.NET content . This folder must reside in the site root folder. If you are using a virtual folder, enter its name, not the folder that contains the content.<br><i>See Also:</i> <a href="#">"Creating an Integrated Search Folder Structure" on page 416</a> |




| Field               | Description  |
|---------------------|--|
| Exclude Extensions  | <p>If you want the search to ignore certain file types, enter those extensions in this format: *.<b>filetype</b>. For example *.<b>xml</b>. If you enter more than one, separate them with a comma (,).</p> <p>By default, <b>Ektron CMS400.NET</b> places several file types that a search would typically ignore. Edit as needed.</p> <hr/> <p><b>Important!</b> - If you enter any value into the <b>Include Extensions</b> field, this field is ignored.</p> |
| Include Extensions  | <p>If you want the search to include only certain file types, enter those extensions in this format: *.<b>filetype</b>. For example *.<b>xml</b>. If you enter more than one, separate them with a comma (,).</p> <hr/> <p><b>Important!</b> - If you enter any value into this field, the <b>Exclude Extensions</b> field is ignored.</p>   |
| Recursive           | <p>Check this box if you want the search to include all child folders under the folder in the <b>Site Directory</b> field.</p>   |
| Exclude Directories | <p>If you want to exclude files in any directory underneath the directory listed in the <b>Site Directory</b> field, enter the names of the directories to exclude. You do not need to enter the path to the directory -- only the name.</p> <p>If you enter more than one directory, use a comma to separate them.</p> <p>By default, <b>Ektron CMS400.NET</b> places several directories that a search would typically ignore. Edit as needed.</p>             |

**IMPORTANT!** Ektron's Windows service runs hourly to index these files. So, you will not see search results for at least an hour after you set up this feature.

## Viewing All Integrated Search Folders

To view all integrated search folders, go to **Settings > Configuration > Integrated Search Folders**. The screen displays every folder that will be included in the Integrated Search. See Also: ["Using the Integrated Search" on page 414](#)

Click any folder to edit its properties or delete it.


If you want to create a new Integrated Search folder, click the Add button (). See Also: ["Creating an Integrated Search Folder Structure" on page 416](#)




## Viewing an Integrated Search Folder


This screen displays all information about one Integrated Search folder. See Also: ["Using the Integrated Search" on page 414](#)

To see documentation for any field on the screen, go to ["Complete the fields as described in the table below." on page 418.](#)

To edit information assigned to this Integrated Search folder, click the Edit button ().

To delete this Integrated Search, click the Delete button ().

## Editing an Integrated Search Folder

To edit an integrated search folder, select it from the View Integrated Search Folders screen. Then, click the Edit button ().

Edit the fields as needed. To see documentation for any field, go to ["Complete the fields as described in the table below." on page 418.](#)

## Searching for non-Ektron CMS400.NET Content

You can search for all non-**EKTRON CMS400.NET** content by file title. For example, you can find the file Ektron.gif by inserting **EKTRON** into the search field.

You can search text files (.doc, .pdf, .txt, etc.) by either file name or text within them.

Finally, you can use the following syntax to find files by extension:

#filename \*.extension. For example, to find all .gif files, use #filename \*.gif. Be sure to click the **Images** button.

### NOTE

Because Ektron CMS400.NET stores all content in .txt files, you cannot use this syntax to find files with a .txt extension.

---



## Integrated Search Content in Search Results

To distinguish Integrated Search content from regular content, the ID number of IS content begins with 1,000,000,000. Also, the last author name is **Non\_Cms\_User**. See illustration below.

**Web** Results 1 - 10 of 12 for @contentid > 2000. (0.09 seconds)

 touch\_win\_demo(4/26/2007 4:19:35 PM)

touch win demo. ...

ID=1073741971 Size=28 KB Last Author=Non\_Cms\_User

 Top 5 Books(4/26/2007 4:19:35 PM)

Top 5 Books. Sheet3 Sheet2 Sheet1 The World Is Flat Title Price State  
of Denial: Bush at War, Part III Bob Woodward Author Thomas L.  
Friedman Twelve Sharp Fiasco Thomas E. Ricks Janet Evanovich 0.00  
0.00 0.00 0.00...

ID=1073741970 Size=27 KB Last Author=Non\_Cms\_User

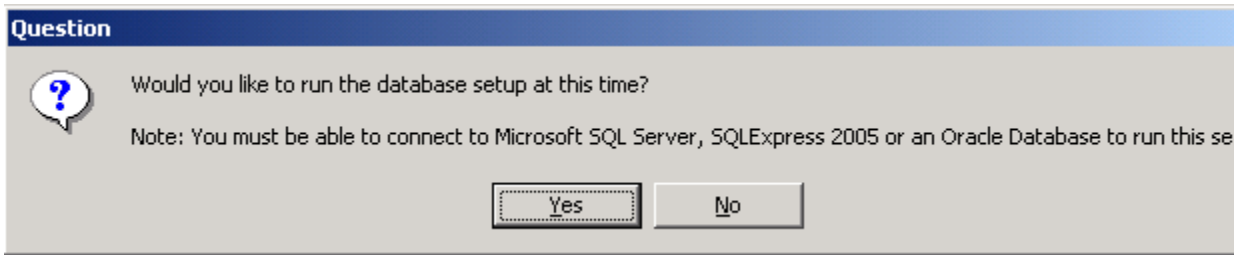
## Setting up a Multiple Site Search Using Virtual Directories

Use the following procedure if you want to set up two sites but use a single database. The steps below allow you to search from either site to find the same content.

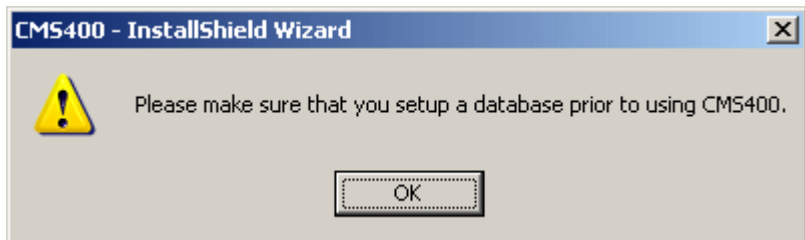
In this example, the first site contains the database, while the second site uses virtual directories to point to content in the first site.

1. Set up the first site and create a database for it in the normal manner.
2. Set up the second site, but when you are prompted to set up the database, click **No**.





- The following message appears. Press **OK**.



- In the first site, open the web.config file.
- Copy the database connection information for your database, as indicated below.

```
<connectionStrings>
  <!--FOR SQLSERVER-->
  <add name="Ektron.DbConnection" providerName="System.Data.SqlClient"
  connectionString="server=(local);database=CMS400Min;Integrated Security=TRUE;user=;pwd=;" />

  <!--FOR ORACLE-->
  <!--add name="Ektron.DbConnection" providerName="System.Data.OracleClient"
  connectionString="Data Source=orcl;User Id=system;Password=welcome;" /-->
</connectionStrings>
```

- In the second site, open the web.config file. Then, overwrite the database information with the text you copied in Step 5.
- Copy the catalog information from the first site to the second. To do this, open the first site's web.config file, and copy the contents of the <providers> element (illustrated below).

```
<providers>

  <add name="MSIndexServer"
  type="Ektron.Cms.WebSearch.SearchProviders.MSIndexProvider,
  Ektron.Cms.WebSearch" catalogName="CMS400Min3152007121250Publish">
```



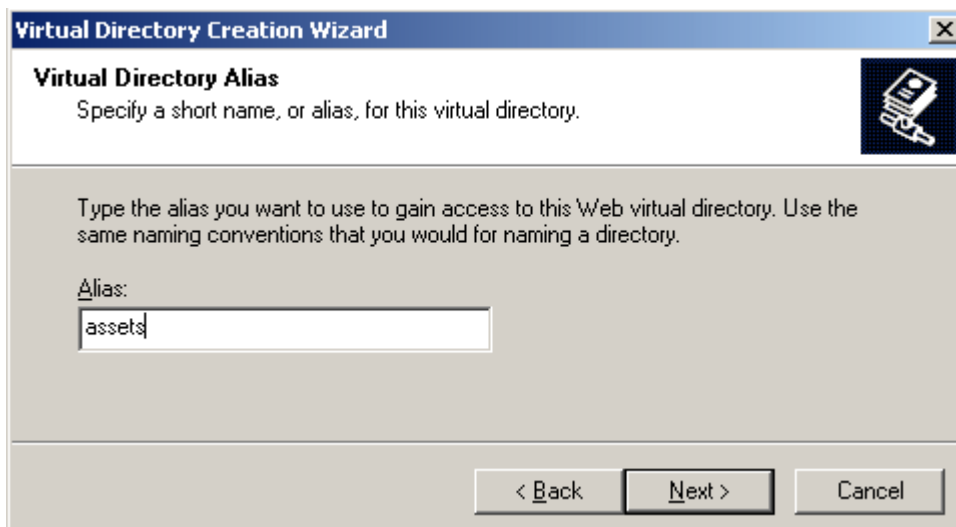
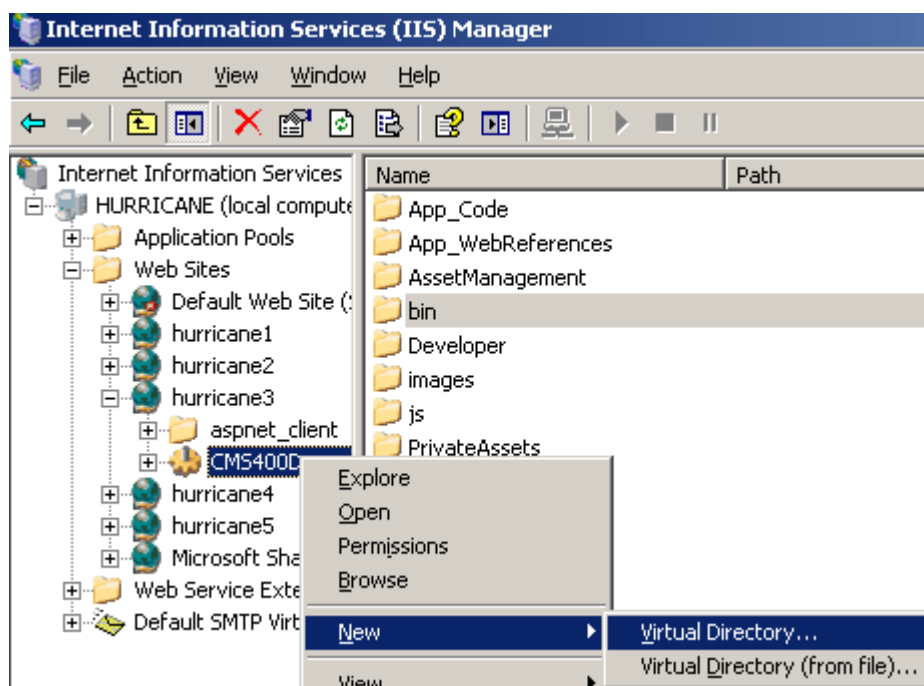
```
privateCatalogName="CMS400Min3152007121250Private" pageSize="10"
description="MS Index Server Provider"/>

    <add name="MSIndexDialectServer"
type="Ektron.Cms.WebSearch.SearchProviders.MSIndexDialectProvider,
Ektron.Cms.WebSearch" catalogName="CMS400Min3152007121250Publish"
privateCatalogName="CMS400Min3152007121250Private" pageSize="10"
description="MS Index Server Dialect2 Provider"/>

</providers>
```

8. In the second site, open the web.config file. Then, overwrite the <providers> information with the text you copied in Step 7.
9. Open the folder that contains the first site. Copy the AssetManagement.config file.
10. Open the folder that contains the second site. Overwrite the AssetManagement.config file in that folder with the file you copied in Step 9.
11. Set up the virtual directories. To do that, follow these steps.
  - In IIS, open the second Web site you created in Steps 2 and 3
  - Delete the Assets folder
  - Create a new virtual directory named Assets

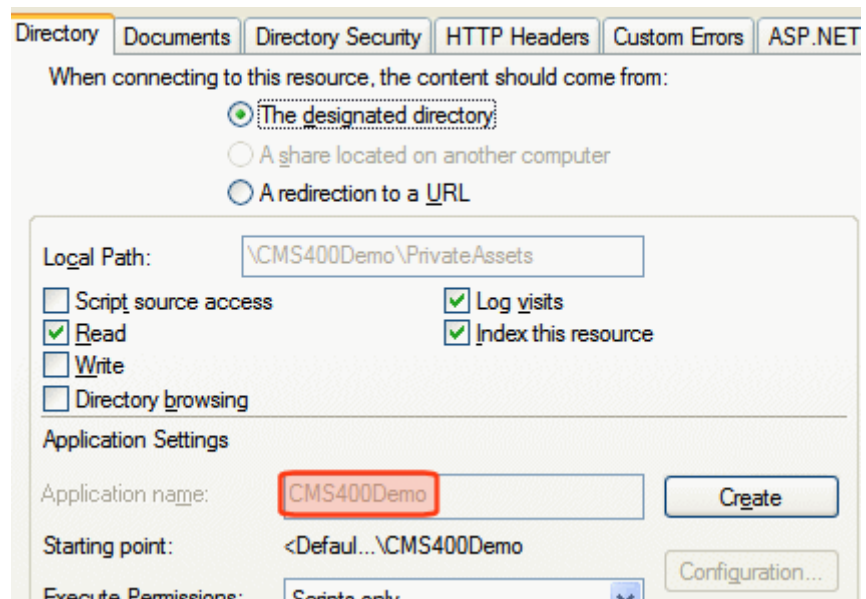




- When prompted to specify a path to the new Assets folder, navigate to the first site's Assets folder



- When you finish setting up the virtual folder to Assets directory, set up virtual directories in the same manner for the following directories: PrivateAssets, uploaded files, and uploaded images. Remember to delete the folder in the second site before creating the virtual directory.
- Make sure that none of the folders is set up as an application. To do that, open IIS, right click each folder and select **properties**. On the **Directory** tab, the **Application name** field should be grayed out, as shown below.






## Searching for Metadata

- Only searchable type metadata values are found. See *Also:* ["Types of Metadata" on page 115](#)
- It can take up to 30 minutes for newly-added metadata to be available to the search
- To find content with certain metadata values, enter the following syntax into the search text field: `@fieldname search text`. For example, `@description Ektron`



- Searchable metadata field names must not include a space. If they do, the search cannot find the metadata.
- To find content with searchable metadata whose style is **yes or no**, enter the following syntax into the search text field: `@over65 = true` **OR** `@over65 = false`.
- To find content with searchable metadata whose style is **multiple selections**, enter the following syntax into the search field: `@fieldname any selection value`. For example, `@area academics` finds all content to which the multiple selections type metadata definition **Area** is applied, and one its values is **academics**.

**Edit Metadata definition "Area"**

**Name:**

**ID:**

**Type:**

**Editable:** ☒

**Display in Ektron Explorer** ☐

**Searchable Property**

**Publicly viewable:** ☒

**Style:**

**Separator:**

**List (use separator between values):**

To search for content to which several multiple selector metadata values are applied, use the syntax `@fieldname any selection value and another selection value`. For example, `@area academics and athletics`.



## Installing the Visio IFilter

The search finds text within Visio documents if the Visio IFilter has been installed to the **Ektron CMS400.NET** server. Use the following links to download the Visio IFilter.

| Visio Version | Link  |
|---------------|---|
| 2003          | <a href="http://www.microsoft.com/downloads/details.aspx?FamilyID=dcee9e09-448b-4386-b901-efea29cac808&amp;DisplayLang=en">http://www.microsoft.com/downloads/details.aspx?FamilyID=dcee9e09-448b-4386-b901-efea29cac808&amp;DisplayLang=en</a> |
| 2002          | <a href="http://www.microsoft.com/technet/prodtechnol/Visio/visio2002/deploy/ifilter.msp">http://www.microsoft.com/technet/prodtechnol/Visio/visio2002/deploy/ifilter.msp</a>   |

## Display of Search Results

Below is an example of the Web Site Search and Search Published results screen. Your developer can customize it using the Web Search server control.





Web   Html   Documents   Images   Multi Media   **more »**   [Go Back](#)


     [Advanced Search](#)

---

**Web** Results **Start Count 1 - End Count 9** of 9 for **immune**. (0.0468483 seconds)

 [AntiBody Therapy\(4/7/2006 12:52:30 PM\)](#)  
 AntiBody Therapy   Overview The immune system protects the body from pathogens like bacteria and viruses that cause infection. Antibodies, also called immunoglobulins, are produced by the immune system to help the body destroy these pathogens. Immunoglobulins are proteins which circulate in the bl...  
 ID=45 Size=4767 Last Author=Application Administrator Hit Count=1 Rank=864

 [Hemophilia Therapy\(4/7/2006 12:52:55 PM\)](#)  
 Hemophilia Therapy Hemophilia is a rare disorder in which a person's blood does not clot properly because they do not produce enough of, or are missing, blood clotting proteins called factors. The body depends on these clotting factors to stop bleeding after injury and to promote healing. Overview...  
 ID=46 Size=2795 Last Author=Application Administrator Hit Count=1 Rank=192

 [Types of Arthritis\(8/21/2006 11:01:30 AM\)](#)  
 There are more than 100 different types of arthritis. Some of the more common types include: Osteoarthritis. This is the most common type of arthritis. It occurs when the cartilage covering the end of the bones gradually wears away.

As you can see, search results screen begins with the title and last edited date. Following them is an abstract of the content, which is automatically generated by the Windows Indexing Service. Following the abstract is additional information, such as content ID number, size, last author, number of occurrences of the search term, and rank. Your developer determines which criterion is used to order the results.

When you click the title of any content item, it appears with the search term highlighted (see example below).



One antidote to cancer is information

In general our responses to cancer are converging, but very Presently all cancer authorities are agreed on only one thing: cannot take hold in a healthy **immune** system

The World Health Organisation (W.H.O.) is promoting prevent better option than treatment and particularly targeting smoki highest recogniseable risk area. The Cancer Research Institu' is seeking vaccines that support the body's own ability to he Alternative and holistic approaches seek to do the same with nutrition, lifestyle and other choices.

Different philosophies of medicine achieve '**immune**' support' ways not considered by orthodox Western medicine, which concentrates mainly on 'drugs and surgery' as an afterthought disease, often just adding more toxins and stress to an overl system. Alternative treatments take many forms to support t

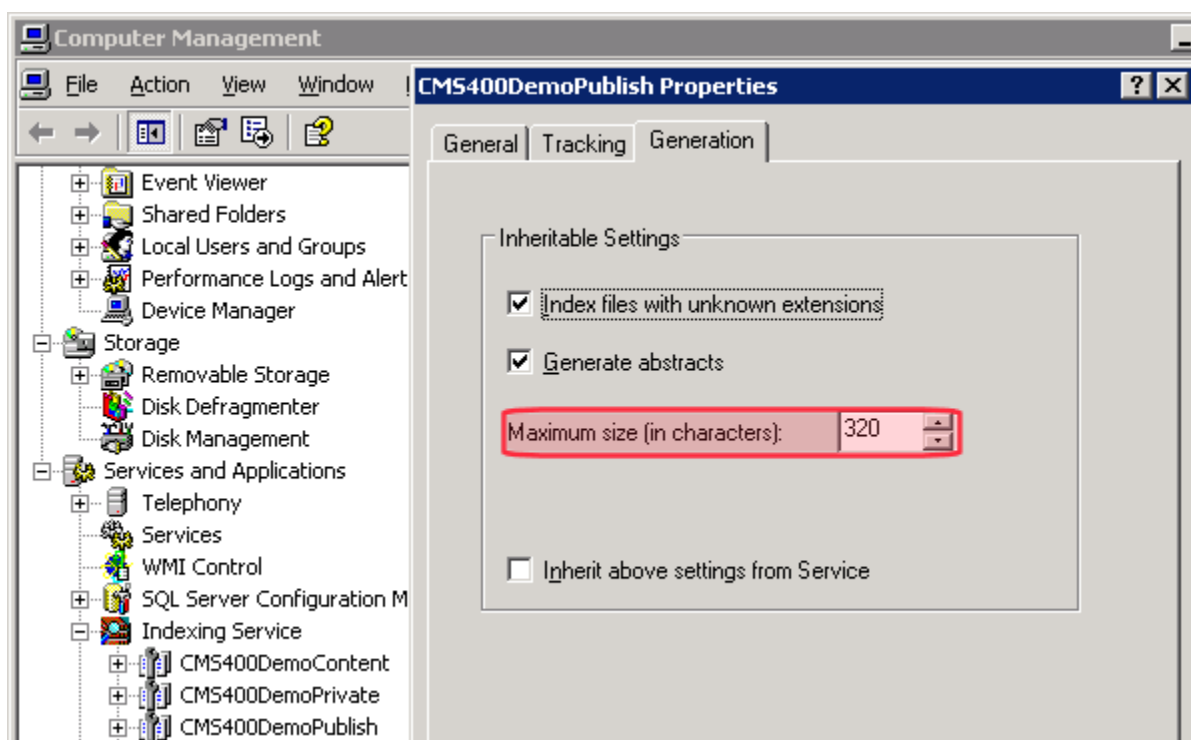
See Also:

- ["Adjusting the Length of the Search Result Abstract" on page 429](#)
- ["Search Result Ranking" on page 430](#)

## Adjusting the Length of the Search Result Abstract

To adjust the length of the abstract, update the Indexing Service's Properties window > **Generation** tab > **Maximum Size** field (see below).





The abstract's text is taken from the content. (It ignores text in tables.) If the content text has fewer characters than the **Maximum Size**, Ektron CMS400.NET tries to complete the abstract by retrieving the title, summary, metadata, comments, and additional information stored in the content item's tabs.

## Search Result Ranking

Each content item found by a catalog search is given a numerical rank between 0 and 1000. Search results can be sorted by rank.

Criteria used to calculate rank include the

- number of occurrences of the search term
- proximity of search term to beginning of file
- proximity of search term to other occurrences of the term
- whether the term is in the title



# Query Language

**NOTE**

Following text collected from Microsoft Web site. © 2006 by Microsoft Corporation. All rights reserved.

To search for any word or phrase on a Web site, enter the word or phrase into the Search field and click the button to begin the search.



Web   Html   Documents   Images   Multi Media   more »

     [Advanced Search](#)

This section covers the following topics.

- ["Rules for Formulating Queries" on page 431](#)
- ["Boolean and Proximity Operators" on page 433](#) - increase accuracy of searches by inserting Boolean and proximity operators
- ["Localized Symbols and Keywords" on page 434](#) - explains which keywords are supported in foreign languages
- ["Wildcards" on page 434](#) - find pages with words similar to your search term
- ["Free-Text Queries" on page 435](#) - create a query based on a phrase's meaning as opposed to exact wording
- ["Vector Space Queries" on page 435](#) - find pages that match a list of words and phrases
- ["Property Value Queries" on page 436](#) - query a file's properties
- ["Query Examples" on page 441](#) - examples of various queries

## Rules for Formulating Queries

When a search is executed, it returns a list of Web pages that contain the word or phrase that a user entered, regardless of where it appears in text.

Follow these rules when formulating queries.



- Multiple words are treated as individual search terms. So, the term **calendar server** returns pages that have both words.  
To find pages that have calendar and server in that exact order, use quotes. "**calendar server**" returns pages that include both terms in that exact order with no intervening words.
- Queries are case-insensitive. You can type a query in upper or lower case.
- You can search for any word except those in the *noise file*.  
**Ektron CMS400.NET**'s noise file screens from the search every single letter of the alphabet as well as common words. Examples of common words are about, after, all, and also. Avoid entering such words into the Search Text field, because the search ignores them.  
  
The list of noise words (noise.enu) is installed to your *siteroot/Workarea* folder. You can open a noise file with a simple word processor program, such as Notepad, to view the noise words. You can also edit the file. For example, you can remove words that users should be able to search on.
- Words in the noise file are treated as placeholders in phrase and proximity queries. For example, if you search for "Word for Windows", the results could return "Word for Windows" and "Word and Windows", because "for" is in the exception list.
- Punctuation marks, such as period (.) and comma (,), are ignored by a search.
- To use special characters, such as &, |, ^, #, @, \$, (, ), in a query, enclose the query in quotation marks ("").
- To search for a word or phrase containing quotation marks, surround the entire phrase with quotation marks and double the quotation marks around the word to be surrounded with quotes. For example, "World-Wide Web" or ""Web"" searches for World-Wide Web or "Web".
- Use Boolean operators (AND, OR) and the proximity operator (NEAR) to specify additional search criteria. See *A/so: "Boolean and Proximity Operators" on page 433*
- Use the wildcard character (\*) to find words with a given prefix. For example, the query **esc\*** finds Web pages with "ESC," "escape," and so on. See *A/so: "Wildcards" on page 434*
- You can specify free-text queries without regard to query syntax. See *A/so: "Free-Text Queries" on page 435*



- Vector space queries can be specified. See Also: "[Vector Space Queries](#)" on page 435
- You can search on ActiveX™ (OLE) and file attribute property values. See Also: "[Property Value Queries](#)" on page 436

## Boolean and Proximity Operators

Use boolean and proximity operators to create a more precise query.

| To Search for                         | Example   | Results  |
|---------------------------------------|---|--|
| Both terms on a page                  | healthcare insurance  | Pages with words "healthcare" and "insurance"  |
| Either term on a page                 | kidney or renal<br>—Or—<br>kidney   renal#                          | Pages with "kidney " or "renal"  |
| All pages that match a property value | @CMSsize > 1000   | Pages greater than 1000 kilobytes  |
| Both terms on a page, close together  | treatment near immunoglobulin<br>—Or—<br>treatment ~ immunoglobulin | Pages with the word "treatment" near the word "immunoglobulin" See Also: " <a href="#">The NEAR operator is like the AND operator because it finds pages that include both search words.</a> " on page 433 |

### Tips

- To nest expressions within a query, add parentheses. Expressions within parentheses are evaluated before the rest of the query.
- Use double quotes (") to ignore a Boolean or NEAR operator keyword. For example, "Abbott and Costello" finds pages with the entire phrase, not pages that match the Boolean expression. In addition to being an operator, the word "and" is a *noise word* in English.
- The NEAR operator is like the AND operator because it finds pages that include both search words.



However, the rank assigned by NEAR depends on the proximity of the search words. A page with the searched-for words closer together has a higher rank than a page where they are farther apart. If the search words are more than 50 words apart, the page is assigned a rank of zero.

**NOTE** The NEAR operator can be applied only to words or phrases.

- The AND operator has a higher precedence than OR. For example, the first three queries are equal, but the fourth is not:
  - a AND b OR c
  - c OR a AND b
  - c OR (a AND b)
  - (c OR a) AND b

## Localized Symbols and Keywords

The symbols (&, |, !, ~) and the English keywords AND, OR, and NEAR work the same in all languages supported by **Ektron CMS400.NET**. Localized keywords are also available when the browser locale is set to one of the following languages.

| Language | Keywords               |
|----------|------------------------|
| German   | UND, ODER, NICHT, NAH  |
| French   | ET, OU, SANS, PRES     |
| Spanish  | Y, O, NO, CERCA        |
| Dutch    | EN, OF, NIET, NABIJ    |
| Swedish  | OCH, ELLER, INTE, NÄRA |
| Italian  | E, O, NO, VICINO       |

## Wildcards

Wildcard operators find pages that contain words similar to a given word.



| To Search For                         | Example | Results   |
|---------------------------------------|---------|---|
| Words with the same beginning letters | pharm*  | Pages with words that have the prefix <b>pharm</b> , such as <b>pharmaceutical</b> , <b>pharmacist</b> , and <b>pharmacology</b> .  |
| Words based on any form of a verb     | fly**   | Pages with any form of a verb. For example, if you enter <b>fly</b> , the search returns pages that contain <b>flying</b> , <b>flown</b> , <b>flies</b> , and <b>flew</b> . |

## Free-Text Queries

A free-text query finds pages that match the meaning, not the exact wording, of submitted words and phrases. Begin free-text queries with `$contents`.

You cannot use boolean, proximity, or wildcard operators in a free-text query.

| To Search For              | Example  | Results   |
|----------------------------|--|---|
| Files that match free-text | <code>\$contents</code> how do I print in Microsoft Excel? | Pages that mention printing and Microsoft Excel |

## Vector Space Queries

The search supports *vector space* queries, which return pages that include a list of words and phrases. Each page is ranked according to how well it matches the query.

| To Search for                     | Example     | Results   |
|-----------------------------------|-------------|---|
| Pages that contain specific words | light, bulb | Files with words that best match the search words |



| To Search for  | Example   | Results  |
|--|---|--|
| Pages that contain weighted prefixes, words, and phrases | invent*, light[50], bulb[10], "light bulb"[400] | Files that contain words prefixed by "invent," the words "light," "bulb," and the phrase "light bulb" (the terms are weighted) |

### Tips

- Separate terms in a vector query with commas (,)
- You can weight terms in vector queries by using the `[weight]` syntax (see example above)
- Pages found by vector queries do not necessarily match all words submitted in the query
- Vector queries work best when results are sorted by rank

## Property Value Queries

Use a property value query to find files whose property values match a given criteria. Properties you can query include file information (like file name and size), and ActiveX properties, including the document summary stored in files created by ActiveX-aware applications.

There are two types of property queries.

- **Relational property queries** - consist of an "at" character (@), a property name, a relational operator, and a property value. For example, to find all files larger than one million kilobytes, use `@CMSsize > 1000000`. See Also: ["Relational Operators" on page 438](#)
- **Regular expression property queries** - consist of a number sign (#), a property name, and a regular expression for the property value. For example, to find all .avi files, use `#filename *.avi`. See Also: ["Regular Expressions" on page 440](#)

Regular expressions do not match the contents (`#contents`) and all (`#all`) properties.

In regular expression property queries, you can only use properties that are retrievable at query time. Properties that are not retrievable include HTML META properties not stored in the property cache.



## Property Names

Property names are preceded by the “at” sign (@) for relational queries, and the pound sign (#) for regular expression queries.

If no property name is specified, @contents is assumed.

Properties available for all files are listed below.

| Property Name | Description   |
|---------------|---|
| All           | Matches words, phrases, and any property  |
| Contents      | Words and phrases in the file<br><br><u>Note: The contents property does not support relational operators. If a relational operator is specified, no results are found. For example, @contents Ektron finds documents containing Ektron, but @contents=Ektron finds none.</u> |
| Filename      | Name of the file  |
| CMSsize       | File size   |
| Write         | Date file was created or last modified (whichever is later)   |

You can also use ActiveX property values in queries. You can search for files created by most ActiveX-aware applications by querying for the following properties.

| Property Name | Description             |
|---------------|-------------------------|
| DocTitle      | Title of the document   |
| DocSubject    | Subject of the document |
| DocAuthor     | The document's author   |



| Property Name | Description                 |
|---------------|-----------------------------|
| DocKeywords   | Keywords for the document   |
| DocComments   | Comments about the document |

## Relational Operators

Use relational operators to create relational property queries.

| To Search for                                 | Example   | Results                                  |
|---|---|--|
| Property values in relation to a fixed value  | <pre>@CMSSize &lt; 100 @CMSSize &lt;= 100 @CMSSize = 100 @CMSSize != 100 @CMSSize &gt;= 100 @CMSSize &gt; 100</pre> | Files whose size matches the query       |
| Property values with all of a set of bits on  | <pre>@attrib ^a 0x820</pre>   | Compressed files with the archive bit on |
| Property values with some of a set of bits on | <pre>@attrib ^s 0x20</pre>  | Files with the archive bit on            |

## Property Values

| To Search for                  | Example                               | Results  |
|--------------------------------|---------------------------------------|--|
| A specific value               | <pre>@DocAuthor = "Bill Bailey"</pre> | Files authored by Bill Bailey                  |
| Values beginning with a prefix | <pre>#DocAuthor George*</pre>         | Files whose author property begins with George |



| To Search for  | Example   | Results   |
|--|---|---|
| Files of any extension                               | #filename *.gif   | Files with a .gif extension<br><br><u>Note: Because Ektron CMS400.NET stores all content in .txt files, you cannot use this syntax to find files with a .txt extension.</u> |
| Files modified after a certain date                  | @write > 2006/02/14<br><br><u>Note: You cannot use the equal operator (=) with @ write. Only greater than (&gt;) and less than (&lt;) operators work.</u> | Files modified after February 14, 2006  |
| Vectors matching a vector                            | @vectorprop = { 10, 15, 20 }  | ActiveX documents with a vectorprop value of { 10, 15, 20 }   |
| Vectors where each value matches a criterion         | @vectorprop >^a 15  | ActiveX documents with a vectorprop value in which all values in the vector are greater than 15   |
| Vectors where at least one value matches a criterion | @vectorprop ^=s 15  | ActiveX documents with a vectorprop value in which at least one value is 15   |

### ***Tips for Using Property Queries***

- Use the pound (#) character before the property name when using a regular expression in a property value.  
Use the “at” (@) character otherwise. The equal (=) relational operator is assumed for regular-expression queries.
- File name (#filename) is the only property that efficiently supports regular expressions with wildcards to the left of text.
- Dates use the format yyyy/mm/dd.  
You can omit the first two characters of the year. If you do, 29 or less is interpreted as the year 2000, and 30 or greater is interpreted as the year 1900. All dates are in Greenwich Mean Time (GMT).



- Currency values use the format x.y, where x is the whole value amount and y is the fractional amount. There is no assumption about units.
- Boolean values are (t) or (true) for TRUE and (f) or (false) for FALSE.
- Vectors (VT\_VECTOR) are expressed as an opening brace ({), a comma-separated list of values, and a closing brace (}).
- Single-value expressions that are compared against vectors are expressed as a relational operator, then a (^a) for all of or a (^s) for some of. See Also: ["Relational Operators" on page 438](#)
- Numeric values can be expressed in decimal or hexadecimal (preceded by 0x).

## ***Regular Expressions***

Regular expressions in property queries are defined as follows.

- Any character except asterisk (\*), period (.), question mark (?), and vertical bar (|) defaults to matching itself.
- A regular expression can be enclosed in matching quotes (""). It *must* be enclosed in quotes if it contains a space ( ) or closing parenthesis ()).
- The characters \*, ., and ? behave as in Windows. They match any number of characters, match (.) or end of string, and match any one character, respectively.
- The character | is an escape character. After |, the following characters have special meaning:
  - ( opens a group. Must be followed by a matching ).
  - ) closes a group. Must be preceded by a matching (.
  - [ opens a character class. Must be followed by a matching (un-escaped) ].
  - { opens a counted match. Must be followed by a matching }.
  - } closes a counted match. Must be preceded by a matching {.
  - , separates OR clauses.
  - \* matches zero or more occurrences of the preceding expression.



- **?** matches zero or one occurrences of the preceding expression.
- **+** matches one or more occurrences of the preceding expression.

Anything else, including **|**, matches itself.

- Between square brackets (**[]**), the following characters have special meaning.
  - **^** matches everything but following classes. Must be the first character.
  - **]** matches **]**. May only be preceded by **^**. Otherwise, it closes the class.
  - **-** range operator. Preceded and followed by normal characters.

Anything else matches itself (or begins or ends a range at itself).

- Between curly braces (**{}**), the following syntax applies.
  - **|{m}|** matches exactly *m* occurrences of the preceding expression. ( $0 < m < 256$ ).
  - **|{m,}|** matches at least *m* occurrences of the preceding expression. ( $1 < m < 256$ ).
  - **|{m,n}|** matches between *m* and *n* occurrences of the preceding expression, inclusive. ( $0 < m < 256$ ,  $0 < n < 256$ ).
- To match **\***, **.**, and **?**, enclose them in brackets (for example, **[\*]sample** matches **"\*sample"**).

### Query Examples

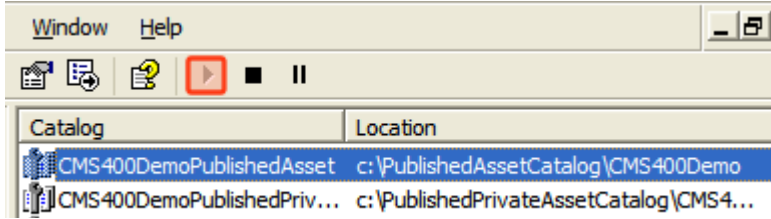
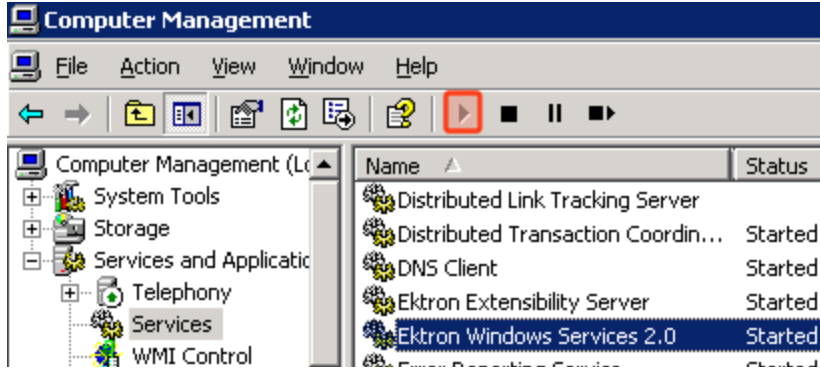
| Example          | Results                 |
|------------------|-------------------------|
| @CMSsize > 10000 | Pages larger than 10 MB |



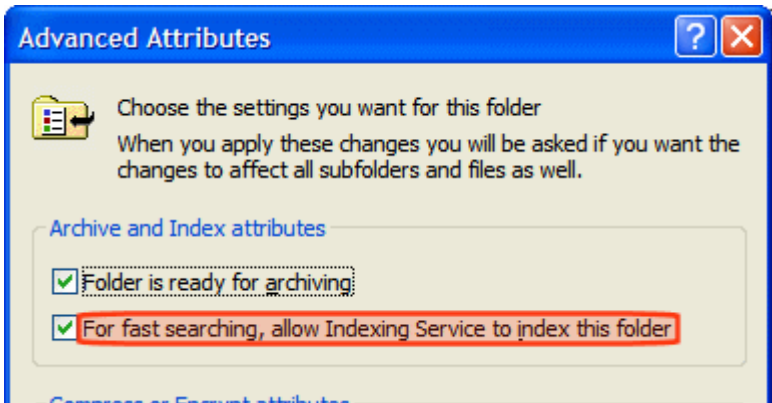
| Example   | Results  |
|---|--|
| @write > 2003/05/12<br><u>Note: You cannot use the equal operator (=) with @ write. Only greater than (&gt;) and less than (&lt;) operators work.</u> | Pages modified after the date  |
| pear tree   | Pages with the phrase "pear tree"  |
| "pear tree"   | Same as above  |
| @contents pear tree   | Same as above  |
| Ektron and @CMSsize > 10000   | Pages with the word "Ektron" that are larger than 10 thousand kilobytes            |
| "Ektron and @CMSsize > 10000"   | Pages with the phrase specified (not the same as above)                            |
| #filename *.avi   | Video files (the # prefix is used because the query contains a regular expression) |
| @attrib ^s 32   | Pages with the archive attribute bit on  |
| @docauthor = "John Stanton"   | Pages with the given author  |
| \$contents why is the sky blue?   | Pages that match the query   |



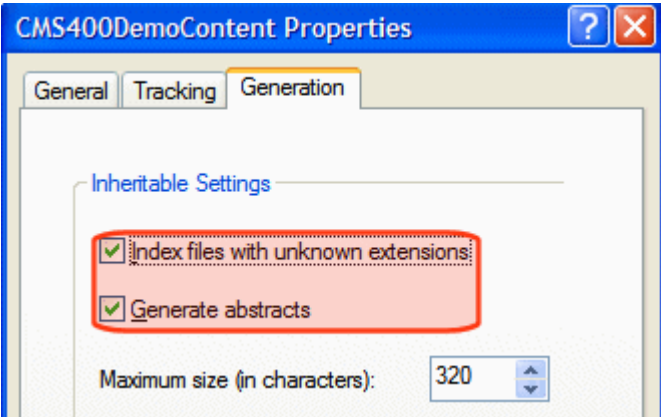
# Search Troubleshooting

| Problem  | Solutions   |
|--|---|
| <p>You publish content but cannot find it using the search</p> | <ol style="list-style-type: none"> <li>Wait 5 or 10 minutes (depends on the load on the server).</li> <li>Make sure the Microsoft indexing service is running (<b>Computer Management &gt; Services and Applications &gt; Indexing Service</b>. Verify that the Run button is grayed out. If the service is not running, start it.</li> </ol>  <ol style="list-style-type: none"> <li>Query the catalog using the new content's ID. See <a href="#">"Querying the Catalog for the Content"</a> on page 446.</li> <li>Make sure the Ektron Windows service is running (<b>Computer Management &gt; Services and Applications &gt; Services &gt; Ektron Windows Services 2.0</b>). Verify that the Run button is grayed out.</li> </ol>  <p>If the service is not running, start it. If you do, it may take a while for the service to prepare the content for indexing.</p> <p><i>(Continued below)</i></p> |

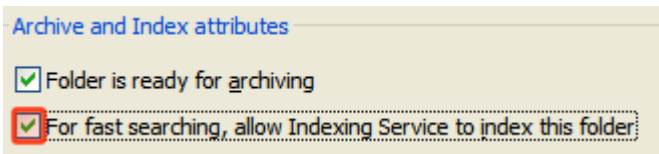


| Problem   | Solutions   |
|---|---|
| <p>You publish content but cannot find it using the search (<i>continued</i>)</p>                                     | <ol style="list-style-type: none"> <li>Make sure the <i>siteroot/Assets</i> folder's Advanced Attributes screen's <b>For fast searching, allow Indexing Service to index this folder</b> checkbox is checked. To access this screen, click the <b>Advanced</b> button on the <i>siteroot/Assets</i> folder properties screen.</li> </ol>  <ol style="list-style-type: none"> <li>Check the priority of the database table. See <a href="#">"Checking the Priority of the Database Table" on page 448</a></li> </ol> |
| <p>Indexing service uses too much memory or resources.</p> <p>Or, too many instances of cidaemon.exe are running.</p> | <p>Check the number of catalogs being serviced. To do so, follow these steps.</p> <ol style="list-style-type: none"> <li>Go to <b>Computer Management &gt; Services and Applications &gt; Indexing Service</b>.</li> <li>You should see three <b>Ektron CMS400.NET</b> catalogs (Public, Private, and Content), plus System and Web. <b>Ektron CMS400.NET</b> does not use the system and Web catalogs, so unless your server uses them for another purpose, you should delete them.</li> <li>Delete any other unused catalogs.</li> <li>Restart the Microsoft Indexing Service.</li> </ol>           |
| <p>The catalog size is growing too quickly, or is really huge</p>   | <p>The indexing service generates an abstract for each content item. See <a href="#">"Display of Search Results" on page 427</a>. By default, the abstract length is 320 characters.</p> <p>To reduce the catalog size, reduce the abstract length. See <a href="#">"Adjusting the Length of the Search Result Abstract" on page 429</a></p>  |
| <p>Catalog is mistakenly deleted or corrupted</p>   | <p>Recreate it. See <a href="#">"Recreating a Catalog" on page 400</a></p>  |



| Problem  | Solutions   |
|--|---|
| <p>The <b>Inheritable Settings</b> checkboxes are not checked</p>            | <p>Make sure the <b>Inheritable Settings</b> checkboxes on the <b>Generation</b> tab of the Properties dialog are checked.</p> <ol style="list-style-type: none"> <li>1. Go to <b>Computer Management &gt; Services and Applications &gt; Indexing Service</b>.</li> <li>2. Select the first of the three <b>Ektron CMS400.NET</b> catalogs (Public, Private, and Content).</li> <li>3. Right click the mouse and select <b>Properties</b>.</li> <li>4. Click the <b>Generation</b> tab.</li> <li>5. Make sure the two checkboxes are checked (illustrated below).</li> </ol>  <ol style="list-style-type: none"> <li>6. Repeat for the other two catalogs.</li> </ol> |
| <p>Verify that Windows can find files on your server.</p>                    | <ol style="list-style-type: none"> <li>1. Open Windows Explorer.</li> <li>2. Right click your C drive and select <b>Search</b>.</li> <li>3. In the <b>All or part of the file name</b> field, enter *.*.</li> <li>4. The search should find all files on your computer.</li> </ol> <p>If it does not, ask your system or network administrator to help you determine why your Windows search is not working. For example, he should verify that you have permission to search for files.</p>  |
| <p>SearchConfigUI.exe crashes while building search indexes and catalogs</p> | <ol style="list-style-type: none"> <li>1. Make sure the metaconfig.doc file exists in the <code>siteroot/uploadedfiles</code> directory.</li> </ol> <p>If it does not, ask <a href="#">Ektron Technical Support</a> to send you a new file.</p>   |



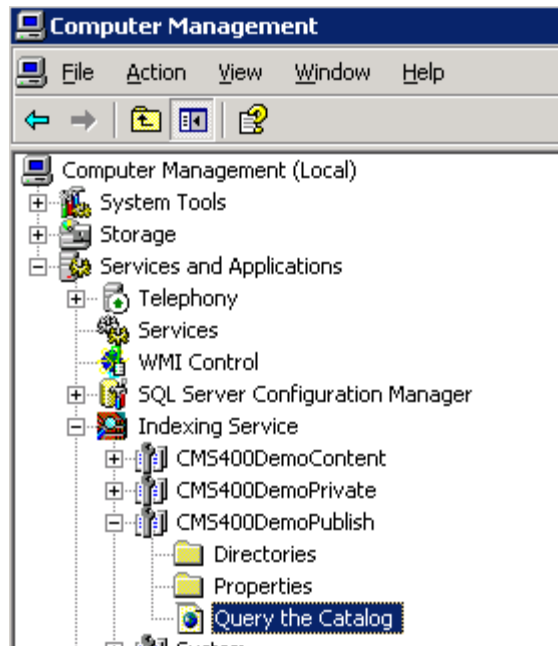
| Problem  | Solutions   |
|--|---|
| MS Indexing Service cannot find files in the <code>siteroot/assets</code> folder.  | <ol style="list-style-type: none"> <li>1. Open Windows Explorer</li> <li>2. Navigate to the <code>siteroot/assets</code> folder.</li> <li>3. Select the folder and right click the mouse.</li> <li>4. Select <b>Properties</b>.</li> <li>5. Click the <b>Advanced</b> button.</li> <li>6. Check the box next to <b>For faster searching, allow Indexing Service to index this folder</b>.</li> </ol>  <ol style="list-style-type: none"> <li>7. Press <b>OK</b>.</li> </ol>   |
| Get error message.<br><b>An unhandled exception has occurred: The type initializer for Ektron.CMS.WebSearch.Manager threw an exception.0</b> | <p>During installation, the user might have canceled the database setup. Check the following.</p> <ol style="list-style-type: none"> <li>1. Check the site root folder for the following folders. If they do not exist, create them. <ul style="list-style-type: none"> <li>•PrivateAssets</li> <li>•Assets</li> <li>•UploadedFiles</li> <li>•UploadedImages</li> </ul> </li> <li>2. Make sure MetaConfig.doc exists in the <code>[sitepath]\UploadedFiles</code> folder. If it does not, ask Ektron Technical Support for a copy of that file from the same <b>Ektron CMS400.NET</b> version.</li> <li>3. Make sure noise.enu file exists in the <code>[sitepath]</code> folder. If it does not, look in the <code>[sitepath]\workarea</code> folder. If noise.enu is there, copy it to the <code>[sitepath]</code> folder. If you cannot find noise.enu, ask Ektron Technical Support for a copy of that file from the same <b>Ektron CMS400.NET</b> version.</li> <li>4. Check the following registry key:<br/> HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\ContentIndexCommon. For that key, make sure <b>DefaultColumnFile</b> has the value <code>C:\WINDOWS\system32\FriendlyNamesDefinitionFile.txt</code>.<br/> If the entry does not exist, create it and set the value as listed above.</li> </ol> |

## Querying the Catalog for the Content

To query the catalog for a content item, follow these steps



1. Go to **Computer Management > Services and Applications > Indexing Service > sitenamePublishedAsset > Query the Catalog**.



2. Choose **Advanced Query**.
3. Use the syntax `@contentID = IDnumber`. For example, if the content ID is 30, enter `@contentID = 30`.



## Indexing Service Query Form

**Enter your advanced query below:**

☐ Standard query (free text)
 ☒ Advanced query

[Tips for searching](#)

Sort by: Rank ▼

Order by: Descending ▼

To see a list of unfiltered documents click:

ry matched 1 record(s). Now showing 1 to 1.

| Title                                | Size | Modified  | Path   |
|--------------------------------------|------|-----------|--|
| <a href="#">Sample Content Block</a> | 3978 | 11/6/2006 | c:\inetpub\wwwroot\cms400demo\assets\0\30_1033.h |

4. The content should appear as shown above.

### Checking the Priority of the Database Table

To check how your database is processing the documents, follow these steps.

1. Launch a database management tool such as SQL Server Management Studio.
2. Find the **Ektron CMS400.NET** database (the default site's database is CMS400Min).
3. Open **Tables > dbo.perform.action**.
4. A list of content blocks being processed appears.



Server Management Studio

Project Query Designer Tools Window Community Help

Change Type

Table - dbo.perform\_action Summary

|   | action_id | content_id | action_to... | action_status | action_priority |
|---|-----------|------------|--------------|---------------|-----------------|
| ▶ | 8         | 850        | 8            | inAction      | -5              |
|   | 9         | 852        | 8            | inAction      | -5              |
|   | 10        | 852        | 8            | inAction      | -5              |
|   | 11        | 850        | 8            | inAction      | -5              |
|   | 12        | 852        | 8            | inAction      | -5              |
|   | 13        | 850        | 8            | inAction      | -5              |
|   | 14        | 852        | 8            | inAction      | -5              |
|   | 15        | 850        | 8            | inAction      | -5              |
|   | 16        | 852        | 8            | inAction      | -5              |
|   | 17        | 850        | 8            | inAction      | -5              |
|   | 20        | 856        | 8            | inAction      | -5              |
|   | 21        | 854        | 8            | inAction      | -5              |
|   | 30        | 858        | 8            | inAction      | -5              |

dbo.LocalizationTarget  
 dbo.max\_entries  
 dbo.menu\_tbl  
 dbo.menu\_to\_item\_tbl  
 dbo.metadata\_type  
 dbo.module\_licenses  
 dbo.nav\_stage\_tbl  
 dbo.nav\_tbl  
 dbo.nav\_to\_content\_s  
 dbo.nav\_to\_content\_t  
 dbo.old\_max\_entries  
 dbo.p\_msg  
 dbo.PDFFileGenTable  
 dbo.PDFFileSyncTable  
**dbo.perform\_action**  
 dbo.permission\_desc  
 dbo.permissions\_tbl

5. Make sure the **action\_priority** for each item is less than -8. If that is the case, the database will process the record.

If the priority is -8 and the action status is **inAction**, there is a problem with the service that processes the document. To resolve the problem, you can

- go to **Computer Management > System Tools > Error Log** to find any errors and fix them
- reset the **action\_priority** value to zero (0) and the action status to **PerformAction**
- contact Ektron Support



# Discussion Boards

## Overview

The Discussion Board feature provides a forum where topics can be discussed on your Web site. A site or membership user with Add Topic permission creates a topic and posts a starter question. Site visitors can then reply. See *Also: "Discussion Board Permissions" on page 492.*

An example of a Discussion Board is below. As you can see, the first screen has general topics, the second screen's topics are more specific, and a third screen displays posts to the forum.

| Forum   | Topics | Posts | Last Post                                       |
|---|--------|-------|---|
| <b>Research Discoveries</b>                         |        |       |   |
| <a href="#">Research</a><br>Latest medical research | 2      | 2     | Wednesday, March 15, 2006 1:00 PM<br>by builtin |

| Research  |                                   |                        |         |       |                                   |
|---|-----------------------------------|------------------------|---------|-------|-----------------------------------|
|   | Topics                            | Topic Starter          | Replies | Views | Last Post                         |
|  | <a href="#">Cancer Treatments</a> | <a href="#">UOneil</a> | 1       | 0     | Wednesday, March 15, 2006 1:00 PM |
|  | <a href="#">Welcome</a>           | <a href="#">UOneil</a> |         |       |                                   |

**Posted:** Wednesday, March 15, 2006 1:00 PM [EDIT](#) [DELETE](#)

The PSA test remains a controversial screening tool for prostate cancer but there is little doubt on its value for helping with treatment decision. Learn what you need to know about PSA.

1

[Back to top](#) [ADD REPLY](#)

IP: 127.0.0.1



As an administrator, you can determine the following Discussion Board features.

- The subjects being discussed
- A starter post, designed to initiate the discussion of a topic
- If users must sign in before posting to the forum
- If a post appears as soon as someone submits it, or must be approved first
  - If a post requires approval, you can edit or delete it before it appears

Whether or not posts must be approved, anyone with permission to the board can perform the following tasks on a post from the Workarea

- edit
- delete
- reply

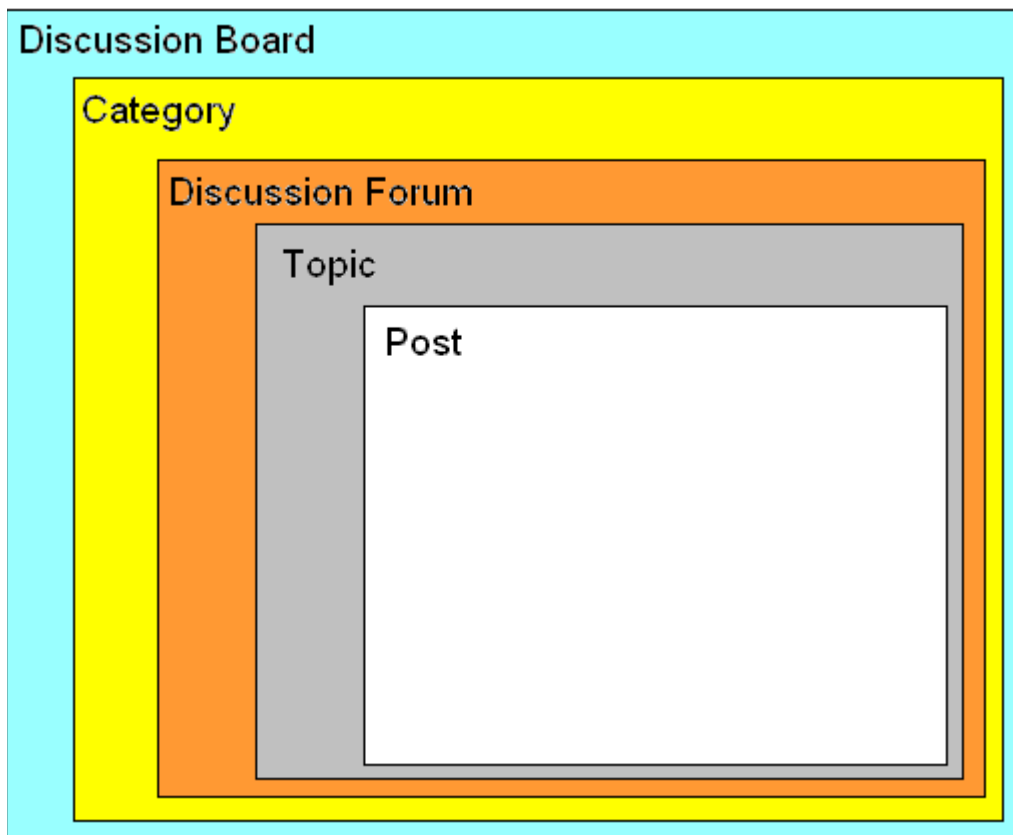
This section explains Discussion Boards through the following topics.

- ["Hierarchy of Discussion Board Elements" on page 451](#)
- ["Implementing Discussion Boards" on page 455](#)
- ["Assigning Permissions to a Discussion Board" on page 489](#)
- ["Inserting Discussion Board Server Controls" on page 495](#)
- ["Using Discussion Boards on Your Web Site" on page 496](#)

## Hierarchy of Discussion Board Elements

A Discussion Board consists of a five-level hierarchy, illustrated below. Before creating a Discussion Board, it is important to understand the elements of the hierarchy.





**Ektron CMS400.NET** supports an unlimited number of Discussion Boards. Each board must follow the hierarchy.

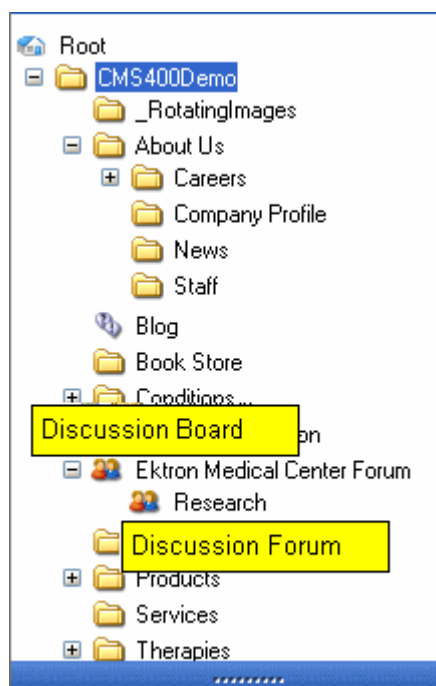
Below is the hierarchy with sample data, to explain how each element is used.



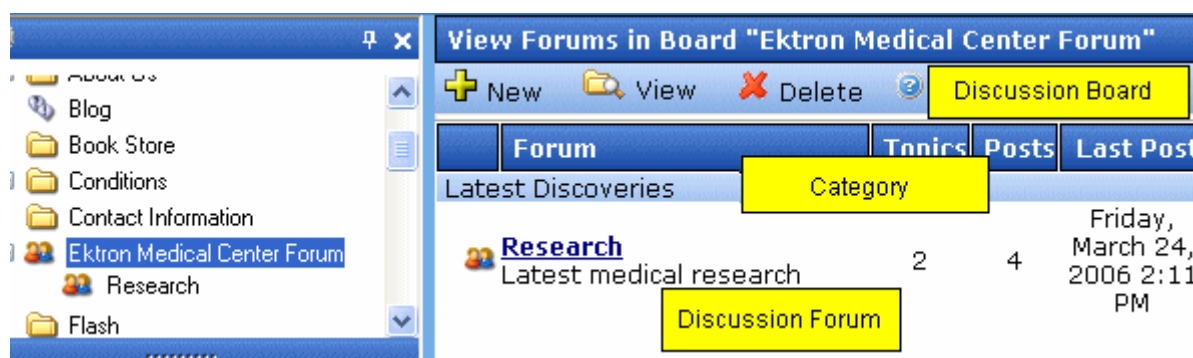


Within the Workarea, Discussion Boards appear as top-level folders in the folder structure. Forums appears under them. Both folders use the people icon (👥) to distinguish them from content and blog folders.



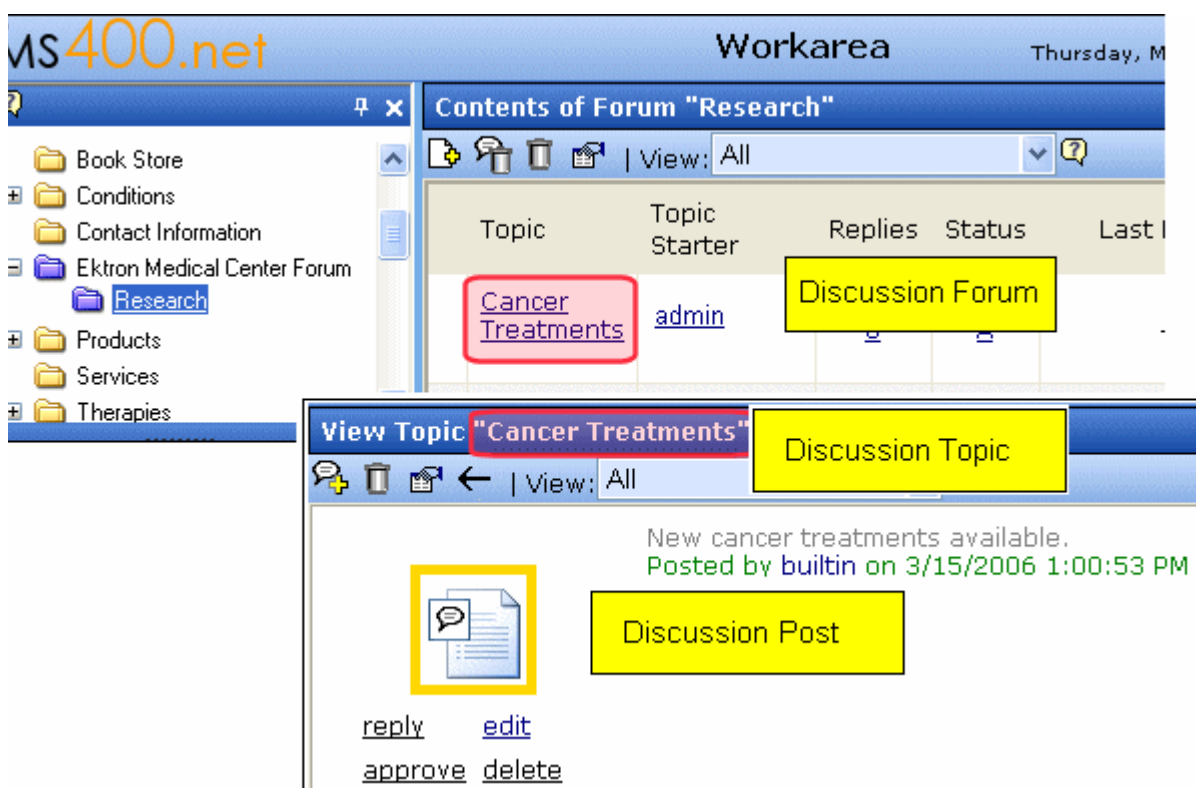


If you click a Discussion Board, you see its Categories and Forums on the right side of the Workarea, as shown below.



If you click a Discussion Forum, you see its topics. If you click a topic, you see its posts, as shown below.





## Implementing Discussion Boards

To implement a Discussion Board into your Web site, place a Forum server control on a Web page. Then, select a Discussion Board.

All Categories and Forums within that board appear on the Web page. You cannot selectively suppress Categories or Forums. Keep this in mind when determining the contents of a Discussion Board.

This is more fully explained through the following topics.

- "Working with Discussion Boards and Categories" on page 456
- "Ranking Forum Users" on page 468
- "Working with Forums" on page 465



- ["Working with Topics" on page 470](#)
- ["Working with Posts" on page 477](#)
- ["Changing Page Size for Discussion Boards" on page 461](#)
- ["Replacing Words in a Post" on page 483](#)
- ["Restricting an IP Address" on page 487](#)
- ["Setting Up Post Reporting" on page 488](#)
- ["Assigning Permissions to a Discussion Board" on page 489](#)

## Working with Discussion Boards and Categories

This section contains the following topics.

- ["Creating a Discussion Board" on page 456](#)
- ["Viewing a Discussion Board" on page 460](#)
- ["Editing a Discussion Board" on page 460](#)
- ["Deleting a Discussion Board" on page 460](#)
- ["Changing Page Size for Discussion Boards" on page 461](#)
- ["Editing Category Name and Sort Order" on page 461](#)
- ["Creating a New Category" on page 462](#)
- ["Terms & Conditions" on page 462](#)

### Creating a Discussion Board

1. To create a Discussion Board, follow these steps. (From the Workarea's **Content** tab, go to the folder in which you want to place the Discussion Board.
2. Click **New > Discussion Board**.



3. The **Add a Discussion Board to folder** screen appears.

**Add a Discussion Board to folder "Content"**

Save Back Help

**Properties** **Categories**

**Board Name:**

**Board Title:**

**Topics:** ☒ **Require Authentication**

Complete the screen using the following table.




**NOTE** Some items in this table only appear when editing an existing Discussion Board's properties.

| Field               | Description   |
|---------------------|---|
| Board Name          | Enter the name of the Discussion Board. This text describes the board within the Workarea. It does not appear on your Web site.   |
| Board Title         | Enter the title of the board.   |
| Accepted HTML       | A comma delimited list of HTML tags that are allowed in the editor. When left blank, all tags are available. This field only appears when editing an existing Discussion Board's properties.<br><br>The default list is:<br><code>br,hr,b,i,u,a,div,ol,ul,li,blockquote,img,span,p,em,strong,font,pre,h1,h2,h3,h4,h5,h6,address</code>  |
| Accepted Extensions | A comma delimited list of file extensions that are allowed to be uploaded. This field only appears when editing an existing Discussion Board's properties. You can enter the extension with or without the period (.). Commas must separate the extensions.<br><br>The default list is: <code>bmp,conf,doc,gif,jpe,jpeg,jpeg,png</code> |
| Max File Size       | The maximum size of the file, in bytes, that a user can upload. The default is 2000 bytes. This field only appear when editing an existing Discussion Board's properties.   |



| Field                                   | Description  |
|---|--|
| Require Authentication                  | <p><b>Effect of this Field on the Web Site</b></p> <p>Check this box if someone must sign in before he can post to the Discussion Board. If the user cannot access a login screen, he cannot post.</p> <p>If this box is unchecked, site visitors are not required to sign in before posting.</p> <p><b>Effect of this Field within the Workarea</b></p> <p>If this field is checked, only users with Add Topic or Edit Topic permissions for the Discussion Board can create or reply to posts.</p> <p>See Also: <a href="#">"Assigning Permissions to a Discussion Board" on page 489</a></p>  |
| CSS Theme                               | <p>Choose a style sheet to determine the appearance of the Discussion Board on your Web site. Select any theme available in the CSS Theme dropdown. The default is <code>site root/Workarea/threadeddisc/themes/standard.css</code>.</p> <p>Alternatively, enter a path below the site root folder to your custom CSS file in the path box.</p> <p>This field only appears when editing an existing Discussion Board's properties.</p> <p><u><b>Note:</b> If you edit a CSS file, Ektron recommends saving it under a new name. This prevents your changes from being overwritten during an upgrade.</u></p> <p>For additional information on creating custom themes, see the Developer Manual section "Discussion Board Server Controls" &gt; "Forum Server Control" &gt; "Using a Custom Theme."</p> |
| Page Templates                          | <p>Lets you specify a template for the forum. If you do not specify a template, the search results do not link properly to the forum.</p>  |
| Quick Deploy: Replicate Folder Contents | <p>Determines whether content in this folder is updated when Quick Deploy is run. This field only appears when editing an existing Discussion Board's properties.</p> <p>See Also: "Quick Deploy" in the <b>Ektron CMS400.NET</b> Site Replication Manual</p>  |



| Field   | Description  |        |       |        |       |  |                                  |  |  |  |  |   |   |   |   |   |                            |  |  |  |  |
|---|--|--------|-------|--------|-------|--|----------------------------------|--|--|--|--|---|---|---|---|---|----------------------------|--|--|--|--|
| Categories Tab  | <p>Enter as many Categories as you wish. Each Category contains one or more Discussion Forums.</p> <p>You <i>must</i> create at least one Category for each Discussion Board.</p> <p>This tab only appears when editing an existing Discussion Board's properties.</p> <p>For more information about how Categories fit into the Discussion Board hierarchy, see "<a href="#">Hierarchy of Discussion Board Elements</a>" on page 451.</p> <hr/> <p><b>Note:</b> You can also add a Category by selecting a Discussion Board then selecting <b>New &gt; Categories</b>.</p> <hr/> <p><b>Category Sort Order</b></p> <p>Categories are the highest level of the hierarchy that appears on your Web site. In the sample Forum below, <b>Latest Discoveries</b> and <b>Patient Care</b> are Categories.</p> <div><table><thead><tr><th></th><th>Forum</th><th>Topics</th><th>Posts</th><th></th></tr></thead><tbody><tr><td colspan="5"><b><u>Latest Discoveries</u></b></td></tr><tr><td></td><td><a href="#">Research</a><br/>Latest medical research</td><td>2</td><td>2</td><td>W</td></tr><tr><td colspan="5"><b><u>Patient Care</u></b></td></tr></tbody></table></div> <p>Categories appear in alphabetical order unless you use the <b>Sort Order</b> field. The <b>Sort Order</b> field accepts a number and uses it to arrange the Categories of a Discussion Board on the Web site. The lowest numbers appear near the top of the page.</p> <p>To access the <b>Sort Order</b> field, follow these steps.</p> <ol style="list-style-type: none"><li>1. Save the Discussion Board.</li><li>2. Click the Discussion Board in the Workarea.</li><li>3. Click <b>View &gt; Properties</b>.</li><li>4. Click the <b>Categories</b> tab.</li><li>5. Modify the number in the <b>Sort Order</b> field as needed.</li></ol> |        | Forum | Topics | Posts |  | <b><u>Latest Discoveries</u></b> |  |  |  |  |  | <a href="#">Research</a><br>Latest medical research | 2 | 2 | W | <b><u>Patient Care</u></b> |  |  |  |  |
|   | Forum  | Topics | Posts |        |       |  |                                  |  |  |  |  |   |   |   |   |   |                            |  |  |  |  |
| <b><u>Latest Discoveries</u></b>  |  |        |       |        |       |  |                                  |  |  |  |  |   |   |   |   |   |                            |  |  |  |  |
|  | <a href="#">Research</a><br>Latest medical research  | 2      | 2     | W      |       |  |                                  |  |  |  |  |   |   |   |   |   |                            |  |  |  |  |
| <b><u>Patient Care</u></b>  |  |        |       |        |       |  |                                  |  |  |  |  |   |   |   |   |   |                            |  |  |  |  |
| Terms & Conditions Tab  | <p>Add the Terms &amp; Condition for using the Discussion Board. By entering any text in this text box and saving, you activate the Terms and Condition feature. See Also: "<a href="#">Terms &amp; Conditions</a>" on page 462</p>  |        |       |        |       |  |                                  |  |  |  |  |   |   |   |   |   |                            |  |  |  |  |



## Viewing a Discussion Board



To view a Discussion Board, select it from the Folders display. When viewing the Board, you see all of its forums. You can click any forum to see details about it.

See Also: ["Implementing Discussion Boards" on page 455](#);  
["Discussion Boards" on page 450](#)

## Editing a Discussion Board

When editing a Discussion Board, you can change all information entered when it was created plus its style sheet.

To edit a Discussion Board, follow these steps.

1. Click the Workarea's **Content** tab.
2. Form the folder structure in the left frame, click the Discussion Board.
3. Click **View > Properties**.
4. Click the Edit button ()
5. Update the screen as needed. Most fields are described in ["Complete the screen using the following table." on page 457](#).
6. Click Save ()

## Deleting a Discussion Board

You can delete any Discussion Board. When you do, its Categories, Forums, and posts are also deleted. Once deleted, they cannot be retrieved.

1. Click the Workarea's **Content** tab.
2. From the folder structure in the left frame, click the Discussion Board.
3. Click **Delete > This folder**.
4. A message appears asking you to confirm.
5. Press **OK** If you are sure.



## Changing Page Size for Discussion Boards

You can change the number of Topics or Posts shown on a page by changing the `ek_PageSize` value in the Web.config file.

The screenshot shows the 'Research' section of the Ektron Medical Center Forum. It features a table with columns: Topics, Topic Starter, Replies, Views, and Last Post. The table lists three topics: 'Test Topic 2', '1Test Topic', and 'Welcome'. Below the table is a pagination bar that reads 'Page 1 of 2' with links for '1' and '2'. The '2' link is highlighted with a red box.

| Topics                       | Topic Starter      | Replies | Views | Last Post                           |
|------------------------------|--------------------|---------|-------|-------------------------------------|
| <a href="#">Test Topic 2</a> | <a href="#">AA</a> | 0       | 0     | Monday, October 16, 2006 12:29 PM ➡ |
| <a href="#">1Test Topic</a>  | <a href="#">AA</a> | 0       | 2     | Monday, October 16, 2006 10:53 AM ➡ |
| <a href="#">Welcome</a>      | <a href="#">AA</a> | 1       | 17    | Monday, April 10, 2006 8:48 PM ➡    |

Page 1 of 2 [1](#) [2](#)

See Also: The `ek_PageSize` property description in the Ektron CMS400.NET Setup Manual section “Managing the web.config File” > “Settings in the web.config File” > “Miscellaneous Settings.”

## Editing Category Name and Sort Order


You can change any Category’s name or sort order. To do so, follow these steps.

1. Click the Workarea’s **Content** tab.
2. From the folder structure in the left frame, click the Discussion Board that contains the Categories.
3. Click **View > Properties**.
4. Click the **Categories** tab.






| Category                           | Sort Order |
|------------------------------------|------------|
| <a href="#">Latest Discoveries</a> | 1          |
| <a href="#">Patient Care</a>       | 2          |
| <a href="#">Clinical Research</a>  | 3          |

- Click the Category that you want to edit.
- The current Category name and sort order appear on a new screen. Edit as needed. See *Also: "Category Sort Order" on page 459.*
- Click Save ().

## Creating a New Category

Use this procedure when you want to add a new Category to a Discussion Board.

**NOTE** For more information about how Categories fit into the Discussion Board hierarchy, see *"Hierarchy of Discussion Board Elements" on page 451.*

- Click the Workarea's **Content** tab.
- From the folder structure in the left frame, click the Discussion Board to which you want to add a Category.
- Click **New > Category**.
- Enter a Category name and sort order. See *Also: "Category Sort Order" on page 459*
- Click Save ().

## Terms & Conditions



Adding Terms & Conditions to a discussion board allows you to convey to a user the expectations when using the discussion board. Once added, users are not allowed to post to the forum until they have agreed to the Terms.



|   |  |
|---|--|
| <b>Ektron Medical Center Forum » Research » Cancer treatments</b> |  |
| <b>Post A Reply</b>   |  |
|   | In order to proceed, you must agree with the following rules:  |
|   | Use of this Site constitutes agreement with the following terms and conditions:<br>The Forum administers this Site. Unless expressly stated otherwise, the findings<br>interpretations and conclusions expressed in the materials in this Site are those<br>of the various authors of the work and are not necessarily those of The Forum's<br>staff or Board... |
| <input type="checkbox"/>  | I have read and agree to abide by the forum rules.   |
| <input type="button" value="Continue"/>                           |  |

When new Membership users are added, you can have them accept the Terms & Conditions during registration. This is explained in the "Membership Server Control" section of Developer manual.





\*First Name:   
 \*Last Name:   
 \*Password:   
 \*Confirm Pwd:   
 \*E-Mail Address:   
 Display Name:   
 User Language:    
 Subscriptions ☐ Wellness Articles  
 (Notification will send in user language)  
 zip   
 Private Profile ☐  
 \*Region  

In order to proceed, you must agree with the following rules:  
 Use of this Site constitutes agreement with the following terms and conditions:  
 The Forum administers this Site. Unless expressly stated otherwise, the findings  
 interpretations and conclusions expressed in the materials in this Site are those  
 of the various authors of the work and are not necessarily those of The Forum's  
 staff or Board...

☐ I have read and agree to abide by the forum rules.

### ***Adding Terms and Conditions to a Discussion Board***

1. In the Workarea, navigate to the Discussion Board.
2. Click **View > Properties**.
3. Click the Edit button (.
4. Click the **Terms & Conditions** tab.
5. Add the terms and conditions text to editor.
6. Click the Save () button.



## Working with Forums

A Forum is a particular thread within a Discussion Board. To learn about how Forums fit into the Discussion Board hierarchy, see ["Hierarchy of Discussion Board Elements" on page 451](#).

For each Forum, you define the following:

- name and Description
- whether posts to it must be approved before appearing on your Web site
- if it's accepting new postings
- its sort order, which determines its sequence on the Web page within its Category
- its Category

This section contains the following topics.

- ["Creating a Forum" on page 465](#)
- ["Editing a Forum" on page 467](#)
- ["Deleting a Forum" on page 468](#)
- ["Ranking Forum Users" on page 468](#)

### Creating a Forum

You can only create a Forum after a Discussion Board and at least one Category have been created.

1. In the Workarea, click **Content** then select a Discussion Board.
2. Click **New > Discussion Forum**.
3. The **Add a Discussion Forum to Board** screen appears.



Add a Discussion Forum to Board "Ektron Medical Center Forum"





**Properties**

**Name:**


**Description:**

**Topics:** ☒ **Moderate Comments**  
☐ **Lock Forum**

**Sort Order:**

**Category:** Latest Discoveries ▼

Complete the screen using the following table.

| Field       | Description  |
|-------------|--|
| Name        | <p>Enter the name of the discussion Forum.</p> <p>The name identifies the Forum in the left side of the Workarea. The forum's name appears next to a people icon (👤). This icon distinguishes it from content and blog folders. It also appears on the Web site (see example below).</p> <div style="text-align: center;">  </div> |
| Description | <p>Enter a more detailed description of the Forum.</p> <p>The description appears on the Web site, as illustrated above.</p>   |





| Field             | Description  |
|-------------------|--|
| Moderate Comments | <p>Checking this box allows:</p> <ul style="list-style-type: none"> <li>• comments to be approved before being posted to the Web site.</li> <li>• a post to be reported to all moderators of the forum. See <i>Also</i>: <a href="#">"Reporting a Post" on page 502</a> and <a href="#">"Setting Up Post Reporting" on page 488</a></li> </ul> <p>Only users who are granted <b>Moderate</b> permission can approve comments, thereby allowing them to be published on the site. See <i>Also</i>: <a href="#">"Discussion Board Permissions" on page 492</a></p> |
| Lock Forum        | <p>Check this box if you want to prevent all posting to this Forum. You can do this temporarily or permanently.</p> <p>If a Forum is locked, only members of the Administrators user group can post to it, or edit or delete posts. Those users can post from the Web site or the Workarea.</p>  |
| Sort Order        | <p>Enter a number if you want to arrange the sequence of Forums within the Category.</p> <p>If you do not, Forums appear in alphabetical order within a Category.</p>  |
| Category          | <p>Enter the Category within which this Forum will appear on the Web site. To learn more about the relationship of Categories to Forums, see <a href="#">"Hierarchy of Discussion Board Elements" on page 451</a>.</p>   |

4. Click Save (.

## Editing a Forum

Follow these steps if you want to change any information about a Forum.

1. Click the Workarea's **Content** tab.
2. From the folder structure in the left frame, click the Discussion Board that contains the Forum.
3. Click the Forum.
4. Click the View Properties button (.
5. Click the Edit button (.
6. Update the screen as needed. The fields are described in ["Complete the screen using the following table." on page 466](#).




7. Click Save (  ).

## Deleting a Forum

You can delete any Forum. When you do, its topics and posts are also deleted. Once deleted, they cannot be retrieved.

To delete a Forum, follow these steps.

1. Click the Workarea's **Content** tab.
2. From the folder structure in the left frame, click the Discussion Board that contains the Forum.
3. Click the Forum.
4. Click the Delete Forum button (  ).
5. A message appears asking you to confirm.
6. Press **OK** if you are sure.

## Ranking Forum Users

The User Ranking feature lets you recognize users for their contributions to the forum. You can create a ranking system and decide how many posts must be submitted to move a user to the next level.

For example, the starter level might be Ektron Newbie for zero to nine posts. The second level, Ektron Intermediate for ten to nineteen posts. The third level, Ektron Expert for twenty to thirty posts.

The ranking system lets forum users build credibility. You can assign each rank an image, which appears below the user's name. You can also create specialized ranks that are separate from the ladder system for forum users. Once users are moved to a specialized rank, they are there exclusively. For example, after a forum user acquires Ektron Developer Certification, he is moved to the Ektron Developer rank.

Users can be returned from a specialized rank back to the ladder system. The next time that user adds a post, the system tallies his number of posts and places him in the correct rank.



To add a user rank, follow these steps.

**NOTE**

In addition to using User Ranks for a specific forum, you can access the User Ranks feature from the Workarea > Settings > Configuration > Discussion Board > User Ranks. If you have more than one forum, this allows you select Discussion Boards to which User Ranks are applied.

1. In the Workarea, navigate to the Discussion Board.
2. Click **New > User Ranks**.
3. The New User Ranks screen appears.

4. Complete the screen using the following table.

| Field           | Description   |
|-----------------|---|
| Name            | The name of the rank. For example, Newbie, Expert, Developer, or Associate.   |
| Rank Image      | Enter a path to the image that represents this rank. Images are optional.   |
| Number of Posts | Enter the number of posts it takes to reach this rank. If the Starting Rank check box is checked, the number is 0 (zero). |
| Starting Rank   | If this is the starting rank, check this box.   |



5. Click the Save button (  ).

## Working with Topics

Topics are specific issues to be discussed in a Forum. For example, in a medical research Forum, a topic might be New Cancer Treatments. Topics can only be started within the Workarea.

Before creating a topic, you must create a Forum into which to place it. To learn more about how Topics fit into the Discussion Board hierarchy, see ["Hierarchy of Discussion Board Elements" on page 451](#).

This section contains the following topics:

- ["Adding a Topic to a Forum" on page 470](#)
- ["Setting and Changing the Topic Priority" on page 473](#)
- ["Viewing a Topic" on page 474](#)
- ["Editing a Topic's Title" on page 476](#)
- ["Approving a Topic" on page 477](#)
- ["Deleting a Topic" on page 477](#)


### Adding a Topic to a Forum

When a new Topic is created, the first post is created from the message of the Topic.

To create a Topic, follow these steps.

#### NOTE

If the user adding the Topic is not a Forum moderator, that user does not see the Topic in the workarea until it is approved. See Also: ["Approving a Topic" on page 477](#).

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. Click the New Topic button (  ).
3. The Post New Topic screen appears.



Post New Topic

Topic







Subject:

☒ Normal  
☐ Sticky  
☐ Announcement

Message:

4. Complete the screen using the following table.



| Field   | Description  |                       |         |               |         |       |   |                          |                       |   |   |   |                 |                       |   |   |
|---|--|-----------------------|---------|---------------|---------|-------|---|--------------------------|-----------------------|---|---|---|-----------------|-----------------------|---|---|
| Subject   | <p>Enter a short description of the topic. The Topic Subject appear on the Forum page, as shown below.</p> <div><div>Research</div><table><tr><th></th><th>Topics</th><th>Topic Starter</th><th>Replies</th><th>Views</th></tr><tr><td></td><td><b>Cancer Treatments</b></td><td><a href="#">admin</a></td><td>2</td><td>0</td></tr><tr><td></td><td><b>Welcome!</b></td><td><a href="#">admin</a></td><td>2</td><td>0</td></tr></table></div> |                       | Topics  | Topic Starter | Replies | Views |  | <b>Cancer Treatments</b> | <a href="#">admin</a> | 2 | 0 |  | <b>Welcome!</b> | <a href="#">admin</a> | 2 | 0 |
|   | Topics   | Topic Starter         | Replies | Views         |         |       |   |                          |                       |   |   |   |                 |                       |   |   |
|  | <b>Cancer Treatments</b>   | <a href="#">admin</a> | 2       | 0             |         |       |   |                          |                       |   |   |   |                 |                       |   |   |
|  | <b>Welcome!</b>  | <a href="#">admin</a> | 2       | 0             |         |       |   |                          |                       |   |   |   |                 |                       |   |   |
| Priority  | <p>Set the priority level for the topic. This determines where the topic appears in the topic list on the site. The default setting is Normal. See Also: "<a href="#">Setting and Changing the Topic Priority</a>" on page 473</p>   |                       |         |               |         |       |   |                          |                       |   |   |   |                 |                       |   |   |
| Message   | <p>Enter the entire text of the topic.</p> <p>The Topic Message appears on a new Web page after a Web site visitor clicks a Topic's Subject line.</p> <div><div>ADD REPLY</div><div><a href="#">admin</a> <b>Posted:</b> Wednesday, March 15, 2006 1:00 PM<div><div>EDIT</div><div>DELETE</div></div></div><p>The PSA test remains a controversial screening tool for prostate cancer, but there is little doubt on its value for helping with treatment decisions. Learn what you need to know about PSA.</p></div>   |                       |         |               |         |       |   |                          |                       |   |   |   |                 |                       |   |   |

5. Click Save (.



## Setting and Changing the Topic Priority

You can set the priority of a topic when creating it. Within a forum, topics are sorted by priority.



A user must have Moderate permission for a forum to set a topic's priority. Anyone with Moderate permission can change a topic's priority by editing the forum's properties.

### Priority Levels

There are three priority levels:

- Announcement
- Sticky
- Normal
- **Announcement** - topic always appears at the top of the list. If more than one announcement is on the list, the most recent one appears at the top. The rest appear by date, newest to oldest.

The Announcement icon () appears to the left of each topic.

| Ektron Medical Center Forum » Research  |                              |               |         |       |                                    |
|---|------------------------------|---------------|---------|-------|------------------------------------|
| Research  |                              |               |         |       |                                    |
|   | Topics                       | Topic Starter | Replies | Views | Last Post                          |
|  | <a href="#">Test topic 3</a> | AA            | 0       | 0     | Friday, October 20, 2006 5:17 PM ➡ |
|  | <a href="#">Test topic 2</a> | AA            | 0       | 0     | Friday, October 20, 2006 5:10 PM ➡ |

- **Sticky** - displays the topic at the top of the list, although below any announcements. If more than one sticky topic appears on the list, the most recent appears at the top. The rest appear by date, newest to oldest.

The Sticky icon () appears to the left of each topic.



Ektron Medical Center Forum » Research

NEW TOPIC SEARCH

| Research |                              |               |         |       |                                      |
|----------|------------------------------|---------------|---------|-------|--------------------------------------|
|          | Topics                       | Topic Starter | Replies | Views | Last Post                            |
|          | <a href="#">Test topic 3</a> | AA            | 0       | 0     | Friday, October 20, 2006 5:17 PM ➡   |
|          | <a href="#">Test topic 2</a> | AA            | 0       | 0     | Friday, October 20, 2006 5:10 PM ➡   |
|          | <a href="#">1Test Topic</a>  | AA            | 0       | 5     | Thursday, October 19, 2006 3:54 PM ➡ |
|          | <a href="#">Welcome</a>      | AA            | 1       | 17    | Monday, April 10, 2006 8:48 PM ➡     |

- **Normal** - The topic appears first only if no Announcements or Sticky topics are added. The Normal icon () appears next to the topic.

Ektron Medical Center Forum » Research

NEW TOPIC SEARCH

| Research |                              |               |         |       |                                      |
|----------|------------------------------|---------------|---------|-------|--------------------------------------|
|          | Topics                       | Topic Starter | Replies | Views | Last Post                            |
|          | <a href="#">Test topic 3</a> | AA            | 0       | 0     | Friday, October 20, 2006 5:17 PM ➡   |
|          | <a href="#">Test topic 2</a> | AA            | 0       | 0     | Friday, October 20, 2006 5:10 PM ➡   |
|          | <a href="#">1Test Topic</a>  | AA            | 0       | 5     | Thursday, October 19, 2006 3:54 PM ➡ |
|          | <a href="#">Welcome</a>      | AA            | 1       | 17    | Monday, April 10, 2006 8:48 PM ➡     |

## Viewing a Topic

**NOTE** To learn about viewing a topic from your Web site, see "Using Discussion Boards on Your Web Site" on page 496.

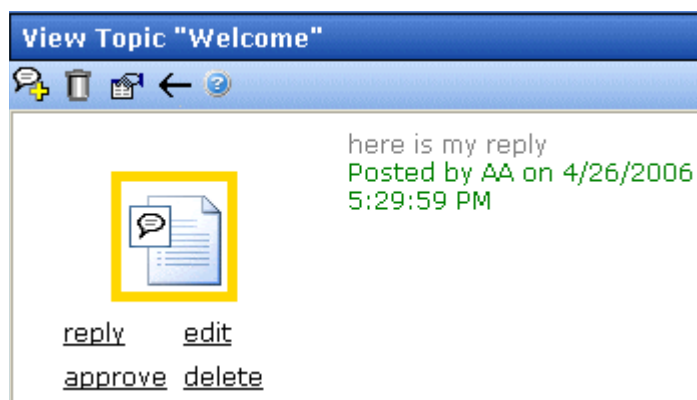
To view a topic from the Workarea, follow these steps.

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. The Forum's topics appear in the right frame. Click the one that you want to view.









The main body of the Topic screen displays each post within the topic. If a post is surrounded by a yellow border (as illustrated below), it must be approved before it appears on the Web site. Only users with Moderate permission can approve a post. See *Also: "Assigning Permissions to a Discussion Board" on page 489*



The following options may appear across the top of the screen, depending on your permissions.



| Button  | Description                       | For more information, see                             |
|---|-----------------------------------|---|
|  | Post a new reply to the topic     |   |
|  | Delete topic and all of its posts | <a href="#">"Deleting a Topic" on page 477</a>        |
|  | View and edit the topic's title   | <a href="#">"Editing a Topic's Title" on page 476</a> |
|  | Return to previous screen         |   |

Under each post is a set of options that you may be able to perform on any post, depending on your permissions and the status of the post.


If the option is *underlined*, you have authority to perform it. If not, you cannot. For example, if a post's status is approved, the approve option is not underlined, because it is already approved.

See Also:

- ["Approving a Post in the Workarea" on page 479](#)
- ["Adding a Reply to a Post" on page 478](#)
- ["Editing a Post" on page 480](#)
- ["Deleting a Post" on page 480](#)

## Editing a Topic's Title

The only part of topic you can edit is its title.


1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. The Forum's topics appear in the right frame. Click the one that you want to edit.
3. Click the View Properties button (.
4. The Edit Topic screen appears. Modify the title as needed.



5. Click Save ().


## Approving a Topic

A Topic needs approval when a user without moderate permissions for the Forum adds a Topic. To approve a Topic, follow these steps.

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. The Forum's topics appear in the right frame. Click the one that you want to approve.
3. The View Topic screen appears.
4. Click the Approve Topic button (.
5. The Topic is approved.

## Deleting a Topic

You can delete any Topic. When you do, its posts are also deleted. Once deleted, they cannot be retrieved.

1. In the Workarea, click the **Content** tab, select a Discussion Board, then select a Forum from the folder structure.
2. The Forum's topics appear in the right frame. Click the one that you want to delete.
3. The View Topic screen appears.
4. Click the Delete Topic button (.
5. A confirmation message appears.
6. Click **OK** if you are sure you want to delete it.

## Working with Posts

When a new Topic is created, the first post is created from the message of the Topic. Essentially, all posts to the Topic are replies to the first.

This section contains the following topics:

- ["Adding a Reply to a Post" on page 478](#)

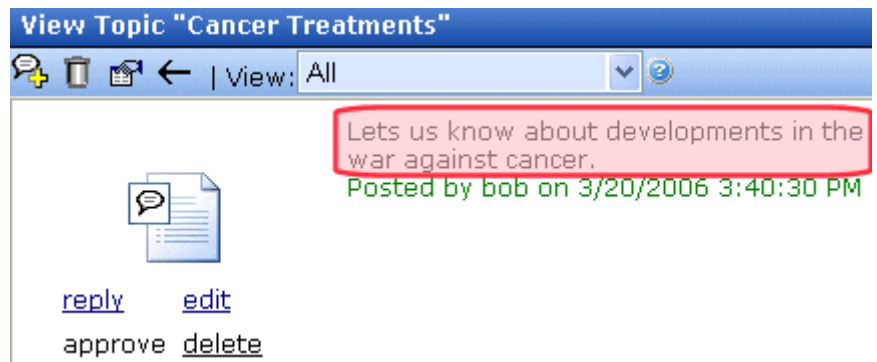


- "Approving a Post in the Workarea" on page 479
- "Editing a Post" on page 480
- "Deleting a Post" on page 480
- "Attaching Images and Files to a Post" on page 481
- "Searching a Forum's Posts" on page 483
- "Replacing Words in a Post" on page 483

## Adding a Reply to a Post

**NOTE** You can also reply to a post from the Web site. See "Posting a Reply" on page 498.

1. In the Workarea, click the **Content** tab
2. Select a Forum from the folder structure.
3. The Forum's topics appear in the right frame. Click the one that has the post that you want to reply to.
4. The next screen, View Topic, displays all posts to the selected topic.
5. Find the post that you want to reply to by reading its text (illustrated below).



6. Click reply.
7. Enter a **Title** for the post.
8. In the **Description** field, enter the text of your post.








## Approving a Post in the Workarea

When defining a Forum, you can check the **Moderate Comments** field. If you do, posts to the Forum must be approved before they appear on the Web site. Only users who are assigned the **Moderate** permission are allowed to approve a post. See *A/so: "Discussion Board Permissions" on page 492*

You can approve a post from the Workarea or the Forum on the site. See also *"Approving a Post" on page 500*.

To approve a post in the Workarea, follow these steps.

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. The Forum's topics appear in the right frame. Click the one that has the post that you want to reply to. (Unapproved posts have a red flag in the left column, as illustrated below.)

| Contents of Forum "Research"   |               |                   |                   |  |
|--|---------------|-------------------|-------------------|--|
|       View: English (U.S.) |               |                   |                   |  |
| Topic  | Topic Starter | Replies           | Status            |  |
| <a href="#">Cancer Treatments</a>  | 999999999     | <a href="#">1</a> | <a href="#">A</a> |  |
|  <a href="#">Welcome!</a>   | 999999999     | <a href="#">1</a> | <a href="#">A</a> |  |

3. The next screen, View Topic, displays all posts to the selected topic.
4. Find the post you want to reply to. Unapproved posts have a yellow border (Illustrated below).






5. Click approve under the post icon.

## Editing a Post

You can edit the text of a post but you cannot edit its title.

**NOTE** You can also edit a post from the Web site. See ["Using Discussion Boards on Your Web Site" on page 496.](#)

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. The Forum's topics appear in the right frame. Click the one that has the post that you want to edit.
3. The next screen, View Topic, displays all posts to the selected topic.
4. Find the post that you want to edit.
5. Click edit under the post icon.
6. The Edit Reply screen appears. Within the editor, update the text as needed.
7. Click Save (.

## Deleting a Post

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. The Forum's topics appear in the right frame. Click the one that has the post you want to delete.



3. The next screen, View Topic, displays all posts to the selected topic.
4. Find the post that you want to delete.
5. Click delete under the post icon.

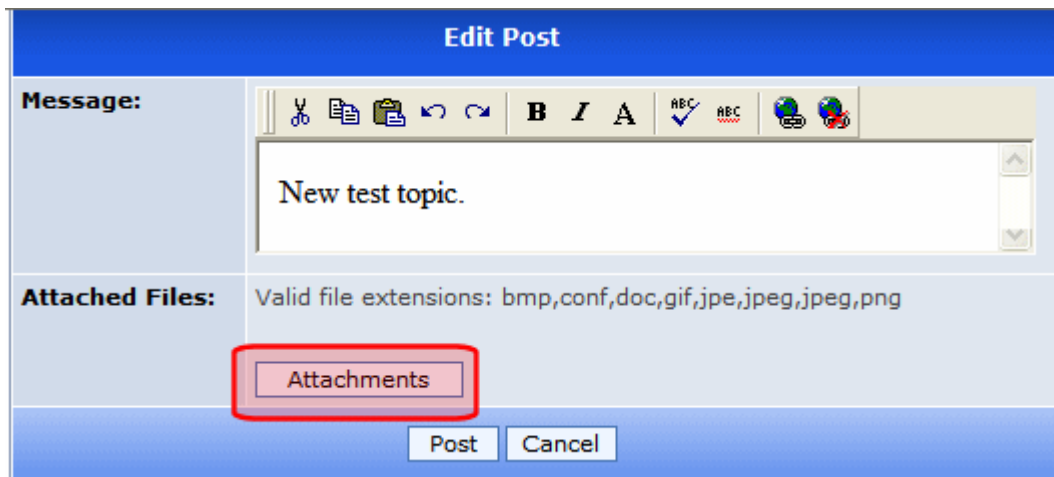
## Attaching Images and Files to a Post

When creating a topic or post, you can add an attachment. In the Attached Files field, A list of the files of files that will be attached appears, In addition, a list of valid file extensions appear. The list of valid file extensions and maximum size of the file upload are defined at the Discussion Board level. See "[Accepted Extensions](#)" on page 457 and "[Max File Size](#)" on page 457.

### Attaching a File

To add an attachment to a topic or post, follow these steps.

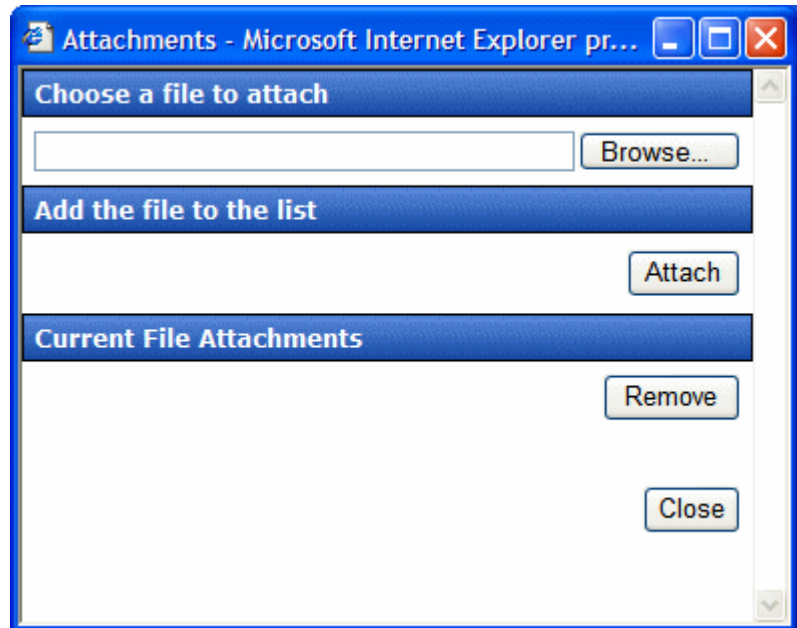
1. Click the **Attachments** button below the editor.



The screenshot shows the 'Edit Post' window. It has a blue header bar with the text 'Edit Post'. Below the header, there is a 'Message:' label on the left and a text area on the right containing 'New test topic.'. Above the text area is a toolbar with various icons for editing (cut, copy, paste, undo, redo, bold, italic, align, link, unlink, etc.). Below the text area, there is an 'Attached Files:' label on the left and a text area on the right containing 'Valid file extensions: bmp,conf,doc,gif,jpe,jpeg,jpeg,png'. Below this text area, there is a button labeled 'Attachments' which is highlighted with a red rectangular box. At the bottom of the window, there are two buttons: 'Post' and 'Cancel'.

2. The Attachments window appears.





3. Click the **Browse...** button to find the file.
4. Browse to the location of the file and select it.
5. Click **Open**.
6. Click the **Attach** button to attach the file to the post.
7. The file appears in the list of Current File Attachments.
8. Click the **Close** button.

### ***Viewing an Attached File***

To view an attached file, click on its name in the post.

### ***Removing an Attached File***

To remove a file from the list of attachments, follow these steps.

1. Click the **Attachments** button below the editor.
2. Highlight the attached item.



3. Click the **Remove** button.
4. Click the **Close** button.

## Searching a Forum's Posts

The Forum server control includes a search feature that lets site visitors search through all posts on your site. Any user can access the search from the Forum screen (see below).

Ektron Medical Center Forum » Research

NEW TOPIC SEARCH

| Research  |         |               |         |       |                       |
|---|---------|---------------|---------|-------|-----------------------|
|   | Topics  | Topic Starter | Replies | Views | Last Post             |
|  | Welcome | AA            | 2       | 13    | Monday, June 26, 2006 |

Ektron Medical Center Forum » Search

Research Match Any Words

Search

When a site visitor clicks **Search**, he can search the current forum (the default value), select a different forum, or search all forums.

## Replacing Words in a Post

You can configure Ektron CMS400.NET Forums to replace unwanted words in a post. This feature is useful for changing words that are obscene, indecent, or should not appear on your site. In addition, Replace Words can fix commonly misspelled words. For example, *the* can replace *teh*. See Also: ["Adding a Replacement Word" on page 485](#)

The Replace Words feature works with exact matches but does not append words. For example, if you replace *car* with *auto*, then the sentence *I bought the car from the cartel* becomes *I bought the*



*auto from the cartel.* Note that *cartel* did not change to *autotel* even though the word *car* appears in *cartel*.

This feature is more fully explained through the following topics.

- ["Using Regular Expressions" on page 484](#)
- ["Adding a Replacement Word" on page 485](#)
- ["Viewing Existing Replacement Words" on page 486](#)
- ["Editing a Replacement Word" on page 486](#)
- ["Deleting a Replacement Word" on page 486](#)

### **Using Regular Expressions**

If you would like the Replace Words feature to modify words that contain a word you do not want used, you can use Regular Expressions. A Regular Expression, often referred to as regex, is a pattern of metacharacters placed around a word that describes a string. Used for string manipulation, regex allows you to detail a succinct description of a group of words without having to detail each word in the group.

| Regular Expression | Description  |
|--------------------|--|
| .                  | Matches any character, similar to a wildcard. For example, <code>.ar</code> matches any three letter word ending in <i>ar</i> , such as <i>car</i> , <i>bar</i> , <i>tar</i> or <i>far</i> .   |
|                    | Acts as an <i>or</i> operator. For example, <code>steak stake</code> would find <i>steak</i> or <i>stake</i> .   |
| [ ]                | Matches one character that is between the brackets. For example, <code>[rst]</code> matches <i>r</i> , <i>s</i> or <i>t</i> . <code>[d-g]</code> matches <i>d</i> , <i>e</i> , <i>f</i> , or <i>g</i> . Another example, <code>[bc]ar</code> matches <i>bar</i> and <i>car</i> . If you need to match a dash (-), use it at the beginning or end of the group. For example, <code>[xyz-]</code> or <code>[-xyz]</code> . |
| [^ ]               | Matches one character that is not in the group. For example, <code>[^rst]</code> matches any character other than <i>r</i> , <i>s</i> or <i>t</i> . Another example, <code>[^bc]ar</code> does not match <i>bar</i> or <i>car</i> , but does match words, such as <i>tar</i> or <i>far</i> .   |
| ^                  | Matches the beginning of any line. For example, <code>^[bc]ar</code> matches <i>bar</i> or <i>car</i> , but only at the beginning of a line.   |




| Regular Expression | Description  |
|--------------------|--|
| \$                 | Matches the end of any line. For example, <code>^[bc]ar</code> matches <i>bar</i> or <i>car</i> , but only when it appears at the end of a line.   |
| ( )                | Marks a sub expression. For example, <code>alt(a e)r</code> finds <i>altar</i> or <i>alter</i> .   |
| *                  | When an expression is followed by *, it matches zero or more versions of the expression. For example, <code>[rst]*</code> finds ( <i>blank</i> ), <i>r</i> , <i>s</i> , <i>t</i> , <i>rs</i> , <i>sr</i> , <i>rt</i> , <i>tr</i> , <i>st</i> , <i>ts</i> , <i>rst</i> , <i>rts</i> , <i>srt</i> , <i>str</i> , <i>trs</i> and <i>tsr</i> .   |
| +                  | When an expression is followed by +, it matches one or more versions of the expression. This differs from * because it does not match ( <i>blank</i> ). It must match at least one character. For example, <code>r+</code> matches <i>r</i> , <i>rr</i> , <i>rrr</i> and so on.  |
| {x,y}              | Must match at least x times and not more than y times. For example, <code>s{2,4}</code> matches <i>ss</i> , <i>sss</i> and <i>ssss</i> . You can also use {x} to specify an exact match. For example, <code>s{3}</code> matches <i>sss</i> . You can use {x,} to specify that the match is at least x amount of times. For example, <code>s{4,}</code> matches <i>ssss</i> , <i>sssss</i> , <i>ssssss</i> and so on. |
| ?                  | Must match the preceding character zero or one times. For example, <code>Boa?rder</code> matches <i>boarder</i> and <i>border</i> .  |

## Adding a Replacement Word

To add a replacement word to a Forum, follow these steps.

**NOTE** [In addition to using Replace Words for a specific forum, you can access the Replace Word feature from the Workarea > Settings > Configuration > Discussion Board > Replace Words. If you have more than one forum, this allows you select to which Discussion Boards the Replace Words feature is applied.](#)

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. Click **New > Replace Word**.
3. The Replace Word screen appears.
4. Add the word to be replaced in the **Old Word** textbox.
5. Add the replace word in the **New Word** textbox.
6. Select the language for the Replace Word.
7. Click the Save button (.





### ***Viewing Existing Replacement Words***


To view a list of existing words that are replaced, follow these steps.

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. Click **View > Replace Words**.
3. A list of word to be replaced appears.

### ***Editing a Replacement Word***

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. Click **View > Replace Words**.
3. Click on the either the Old Word or the New Word to edit.
4. Click the Edit button ().
5. Change the Old Word, New Word or Language.
6. Click the Save button (.

### ***Deleting a Replacement Word***

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. Click **View > Replace Words**.
3. Click on the either the Old Word or the New Word to delete.
4. Click the Delete button (.
5. A dialog box asks if you are sure you want to delete.
6. Click **OK**.



## Restricting an IP Address


If you are not using authentication for the forums and want to block a site visitor from posting to the forum, you can use the Restricted IP feature to block site visitors from posting to the forum.




### Adding an IP Address the Restricted List

**NOTE** In addition to using Restricted IPs for a specific forum, you can access the Restricted IP feature from the Workarea > Settings > Configuration > Discussion Board > Restricted IPs. If you have more than one forum, this allows you select to which Discussion Boards the Restricted IPs are applied.


To add an IP address to the restricted list, follow these steps.

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. Click **New > Restricted IP**.
3. Enter the IP Address to be blocked.
4. Click the Save button (.
5. A list of restricted IP addresses appear.


### Editing a Restricted IP Address

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. Click **View > Restricted IPs**.
3. A list of restricted IP addresses appears.
4. Click the IP address to be edited.
5. Click the Edit button (.



6. Edit the IP address in the **Block IP** text box.
7. Click the Save button (  ).

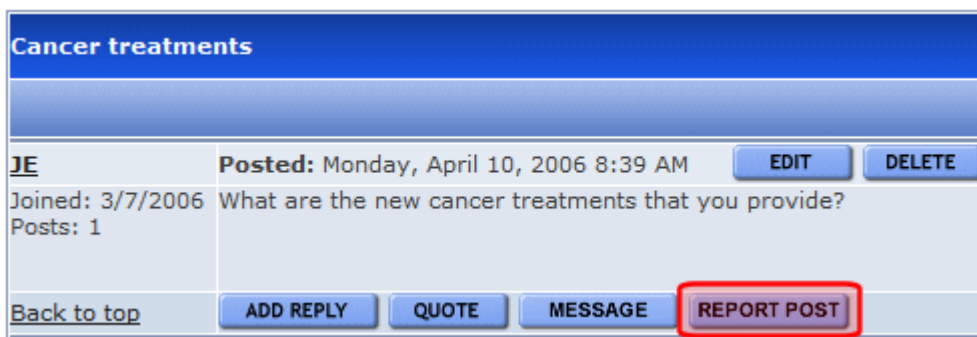
## Deleting a Restricted IP Address

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. Click **View > Restricted IPs**.
3. A list of Restricted IP addresses appears.
4. Click the IP address to be deleted.
5. Click the Delete button (  ).
6. A dialog asks if you are sure you want to delete the restricted IP address.
7. Click **OK** to continue.
8. A list of the remaining restricted IP addresses appear.

See Also: "[Discussion Boards](#)" on page 450

## Setting Up Post Reporting

When you set up the Post Reporting feature in a Forum, it adds a Report button to the bottom of each post. This button allows users to report posts to moderators of the forum. For example, users can report posts that are offensive or spam posts.



When a user clicks the Report button, an email notification is sent to moderators. A moderator can then view the post and decide whether to edit, delete or leave the post. See Also: "[Reporting a Post](#)" on page 502







To set up a Forum for Post Reporting, follow these steps.

**IMPORTANT!**

Your Ektron CMS400.NET Web server must be set up to send emails. See the Setup Manual section "Configuring E-Mail Notifications for Tasks and Content Workflow."

---

1. In the Workarea, click the **Content** tab.
2. Select a Discussion Board from the folder structure.
3. Click **View > Permissions**.
4. Make sure moderators of the forum have Moderate permission. Assigning Permissions are explained in "[Assigning Permissions to a Discussion Board](#)" on page 489
5. Click the Back button ()
6. Select a Forum.
7. Click the Properties button ()
8. Make sure the Moderate Comments box is checked.
9. If not, click the Edit button ()
10. Check the Moderate Comments box.
11. Click the Save button ()

## Assigning Permissions to a Discussion Board

Like regular content folders, Discussion Boards have a permission table that lets you determine which users can perform which functions. (To learn more about folder permissions, see "[Setting Permissions](#)" on page 686.) Because Discussion Boards have different functions than folders, their permission table is slightly different.

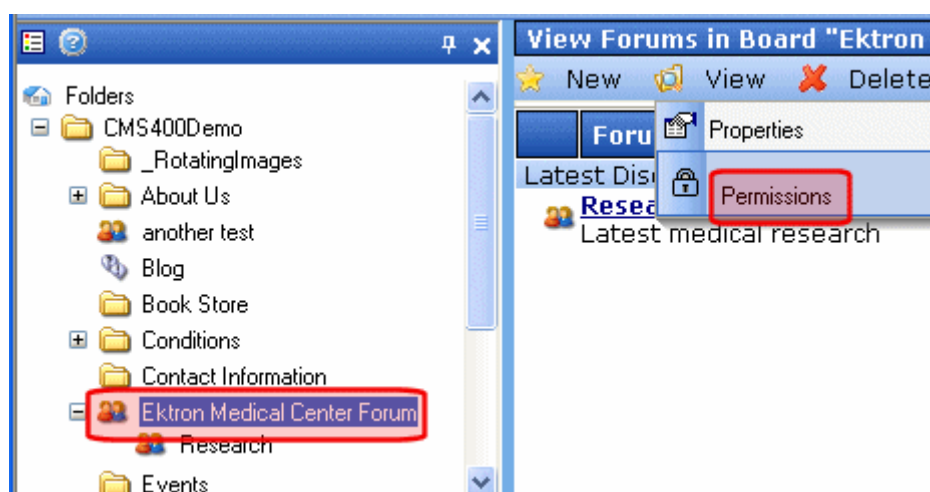
To access a Discussion Board's permission table, navigate to and click on the board so it appears in the Workarea. Then, click **View > Permissions**.

**NOTE**

Only Administrators group members can access the Discussion Board Permission Table.

---





Below is an example of a Discussion Board permission table for regular users. Membership users have fewer permissions. See *Also: "Discussion Board Permissions" on page 492*

| View Permissions for Board "another test"  |      |                 |           |                                       |            |          |  |
|--|------|-----------------|-----------|---------------------------------------|------------|----------|--|
| <div> <div> <div>+</div> <div>🗑️</div> <div>←</div> <div>?</div> </div> <div>Standard Permissions</div> </div> |      |                 |           |                                       |            |          |  |
| <a href="#">View Advanced Permissions</a>  |      |                 |           | <a href="#">View MemberShip users</a> |            |          |  |
| User or Group Name   | Read | Only Edit Topic | Add Topic | Delete Topic                          | Post/Reply | Moderate |  |
| <a href="#">alpesh</a>   | x    | x               |           | x                                     | x          |          |  |
| <a href="#">bobuser</a>  | x    | x               | x         | x                                     | x          | x        |  |

| View Permissions for Board "another test"  |           |            |              |                                       |  |  |  |
|--|-----------|------------|--------------|---------------------------------------|--|--|--|
| <div> <div> <div>+</div> <div>🗑️</div> <div>←</div> <div>?</div> </div> <div>Advanced Permissions</div> </div> |           |            |              |                                       |  |  |  |
| <a href="#">View Standard Permissions</a>  |           |            |              | <a href="#">View MemberShip users</a> |  |  |  |
| User or Group Name   | Add Forum | Edit Forum | Delete Forum |                                       |  |  |  |
| <a href="#">alpesh</a>   | x         | x          |              |                                       |  |  |  |
| <a href="#">bobuser</a>  | x         | x          | x            |                                       |  |  |  |
| <a href="#">chandra</a>  |           |            |              |                                       |  |  |  |



Discussion Board permissions are more fully explained through the following topics.

- ["Initialization of Permission Values" on page 491](#)
- ["Discussion Board Permissions" on page 492](#)
- ["Discussion Forum Permissions for Membership Users" on page 493](#)
- ["Granting Discussion Board Permissions to Users and User Groups" on page 494](#)
- ["Removing Discussion Board Permissions from Users and User Groups" on page 494](#)
- ["Editing Discussion Board Permissions for Users and User Groups" on page 495](#)

## Initialization of Permission Values

When you create a Discussion Board, **Ektron CMS400.NET** seeds its permission table with values from the parent folder, as described in the following table.

| Parent Folder Permission | Discussion Board Permission |
|--------------------------|-----------------------------|
| Read only                | Read only                   |
| Edit                     | Edit Topic                  |
| Add                      | Add Topic                   |
| Delete                   | Delete Topic                |
| Add Folders              | Add Forum                   |
| Edit Folders             | Edit Forum                  |
| Delete Folders           | Delete Forum                |



**NOTE**

Because there are no corresponding permissions for the Discussion Board's **Moderate** and **Post/reply** permissions, their initial value is blank.

So for example, if the user JSmith has permission to perform all functions for a folder, and a Discussion Board is created in that folder, JSmith initially receives all permissions listed above for the Discussion Board. However, you can edit the permissions as needed.

As soon as you create a Discussion Board, it is disconnected from the parent folder's permission table. Subsequent changes to the parent's permissions have no effect on Discussion Board permissions.

## Discussion Board Permissions

The following table lists all permissions that may be granted to regular users. Only some permissions can be granted to membership users (that is, site visitors who register to participate in the forum).

| Permission   | Give the user ability to   | Can be assigned to membership users | For more information, see  |
|--------------|--|-------------------------------------|--|
| Read only    | View forums and posts; cannot submit a post  | Yes                                 |  |
| Edit Topic   | Edit a topic's title   | No                                  | "Editing a Topic's Title" on page 476  |
| Add Topic    | Add new topics   | Yes                                 | "Adding a Topic to a Forum" on page 470  |
| Delete Topic | Delete a topic   | No                                  | "Deleting a Topic" on page 477   |
| Post/Reply   | Post a new topic or reply to an existing one, either from the Workarea or the site | Yes                                 | "Adding a Topic to a Forum" on page 470;<br>"Adding a Reply to a Post" on page 478 |



| Permission   | Give the user ability to  | Can be assigned to membership users | For more information, see       |
|--------------|---|-------------------------------------|---------------------------------|
| Moderate     | Approve posts and receive notifications when a post is reported using the report post feature; only applicable if the Forum's Properties field <b>Moderate Comments</b> is checked.<br><br><u><b>Important:</b> Everyone who has Moderate permission will receive notifications when a post is reported. See Also: "Reporting a Post" on page 502</u> | No                                  | "Moderate Comments" on page 467 |
| Add Forum    | Create a new forum  | No                                  | "Creating a Forum" on page 465  |
| Edit Forum   | Edit a forum  | No                                  | "Editing a Forum" on page 467   |
| Delete Forum | Delete a forum  | No                                  | "Deleting a Forum" on page 468  |

## Discussion Forum Permissions for Membership Users

By default, membership users are assigned the following permissions:

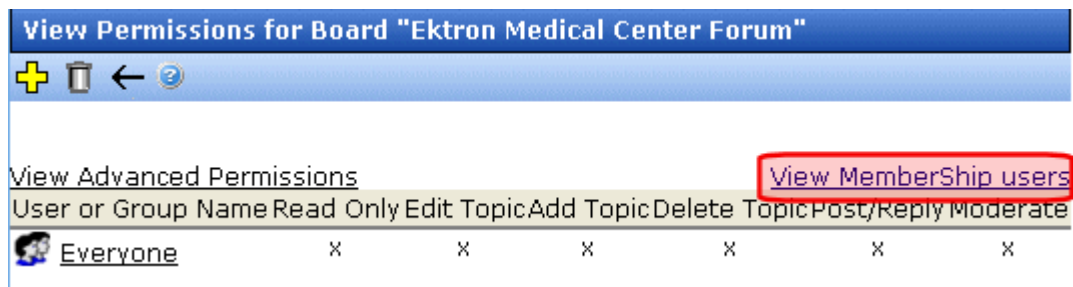
- Read only
- Add Topic
- Post Reply

They cannot be granted Edit or Delete topic nor advanced permissions (Add, Edit or Delete forum).

To change the default permissions, follow these steps.

1. Navigate to and click on the Discussion Board so it appears in the Workarea.
2. Click **View > Permissions**.
3. Click **View Membership Users**.







4. The View Permissions for Board screen appears.
5. Add new member users and groups, remove them, or change their permissions.

## Granting Discussion Board Permissions to Users and User Groups


To give a user or user group permissions to work with a Discussion Board, follow these steps.

1. Navigate to and click on the Discussion Board so it appears in the Workarea.
2. Click **View > Permissions**.
3. Click the Add button (.
4. All users and groups who are not currently assigned permissions appear. Click any user or group.
5. The Add Permission for Folder screen appears with the selected user or group.
6. Assign appropriate standard and advanced permissions then click the Save button (). See Also: "[Assigning Permissions to a Discussion Board](#)" on page 489

## Removing Discussion Board Permissions from Users and User Groups


To remove a user or user group from the Discussion Board permission table, follow these steps. After you remove the user, Discussion Boards do not appear within his Workarea.



1. Navigate to and click the Discussion Board so it appears in the Workarea.
2. Click **View > Permissions**.
3. Click the Delete icon ().
4. Select the user or group that you want to remove from the Permission table.
5. A confirmation message. Click **OK**.
6. The user is removed.

## Editing Discussion Board Permissions for Users and User Groups

To edit a user or user group's Discussion Board permissions, follow these steps.

1. Navigate to and click the Discussion Board so it appears in the Workarea.
2. Click **View > Permissions**.
3. Click the user or group whose permissions you want to edit.
4. The Edit Permissions screen appears.
5. Change the settings as appropriate. See Also: ["Discussion Board Permissions" on page 492](#)
6. Click the Save button (.

## Inserting Discussion Board Server Controls

**Ektron CMS400.NET** provides two server controls for use with the Discussion Boards. The Forum server control displays the discussion board. The Active Topics server control lets you display a list of active or recent topics.

### Inserting the Forum Server Control

After creating at least one hierarchy of Discussion Board elements, place a Forum server control on a Web page. That procedure is described in the **Ektron CMS400.NET Developer's Manual** section "Introduction to Ektron CMS400.NET Server Controls" > "Discussion Board Server Controls" > "Forum Server Control."



If you want require authentication by site visitors, the template that hosts the Forum should also contain

- a Membership server control (or a link to page that has one). This lets site visitors/membership users register for Discussion Boards.
- a Login server control that lets the site visitor/membership user log in

---

**NOTE** Ektron recommends adding text below the Login server control to remind the site visitor to enter his email address at the **User** field. For example, "At the **User** field, enter your email address."

---

## Inserting the ActiveTopics Server Control

Displays a list of either the most active or most recent topics. This server control can be placed anywhere on your site. For example, when a site visitors views your home page, you might want to display a list of the last ten topics added to the board.

To learn about the ActiveTopics Server Control, see the **Ektron CMS400.NET** Developer's Manual section "Introduction to Ektron CMS400.NET Server Controls" > "Discussion Board Server Controls" > "ActiveTopics Server Control."

## Using Discussion Boards on Your Web Site

This section explains what can be done when using a Discussion Board on your site.







- "Approving a Topic" on page 497
- "Sorting Topics" on page 497
- "Posting a Reply" on page 498
- "Editing a Post" on page 500
- "Quoting a Post" on page 498
- "Approving a Post" on page 500
- "Deleting a Post" on page 502
- "Reporting a Post" on page 502




- "Suppressing User Information from the Forum Profile Display" on page 502
- "Outputting a Forum as an RSS Feed" on page 506
- "Subscribing to a Discussion Board" on page 506
- "Sending a Private Message" on page 508
- "Using the Control Panel" on page 509

## Approving a Topic

A Topic needs to be approved when a user who does not have moderate permission for the Forum adds a Topic. When you view topics on the site, any that need approval are highlighted with a different color background.

| Research  |               |         |       |   |  |
|---|---------------|---------|-------|---|--|
| Topics  | Topic Starter | Replies | Views | Last Post   |  |
|  <a href="#">Potential Treatment</a> (Approve) | JE            | 0       | 0     | Wednesday, December 20, 2006 11:25 AM ➡  |  |
|  <a href="#">Welcome</a>                       | AA            | 1       | 19    | Monday, April 10, 2006 8:40 PM ➡         |  |
|  <a href="#">Cancer treatments</a>            | AA            | 2       | 54    | Monday, April 10, 2006 8:40 PM ➡       |  |

From this screen, you can click the **Approve** link next to the topic's title. You could also click the Topic's title to view it and click the **Approve** button (  ) on that screen.

## Sorting Topics

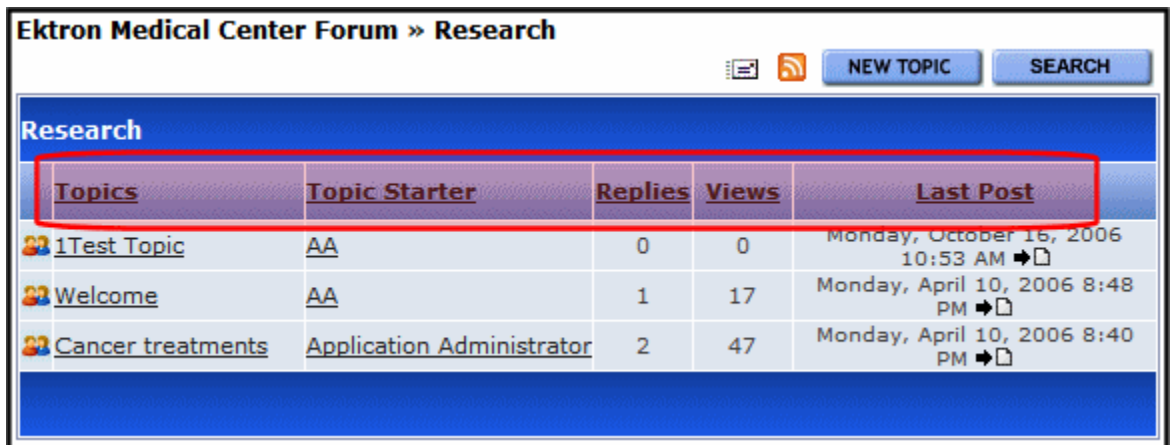
Topics can be sorted by the columns of a forum. To sort a forum:

1. Go to the Web page that hosts the Discussion Board.
2. Click the Forum of interest.
3. Click any of the column titles to sort by alpha or numerical order.



On the first click, items are sorted first by any numeric (1-10) values, then by alpha values (A to Z). Clicking a column title a second time sorts the items in reverse.

When the page is first viewed, the list is sorted by Last Post.



**Ektron Medical Center Forum » Research**

NEW TOPIC SEARCH

**Research**

| Topics                            | Topic Starter                             | Replies | Views | Last Post                           |
|-----------------------------------|---|---------|-------|-------------------------------------|
| <a href="#">1Test Topic</a>       | <a href="#">AA</a>                        | 0       | 0     | Monday, October 16, 2006 10:53 AM ➡ |
| <a href="#">Welcome</a>           | <a href="#">AA</a>                        | 1       | 17    | Monday, April 10, 2006 8:48 PM ➡    |
| <a href="#">Cancer treatments</a> | <a href="#">Application Administrator</a> | 2       | 47    | Monday, April 10, 2006 8:40 PM ➡    |

## Posting a Reply

1. Go to the Web page that hosts the Discussion Board.
2. Click the Forum of interest.
3. Click **Add Reply**.

**NOTE** If a topic is moderated, a message appears stating that your reply is pending moderator approval.

There are two editors that site visitors can use when replying:

- eWebEditPro (scaled-down version)
- Javascript Editor

For users who sign in before posting, this decision is made for the user at the **Forum Editor** field on the Edit User screen.

If users does not sign in, the Javascript Editor is the editor.

## Quoting a Post

Quoting a post's comments allows you to reply to a post and have that post's comments appear in your post. In addition to adding your own comments, you can edit the quoted comments. This



allows you to quote only the portion of the post on which you would like to comment.

|                             |  |                       |                             |
|-----------------------------|--|-----------------------|-----------------------------|
| <b>Anonymous</b>            | <b>Posted:</b> Thursday, June 21, 2007 3:12 PM   | <a href="#">EDIT</a>  | <a href="#">DELETE</a>      |
|                             | <b>Anonymous wrote:</b><br>When creating a Web form, it can be done in C# or VB.<br>Which do you prefer?<br><br>I prefer VB, but I would like to learn C#. |                       |                             |
| <a href="#">Back to top</a> | <a href="#">ADD REPLY</a>  | <a href="#">QUOTE</a> | <a href="#">REPORT POST</a> |

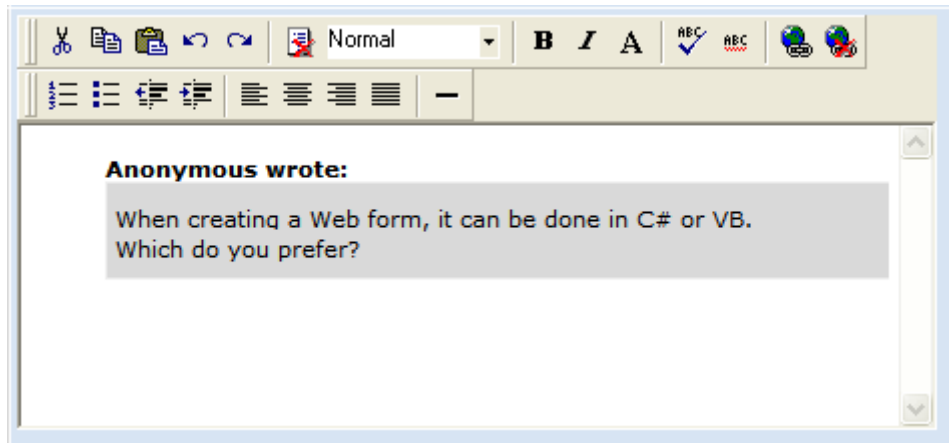
To quote a post, follow these steps.

1. Go to the Web page that hosts the Discussion Board.
2. Click the Forum of interest.
3. Click a Topic.
4. Find the post you want to quote.
5. Click the Quote button.

|                             |   |                       |
|-----------------------------|---|-----------------------|
| <b>Anonymous</b>            | <b>Posted:</b> Thursday, June 21, 2007 3:10 PM                                | <a href="#">EDIT</a>  |
|                             | When creating a Web form, it can be done in C# or VB.<br>Which do you prefer? |                       |
| <a href="#">Back to top</a> | <a href="#">ADD REPLY</a>   | <a href="#">QUOTE</a> |
|                             | <a href="#">REPORT POST</a>   |                       |

6. The editor appears with the quoted information at the top of the text area.





7. Add your comments below the quote.
8. Click Post.

## Editing a Post

1. Go to the Web page that hosts the Discussion Board.
2. Click the Forum of interest.
3. Find the topic you want to edit.
4. Click **Edit**.

## Approving a Post


When defining a Forum, you can check the **Moderate Comments** field. If you do, posts to the Forum must be approved before they appear on the Web site. Only users who are assigned the **Moderate** permission are allowed to approve a post. See *A/so*: ["Discussion Board Permissions" on page 492](#)

You can approve a post from the Workarea or the Forum on the site. See also ["Approving a Post in the Workarea" on page 479](#).


To approve a post from the Forum, follow these steps.

1. Log into the site.
2. Navigate to the Forum.




3. Click the Moderate button (  ).
4. The Forum's Control Panel appears.



5. Click the topic.
6. The topic appears. Posts requiring approval have an Approve button (  ).



7. Click the Approve button (  ).



8. A screen appears stating that the post has been approved.
9. The post is now available.

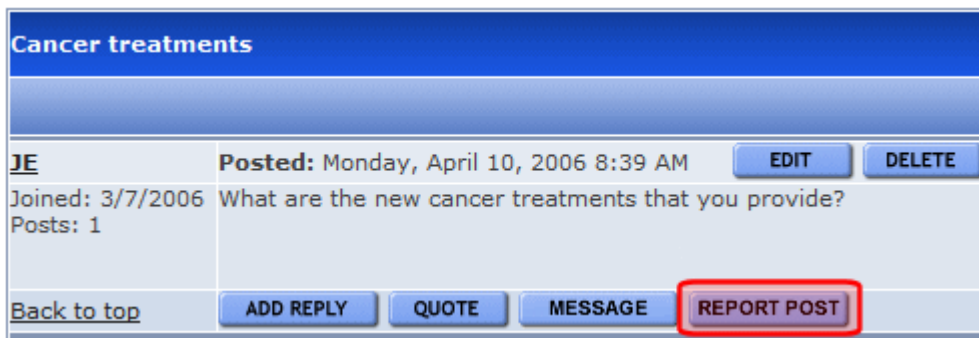
## Deleting a Post

1. Go to the Web page that hosts the Discussion Board.
2. Click the Forum of interest.
3. Find the topic you want to delete.
4. Click **Delete**.

## Reporting a Post

Sometimes it becomes necessary to allow users of the forum to report posts to a moderator. For example, to report spam posts or posts that are offensive.



When a user clicks the Report button located at the bottom of the post, an email notification is sent to all moderators of the forum. One of the moderators can view the post and decide whether to edit, delete or leave the post alone. See *Also: "Setting Up Post Reporting" on page 488*



## Suppressing User Information from the Forum Profile Display

Anyone browsing to a Discussion Forum can view information about its contributors by clicking the user name, as shown below.



| Ektron Medical Center Forum » Research  |                                   |                           |         |       |
|---|-----------------------------------|---------------------------|---------|-------|
| Research  |                                   |                           |         |       |
|   | Topics                            | Topic Starter             | Replies | Views |
|  | <a href="#">Welcome</a>           | AA                        | 1       | 12    |
|  | <a href="#">Cancer treatments</a> | Application Administrator | 6       | 44    |

| Ektron Medical Center Forum » Profile for AA   |                                  |
|--|----------------------------------|
| Profile: AA  |                                  |
| About  | Statistics                       |
| First Name: Albert   | Joined:                          |
| Last Name: Aponovich   | Last Visit: 4/19/2006 2:00:00 PM |
| Last 3 Posts   |                                  |
| <b>Topic:</b> <a href="#">Welcome</a><br><b>Posted:</b> 11-Oct-2006 02:47:54 PM 11-Oct-2006 02:47:54 PM<br>Can't wait to start reading.                  |                                  |
| <b>Topic:</b> <a href="#">Welcome</a><br><b>Posted:</b> 10-Apr-2006 08:47:28 PM 10-Apr-2006 08:47:28 PM<br>Welcome to Ektron Medical!                    |                                  |
| <b>Topic:</b> <a href="#">Cancer treatments</a><br><b>Posted:</b> 10-Apr-2006 08:26:39 PM 10-Apr-2006 08:26:39 PM<br>New cancer treaments are available. |                                  |

However, if the Forum server control's `HideUserProfile` property is `true`, non-administrator users cannot see the profile, even if the **Private Profile** check box is unchecked. For more information, see ["How Users Suppress Profile Information"](#) on page 504 and ["How Administrators Suppress Profile Information"](#) on page 505.

Administrators can see the profile, regardless of how the `HideUserProfile` property is set.

### ***What Information is Contained in the Profile?***



The profile contains the following information about a user:

- **First Name** - the first name of the user
- **Last Name** - the last name of the user
- **Email** - the email address of the user
- **Joined** - the date the user joined
- **Last Visit** - the date the user last visited the site
- **Number of Posts** - the amount of posts a user has contributed
- **Post History** - a list of posts the user has contributed

### ***How Users Suppress Profile Information***

Users can determine if their profile is viewable via the **Private Profile** checkbox on the Forum Registration screen (shown below). If the box is checked, profile information is suppressed.

---

**NOTE** If the Forum server control's `HideUserProfile` property is set to `true`, non-administrator forum visitors cannot see the profile, even if the **Private Profile** check box is unchecked.

---



**Ektron Medical Forums : Register**

First Name:

Last Name:

Password:

Confirm Pwd:

E-Mail Address:

Display Name:

Subscriptions ☐ Wellness Articles  
(Notification will send in user language)

zip

Private Profile ☐

\*Region

**NOTE** The Forum Registration screen appears wherever your developer inserts the Membership Server Control. For more information, see the **Ektron CMS400.NET** Developers Manual section "Membership Server Control."

### ***How Administrators Suppress Profile Information***

If you want to suppress the display of user names as an administrator, follow these steps.


**NOTE** If the Forum server control's `HideUserProfile` property is set to `true`, non-administrator forum visitors cannot see the profile, even if the **Private Profile** check box is unchecked.

1. If the user is a *regular user*, go to **Settings > Users** and select the user whose information you want to suppress.  
If the user is a *membership user*, go to **Modules > Memberships > Users** and select the user whose information you want to suppress.



2. In the User Properties area of the screen, check the **Private Profile** checkbox.


## Outputting a Forum as an RSS Feed

You can output a Forum as an RSS feed by clicking the RSS feed button () . Each level of the Forum has an RSS feed button. This allows you to output a specific topic as an RSS feed.

The following is an example of the output.



```
<?xml version="1.0" encoding="UTF-8" ?>
- <rss version="2.0">
  <!-- Generated by Ektron CMS400.NET -->
  - <channel>
    <title>Ektron Medical Center Forum</title>
    <link>http://test/webform.aspx</link>
    <description>Ektron Medical</description>
  - <item>
    <title>Research</title>
    <link>http://test/webform.aspx?g=topics&f=108</link>
  - <description>
    <![CDATA[ Latest medical research ]]>
  </description>
  <pubDate>Wed, 11 Oct 2006 17:50:04 GMT</pubDate>
</item>
</channel>
</rss>
```

## Subscribing to a Discussion Board




After logging in, discussion board users can subscribe to forum posts and replies by clicking the Subscribe button () (highlighted below).



**Ektron Medical Center Forum » Research**



[NEW TOPIC](#)
[SEARCH](#)

**Research**

| Topics  | Topic Starter                             | Replies | Views | Last Post                            |
|---|---|---------|-------|--------------------------------------|
|  <a href="#">1Test Topic</a>       | <a href="#">AA</a>                        | 0       | 4     | Thursday, October 19, 2006 3:54 PM ➡ |
|  <a href="#">Welcome</a>           | <a href="#">AA</a>                        | 1       | 17    | Monday, April 10, 2006 8:48 PM ➡     |
|  <a href="#">Cancer treatments</a> | <a href="#">Application Administrator</a> | 2       | 47    | Monday, April 10, 2006 8:40 PM ➡     |

The button appears at each Discussion Board level, so that a user can subscribe to forums and topics of interest. After clicking the button, the following screen appears.

**Ektron Medical Center Forum » Subscribe/Unsubscribe**

**Subscribe/Unsubscribe**

**Forum:** Ektron Medical Center Forum » Research

**Notification Type:** All Posts ▼

[Add Subscription](#)

The user selects a notification type, listed below.

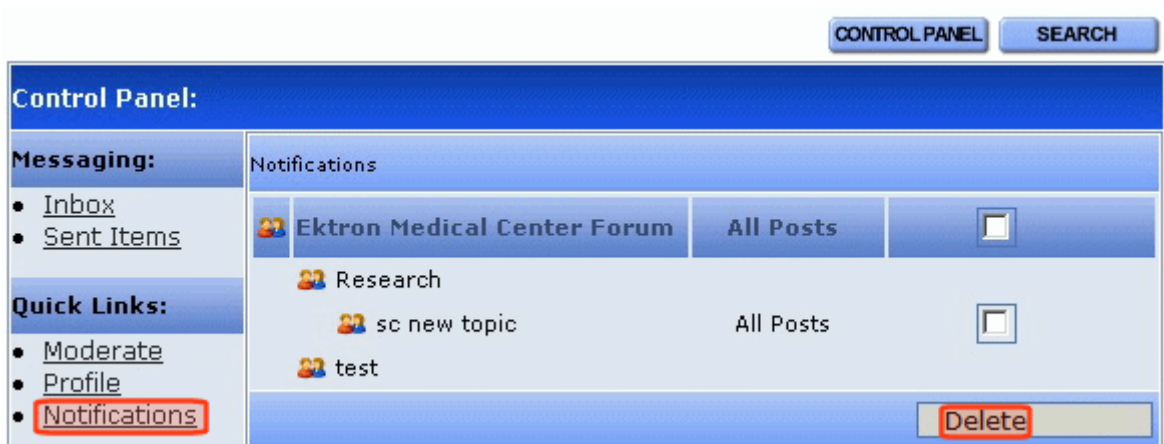
- **All Posts** - notifies you when any post or reply is added
- **Replies to Me** - notifies you when someone replies to your post

Next, he clicks the **Add Subscription** button. A page notifies him that his subscription was added.

### ***Reviewing Subscriptions***



To review your forum subscriptions, go to the Control Panel and click **Notifications** in the lower left corner. A screen indicates each Discussion Board level to which you have subscribed, as illustrated below.



### ***Deleting a Subscription***

To delete any subscription, check the corresponding check box and click the Delete button (highlighted above).

### **Sending a Private Message**

Logged in users can send a private message to the person who created a post or reply. Only the sender and receiver can view private messages. This requires both users to be either a CMS400.NET user or a Membership user.

To send a private message, follow these steps.

1. Navigate to a post.
2. Click on the User's name.
3. When the User Profile appears, click the Message button.



**Ektron Medical Center Forum » Profile for JE**

**Profile: JE**

**MESSAGE**

| About   |                   | Statistics  |                       |
|---------|-------------------|-------------|-----------------------|
| First:  | John              | Joined:     | 3/7/2006 10:07:15 AM  |
| Last:   | Edit              | Last Visit: | 10/17/2006 4:25:42 PM |
| Email:  | jedit@example.com | Posts:      | 1                     |
| zip:    | 03031             |             |                       |
| Region: | North             |             |                       |

**Last 1 Posts**

**Topic:** Cancer treatments

**Posted:** 10-Apr-2006 08:39:27 PM 10-Apr-2006 08:39:27 PM

What are the new cancer treatments that you provide?

4. The Message screen appears.

**NOTE** The **To:** field is filled automatically. Users cannot add additional members.

5. Enter a Subject.
6. Enter a Message.
7. Click the Post button.
8. Users are notified that a message was sent.

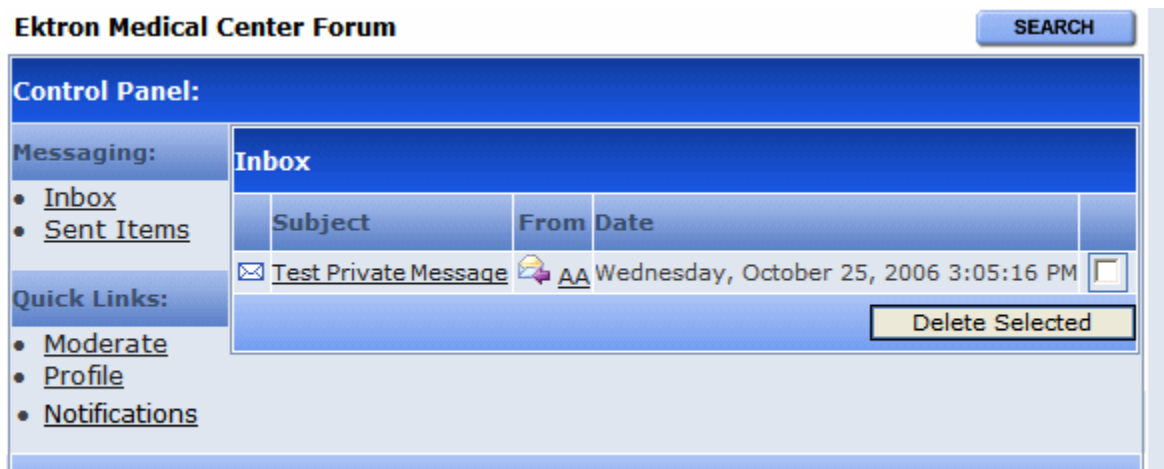
## Using the Control Panel



The Control Panel allows logged in users to view your profile, read, reply to and delete private messages. It also allows users with moderate permissions to moderate the forum. The Control Panel button is located at the forum level.





Clicking the Control Panel button opens control panel.



The Inbox view appears by default. From this view, users can read a message by clicking on it. Once a message is read, its icon changes from unread () to read ()

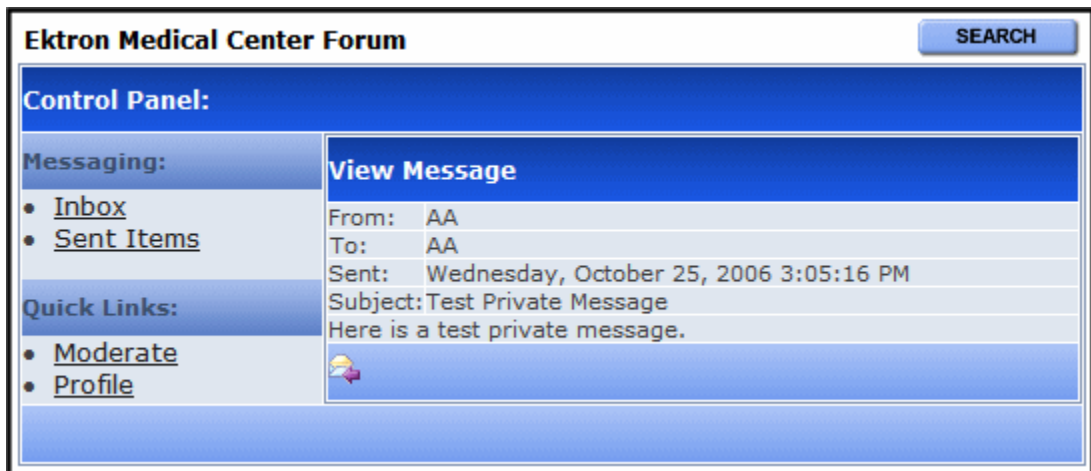
In addition, users can view information about the person who sent the message by clicking their name. Users can also delete the message by clicking the corresponding check box then the delete button. To switch to a different view, click its link.


The user can also check his subscriptions. See "[Reviewing Subscriptions](#)" on page 507.



## Viewing and Replying to Messages

From the Inbox or Sent Items in the Control Panel, users can view a message by clicking on it. On the View Message screen, users can see who sent the message, to whom the message was directed, when it was sent, the subject and the contents of the message.



Users can reply to a message by clicking the reply button (). Once clicked, the editor opens in the control panel, and a user can reply.

**IMPORTANT!**

When replying to a private message, users add their response to the existing message. Only one message is created.



**Ektron Medical Center Forum** SEARCH

**Control Panel:**

**Messaging:**

- [Inbox](#)
- [Sent Items](#)

**Quick Links:**

- [Moderate](#)
- [Profile](#)

**To:** AA

**Subject:** RE: Test Private Message

**Message:**

Paragraph Font Size Color

Here is the reply to the message.

Here is a test private message.

Post Cancel

Once a user adds a reply to the private message, he clicks the **Post** button. He is then informed that the message was sent.

### ***Deleting a Private Message***

To delete a private message, follow these steps.

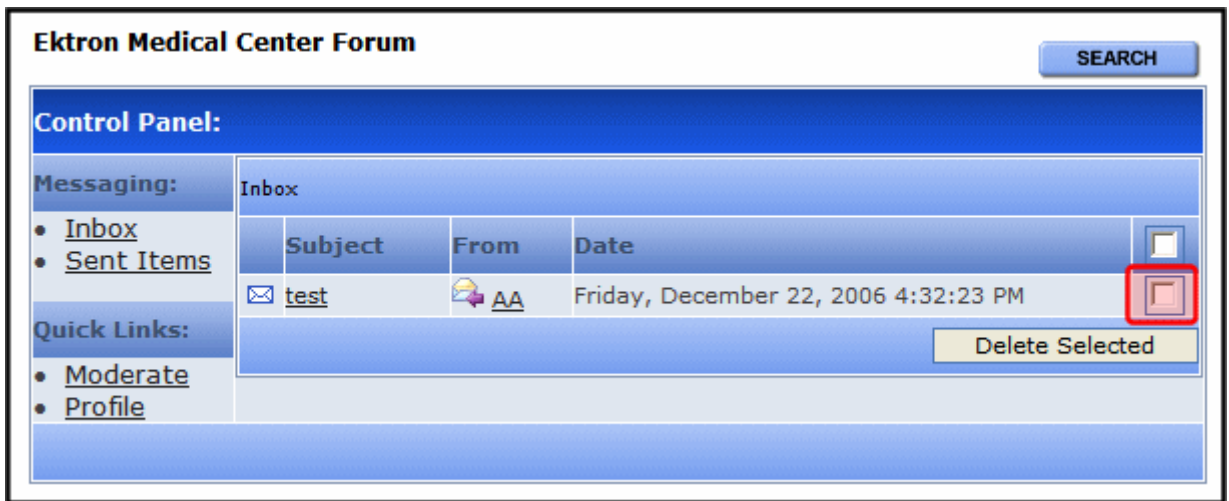
1. Click the Control Panel button on the front page of the Discussion Board.

**Ektron Medical Center Forum** CONTROL PANEL SEARCH

| Forum   | Topics | Posts | Last Post                                     |
|---|--------|-------|---|
| <b>Latest Discoveries</b>                           |        |       |   |
| <a href="#">Research</a><br>Latest medical research | 3      | 3     | Tuesday, October 24, 2006 11:26 AM<br>by AA ➡ |

2. Click the check box next to the message.





3. Click the **Delete Selected** button.
4. A confirmation box asks if you want to delete all selected messages. Click **OK**.
5. The message is deleted.

### ***Viewing a User Profile From the Control Panel***

To view a profile from the Control Panel, click the Profile link in the Control Panel. "What Information is Contained in the Profile?" on page 503



**Ektron Medical Center Forum** SEARCH

**Control Panel:**

**Messaging:**

- [Inbox](#)
- [Sent Items](#)

**Quick Links:**

- [Moderate](#)
- [Profile](#)

**Inbox**

| Subject                                  | From               | Date                                   |                          |
|--|--------------------|--|--------------------------|
| <a href="#">RE: Test Private Message</a> | <a href="#">AA</a> | Wednesday, October 25, 2006 6:20:47 PM | <input type="checkbox"/> |
| <a href="#">Test Private Message</a>     | <a href="#">AA</a> | Wednesday, October 25, 2006 3:05:16 PM | <input type="checkbox"/> |

**Delete Selected**

Once the Profile link is clicked, the user's profile page appears.

**Ektron Medical Center Forum » Profile for AA**

**Profile: AA**

**MESSAGE**

| About   |               | Statistics  |                        |
|---------|---------------|-------------|------------------------|
| First:  | Application   | Joined:     |                        |
| Last:   | Administrator | Last Visit: | 10/24/2006 11:05:13 AM |
| Email:  |               | Posts:      | 2                      |
| zip:    | 03031         |             |                        |
| Region: | North         |             |                        |

**Last Posts**

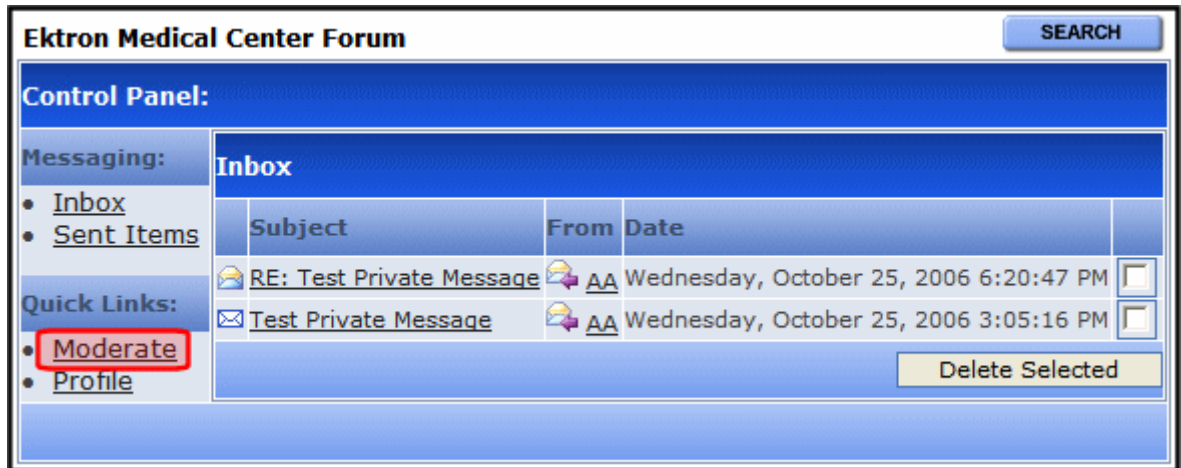
**Topic:** [Welcome](#)  
**Posted:** 10-Apr-2006 08:47:28 PM  
 Welcome to Ektron Medical!

**Topic:** [Cancer treatments](#)  
**Posted:** 10-Apr-2006 08:26:39 PM  
 New cancer treaments are available.

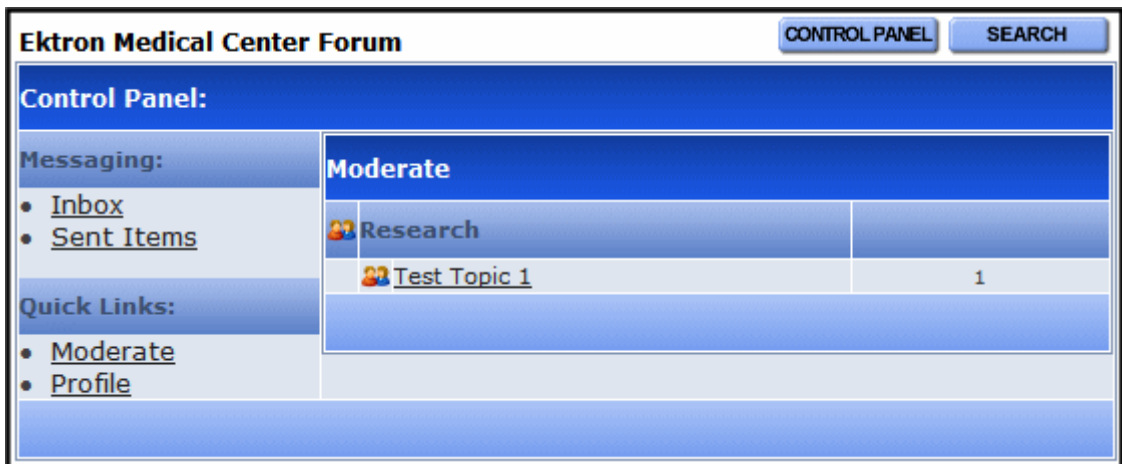
### ***Moderating From the Control Panel***



Users who have permission to moderate a forum can do so from the Control Panel by clicking the **Moderate** link.



Once **Moderate** is clicked, the user sees a list of items that need approval.





Clicking an item opens the post. From this screen, you can edit, approve, or delete the post. See Also: ["Approving a Post" on page 500](#).



---

# Ektron Explorer

The **Ektron CMS400.NET** User Manual section “Using Ektron Explorer” provides the following information:

- general description
- installation instructions
- how to view it

Since that information is not repeated here, you should read that before reading this section.

This section has the following topics:

- ["Access to Ektron CMS400.NET" on page 517](#)
- ["Configuring Ektron Explorer" on page 517](#)
- ["Viewing Administrative Information" on page 525](#)

## Access to Ektron CMS400.NET

By default, when someone signs on to Ektron Explorer, the sign-in uses a special membership user, EkExplorerUser. This user has read-only access to every folder, so he can *view* all published content, both public and private, but not *edit* content.

To allow a user to work with content as allowed in the Permission table, change his configuration so that the sign-on uses his username and password. See *Also*: ["Configuring Ektron Explorer" on page 517](#)

## Configuring Ektron Explorer

When the Ektron Explorer is installed to a client PC, it assumes the following information:



- location of **Ektron CMS400.NET** - specified during installation
- username and password - a default user is created in **Ektron CMS400.NET** for the purpose of viewing CMS content. That user cannot edit the content.

You can change these values using the Explorer's Configuration Manager (illustrated below).

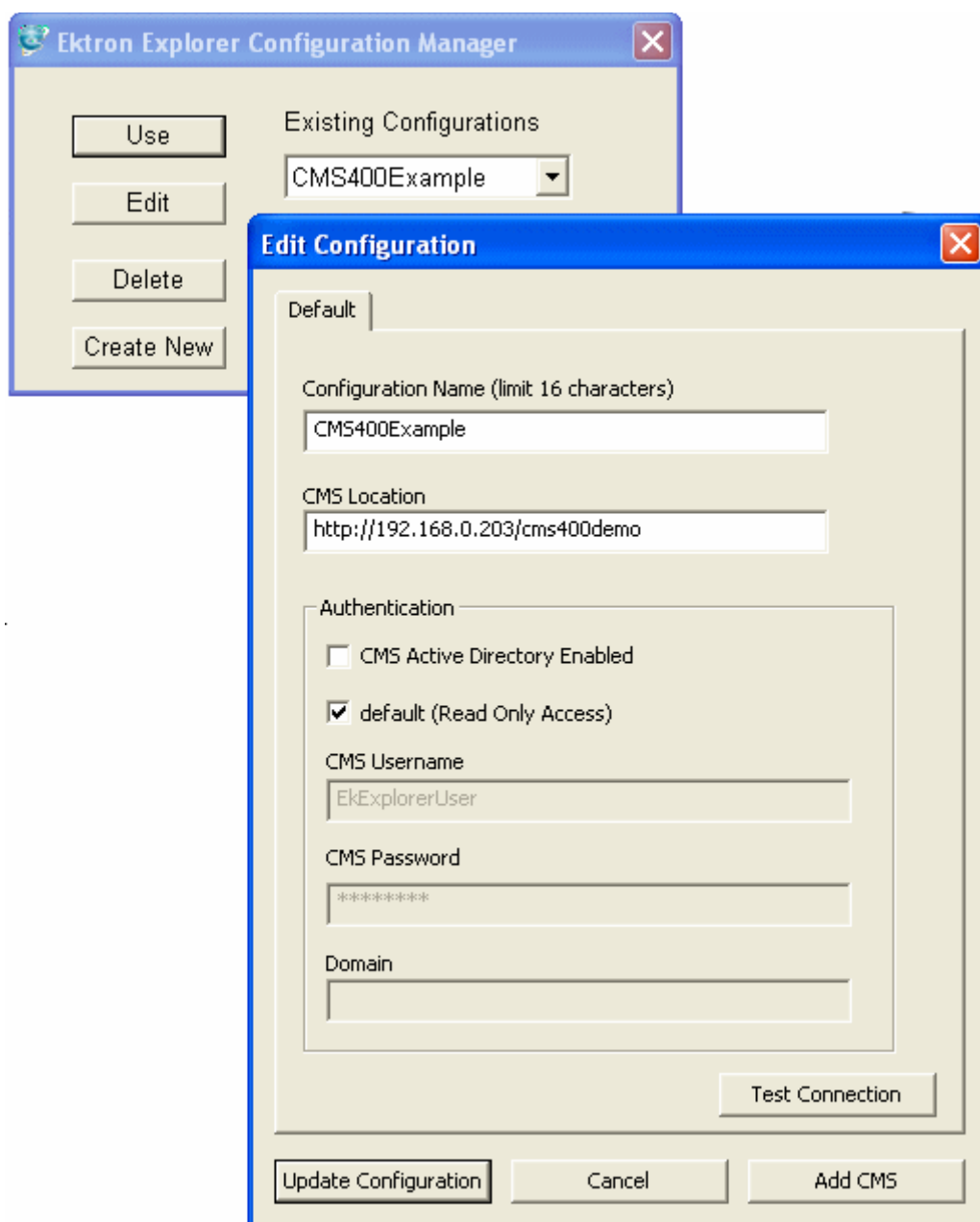
**NOTE**

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If several people use separate Windows user accounts on the same PC , the CMS configurations created by one Windows user are hidden from other users on that PC.

---





If you change the **CMS Username** and **CMS password** in an existing or new configuration, users who sign on under that



configuration are granted the editing privileges assigned in the Permission table. See Also: ["Setting Permissions" on page 686](#)

For example, a user whose user name and password you enter has permission to edit all content in **Ektron CMS400.NET**. To edit the content, the user browses to it, right clicks the mouse and selects **Edit** from the popup menu. The content is surrounded by a colored border that indicates if it is eligible for editing. For more information, see ["Recognizing Content" on page 15](#).

**NOTE** To learn how to access **Ektron CMS400.NET** content from the Ektron Explorer, see the **Ektron CMS400.NET** User Manual section "Using Ektron Explorer."

---

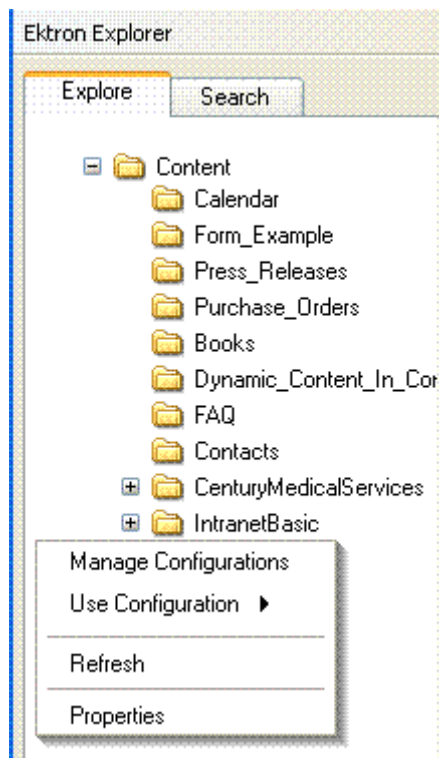
## Accessing the Configuration Manager

Click the Windows **Start** button then follow this path:

**Programs > Ektron > Ektron Explorer > Configuration Manager**

When Explorer is open, you can access Configuration Manager by placing the cursor in the left frame and right clicking the mouse.





## Configuration Manager Options

The Explorer Configuration Manager provides four buttons, described below.

| Button | Description  |
|--------|--|
| Use    | Lets you determine, via the <b>Existing Configurations</b> dropdown list, which CMS to explore. See Also: <a href="#">"Switching Between Configurations" on page 524</a> |
| Edit   | For any configuration, change the name, location or authentication information. See Also: <a href="#">"Editing a Configuration" on page 522</a>                          |



| Button     | Description  |
|------------|--|
| Delete     | Remove a configuration. See Also: <a href="#">"Deleting a Configuration" on page 525</a>         |
| Create New | Create a new configuration. See Also: <a href="#">"Creating a New Configuration" on page 523</a> |

## Editing a Configuration

To edit an existing configuration, follow these steps.

1. Access the Configuration Manager as described in ["Accessing the Configuration Manager" on page 520](#).
2. Click the **Edit** button.
3. The Edit Existing Configuration screen appears. Use the following table to guide you through each field.

### ***Fields on the Edit Existing Configuration Screen***

| Field                        | Description  |
|------------------------------|--|
| Configuration name           | Update the configuration name. You use this name to identify which configuration to log into.  |
| CMS Location                 | Enter the full path to the <b>Ektron CMS400.NET</b> version that you will access via this configuration. For example, <code>http://bills_computer/cms400min</code><br>The default location is the local PC:<br><code>http://localhost/cms400min</code><br>You can also use a static IP address followed by your Web site root folder. For example:<br><code>http://192.168.25.874/cms400min</code> |
| Authentication               |  |
| CMS Active Directory Enabled | If your site is using Active Directory for sign in, check this box. If you do, the <b>Domain</b> field (below) becomes active, so that you can enter the Domain as part of the login information.  |



| Field                      | Description  |
|----------------------------|--|
| default (Read Only Access) | <p>Check this checkbox if, when accessing Ektron Explorer via this configuration, you want to submit the default user name and password. In this case, the user can view all CMS content but not edit.</p> <p>If you want to edit CMS content, change the CMS login name and password to a user with editing privileges.</p>   |
| CMS Login                  | <p>(Only available if <b>default</b> is not checked.)</p> <p>Enter your CMS username, as entered in the CMS Add/Edit User screen. See Also: <a href="#">"Creating a New User" on page 635</a></p> <p>Within Ektron Explorer, you will have the same privileges for working with content that you have in <b>Ektron CMS400.NET</b>. See Also: <a href="#">"Setting Permissions" on page 686</a></p> |
| CMS Password               | <p>(Only available if <b>default</b> is not checked.)</p> <p>Enter your CMS password, as entered in the CMS Add/Edit User screen. See Also: <a href="#">"Creating a New User" on page 635</a></p> <p>Within Ektron Explorer, you will have the same privileges for working with content that you have in <b>Ektron CMS400.NET</b>. See Also: <a href="#">"Setting Permissions" on page 686</a></p> |
| Domain                     | <p>(Only available if <b>CMS Active Directory Enabled</b> is checked.) Enter the user's Active Directory domain.</p>   |
| Test Connection            | <p>Use this button to run a quick test of the configuration information. The test results indicate if the connection is successful.</p> <p>If it is not, an error message appears to help you diagnose the problem.</p>  |

#### 4. Click **Update Configuration**.

## Creating a New Configuration

You might want to create a new configuration to

- sign in to a different instance of **Ektron CMS400.NET** (for example, one on a different computer)



- sign in as a different user

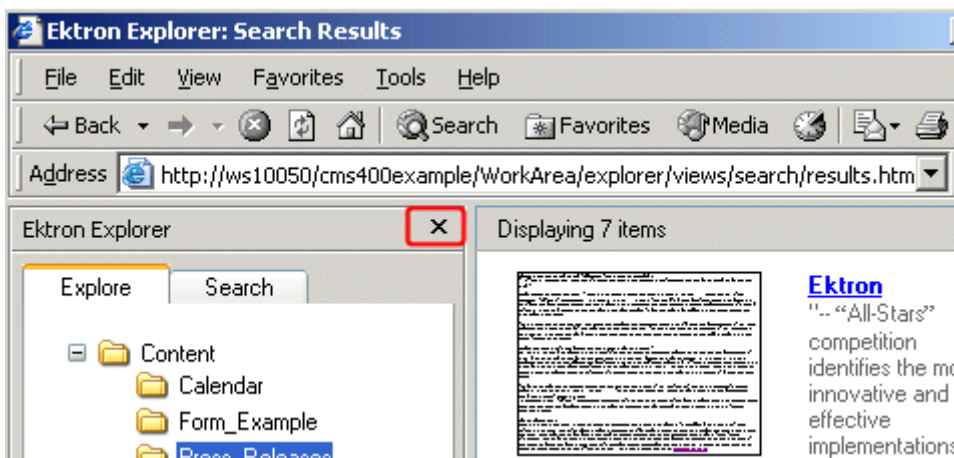
To create a new configuration, follow these steps.

1. Access the Configuration Manager, as described in ["Accessing the Configuration Manager" on page 520](#).
2. Click **Create New**.
3. Complete the fields on the screen. See ["Fields on the Edit Existing Configuration Screen" on page 522](#).
4. Press the **Test Connection** button. When you do, the CMS location, username, and password are tested for validity.
5. Click the **Add New** button.

## Switching Between Configurations

If you have two or more configurations and want to sign off one and sign on to the other, follow these steps.

1. Click the small **X** on the top right corner of the Ektron Explorer frame (illustrated below).



2. The Ektron Explorer closes.
3. Access the Configuration Manager, as described in ["Accessing the Configuration Manager" on page 520](#).



4. Pull down the **Existing Configurations** drop down list and select the configuration that you want to use.
5. Click the **Use** button.
6. Sign back on to Ektron Explorer.

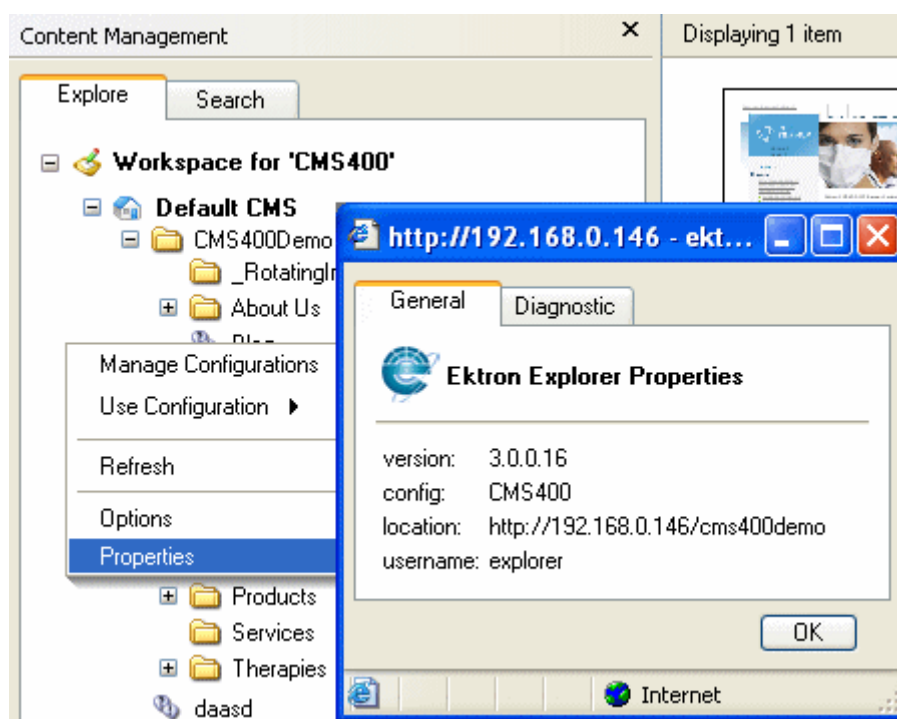
## Deleting a Configuration

1. Access the Configuration Manager, as described in "[Accessing the Configuration Manager](#)" on page 520.
2. Pull down the **Existing Configurations** drop down list and select the configuration that you want to delete.
3. Click the **Delete** button.

## Viewing Administrative Information

The Explorer Properties screens provide information to help system administrators evaluate and troubleshoot problems related to Ektron Explorer. To access it, place the cursor in the left panel but do not select a folder. Then, right click the mouse and select **Properties**.





The following table explains the information provided on both tabs of the Ektron Explorer Properties screen.

| Tab     | Field    | Description   |
|---------|----------|---|
| General | Version  | The version of Ektron Explorer installed on the client.   |
|         | Config   | The name of the configuration being used. See Also: <a href="#">"Configuring Ektron Explorer" on page 517</a> |
|         | Location | The path to the server that contains the CMS linked to Ektron Explorer.                                       |
|         | username | The name of the user signed in to Ektron Explorer.  |



| Tab        | Field                                     | Description  |
|------------|---|--|
| Diagnostic | Server name                               | The server that contains the CMS linked to Ektron Explorer.  |
|            | Local Address                             | The client that contains Ektron Explorer.  |
|            | Application Path                          | The folder that contains the Web services and Explorer folders.  |
|            | Client version                            | The version of Ektron Explorer installed on the client.  |
|            | Server version                            | The version of <b>Ektron CMS400.NET</b> installed on the server.   |
|            | Configuration name                        | The name of the configuration being used. See <i>Also: "Configuring Ektron Explorer" on page 517</i>   |
|            | Configuration username                    | The user signed in to Ektron Explorer using the configuration listed above.  |
|            | Configuration location                    | The path to the server that contains the CMS linked to Ektron Explorer, as defined in the configuration listed above.  |
|            | Web Services: HTTP Status                 | Ektron Explorer requires Web Services to be working. This field indicates the status of Ektron Explorer's Web Service.<br>Green - Web Service is working<br>Red - Web Service is not working |
|            | Dependencies: Ektbartb.dll, EktAsset2.ocx | Ektron Explorer requires these two files on the client.<br>Green - the file resides on the client<br>Red - the file is missing   |



---

# Calendars

The Calendars feature allows you to create event calendars for your Web site. Once created, users may add calendar events that are posted to the calendar for visitors to see.

## NOTE

---

The User Manual section “Working with Calendars” explains calendar concepts and procedures that end users need to know. This section does not repeat that information. So, you should be familiar with that information before reading this.

Also, the Ektron CMS400.NET Developer’s Manual provides instructions on using the Calendar server control/custom function.

---









This chapter explains **Ektron CMS400.NET** calendars through the following topics.

- “Calendar Toolbar Buttons” on page 529
- “Accessing the Workarea Using Calendars” on page 530
- “Calendar Permissions” on page 530
- “Adding a New Calendar” on page 531
- “Editing a Calendar” on page 536
- “Deleting a Calendar” on page 536
- “Calendar Event Types” on page 536
- “Displaying Calendars on Web Pages” on page 539
- “Creating a Foreign Language Calendar” on page 540






## Calendar Toolbar Buttons

Within the Calendars feature, several buttons (described below) help you perform actions.

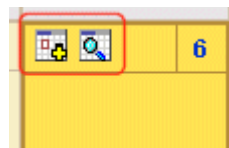
| Button  | Name                        | Lets you   | More Information   |
|---|-----------------------------|--|--|
|    | Add Calendar                | Access Add Calendar screen                               | <a href="#">"Adding a New Calendar" on page 531</a>  |
|    | Save                        | Save calendar or calendar event                          |  |
|    | Show Calendar               | Display calendar in Workarea                             | "Viewing a Calendar" in the <b>Ektron CMS400.NET</b> User Manual chapter "Working with Calendars"                        |
|    | Manage Event Types          | Add, edit, and delete Event Types to and from a calendar | <a href="#">"Calendar Event Types" on page 536</a>   |
|   | Add Calendar Event          | Access Add Calendar Event screen in the Workarea         | "Adding a Calendar Event" in the <b>Ektron CMS400.NET</b> User Manual chapter "Working with Calendars"                   |
|  | Edit                        | Edit calendar or event name                              | <a href="#">"Editing a Calendar" on page 536</a> ; <a href="#">"Editing the Event Type Name" on page 538</a>             |
|  | Delete                      | Delete calendar or calendar event                        | <a href="#">"Deleting a Calendar" on page 536</a>  |
|  | Delete all recurring events | Delete all events in a recurring series                  | "Deleting All Events in a Recurring Series" in the <b>Ektron CMS400.NET</b> User Manual chapter "Working with Calendars" |



| Button  | Name               | Lets you   | More Information   |
|---|--------------------|--|--|
|  | Add Calendar Event | Access the Add Calendar Event screen from calendar on Web page | "Adding a Calendar Event" in the <b>Ektron CMS400.NET</b> User Manual chapter "Working with Calendars"   |
|  | View Date          | View calendar events for selected day                          | "Viewing a Calendar Event" in the <b>Ektron CMS400.NET</b> User Manual chapter "Working with Calendars"  |
|  | Add Library        | Select a library Quicklink for an event.                       | Hyperlink field description in the <b>Ektron CMS400.NET</b> User Manual chapter "Working with Calendars" |

## Accessing the Workarea Using Calendars

To access the Workarea after viewing a calendar, you cannot right click the mouse then choose Workarea from the context-sensitive menu as you can with content. Instead, after logging in, click either the Add Events or View Events icon (circled below) to access the Workarea.



## Calendar Permissions

Calendar permissions are derived from the content folder assigned to the calendar. This section explains the permissions you can set for a calendar.



## Administrator Permissions

Members of the following groups have full control over all calendar features (as they do for content). Only these users can add, edit, or delete a calendar.

- administrator user group
- users and user groups defined on the Manage Members for Role: Calendar-Admin screen. (For more information, see ["Defining Roles" on page 704.](#))

Administrators may also add, edit, and delete calendar events.

## User Permissions


Users who are not in one of the groups listed in ["Administrator Permissions" on page 531](#) *cannot* add, edit, or delete calendars.

Non-administrator users can add, edit, or delete calendar events *if* they have add, edit, and delete permissions for the calendar's content folder. See Also: ["Setting Permissions for a Content Folder" on page 690](#)

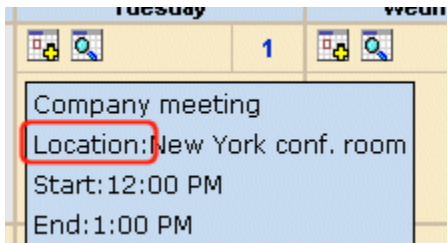
## Adding a New Calendar

To add a new calendar, follow these steps.

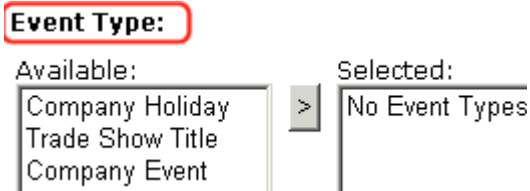
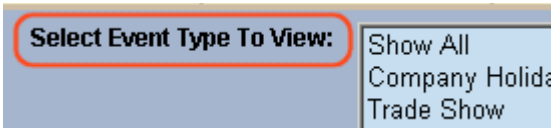

See Also: ["Calendar Permissions" on page 530](#)

1. Click **Modules > Calendar**.
2. Click the Add Calendar button (.
3. The Add or Edit Calendars screen appears. The following table explains each field on the screen.




| Section          | Description   |
|------------------|---|
| Title            | Enter a calendar title, which identifies the calendar in the Workarea.  |
| Description      | Enter a calendar description, which appears on the Calendar Modules screen to help identify the calendar.   |
| Location Label   | <p>Specify the label text for the location field. The location appears with the detail of a calendar event.</p>   |
| Start Time Label | Specify a label for the start time. A calendar event can display the start time.  |
| End Time Label   | Specify a label for the end time. A calendar event can display the end time.  |
| Display Weekends | <p>Place a check in this box if you want the calendar to display Saturdays and Sundays along with weekdays.</p> <p>To display weekdays only, remove the check. See Also: <a href="#">"Display Weekends" on page 535</a></p>   |
| Forward Only     | <p>To have the calendar display only events from the date when someone views the calendar forward (but no past events), place a check in the box next to</p> <p><b>Show only events that fall after the viewing day</b></p> <p>However, a logged-in user can view past calendar events.</p> |



| Section               | Description   |
|-----------------------|---|
| Event Type Label      | <p>One section of the Add Calendar Events screen displays available event types and lets the user assign them to the event.</p>  <p>By default, this text is <b>Event Type:</b>. To change the default text, edit this field.</p>   |
| Event Types Available | <p>If you want to allow users to assign event types to events on this calendar, check this box.</p>   |
| Event Types Required  | <p>If you want to require users to assign event types when adding events, check this box.</p> <p>This checkbox can only be checked if <b>Event Types Available</b> is checked.</p>  |
| Instructions          | <p>If you allow users to filter a calendar view by event type, text appears at the bottom of the screen that explains how to use the selection box. By default, this text is <b>Select Event Type To View</b>.</p>  <p>If you want to change this text, edit this field.</p>  |
| Show All label        | <p>If you allow users to filter a calendar view by event type, the list of event types appears at the bottom of the screen. On top of the list is text indicating that all event types will appear on the calendar. By default, this text is <b>Show All</b>.</p>  <p>If you want to change this text, edit this field.</p> |






















| Section          | Description   |
|------------------|---|
| Long Description | <p>This field can allow the user to enter additional information about a calendar event.</p>  <p>Your choices are:</p> <ul style="list-style-type: none"> <li>• <b>No Long Description</b> - no additional description is allowed</li> <li>• <b>Text Only</b> - while adding an event, a user can enter text into a <b>Long Description</b> box. No formatting is allowed within this text.<br/>This text appears in the Event View screen and in the XML Packet. Because the text is not formatted, the XSL creator is responsible for its display.</li> <li>• <b>Rich Text Description</b> - works the same as the Text Only option (see above) except the user can format text using Ektron's eWebEditPro editor.</li> </ul> |
| Content Folder   | <p>Specify the calendar's content folder.</p> <p>To understand how folder assignment affects calendar use, see <a href="#">"Calendar Permissions" on page 530</a>.</p> <p>By default, the root (0) folder is selected. To assign a different folder, click <b>change</b>. If you do, a new screen appears. Navigate to and select the folder of your choice.</p>  |

4. Click the Save button (  ).





















## Display Weekends

To display seven day weeks (for example, Sunday to Saturday), as opposed to five day weeks (Monday to Friday), check this box.

| << March   |  |  |  |  |  | April  |  |   |  |   |  |
|--|--|--|--|--|--|--|--|---|--|---|--|
| Sunday   |  | Monday   |  | Tuesday  |  | Wednesday  |  | Thursday  |  | Friday  |  |
|  |  |  |  |  |  |  |  |   |  |   1<br>birthday party |  |
|   3  |  |   4  |  |   5  |  |   6  |  |   7  |  |   8                   |  |
|  |  |  |  | company meeting  |  |  |  | test  |  |   |  |
|   10 |  |   11 |  |   12 |  |   13 |  |   14 |  |   15                  |  |



**Do Not Display Weekends**

| << March   |  |  |  |  | April |   |  |  |  |
|--|--|--|--|--|-------|---|--|--|--|
| Monday   |  | Tuesday  |  | Wednesday  |       | Thursday  |  |  |  |
|  |  |  |  |  |       |   |  |   birthday party |  |
|   4  |  |   5  |  |   6  |       |   7  |  |                  |  |
|  |  | company meeting  |  |  |       | test  |  |  |  |
|   11 |  |   12 |  |   13 |       |   14 |  |                  |  |



## Editing a Calendar

All calendar information, with the exception of the ID, can be edited at any time. To edit a calendar, follow these steps.

1. Access the View Calendar screen for the calendar you want to edit.
2. Click the Edit button (  ).
3. The Add or Edit Calendar screen is displayed.
4. Make the necessary changes to the calendar, using the table in ["Adding a New Calendar" on page 531](#) as a reference.
5. Click the Save button (  ).

## Deleting a Calendar


You can delete calendars that are no longer needed.

---

**NOTE** [Deleting a calendar deletes all events assigned to it.](#)

---

To delete a calendar, follow these steps.

1. Access the View Calendar Screen for the calendar you want to delete.
2. Click the Delete button (  ).
3. A confirmation message is displayed.
4. Click **OK**.

## Calendar Event Types

Any calendar event can have one or more Event Types assigned to it. An event type might be a meeting, product demonstration, or deadline. When a user views a calendar, he can change the display to view only events that are relevant to him.




This section explains how to manage calendar Event Types through the following subtopics.

- ["Enabling Event Types" on page 537](#)
- ["Viewing Event Types" on page 537](#)
- ["Adding Event Types" on page 538](#)
- ["Editing the Event Type Name" on page 538](#)
- ["Deleting Event Types" on page 539](#)
- ["Assigning an Event Type to an Event" on page 539](#)


## Enabling Event Types

To enable event types, edit the calendar and check off the **Event Types Available** box. If desired, you can also check the **Event Types Required** box. This forces the user to specify an event type when adding a calendar event. See *Also: "Adding a New Calendar" on page 531*

Once event types are enabled, the Manage Event Types button () appears on the toolbar.

## Viewing Event Types

To view available Event Types, follow these steps.

1. Access the View Calendar screen for the calendar whose event types you want to view.
2. Click Event Types button ().

### NOTE



If the Event Types button does not appear in the toolbar, you must make Event Types available. See ["Enabling Event Types" on page 537](#) for more information.

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

From this screen, you can add, edit, and delete Event Types.







## Adding Event Types

1. Access the Event Types screen, as described in ["Viewing Event Types" on page 537](#).
2. Click the Add button (.
3. The Add or Edit an Event Type screen is displayed.
4. Type an Event Type name in the displayed field.
5. Click the Save button (.

After you add an Event Type to a calendar, it can be assigned to a calendar event by users. See ["Assigning an Event Type to an Event" on page 539](#) for more information.

## Editing the Event Type Name



To edit the name of an event type, follow these steps.

1. Access the View Event Types for [Calendar Name] for the calendar with the Event Type you want to edit, as described in ["Viewing Event Types" on page 537](#).
2. Click the Event Types button (.
3. The View Event Types for [Calendar Name] window opens, listing all Event Types.
4. Click the Edit button (.
5. The Edit an Event Type screen appears.
6. Click the radio button next to the Event Type you want to edit.
7. Click the Edit button (.
8. The Add or Edit an Event Type screen is displayed. Update the Event Type name.
9. Click the Save button (.




## Deleting Event Types

To delete an event type from a calendar, follow these steps.

1. Access the View Event Types for [Calendar Name] for the calendar with the Event Type you want to delete, as described in ["Viewing Event Types" on page 537](#).
2. Click the Event Types button (  ).
3. The View Event Types for [Calendar Name] window opens, listing all Event Types.
4. Click the Remove button (  ).
5. The Delete Event Types screen displays available Event Types.
6. Check the box next to each Event Type you want to delete.

### NOTE

Click either **Select All** or **Clear All** to check off all or none of the Event Types.

7. Click the Delete button (  ) to delete the Event Type.
8. A confirmation message is displayed.
9. Click **OK**.

## Assigning an Event Type to an Event

After Event Types are available, users can assign them to calendar events. This is described in the **Ektron CMS400.NET** User Manual chapter "Working with Calendars."

After users assign Event Types to a calendar event, visitors can filter the calendar view by them.

## Displaying Calendars on Web Pages

After a calendar is created, it can easily be inserted onto a Web page. For information about inserting calendars into your Web site, refer to the Ektron CMS400.NET Developers Reference Manual.





















## Creating a Foreign Language Calendar

As part of the comprehensive multi-language features of **Ektron CMS400.NET**, calendars can be created in any supported language.

**Exception** Microsoft's .NET platform supports most languages. If a language is not supported by .NET (for example, Welsh), an English calendar appears instead.

Once you enter the calendar and event information in the foreign language, the calendar display (that is, day and month names) automatically appears in that language. Also, regional conventions for first-last days of the week, and date and time formats are maintained. As an example, see the French calendar below.

| << mars  |  | avril  |  |   |   | mai >>   |  |
|--|--|--|--|---|---|--|--|
| lundi  | mardi  | mercredi   | jeudi  | vendredi  | samedi  | dimanche   |  |
|  |  |  |  |   1 |  2    |  3    |  |
|  |  |  |  |   |   |  |  |
|  4  |  5  |  6  |  7  |  8   |  9  |  10 |  |
|  |  |  |  |   |   |  |  |
|  11 |  12 |  13 |  14 |  15  |  16 |  17 |  |
|  |  |  |  |   |   |  |  |

Notice that the days and months are translated, and that the week begins on Monday instead of Sunday (as in American English).

And in the daily detail (below), note that date and time format follows French conventions.



**WARNING!**

In order to see foreign characters and accents, the client PC must have support enabled for that language in Windows. For more information, see <http://www.microsoft.com/globaldev/handson/user/2kintl supp.msp>.

| << 31/03/2005 |  | vendredi 1 avril 2005 | 02/04/2005 >> |
|---------------|--|-----------------------|---------------|
| 00:00         |  |                       |               |
| 01:00         |  |                       |               |
| 02:00         |  |                       |               |
| 03:00         |  |                       |               |
| 04:00         |  |                       |               |
| 05:00         |  |                       |               |
| 06:00         |  |                       |               |
| 07:00         |  |                       |               |
| 08:00         |  |                       |               |
| 09:00         |  |                       |               |
| 10:00         |  |                       |               |
| 11:00         |  |                       |               |
| 12:00         |  |                       |               |
| 13:00         |  |                       |               |
| 14:00         |  |                       |               |

See Also: "Using an Existing Calendar ID or Creating a New One" on page 541

## Using an Existing Calendar ID or Creating a New One

When you create a calendar in a foreign language, you can either use an existing calendar ID or create a new one.

| Type   | Use when...  | For more information, see   |
|--|--|---|
| Foreign language version of existing calendar ID | You want one Web page that displays a calendar in the language selected by the site visitor                      | "Creating a Multi-lingual Calendar Using the Same ID" on page 543 |
| New calendar ID                                  | The foreign calendar will be placed on its own Web page; there is no equivalent calendar in the default language | "Creating a Multilingual Calendar Using a New ID" on page 544     |



For example, the following is the English-language version of the sample calendar provided with the intranet. The URL of the following calendar is

```
http://localhost/CMS400EXAMPLE/intranet/
calendar.aspx?menu_id=15&calendar_id=3&titleLabel=Company%20Calendar&LangType=1033
```

| << March |  |                 |  |           | April |          |  |        |  |
|----------|--|-----------------|--|-----------|-------|----------|--|--------|--|
| Monday   |  | Tuesday         |  | Wednesday |       | Thursday |  |        |  |
|          |  |                 |  |           |       |          |  |        |  |
|          |  |                 |  |           |       |          |  | birthd |  |
| 4        |  | 5               |  | 6         |       | 7        |  |        |  |
|          |  | company meeting |  |           |       |          |  |        |  |
| 11       |  | 12              |  | 13        |       | 14       |  |        |  |
|          |  |                 |  |           |       |          |  |        |  |
| 18       |  | 19              |  | 20        |       | 21       |  |        |  |
|          |  |                 |  |           |       |          |  |        |  |
| 25       |  | 26              |  | 27        |       | 28       |  |        |  |

If you create a French version of that calendar, and a user navigates to the same page but views it in French, he sees the French version of the calendar (below). Note that they are separate calendars with separate event listings -- they only share the ID number.



The URL of the following calendar is

`http://localhost/CMS400EXAMPLE/intranet/  
calendar.aspx?menu_id=15&calendar_id=3&TitleLabel=Company%20Calendar&LangType=1036`

| << mars |    |       |    | avril    |    |       |    |          |    |        |  |
|---------|----|-------|----|----------|----|-------|----|----------|----|--------|--|
| lundi   |    | mardi |    | mercredi |    | jeudi |    | vendredi |    | samedi |  |
|         |    |       |    |          |    |       |    |          | 1  |        |  |
|         |    |       |    |          |    |       |    |          |    |        |  |
|         | 4  |       | 5  |          | 6  |       | 7  |          | 8  |        |  |
|         |    |       |    |          |    |       |    |          |    |        |  |
|         | 11 |       | 12 |          | 13 |       | 14 |          | 15 |        |  |
|         |    |       |    |          |    |       |    |          |    |        |  |
|         | 18 |       | 19 |          | 20 |       | 21 |          | 22 |        |  |
|         |    |       |    |          |    |       |    |          |    |        |  |

### ***Creating a Multi-lingual Calendar Using the Same ID***

To create a multi-lingual calendar using the same ID number but a different language, follow these steps.

1. Within the Workarea, select **Modules > Calendars**.
2. Select the calendar for which you want to create a version in another language.



- When the View Calendar Screen appears, pull down the **Add In** box and select the new language.

**View Calendar "Intranet Company Calendar"**

View In: English (U.S.) Add In: Select a Language

**Title:** Intranet Company Calendar

**ID:** 3

**Description:**

**Location Label:** Location:

**Start Time Label:** Start:

Select a Language  
Czech  
German (Standard)  
Spanish (Traditional)

- Complete the calendar information, as explained in ["Adding a New Calendar" on page 531](#).

### ***Creating a Multilingual Calendar Using a New ID***

To create a multi-lingual calendar using a unique ID number, follow these steps.

- Within the Workarea, select **Modules > Calendars**.
- From the Calendar Modules screen, click to open the **View In** dropdown box.

**Calendar modules**

View In: English (U.S.)

| Title   | ID | LangID | Description | Path       |
|---|----|--------|-------------|------------|
| <a href="#">Calendar Example</a>                    | 1  | 1033   |             | \Calendar  |
| <a href="#">Century Medical Training And Events</a> | 2  | 1033   |             | \CenturyMe |
| <a href="#">Intranet Company Calendar</a>           | 3  | 1033   |             | \          |

All  
Czech  
English (U.S.)  
French (Standard)  
German (Standard)  
Spanish (Traditional Sort)



3. Select the language for the calendar.
4. The Calendar Modules screen reappears, showing only calendars in the selected language (if any exist).

Complete the calendar information, as explained in ["Adding a New Calendar" on page 531](#).



# URL Aliasing

Aliasing is an **Ektron CMS400.NET** feature that lets you change the name of your Web site's pages. By default, **Ektron CMS400.NET** Web pages have the following format:

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

See Also: "Forming URLs For Ektron CMS400.NET Documents" on page 84

Sometimes, you want to change a page's name. The Aliasing feature offers two ways to do this:

- **Ektron CMS400.NET** can automatically change each page's name to a format that search engines more easily recognize. This is called *Automatic Aliasing*.
- You can manually change the name of any page to whatever you wish. For example, you can change the name of your technical support page to `http://www.example.com/help.htm` from `http://www.example.com/help.aspx?id=27`. This is called *Manual Aliasing*.

## NOTE

When using Manual Aliasing, you cannot alias the root of your Web site (for example, `www.example.com`). You can, however, alias everything after that.

This chapter explains how to alias pages on your Web site through the following topics.

- "Automatic vs. Manual URL Aliasing" on page 547
- "Automatic URL Aliasing" on page 547
- "Manual Aliasing" on page 550



## Automatic vs. Manual URL Aliasing

Automatic URL Aliasing allows you to create a URL that does not have a URL parameter. This URL aliases the URL that contains parameters found in a regular Ektron CMS400.NET URL, such as ?id=43. With Automatic URL Aliasing, you can alias all content at once. For more information on Automatic URL Aliasing, see ["Automatic URL Aliasing" on page 547](#).

Manual URL Aliasing lets you choose the URL and extension that you would like to use. With Manual URL Aliasing, you must assign an alias to each content item individually. You can also assign several aliases to any content item then pick one to be the primary alias. For more information on Manual URL Aliasing, see ["Manual Aliasing" on page 550](#).

## Automatic URL Aliasing

People looking for information on your Web site typically use search engines (such as Google.com) to find pages with the desired content. On rare occasions, some older search engines work better without the URL parameters that make up an **Ektron CMS400.NET** Web page name.

If this becomes a problem, use the Automatic URL Aliasing feature, which creates a page name that search engines easily recognize. The new name includes the template and the page's ID values.

When you use the Automatic URL Aliasing feature, **Ektron CMS400.NET** makes the following changes.

- A delimiter of `ekt` indicates the start of each parameter
- URL parameters follow each delimiter

Here is an example of aliasing content.

### Original URL

```
/400Intranet/mycalendars.aspx?id=2
```



## Aliased version

/400Intranet/mycalendars\_ektid2.aspx

## Enabling Automatic URL Aliasing

If you do not see a **URL Aliasing** option under **Settings > Configuration**, follow these steps to enable it.

### NOTE

Before editing your web.config file, you should close all open browsers. In some instances, you may need to do an IIS reset.

1. Open the web.config file, located in your Web site's root folder.
2. Change the value of `ek_RedirectorInstalled` to **True**.
3. Enable the URL aliasing section of the `httpHandlers` element. To do so, uncomment the following tags by removing the dashes and the exclamation point (!) in red below.

```
<httpHandlers>
.
<!--add verb="*" path="*.asmx"
.
.
<add verb="*" path="*" type="URLRewrite.URLRewriter,Ektron.Cms.URLRewriter" /-->
```

The tags are separated by several lines that look like this:

```
<add verb="*" path="*.gif" type="URLRewrite.StaticFileHandler,Ektron.Cms.URLRewriter" />
```



4. Save web.config.

## Activating/Deactivating the Aliasing Feature

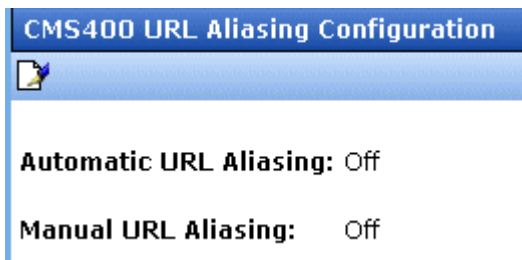
To activate the automatic aliasing feature, follow this path to the URL Aliasing Configuration screen: **Settings > Configuration > URL Aliasing**.

### NOTE

If you do not see a **URL Aliasing** option under **Configuration**, see "Enabling Automatic URL Aliasing" on page 548.

The screen indicates if automatic aliasing is currently on or off. To change its state, click the Edit button () , check or uncheck the box, and click the Save button ().





If **Automatic Aliasing** is turned on and you uncheck it, your page URLs return to their original format (see "[Sample Quicklinks Folder with URL Aliasing Turned Off](#)" on page 549).

## Effect of Activating Automatic URL Aliasing

When you enable automatic URL aliasing, the feature updates every Quicklink in your **Ektron CMS400.NET** library to the new format. This may take a few moments.

### *Sample Quicklinks Folder with URL Aliasing Turned Off*

| : "CenturyMedical\quicklinks" |    |                      |  |
|-------------------------------|----|----------------------|--|
| ks                            | ←  | English (U.S.)       | ?  |
|                               | ID | Date Modified        | URL Link                                       |
| <a href="#">lower middle</a>  | 86 | 2/7/2005 4:12:37 PM  | /CMS400Example/centurymedical/index.aspx?id=45 |
| <a href="#">top (home)</a>    | 87 | 2/7/2005 4:12:38 PM  | /CMS400Example/centurymedical/index.aspx?id=46 |
|                               | 85 | 5/29/2005 1:47:40 PM | /CMS400Example/centurymedical/index.aspx?id=44 |
| <a href="#">ain content</a>   | 88 | 7/15/2005 2:58:57 PM | /CMS400Example/centurymedical/index.aspx?id=47 |
|                               | 84 | 2/7/2005 4:12:36 PM  | /CMS400Example/centurymedical/index.aspx?id=43 |
| <a href="#">ent</a>           | 91 | 3/8/2005 11:52:46 AM | /CMS400Example/centurymedical/index.aspx?id=50 |
| <a href="#">ent demo</a>      | 90 | 6/29/2005 3:44:04 PM | /CMS400Example/centurymedical/index.aspx?id=49 |

### *Sample Quicklinks Folder with URL Aliasing Turned On*



| :: "CenturyMedical\quicklinks" |    |                      |  |
|--------------------------------|----|----------------------|--|
| ks                             | ←  | English (U.S.)       | ?  |
|                                | ID | Date Modified        | URL Link   |
| <a href="#">lower middle</a>   | 86 | 2/7/2005 4:12:37 PM  | /CMS400Example/centurymedical/index_ektid45.aspx |
| <a href="#">top (home)</a>     | 87 | 2/7/2005 4:12:38 PM  | /CMS400Example/centurymedical/index_ektid46.aspx |
|                                | 85 | 5/29/2005 1:47:40 PM | /CMS400Example/centurymedical/index_ektid44.aspx |
| <a href="#">ain content</a>    | 88 | 7/15/2005 2:58:57 PM | /CMS400Example/centurymedical/index_ektid47.aspx |
|                                | 84 | 2/7/2005 4:12:36 PM  | /CMS400Example/centurymedical/index_ektid43.aspx |
| <a href="#">tent</a>           | 91 | 3/8/2005 11:52:46 AM | /CMS400Example/centurymedical/index_ektid50.aspx |
| <a href="#">tent demo</a>      | 90 | 6/29/2005 3:44:04 PM | /CMS400Example/centurymedical/index_ektid49.aspx |

The aliasing feature does not review Quicklinks embedded in your content -- these maintain their original format. When a user or site visitor is navigating through **Ektron CMS400.NET**, either format works.

## Manual Aliasing

When using manual aliasing, you choose content then assign a different URL to it. From then on, the content can be identified either by its original URL (assigned automatically by **Ektron CMS400.NET**) or its alias.

When assigning an alias, choose the name you want users to see as your URL. In the example below, the page name changed from `/cms400min/index.aspx` to `/cms400min/Launch.htm`. `Launch.htm` is the alias.

### ***Before Manual URL Aliasing***



Library Folder: "Content\quicklinks"

English (U.S.)

| Title                                 | ID | Date Modified           | URL Link                                 |
|---------------------------------------|----|-------------------------|--|
| <del>Contact Ektron</del>             | 20 | 05-Sep-2002 05:46:07 PM | <del>/CMS400Sample/index.aspx?id=1</del> |
| <u>Home Page Content</u>              | 7  | 27-Dec-2004 11:11:56 AM | /CMS400Sample/index.aspx                 |
| <del>Introducing the RC Redstar</del> | 29 | 04-Dec-2003 10:26:41 AM | <del>/CMS400Sample/index.aspx?id=1</del> |
| <u>Login Information</u>              | 8  | 05-Sep-2002 05:46:07 PM | /CMS400Sample/index.aspx?id=1            |
| <del>Season's Greetings</del>         | 30 | 04-Dec-2003 10:26:41 AM | <del>/CMS400Sample/index.aspx?id=1</del> |

### ***After Manual URL Aliasing***

Library Folder: "Content\quicklinks"

English (U.S.)

| Title                                 | ID | Date Modified           | URL Link                                 |
|---------------------------------------|----|-------------------------|--|
| <del>Contact Ektron</del>             | 20 | 05-Sep-2002 05:46:07 PM | <del>/CMS400Sample/index.aspx?id=1</del> |
| <u>Home Page Content</u>              | 7  | 27-Dec-2004 10:50:04 AM | /CMS400Sample/Launch.htm                 |
| <del>Introducing the RC Redstar</del> | 29 | 04-Dec-2003 10:26:41 AM | <del>/CMS400Sample/index.aspx?id=1</del> |
| <u>Login Information</u>              | 8  | 05-Sep-2002 05:46:07 PM | /CMS400Sample/index.aspx?id=1            |
| <del>Season's Greetings</del>         | 30 | 04-Dec-2003 10:26:41 AM | <del>/CMS400Sample/index.aspx?id=1</del> |

This section explains manual aliasing through the following subtopics.

- "Benefits of Manual URL Aliasing" on page 552
- "Enabling Manual Aliasing" on page 552
- "Activating/Deactivating Manual Aliasing" on page 561
- "Permissions for Manual Aliasing" on page 562
- "Adding a Base Reference to a Template" on page 563
- "Assigning a Manual URL Alias" on page 563
- "Editing a Manual URL Alias" on page 567
- "Removing a Manual URL Alias" on page 568



## Benefits of Manual URL Aliasing

Manual URL Aliasing lets you completely alias a static or dynamic site. Benefits include:

- You can make your site more user-friendly by creating “human readable” URLs (for example, `/ourcompany.html` is readable, while `company.aspx?id=1` is not).
- If you have a PHP site, you can alias all php pages and use the same Query String names to pass the needed info to the new ASPX pages.

### NOTE

Any query strings appended to an aliased page pass to the ASPX page and may be used if necessary.

---

- If you have a static Web site (for example, all HTML pages) that is indexed in a search engine, you can alias your whole site and gain complete content management without affecting your search engine ranking.
- You can increase your search engine rankings by naming pages according to the context of a specific search term.

## Enabling Manual Aliasing

If you do not see a **URL Aliasing** option under **Settings > Configuration**, follow these steps to enable it. First, update the `web.config` file. Next, update IIS Application Mappings.

### Updating the Web.config File

1. Close all open browsers. In some instances, you may need to do an IIS reset.
2. Open the `web.config` file, located in your Web site’s root folder.
3. Change the value of `ek_RedirectorInstalled` to **True**.

### NOTE

You only need to perform step 4 if you want add content with an extension other than those already registered, such as `.aspx`. The **App Mappings** tab on the Application Configuration screen (illustrated below) indicates which extensions are registered on your server.

---

4. After `ek_RedirectorManualExt`, enter a comma-delimited list of Web page extensions for which you will want to create aliased pages. For example, `.aspx,.htm,.html`. By default, `.aspx` is in the list.



You can enter one or more extensions. Each extension must begin with a period, and separated from other extensions by a comma.

**IMPORTANT!**

Make sure you do not put spaces in between the extensions.

5. Enable the `httpHandlers` section of `Web.config`. To do so, uncomment the following tags by removing dashes and the exclamation point (!):

To uncomment the opening tag, remove the characters in red below:

```
<!--add verb="" path="*.asmx"
type="System.Web.Services.Protocols.WebServiceHandlerFactory, System.Web.Services,
Version=1.0.5000.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a" validate="false"/>
```

To uncomment the closing tag, remove the characters in red below:

```
<add verb="" path="" type="URLRewrite.URLRewriter, Ektron.Cms.URLRewriter" /-->
</httpHandlers>
```

6. If you want to use `.htm` as a file extension with your Web site, comment out the following line by adding the red characters below.

```
<!--add verb="" path="*/*.htm" type="URLRewrite.StaticFileHandler, Ektron.Cms.URLRewriter" /-->
```

7. Add the following line below the one shown above.

```
<add verb="" path="*.htm" type="URLRewrite.URLRewriter, Ektron.Cms.URLRewriter" />
```

8. Add a similar line for each file type you want to enable. For example:

```
<add verb="" path="*.html" type="URLRewrite.URLRewriter, Ektron.Cms.URLRewriter" />
<add verb="" path="*.aspx" type="URLRewrite.URLRewriter, Ektron.Cms.URLRewriter" />
```

9. For each folder path containing non-HTML content, add the pathway to it relative to the site root:

```
<add verb="" path="*/FOLDERPATH/
.*" type="URLRewrite.StaticFileHandler, Ektron.Cms.URLRewriter"/>
```

For example, for the CMS400Min site, add this:

```
<add verb="" path="*/privateassets/
.*" type="URLRewrite.StaticFileHandler, Ektron.Cms.URLRewriter" />
```

10. Save `web.config`.

**NOTE**

If you are using `.aspx` pages, you do not need to install the ISAPI filter. The following steps do not need to be performed.

## Updating IIS Application Mappings for Windows 2000 and XP

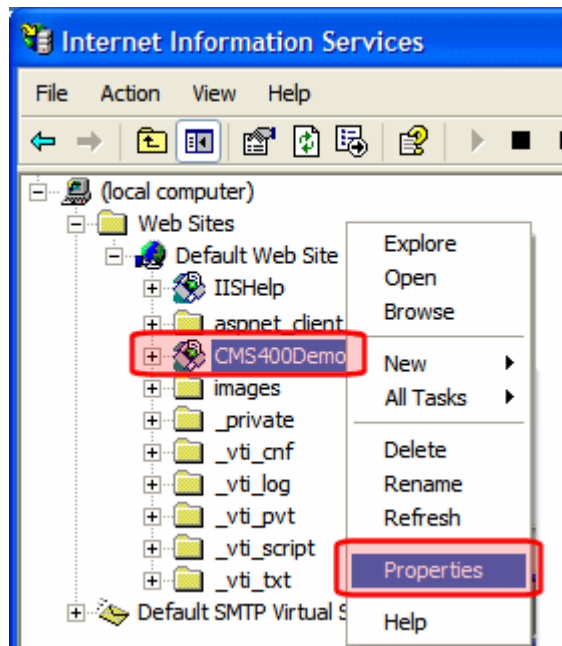


See Also: "Updating IIS Application Mappings for Windows 2003 Server" on page 558

1. Open IIS, go to the Web site, and right-click **Properties**.

**IMPORTANT!**

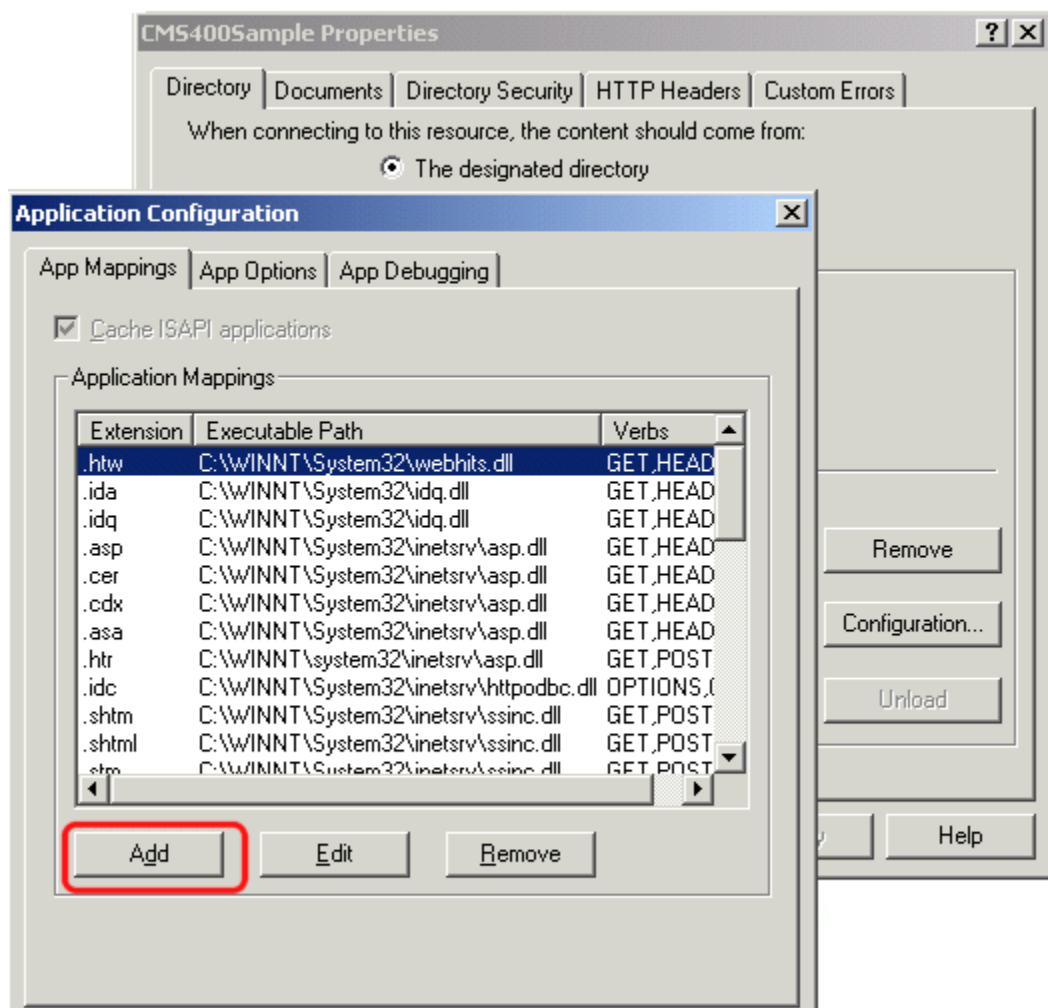
You must click on the actual site not Default Web Site.



2. Click the **Directory** tab.
3. Click the **Configuration** button.
4. On the **Mappings** tab, click **Add**.

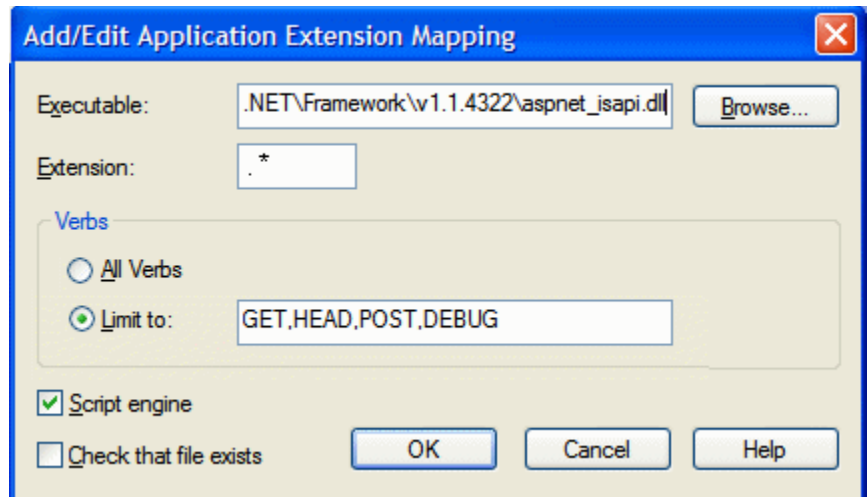


## Windows 2000 or Windows XP



5. The Add/Edit Application Extension Mapping dialog appears.





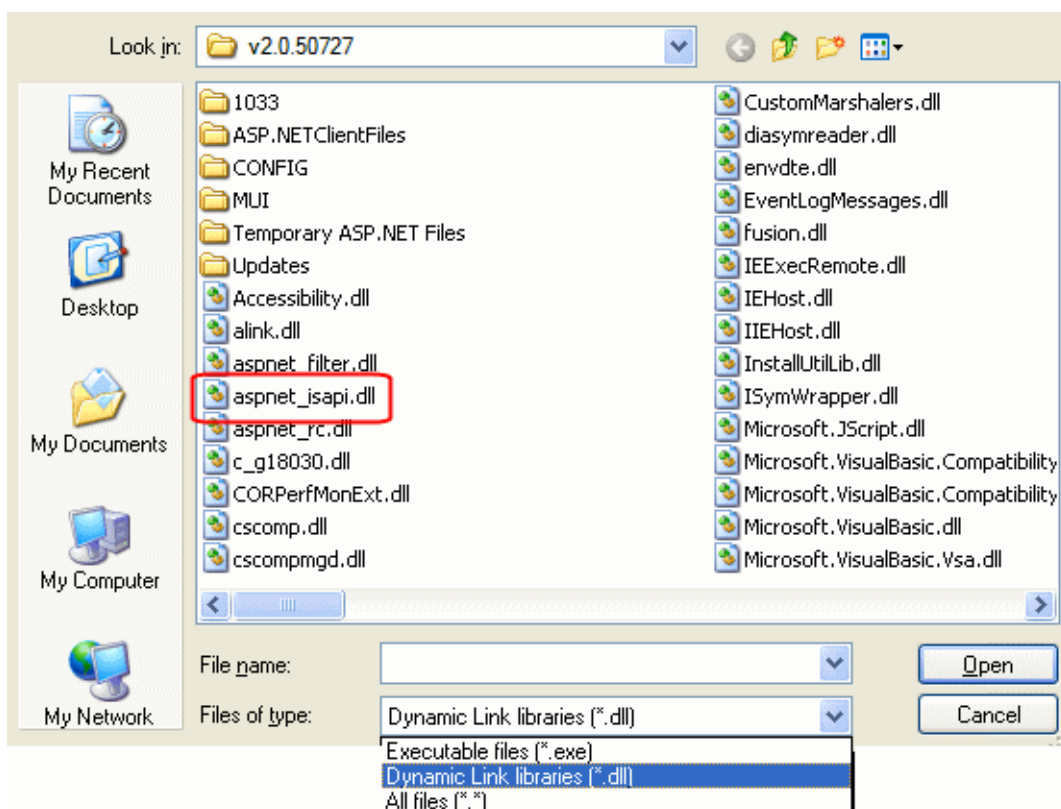
**NOTE** The dialog should look like the sample above when you finish.

6. In the **Executable** field, browse to the .NET Framework aspnet\_isapi.dll file (illustrated below).

**NOTE** Use the latest version of the asp.net\_isapi.dll. The default location is `c:\windows\Microsoft.NET\Framework\latestversion\aspnet_isapi.dll`. In the path, *latestversion* refers to the folder containing the latest version of the .NET framework.

**WARNING!** IIS sometimes abbreviates the path in the **Executable** field, causing the **OK** button to be grayed out. If the text box does not contain the full path, IIS cannot validate it. To remedy this, click in the **Executable** field. The full path appears, and the **OK** button is active.





**NOTE** When browsing to the `aspnet_isapi.dll` folder, you may need to change the **Files of Type** dropdown to **.dll** or **all files**. It is set to **.exe** by default.

7. In the **Extension** field, enter characters to allow all extensions.

| Server Platform | Your entry in the Extension field |
|-----------------|-----------------------------------|
| Windows 2000    | *.*                               |
| Windows XP      | .*                                |

8. Under **Verbs**, check **Limit to**. Then, enter **GET, HEAD, POST, DEBUG**.
9. Uncheck **Check** (or **Verify**) that file exists.



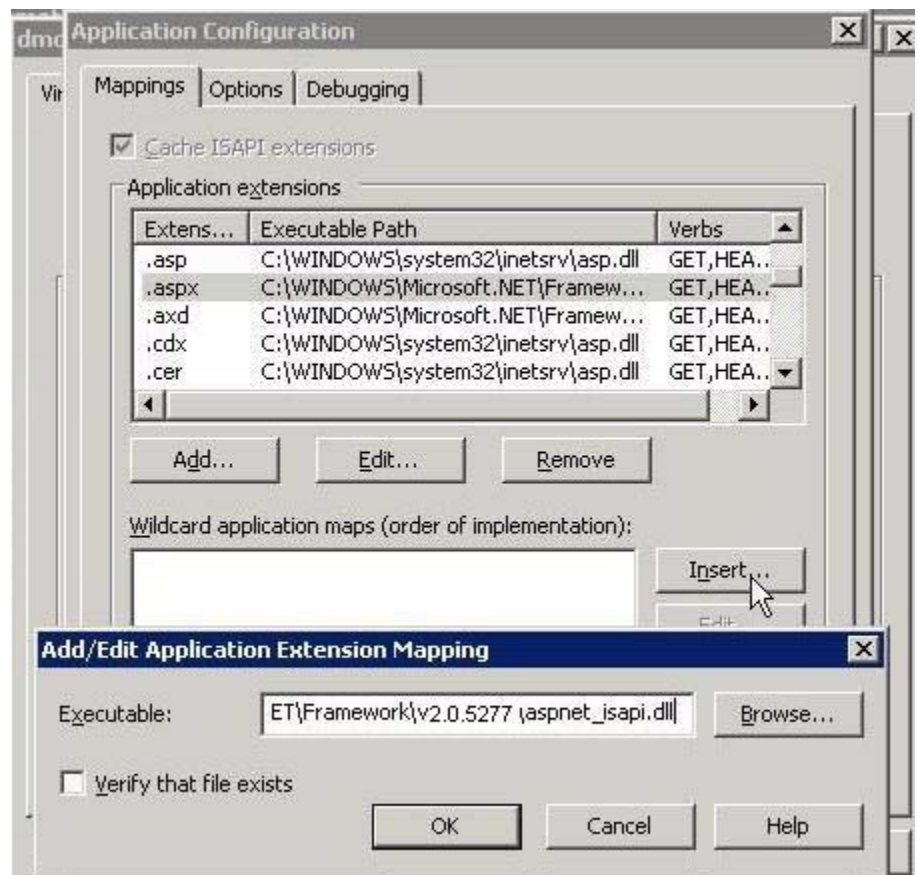
**Important!** Don't skip step 9!

10. Click **OK**.

### **Updating IIS Application Mappings for Windows 2003 Server**

See Also: "Updating IIS Application Mappings for Windows 2000 and XP" on page 553

1. Open IIS, go to the Web site, and right click **Properties**.
2. Click the **Home Directory** tab.
3. Click the **Configuration** button.
4. On the **Mappings** tab, click **Insert**.



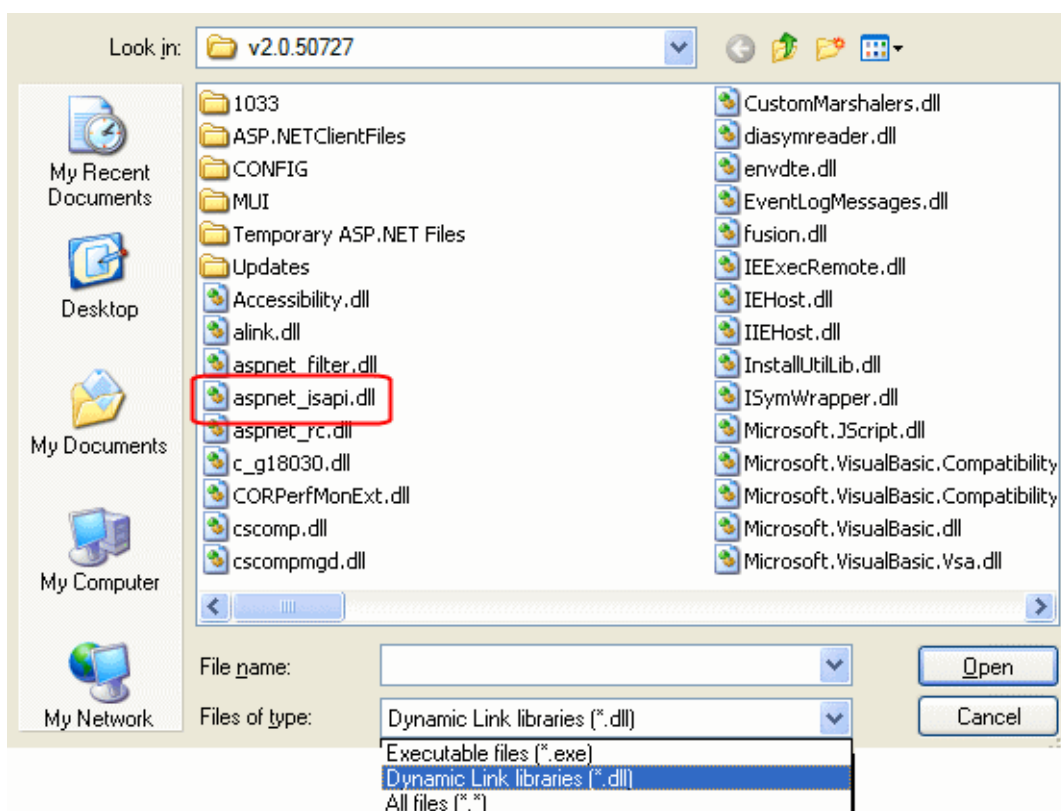
5. The Application Extension Mapping dialog appears (see above).



- In the **Executable** field, click **Browse** to navigate to the .NET Framework aspnet\_isapi.dll file (illustrated below).

**NOTE** Use the latest version of the asp.net\_isapi.dll. The default location is `c:\windows\Microsoft.NET\Framework\latestversion\aspnet_isapi.dll`. In the path, **latestversion** refers to the v2.0.50727 folder or the folder that contains the latest version.

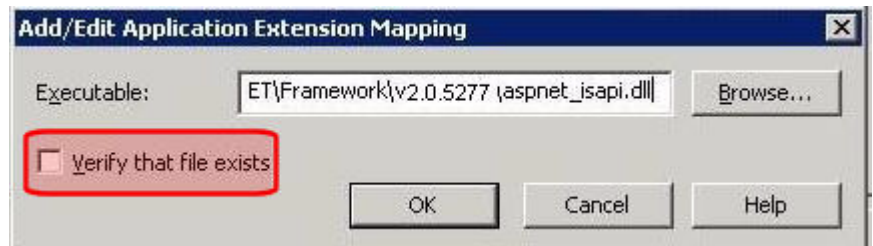
**WARNING!** IIS sometimes abbreviates the path in the **Executable** field, causing the **OK** button to be grayed out. If the text box does not contain the full path, IIS cannot validate it. To remedy this, click in the **Executable** field. The full path appears, and the **OK** button is active.



**NOTE** When browsing to the aspnet\_isapi.dll folder, you may need to change the **Files of Type** dropdown to **.dll** or **all files**.

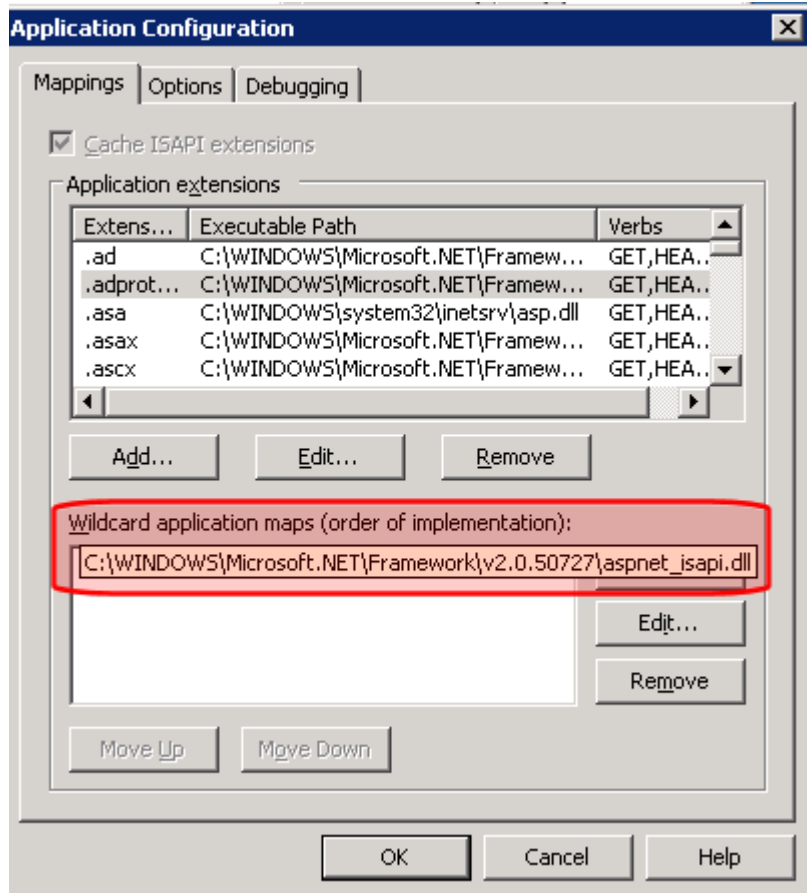
- Make sure **Verify that file exists** is not checked.





8. Click **OK**.
9. In IIS, underneath your Web site, click **Asset Management > dmdata**.
10. Right click **dmdata** and choose **Properties**.
11. Click the **Virtual Directory** tab.
12. Click the **Configuration** button.
13. In the **Wildcard Application Maps** area, if aspnet\_isapi.dll if appears, remove it.






14. Click **OK**.

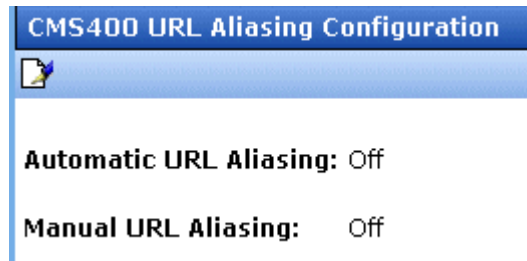
## Activating/Deactivating Manual Aliasing

To activate the aliasing feature, follow this path to the URL Aliasing Configuration screen: **Settings > Configuration > URL Aliasing**.

**NOTE** If you do not see a **URL Aliasing** option under **Configuration**, see "Enabling Manual Aliasing" on page 552.

The screen indicates if Manual Aliasing is currently on or off. To change its state, click the Edit button () , check or uncheck the box, and click the Save button.






If Aliasing is turned on and you uncheck it, your page URLs return to their original format (see ["Sample Quicklinks Folder with URL Aliasing Turned Off" on page 549](#)).

## Permissions for Manual Aliasing

To give users or groups permission to assign a manual alias to content, follow these steps.

1. Go to the Ektron CMS400.NET Workarea and select **Settings > Roles**.
2. Select **Built-In > System-Wide > Alias-Edit**.
3. The Manage Members for Role: Alias-Edit screen appears.
4. Click the Add button (  ).
5. Click the check box next to all users and user groups that have permission to manually alias content.



6. Click the Save button (  ).



See Also: "Defining Roles" on page 704

## Adding a Base Reference to a Template

When aliasing a Web page, you must add a reference to the base URL into the <Head> section of the template. Otherwise, any relative links on the page use the alias as the base URL.

For example, you have the file winners.gif on a Web page. The page's URL is `http://www.example.com/baseball/team.aspx?id=37`. The alias for this page is `http://www.example.com/2004/worldchamps.aspx`. When the page tries to find winners.gif, it looks in the `/2004/` directory. The page should look in the `/baseball/` directory, because that is where the file is located.

Here is the syntax used in the <Head> .

```
<BASE HREF="baseURL"
TARGET="WindowName">
```

Here is an example:

```
<HEAD>

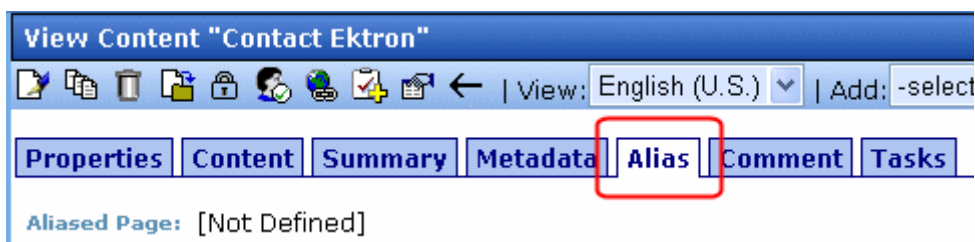
<BASE HREF="http://www.example.com/baseball/">

<HEAD>
```

## Assigning a Manual URL Alias

There are two ways to manually assign an alias.

- Use the Page Name Maintenance screen. This method is for administrators only.
- Use the Alias tab in View Content area of the content. This method can be used by content editors or administrators.







Each method is explained below.

## Adding a Manual Alias via the Page Name Maintenance Screen

**NOTE** Make sure you have enabled URL Aliasing and given the administrator's group permissions for aliasing. See ["Enabling Manual Aliasing" on page 552](#) and ["Viewing the Users in a User Group" on page 643](#).

1. Go to **Workarea > Settings > Configuration > URL Aliasing**.
2. Click the Page Name Maintenance button (  ).
3. The Page Name Maintenance screen appears.


| CMS400 Aliased Page Name Maintenance   |                                |               |        |    |      |      |
|--|--------------------------------|---------------|--------|----|------|------|
|  |                                |               |        |    |      |      |
| Alias  | Actual                         | Content Title | Status | ID | Lang | ID P |
| <a href="#">/CMS400Sample/home.htm</a>   | /CMS400Sample/index.aspx?id=30 | Test          | A      | 30 | 1033 | ✓    |
| <a href="#">/CMS400Sample/home2.htm</a>  | /CMS400Sample/index.aspx?id=31 | test 2        | A      | 31 | 1033 | ✓    |
| <a href="#">/CMS400Sample/ourcompany.htm</a>                                     | /CMS400Sample/home.htm         | Test          | A      | 30 | 1033 | ✗    |

The following explains the columns on the screen.



| Field         | Description  |
|---------------|--|
| Alias         | The URL as it appears aliased.   |
| Actual        | The actual URL before aliasing.  |
| Content Title | The title of the content.  |
| Status        | The status of the content. See Also: <a href="#">"Content Status" on page 20</a> .                                 |
| ID            | The content's ID number.   |
| Lang ID       | The language code for the content. See Also: <a href="#">"Appendix C: List of Supported Languages" on page 979</a> |



| Field   | Description  |
|---------|--|
| Primary | The alias a content editor sees when editing an alias via the Alias tab. See Also: "Adding a Manual URL Alias via the Alias Tab" on page 566<br><br>✓ = Primary Alias for that URL |

- Click the Add Alias button (  ). The Add a New Alias screen appears.

Add a new Alias

Alias Name:

/CMS400Example/  .htm

Content Block:

[Select A Content Block](#)

Link:

/CMS400Example/

Primary:

☐

Library Quicklink:

☒ Overwrite Existing Quicklink  
☐ Do not add Quicklink

- In the **Alias Name** field, choose the name you want to use for an alias.
- Click **Select a Content Block** to choose content.
- The QuickLink Select window appears.
- Choose content.
- Check the **Primary** box if you want to make this the primary alias, that is, the alias a content editor sees when editing an alias via the **Alias** tab.
- Choose a Quicklink option.
  - Overwrite Existing Quicklink** overwrites the existing Quicklink for the content.

**WARNING!**

When you choose to overwrite an existing Quicklink, you permanently delete it. There is no way to revert back to the old Quicklink. If you want to use the old Quicklink again, you need to add a new one. For more information on creating



Quicklinks, see Ektron CMS400.NET User Manual > "Library Folder" > "Quicklinks".

- **Do not add Quicklink** does not create a Quicklink for this alias.


11. Click the Save button (  ).

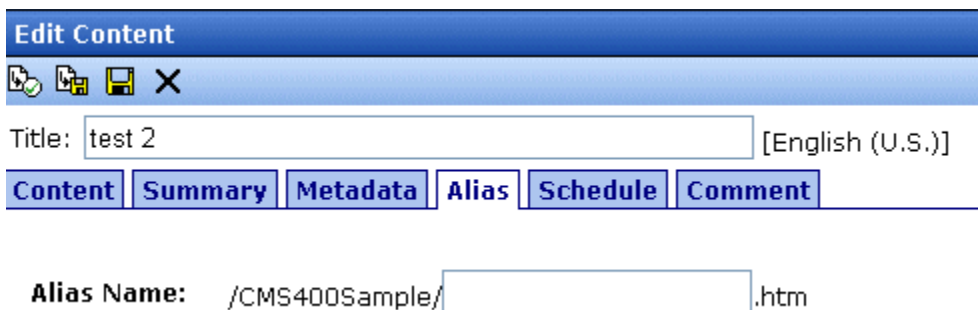
## Adding a Manual URL Alias via the Alias Tab

**NOTE** Make sure you have enabled URL Aliasing and given the administrator's group permissions for aliasing. For information on Enabling URL Aliasing, see "Benefits of Manual URL Aliasing" on page 552. For information on User Group Permissions, see "Viewing the Users in a User Group" on page 643.





On the Alias tab, **Alias Name** has the message, **[Not Defined]**. There are two reasons this message appears:

- No alias is defined
- An alias is defined in Page Name Maintenance, but it is not set to be a primary alias

1. In the Workarea, click the content you want to work with.
2. Click the Edit button (  ). The Edit Content screen appears.



**Edit Content**

Title:  [English (U.S.)]

[Content](#)
[Summary](#)
[Metadata](#)
[Alias](#)
[Schedule](#)
[Comment](#)

**Alias Name:** /CMS400Sample/.htm

3. Click the **Alias** tab.
4. In the **Alias Name** field, enter the name you want to use for an alias.
5. Save and publish the content.




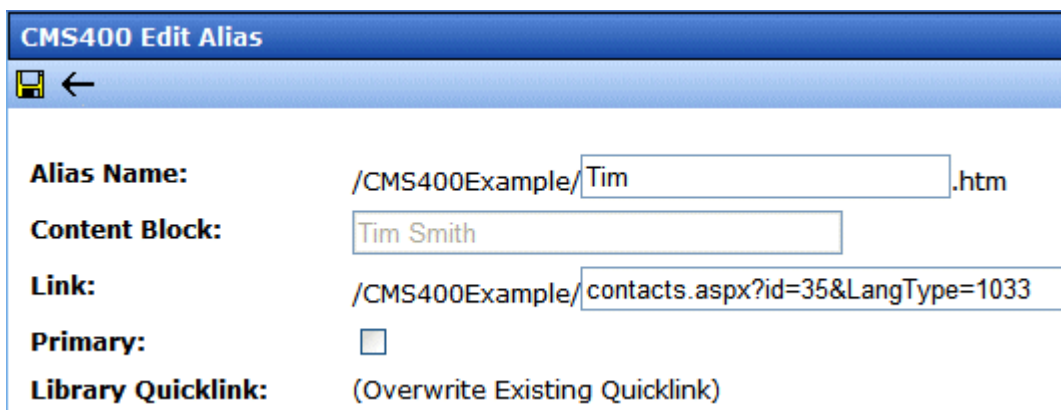
**NOTE** An alias goes live only after content is published.

## Editing a Manual URL Alias



You can edit an alias by going to the Page Name Maintenance screen. This lets you change the alias name and Quicklink properties. You can also change the primary alias if you have more than one for a content item.

To edit a Manual URL Alias, follow these steps.

1. Go to **Workarea > Settings > Configuration > URL Aliasing**.
2. Click the Page Name Maintenance button (  ).
3. On Page Name Maintenance screen, click the link you want to edit.
4. The Edit Alias screen appears.



**CMS400 Edit Alias**

**Alias Name:** /CMS400Example/Tim .htm


**Content Block:** Tim Smith

**Link:** /CMS400Example/contacts.aspx?id=35&LangType=1033

**Primary:** ☐

**Library Quicklink:** (Overwrite Existing Quicklink)




**NOTE** When editing an Alias, you can only change the **Alias Name** and **Primary** fields.

5. Make any changes. To learn about the fields, see ["Adding a Manual Alias via the Page Name Maintenance Screen" on page 564](#).
6. Click the Save button (  ).



## Removing a Manual URL Alias

To remove a Manual URL Alias, follow these steps.

1. Go to **Workarea > Settings > Configuration > URL Aliasing**.
2. Click the Page Name Maintenance button (  ).
3. On Page Name Maintenance screen, click the **Remove button** (  ).
4. Check the boxes of the aliases you would like to remove.
5. Click the Delete button (  ).
6. Click **OK** to confirm.



# Business Rules

## Introduction

Business Rules allow you to define conditions for Web pages on your site. You choose an action based on whether the conditions are true or false when a site visitor browses your site. For example:

- **Condition** - a site visitor visits your site for the first time
- **Action** - add a cookie to the site visitor's system and pop up a welcome message

With Business Rules, you do not write code to set conditions and initiate actions. You simply complete the information requested in the Business Rules wizard, have your developer add a Business Rules server control to your Web form, and assign the server control the Business Rules Ruleset.

### NOTE

[For information on the Business Rules server control, see the Developer Manual Section "Introduction to Server Controls" > "Business Rules Server Control".](#)

Business Rules start out with a Ruleset that is assigned an ID. Each Ruleset is made up of one or more rules. Rules are made up of conditions and actions. There are several predefined conditions and actions for rules in CMS400.NET.

Conditions include:

- Cookie Parameter = value
- Form Parameter = value
- QueryString Parameter = value
- Server Variable = value
- Custom Parameter = value

Actions include:

- Displaying a calendar



- Displaying a message
- Opening a URL in a new window
- Popping up a message
- Redirecting to a new URL
- Setting a cookie value
- Displaying a content block.

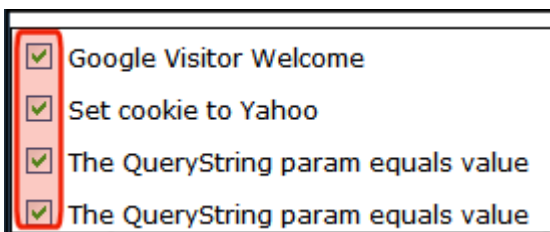
Once a rule is defined, you can add it to multiple Rulesets. This is useful if you have several groups of rules that use a common rule.

Business Rules are more fully explained through the following topics.

- ["Selecting a Rule" on page 570](#)
- ["Creating a New Business Rule Ruleset" on page 571](#)
- ["Working with Rulesets" on page 572](#)

## Selecting a Rule

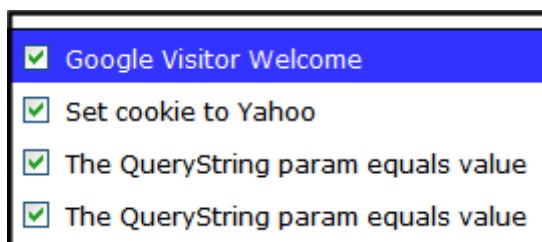
There are two ways to select a rule. The first, check boxes, allows you to select a rule by clicking the check box. This method is used when turning a rule on or off in the Ruleset. Checked, the rule is active. Unchecked the rule is inactive.



The second, highlighting a rule, is used to when you want to work with the rule. For example, you want to add or remove a rule from a



Ruleset. To highlight a rule, click its title. Once a rule is highlighted, it is ready for an action, such as Remove or Edit.





## Creating a New Business Rule Ruleset

### NOTE

Only members of the Administrators group or those defined in Manage Members for Role: Rule Editor screen can create or edit Business Rules and Rulesets. See Also: "Defining Roles" on page 704

You create Business Rules Rulesets from the Business Ruleset screen in the Workarea.

| Business Rulesets   |   |
|---|---|
|   |   |
| ID  | Name  |
| <a href="#">8</a>   | <a href="#">Redirect to Contact Us Page</a> |
| <a href="#">12</a>  | <a href="#">Sample BR</a>                   |
| <a href="#">14</a>  | <a href="#">Welcome Popup</a>               |

The Business Ruleset screen contains these columns:

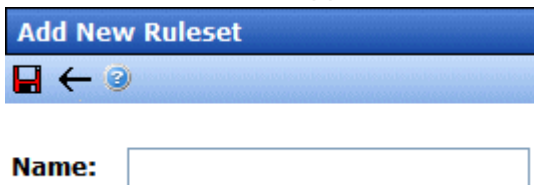
- **ID** - the numerical ID assigned to the Ruleset.
- **Name** - a unique name you give to the Ruleset to help you understand what the Ruleset does.


To add a new Ruleset, follow these steps:


1. In the Workarea, click **Modules > Business Rules**.



2. Click the Add New Ruleset button (.
3. The **Add New Ruleset** screen appears.

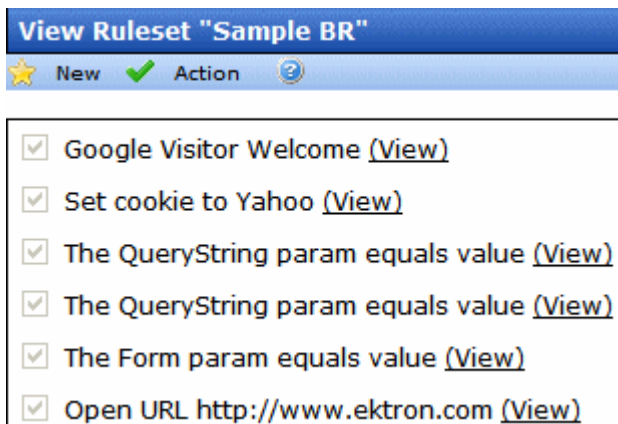


4. In the **Name:** text box, add a name for the rule.
5. Click the Save button (.
6. The View Ruleset screen appears.

At this point, you can continue on to ["Add a New Rule to a Ruleset" on page 576](#) or ["Add an Existing Rule to a Ruleset" on page 581](#) to add a rule or click the Back button () and return to add a rule later.

## Working with Rulesets

After creating a Ruleset, you typically add rules to it via the View Ruleset screen.



The View Ruleset screen is the launch pad for working with existing Rulesets. From this screen you can:

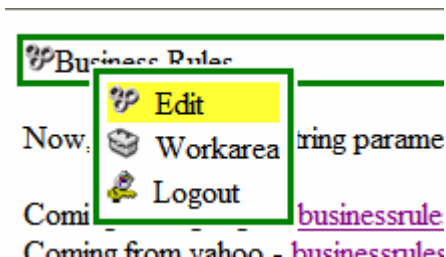
- ["Edit a Ruleset" on page 573](#)
- ["Remove a Rule From a Ruleset" on page 574](#)



- "Change the Order of Rules in the Ruleset" on page 575
- "Delete a Ruleset" on page 575
- "Add a New Rule to a Ruleset" on page 576
- "Add an Existing Rule to a Ruleset" on page 581
- "Edit a Rule in a Ruleset" on page 583
- "Viewing a Rule in a Ruleset" on page 583

## Edit a Ruleset

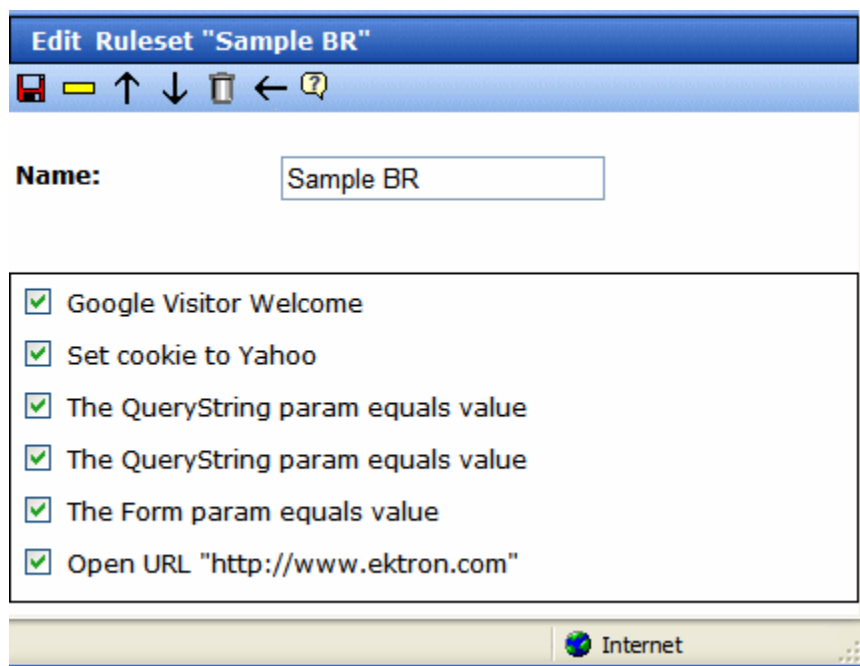
You can initiate editing a Ruleset from two different locations, the Web page or the Workarea. To edit a Ruleset from the Web page, navigate to a Business Rule on a Web page while logged in. Then, right click the Business Rule icon and click **Edit**.



If editing from the Workarea, click **Modules > Business Rules** and then click the Ruleset to edit. Next, click **Action > Edit Ruleset**.

The Edit Ruleset screen appears.





### ***Remove a Rule From a Ruleset***

Follow these steps to remove a rule from the Ruleset.

1. Navigate to the Edit Ruleset screen, as explained in ["Edit a Ruleset" on page 573](#).
2. Highlight the rule you want to remove.

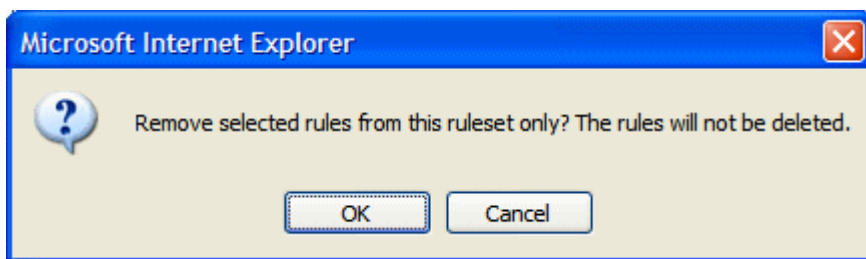
#### **WARNING!**


The check box associated with the rule must be empty for you to remove the rule. If the check box is not empty, the rule will look as though it has been removed

3. Click the Remove Rule button ()



4. A pop up appears letting you know that the rule will be removed from this Ruleset only.






5. Click **OK**.
6. The rule is removed from the Edit Ruleset screen.
7. Click the Save button (  ).

### ***Change the Order of Rules in the Ruleset***

The order of rules in a Ruleset affects how rules are applied when a site visitor views a page. For example, you want to display a welcome message before a content item. To accomplish this, move the rule for the welcome message above the rule for a content item.

Follow these steps to change the order of the rules in a Ruleset.


1. Navigate to the **Edit Ruleset** screen, as explained in ["Edit a Ruleset" on page 573](#).
2. Highlight the rule you want to reorder.
3. Click the Move Up or Move Down buttons (  ) (  ) to move the rule up or down the list.
4. Click the Save button (  ).

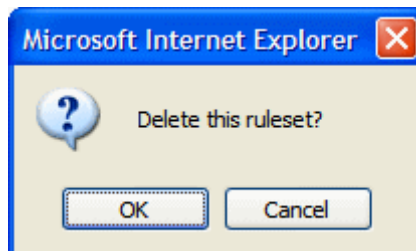
### ***Delete a Ruleset***

When you delete a Ruleset, it is removed from the system permanently. However, rules included in a Ruleset are not deleted. This is because a rule can be used in multiple Rulesets.

Follow these steps to delete a Ruleset.



1. Navigate to the **Edit Ruleset** screen, as explained in "[Edit a Ruleset](#)" on page 573.
2. Click the Delete Ruleset button (  ).
3. A dialog asks you to confirm the deletion.



4. Click **OK**.

## Add a New Rule to a Ruleset

Adding a new rule is easy with Ektron CMS400.NET. Just click the **Add** button on the View Ruleset screen. The Rules Wizard launches and helps you define a rule.

Follow these steps to add a new rule to your Ruleset.

1. If you arrived here from the "[Creating a New Business Rule Ruleset](#)" on page 571 section, continue on to the next step.  
Otherwise, navigate to the Business Rules screen in the Workarea by clicking **Modules > Business Rules**. Next, click the Business Rule for which you want to create a new rule.
2. Click **New > Add New**.
3. The Rules Wizard launches.



**Set Conditions**

Step 1 of 4   **1**   2   3   4   [Back](#)   [Next](#)   [Cancel](#)   [?](#)

**Match any or all of the following conditions.**

Match: **All** of the following conditions.

- ☐ The Cookie [param](#) equals [value](#)
- ☐ The Form [param](#) equals [value](#)
- ☐ The QueryString [param](#) equals [value](#)
- ☐ The Server Variable [param](#) equals [value](#)
- ☐ The User [param](#) equals [value](#)

4. Step 1 prompts you to create conditions for the rule and decide whether a site visitor needs to match Any or All conditions. Clicking the [param](#) and [value](#) links opens a dialog to enter information.

Match: **All** of the following conditions.

- ☐ The Cookie [param](#) equals [value](#)
- ☐ The Form [param](#) equals [value](#)
- ☐ The QueryString [param](#) equals [value](#)
- ☐ The Server Variable [param](#) equals [value](#)
- ☐ The User [param](#) equals [value](#)

Place a check next to any condition you want to use. Use the table below to help you fill out the param and value fields.



## Conditions Table

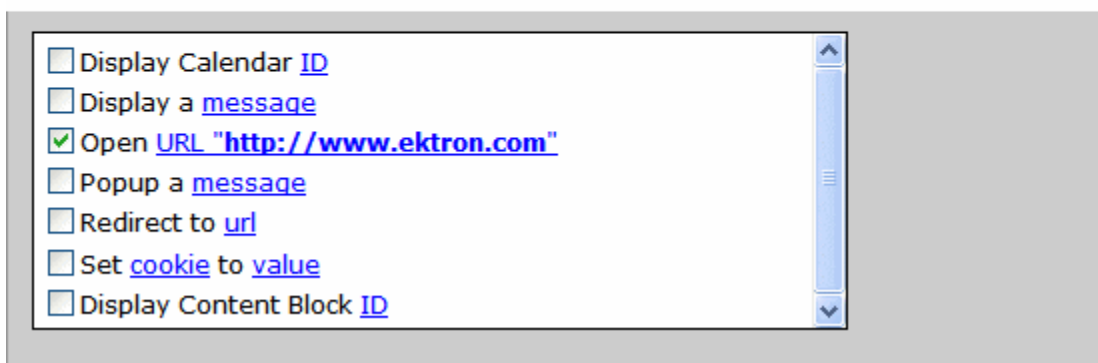
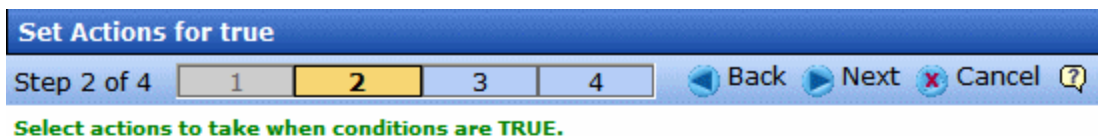
| Condition                              | Description   | Example   |
|--|---|---|
| The Cookie param equals value          | Use a cookie for this condition.<br><b>param</b> - enter <b>Name</b> in this field.<br><b>value</b> - enter the name of the cookie in this field.   | Does the site visitor's system have an Ektron cookie?<br><b>Usage:</b><br>The Cookie <a href="#">param "Name"</a> equals <a href="#">value "Ektron"</a>   |
| The Form param equals value            | Use a form elements field name and match the value entered into the element.<br><b>param</b> - enter a form's element Field Name from a form.<br><b>value</b> - enter the value you want the form element to match. | A form has a Choices Field element with the Field Name "Favorite_Food" and choices of Pizza, Steak and Chicken. When a site visitor chooses Pizza and clicks submit, your rule launches a Pizza company's Web site.<br><b>Usage:</b><br>The Form <a href="#">param "Favorite_Food"</a> equals <a href="#">value "Pizza"</a>   |
| The QueryString param equals value     | Use the QueryString for this condition<br><b>param</b> - the name of the QueryString. For example, ID.<br><b>value</b> - the value associated with the parameter. For example, 18.                                  | Is content with the ID of 18 being displayed?<br><b>Usage:</b><br>The QueryString <a href="#">param "ID"</a> equals <a href="#">value "18"</a>  |
| The Server Variable param equals value | Use server variables from the site visitor.<br><b>param</b> - enter the name of a server variable. For example, HTTPS.<br><b>value</b> - the value associated with the parameter. For example, On.                  | Is the site visitor's browser using SSL?<br><b>Usage:</b><br>The Server Variable <a href="#">param "HTTPS"</a> equals <a href="#">value "On"</a><br><br>A list of server variables and their descriptions can be found at <a href="http://msdn.microsoft.com/library/default.asp?url=/library/en-us/iissdk/html/21b3be8f-d4ed-4059-8e21-6cba2c253006.asp">http://msdn.microsoft.com/library/default.asp?url=/library/en-us/iissdk/html/21b3be8f-d4ed-4059-8e21-6cba2c253006.asp</a> . |



| Condition                     | Description   | Example  |
|-------------------------------|---|--|
| The Custom param equals value | <p>Use custom parameters from the user. User parameters are defined in the codebehind of a web page.</p> <p><b>param</b> - enter the name of a custom parameter. For example, AcctBlnc</p> <p><b>value</b> - the value associated with the parameter. For example, 1000</p> | <p>Is the user's account balance \$1000?</p> <p><b>Usage:</b></p> <p>The Custom <a href="#">param "AcctBlnc"</a> equals <a href="#">value "1000"</a></p> |

#### 5. Click **Next**.

Step 2 of the Wizard prompts you select an action to take if conditions are true. Check the boxes for the actions to take. Click the blue links to add the appropriate information.



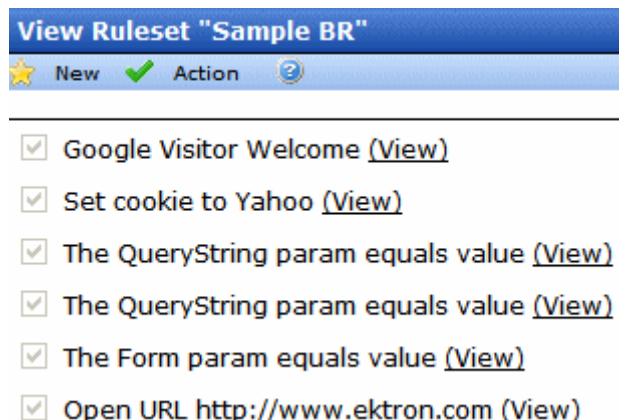


Conditions Table

| Action                   | Description  |
|--------------------------|--|
| Display Calendar ID      | Enter a CMS400.NET Calendar ID.  |
| Display a Message        | Enter a message to be displayed.   |
| Open URL                 | Enter a URL. This opens a new window with the URL.   |
| Popup A Message          | Enter a message that appears in a popup dialog box.  |
| Redirect to a URL        | Enter a URL to redirect a the site visitor's browser.  |
| Set Cookie to Value      | Creates a cookie on the site visitor's system. Enter <b>Name</b> for <a href="#">Cookie</a> and the name of the cookie for <a href="#">Value</a> . |
| Display Content Block ID | Enter a CMS400.NET content block's ID.   |

6. Click **Next**.
7. Step 3 of the Wizard lets you select actions to take when conditions are false. This works the same as Step 2 of the Rules Wizard. For descriptions of the actions, see "[Conditions Table](#)" on page 578.
8. Click **Next**.
9. Step 4 of the Wizard asks you to enter a name for the rule in the text box.
10. Click **Done**.
11. The View Ruleset screen appears. Your rule appears in the Ruleset box.





## Add an Existing Rule to a Ruleset

Because rules are not tied to a Ruleset once they are created, you can add a rule to more than one Ruleset. To add an existing rule to a Ruleset, follow these steps:

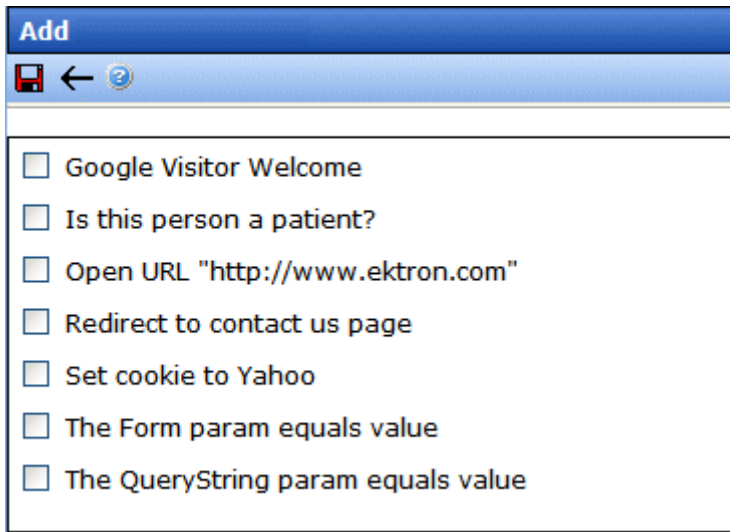
1. If you arrived here from the "Creating a New Business Rule Ruleset" on page 571 section, continue on to the next step.

Otherwise:




Navigate to the Business Rules screen in the Workarea by clicking **Modules > Business Rules**. Next, click the name of the Business Rule for which you want to add an existing rule.

2. Click **New > Add Existing**.
3. The Add an Existing Rule screen appears.



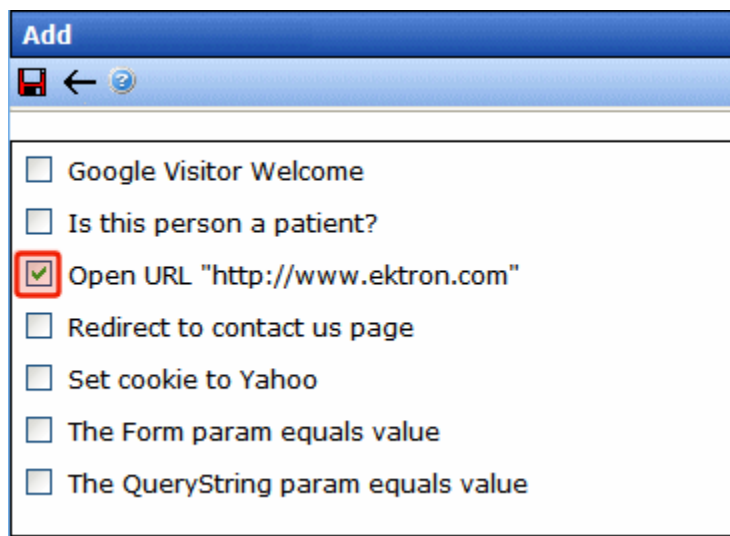


**Add**




  

- ☐ Google Visitor Welcome
- ☐ Is this person a patient?
- ☐ Open URL "http://www.ektron.com"
- ☐ Redirect to contact us page
- ☐ Set cookie to Yahoo
- ☐ The Form param equals value
- ☐ The QueryString param equals value

4. Check the rules to add to the Ruleset.



**Add**

- ☐ Google Visitor Welcome
- ☐ Is this person a patient?
- ☒ Open URL "http://www.ektron.com"
- ☐ Redirect to contact us page
- ☐ Set cookie to Yahoo
- ☐ The Form param equals value
- ☐ The QueryString param equals value

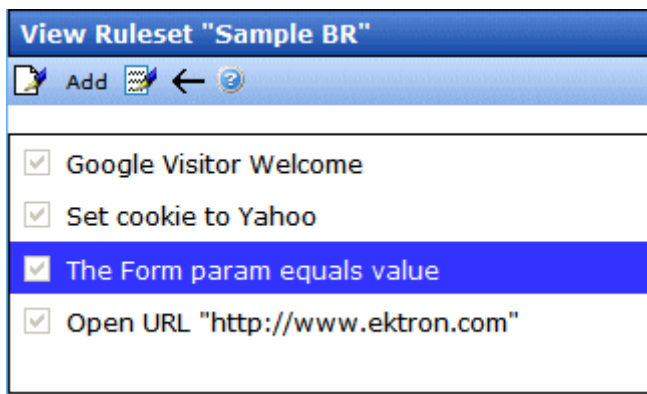
5. Click the Save button ().



## Edit a Rule in a Ruleset

Following these steps to edit a rule in a Ruleset.

1. In the Workarea, navigate to **Modules > Business Rules**.
2. Select the Ruleset that contains the rule to be changed.
3. Highlight the rule to be changed.



4. Click **Action > Edit Rule**.
5. The Rules Wizard appears with the rule loaded. Edit as necessary. The Rules Wizard is explained in ["Add a New Rule to a Ruleset"](#) on page 576.

## Viewing a Rule in a Ruleset

To help you understand the contents of a rule, a [\(View\)](#) link appears next to each rule in a Ruleset. Click this link to launch a view window for the rule. This window displays settings for each Rules Wizard step applied to a rule.

**NOTE** The steps are not editable from this window. To edit rules in a Ruleset, see ["Edit a Rule in a Ruleset"](#) on page 583.



**View Rule**

← → ✕

**Step 1 of 4. Select your conditions**

Match: All ▼ of the following conditions.

- ☐ The Cookie [param](#) equals [value](#)
- ☐ The Custom [param](#) equals [value](#)
- ☐ The Form [param](#) equals [value](#)
- ☒ The QueryString [param "cid"](#) equals [value "google"](#)
- ☐ The Server Variable [param](#) equals [value](#)

To navigate through the steps, use the Previous and Next Step buttons ( ← → ). To close the window, click the Close button ( ✕ ).

## Permission to Work with Business Rules

Only members of the Administrators user group and those defined in the Manage Members for Role: Add Role Member Business Rule Editor screen can work with Business Rules. See Also: ["Defining Roles" on page 704](#)

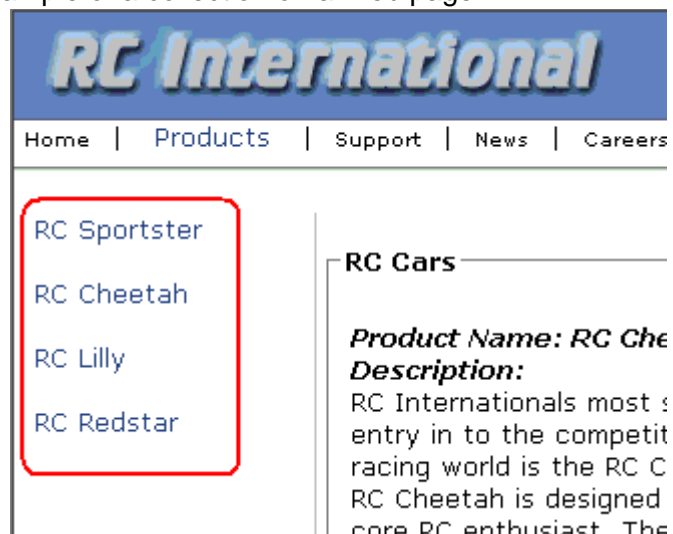


---

# Web Site Navigation Aids

## Collections

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



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



**Highlighted Knowledge Base Articles**[INFO: Release notes for eWebEditPro+XML v4.2](#)[INFO: Release notes for eWebEditPro 4 .2](#)[INFO: eWebEditPro 3 & 4 JavaScript Object Model](#)[INFO: eWebEditPro error messages](#)[INFO: Windows XP Service Pack 2](#)

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



- ["Collection Permissions" on page 586](#)
- ["Setting up Approval for Collections" on page 589](#)

## Collection Permissions

Any of the following users have permission to create or edit a collection.

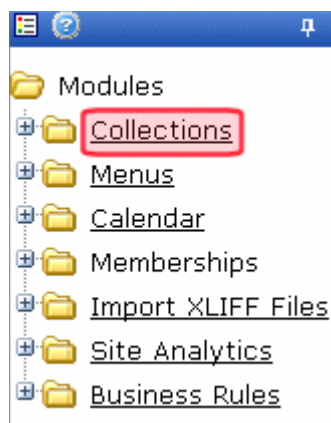
- a member of the Administrators group
- a user who has been assigned the Collection and Menu Admin role. See *Also*: ["Defining Roles" on page 704](#)
- a user who has been granted collection permission for the collection's folder. Permission is granted on the folder Permission screen (see graphic below). See *Also*: ["Setting Permissions" on page 686](#)



| View Permissions for Folder "Root"   |             |             |                                 |                |                  |
|--|-------------|-------------|---------------------------------|----------------|------------------|
| <input type="checkbox"/> The content in this folder is private and can only be viewed by authorized users and members. |             |             |                                 |                |                  |
| <a href="#">View Standard Permissions</a>  |             |             | <a href="#">View MemberShip</a> |                |                  |
| User or Group Name   | Collections | Add Folders | Edit Folders                    | Delete Folders | Traverse Folders |
|  <a href="#">jedit</a>                | x           |             |                                 |                | x                |
|  <a href="#">Everyone</a>             |             |             |                                 |                | x                |

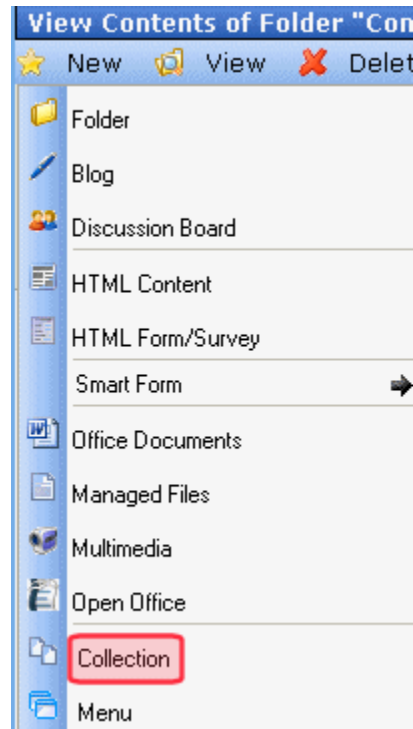
## How a Folder is Assigned to a Collection

If you create a collection by going to the Workarea's **Modules** tab, it is assigned to the root folder.



If you create a collection by going to a folder then selecting **New > Collection**, it is assigned to that folder.





A collection's folder appears on the **Modules > Collections > Collection Report** screen, in the **Path** column. No value there indicates root folder.



| Collections Report                               |    |                                    |                           |
|--|----|------------------------------------|---------------------------|
| + ?  |    |                                    |                           |
| Title  | ID | Description                        | Path                      |
| <a href="#">Homepage Ads</a>                     | 4  |                                    | \                         |
| <a href="#">Homepage News</a>                    | 6  |                                    | \                         |
| <a href="#">About Us</a>                         | 8  |                                    | \                         |
| <a href="#">Jobs test root folder collection</a> | 14 |                                    | \                         |
| <a href="#">Contacts</a>                         | 10 | List of contacts at Ektron Medical | \CMS400Demo\About Us\Sta  |
| <a href="#">API Permissions collection</a>       | 12 |                                    | \Developer\APIPermissions |

## Setting up Approval for Collections

If desired, you can set up an approval system for any collection. As with a content approval chain, you specify users who must approve changes to a collection before it can be published.

Any collection approver can either approve or decline the modified collection. And, if a user who is not an approver tries to delete a collection, that action also requires approval.

See Also:

- "Differences Between Content and Collection Approval Systems" on page 590
- "Creating a Collection that Requires Approval" on page 590
- "Which Users Can Approve Collections" on page 590
- "What Happens When a non-Approver Submits Changes to a Collection" on page 591
- "How Approvals Affect Deleting a Collection" on page 592



## Differences Between Content and Collection Approval Systems

- While content can have a chain of approvers, a collection has a list of approvers. *Any collection approver can publish or decline changes.* There is no concept of a “chain” of approvers.
- While content approval is folder-specific, collection approval is not. Once set up, collection approval affects the collection to which it was assigned, regardless of its folder.

## Creating a Collection that Requires Approval

Only administrators or users to whom the folder-admin role has been assigned see the **Approval is Required** checkbox on the Add and Edit Collection screens. See *Also: “Defining Roles” on page 704*

**Edit Collection "Contacts"**

☐

**Title:**

**ID:**

**Template:**

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

**Description:**

☒ **Include Subfolders**

☐ **Approval is required.**

When the collection is created, its status is set to checked out. This allows you to add items to it. When ready, you can publish it.

## Which Users Can Approve Collections

If you require a collection to be approved, only the following users can approve a change to a collection.

have permission to create or edit a collection.

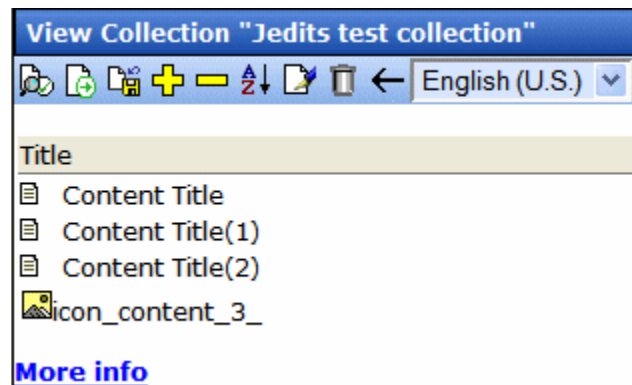



- a member of the Administrators group
- users to whom the Collection Approver role has been assigned and who have permission to work with the collection
- users to whom the Folder User Admin role has been assigned and who have permission to work with the collection



See Also: ["Defining Roles" on page 704](#)

## What Happens When an non-Approver Submits Changes to a Collection

A user who has permission to edit collections but not approve changes sees the following buttons.



After making the change, the user clicks the submit button () . This action triggers an email notification to all approval users for the collection. It also changes the collection's status to checked out. No other users can edit it in this status.

Next, one of the approval users must open the Edit Collection screen and clicks the Publish or Decline button. If he clicks Publish () , the new version of the collection is published to your Web site. If Decline () , the user who submitted the changes is notified by email but no changes are made to your Web site.

If the user who made the changes realizes he made a mistake, he can go to the screen and click the Undo Checkout button at any




time before the approval. In this case, his submitted changes are deleted, and the content reverts to its original state.

As a matter of fact, any user who has permission to edit the collection can perform the undo function any time before the content is approved.

if publish request declined, submitter is notified by email.

## How Approvals Affect Deleting a Collection

To delete a collection, a user who has permission to work with collections but not approve changes clicks the Delete button (  ) from the View Collection screen. This action changes the collection's status to Marked for Deletion (M) and triggers an email notification to all approval users for the collection. One of the approval users must open the Edit Collection screen and click the Delete or Decline button.

If the approval user clicks Delete (  ), the collection is removed from your Web site. If the approval user clicks Decline (  ), the user who submitted the deletion is notified by email but no changes are made to your Web site.



# Personalization Feature

**Ektron CMS400.NET's** Personalization feature can be used in a couple of different ways. It allows

- a signed-in (typically membership) user to determine a page's layout and content. This user can *personalize* the page, displaying whatever interests him in an arrangement of his own design.
- an **Ektron CMS400.NET** administrator to build a page's content without Visual Studio.Net

**IMPORTANT!**

The Personalization feature requires Internet Explorer 5 or higher. You cannot use other browsers.

---

Most personalization features are described in the **Ektron CMS400.NET** User Manual section "Personalizing Your Web Page." Also, the **Ektron CMS400.NET** Developer Manual describes how to create a template that supports personalization. This section only describes permissions that affect someone's ability to personalize a page. So, Ektron recommends familiarizing yourself with those sections before reading this section.

## Sample Pages

When using the sample site provided by Ektron, the Web page <http://localhost/cms400min/mypage.aspx> gives users basic access to the Personalization feature. For example, they can edit, move, and add new content by selecting from a few folders.

Ektron also provides a more advanced page, <http://localhost/cms400min/mypageadvance.aspx>, that lets users add content by selecting a content type then navigating through the CMS to find items of that type. The advanced page also provides an example of how to use the page catalog.



## Permissions that Affect Personalization

A CMS user who is a member of the Administrators groups has full privileges to do everything. Other users, both CMS and membership, can be selectively granted permissions via Personalization roles screens. One screen grants all permissions, while the others grant a single permission.

To assign a role to a user, go to **Workarea > Settings > Roles > Built-In > System Wide > Personalization**. Choose any screen under that folder, click the Add button (+) and select user(s) to whom assign the role. See Also: ["Defining Roles" on page 704](#)

The following table explains the permissions granted by each role.

| Personalization Role | Description  | Add content | Edit content | Move content | Change page for unauthenticated users |
|----------------------|--|-------------|--------------|--------------|---------------------------------------|
| Admin                | Can do everything (Administrators group members also have these permissions)         | ✓           | ✓            | ✓            | ✓                                     |
| Add Web parts        | Add new content to page; new selections controlled by developer who creates template | ✓           |              | ✓            |                                       |
| Edit Web parts       | Replace current content with other content of same type; cannot change type          |             | ✓            | ✓            |                                       |
| Move Web parts       | Move content among Web part zones  |             |              | ✓            |                                       |

The right column indicates the ability to customize a page for all *unauthenticated* site visitors. However, if a membership or CMS user signs in and views a page that he has personalized, his version of the page appears.



**NOTE**

If you assign the Edit Web part role to a user or group, those users have access to all content in your **Ektron CMS400.NET** Web site (except private content). Folder permissions are ignored.

## Web Configuration Tags that Affect Personalization

The following tags in the web.config file (located in your site root folder) affect some aspects of how Personalization works.

**IMPORTANT!**

When using the Personalization feature, the web config file's authentication mode tag must be set to Forms.

```
<webParts>
  <personalization defaultProvider="EktronPersonalizationProvider">
    <providers>
      <addconnectionStringName="Ektron.DbConnection"name="EktronPersonalizationProvider"
type="Ektron.Cms.EktronPersonalizationProvider" />
    </providers>
    <authorization>
      <allow users="*" verbs="enterSharedScope"/>
      <allow users="*" verbs="modifyState"/>
    </authorization>
  </personalization>
</webParts>
```

By default, Personalization is set up for use with MSSQL. If you are using an Oracle database, change the following elements between the <providers> tags from

```
name="EktronPersonalizationProvider"
type="Ektron.Cms.EktronPersonalizationProvider"
```

to

```
name="EktronOraclePersonalizationProvider"
type="Ektron.Cms.EktronOraclePersonalizationProvider"
```

| Tag or Attribute | Description   |
|------------------|---|
| webparts         | Overall tag that surrounds other personalization tags.  |
| personalization  | Tags that surround personalization section of web.config.   |
| defaultprovider  | If <code>EktronPersonalizationProvider</code> appears, Ektron's personalization controls are used instead of Microsoft's. |



| Tag or Attribute                                     | Description  |
|--|--|
| providers  | Tag that surrounds provider information.   |
| add<br>connectionStringName                          | Tells the .NET control to use the database being used by <b>Ektron CMS400.NET</b> .  |
| name   | Tells the .NET control to use <b>Ektron CMS400.NET</b> personalization feature instead of the .NET personalization controls. |
| type   | Tells the .NET control to use <b>Ektron CMS400.NET</b> personalization feature instead of the .NET personalization controls. |
| authorization  | Tag that surrounds the <allow users> tags.   |
| allow users, enter<br>SharedScope and<br>modifyState | Tells Microsoft .NET to let users authorized by the <b>Ektron CMS400.NET</b> control the personalization features.           |



# Menu Feature

**Ektron CMS400.NET**'s Menu feature lets users create and maintain a dropdown menu navigation system for your Web site. Like Collections, the Menu feature gives you the flexibility to display links to content, library assets, external hyperlink and submenus.

This section only describes managing permissions to use the Menus Feature, suggestions for implementing it, and how folder associations work. For more information about using the Menus feature, see the **Ektron CMS400.NET** User Manual section "Working with Menus."

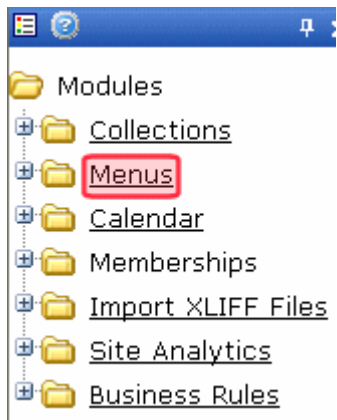
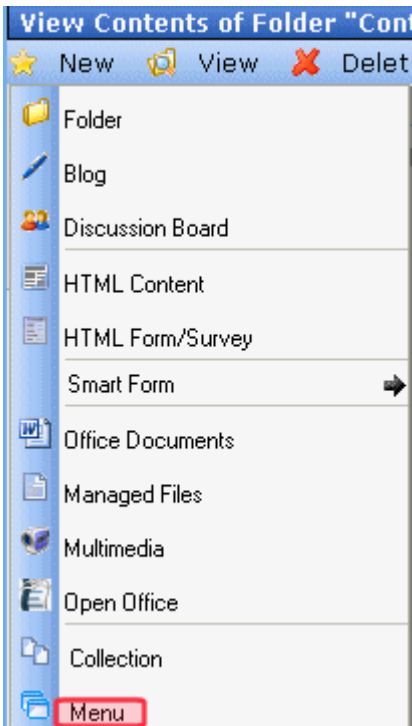
See Also:

- ["Permission to Use the Menus Feature" on page 597](#)
- ["Implementation of the Menus Feature" on page 599](#)
- ["Working with Menus" on page 450.](#)

## Permission to Use the Menus Feature

There are two ways to create a menu. Each has its own permission model.



| Menu Creation Method                                       | Illustration   | How to set permissions   |
|--|--|--|
| Via the Workarea's Modules tab                             |   | <p>The user must be one of the following.</p> <ul style="list-style-type: none"> <li>• a member of the Administrators user group</li> <li>• assigned the Collection and Menu Admin role. See Also: <a href="#">"Defining Roles" on page 704</a></li> <li>• granted permissions to Collections for the root folder. This is advanced permission. See Also: <a href="#">"Setting Permissions through the Permissions Table" on page 686</a></li> </ul> |
| Via the View Contents of Folder screen's New > Menu option |  | <p>See <a href="#">"Permissions for Menus Created from the View Contents of Folder Screen" on page 599</a></p>   |



## Permissions for Menus Created from the View Contents of Folder Screen

Only users with permission to use the Collections feature (illustrated below) for a folder can work with menus. If user does not have permission to Collections, the **Menu** option does not appear on the **New** menu.



Also, if a user has permission to Collections but Read Only permission for content and the library, he cannot add content from a navigation link.

## Implementation of the Menus Feature

In order for a menu to appear on your Web site, your Web developer must modify a page template to display it. This procedure is described in the **Ektron CMS400.NET Developer Manual** sections "Ektron CMS400.NET Server Controls" > "List of Server Controls" > "Menu Server Control", "Smart Menu Server Control", and "DhtmlMenu Server Control."

See Also:

- "Assigning Folders or Templates to a Menu" on page 600
- "Effect of Assigning a Folder to a Menu" on page 601
- "Effect of Assigning a Template to a Menu" on page 603



## Assigning Folders or Templates to a Menu

The Advanced Settings on the Edit Menu screen has **Folder Associations** and **Template Associations** sections (see image below). Any folders or templates currently assigned to the menu appear. You can use this section of the screen to add new templates/ folders or remove existing ones.

**Edit Menu**

Title:  [En

[Advance Settings](#)

**These fields are not required:**

**Image Link:**   
☒ Use image instead of a title

**URL Link:**   
 Hyperlink this menu item to this link

**Template Link:**   
 (Menu Template Link that contents under the current me

**Description:**

**Folder Associations:**  
[Change](#)  
 None selected

**Template Associations:**

For more information, see

- ["Effect of Assigning a Folder to a Menu" on page 601](#)



- ["Effect of Assigning a Template to a Menu" on page 603](#)

## Effect of Assigning a Folder to a Menu

If

- you assign a folder to a menu  
and
- a user navigates to any content item that resides in the folder  
and
- a Smart Menu whose `EnableSmartOpen` property is **true** appears on the screen

the Smart Menu automatically displays the items on the associated submenu.

### NOTE

Navigation to the content item can consist of clicking a quicklink, a menu option, a list summary item, the result of a search, etc.

In effect, you are instructing **Ektron CMS400.NET** to expose a menu whenever a content item that resides in one or more selected folders appears on the screen. As a result, a user who begins looking for a specific content item sees similar items on the screen.

As an example, assume your Web site sells books, and your folders are organized by genre. One of your folders is "Teen Fiction." You create a submenu that contains the top five sellers in "Teen Fiction." You then associate the Teen Fiction folder with that submenu.

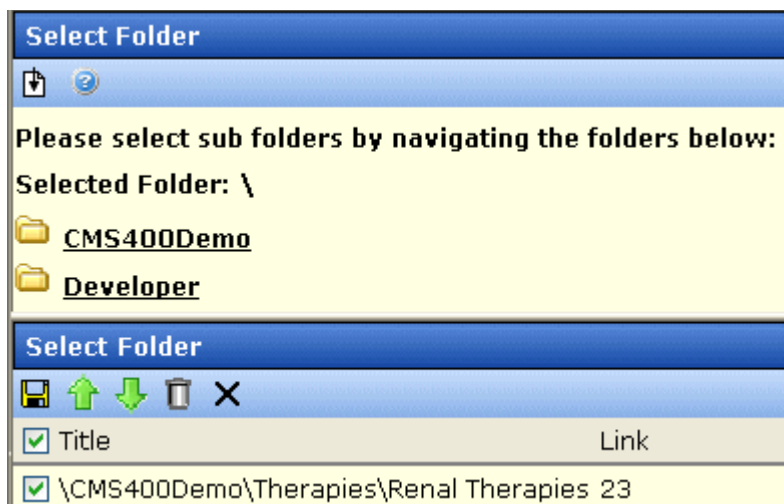
If a site visitor uses the site search to find any book in that category, and proceeds to a page describing the book, the Smart Menu in the page's left column displays the five top Teen Fiction titles.

## Using the Select Folder Screen




The Select Folder screen lets you assign new folders to the menu, reorder the folders, and delete folders from the menu association. These tasks are described below.







When you click **Change** below **Folder Associations** on the Edit menu screen, the Select Folder screen appears (see image below).



The following table describes tasks you can perform on this screen.

| Task                         | Instructions  |
|------------------------------|---|
| Add folder to list           | <ol style="list-style-type: none"> <li>1. In the top of the screen, navigate to the folder you want to add.</li> <li>2. Click the Add button (  ).</li> </ol>  |
| Remove folder from list      | <ol style="list-style-type: none"> <li>1. Click check box to the left of the folder.</li> <li>2. Click the Delete button (  ).</li> </ol>  |
| Remove all folders from list | <ol style="list-style-type: none"> <li>1. Click check box to the left of <b>Folder</b>. <div data-bbox="853 1452 1139 1579" data-label="Image"> <p>This screenshot shows a portion of the 'Select Folder' dialog box. It features a toolbar with icons for adding, moving, deleting, and canceling. Below the toolbar, there is a table with two columns: 'Title' and 'Link'. The table contains one row with a checked checkbox in the 'Title' column and the folder path in the 'Link' column. The word 'Folder' is highlighted in red in the 'Title' column.</p> </div> </li> <li>2. Click the Delete button (  ).</li> </ol> |



| Task  | Instructions  |
|---|---|
| Move a folder up or down on the list<br><u>Note: The sequence in which folders appear has no impact on how they are used. It merely affects the appearance of the folders on the Select Folders screen.</u> | 1. Click check box to the left of the folder.<br>2. Click the up or down arrow buttons (   ). |
| Save changes and return to Edit Menu screen   | Click the Save button (  ).  |
| Exit screen; do not save changes  | Click the Exit button (  ).  |

## Effect of Assigning a Template to a Menu

If

- you assign a template to a menu  
and
- a user navigates to any content item that uses the template  
and
- a Smart Menu whose `EnableSmartOpen` property is **true** appears on the screen

the Smart Menu automatically displays the items on the associated submenu.

**NOTE** Navigation to the content item can consist of clicking a quicklink, a menu option, a list summary item, the result of a search, etc.

In effect, you are instructing **Ektron CMS400.NET** to expose a menu whenever a content item that uses one or more selected templates appears on the screen. As a result, a user who begins looking for a specific content item sees similar items on the screen.

As an example, assume your Web site sells books, and your templates are organized by genre. One of your templates is “Teen Fiction.” You create a submenu that contains the top five sellers in “Teen Fiction.” You then associate the Teen Fiction template with that submenu.



If a site visitor uses the Web site search to find any book in that category, and proceeds to a page describing the book, the Smart Menu in the page's left column displays the five top Teen Fiction titles.

### ***Assigning a Template to a Menu***

To add a new template, follow these steps.

1. Move to the **Template Associations** area of the Edit menu screen.
2. In the box on the right, enter the template that you are assigning to this menu. It can be a CMS template, or any file that you wish.
3. Click **Add**.

To later change or remove the template, select it then click **Change** or **Remove**.



# Taxonomy

**Ektron CMS400.NET's** Taxonomy Feature lets you assign custom-made information categories to folders or individual content items. You can then place a listing of those categories (a *taxonomy*) on a Web page. When that page displays, all published items in that taxonomy appear. So, a taxonomy is an easy way to organize and display Web site content according to your categories.

You can use taxonomy categories to help site visitors find Web site content. To facilitate a taxonomy search, your developer places a Directory server control on a Web page. It looks something like this.

Breadcrumb: [Top](#)

---

**Category:** [\(What's This?\)](#)

[-eWebEditPro](#)

[-CMS400.NET](#)

[-Support](#)

---

**Articles:** [\(What's This?\)](#)

- [Ektron Products](#)

Ektron CMS400 and eWebEditPro, enable anyone anywhere to update and manage their web site.

There is no limit to the number of category levels you can assign to a taxonomy. For example, if you want a Web page to display a link to all content in a folder, you can easily do that using a taxonomy. Alternatively, you can assign any number of content items from any folders to a taxonomy. In the first example, the taxonomy displays content organized by folder structure. In the second case, the taxonomy connects content unrelated by folder structure.



To illustrate the benefits of a taxonomy that pulls together content from different folders, assume your Web site is for a college. Several items that relate to the graduate school are organized under major departments: Admissions, Academics, Faculty, Library & Information Services, etc. Using a taxonomy, you could assemble a group of content items relevant to graduate students (regardless of their folder location), and display them on a graduate students page.

**NOTE**

---

To see a comparison of taxonomy with other list options available with Ektron CMS400.NET, see the User Manual section "Web Site Navigation Aids" > "Working with Collections" > "Comparison of Collections, Menus, Taxonomy, and the List Summary Features."

---

See Also:

- "Creating a Taxonomy" on page 606
- "Additional Taxonomy/Category Tasks" on page 619

## Creating a Taxonomy

Follow these steps to create and deploy a taxonomy.

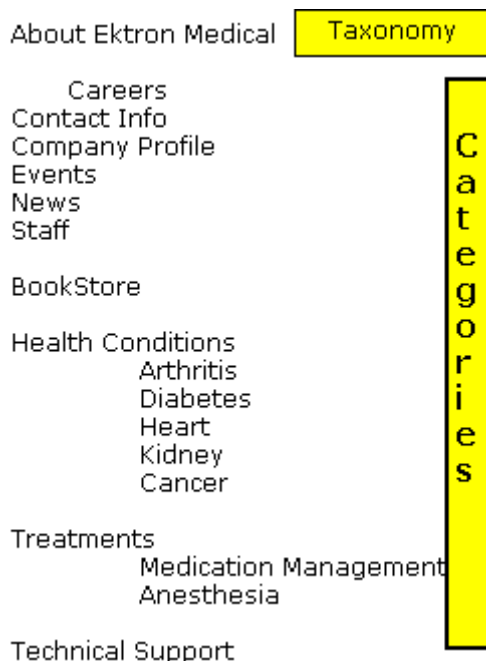
1. "Planning the Taxonomy" on page 606
2. "Creating a Taxonomy in the Workarea" on page 607
3. "Making a Taxonomy Available to a Folder" on page 612
4. "Assigning Content Items to a Taxonomy/Category" on page 615
5. "Assigning a Folder to a Taxonomy/Category" on page 617
6. "Insert the Directory Server Control on a Web Page" on page 619

### Planning the Taxonomy

It helps to design a taxonomy on paper before creating it in **Ektron CMS400.NET**. This can help you configure relationships among the kinds of information before you try to implement them.

As an example, here is a hierarchy of some content in the **Ektron CMS400.NET** sample site. The top level item is the taxonomy. All levels below it are categories.






Next, review the site content and decide which content items and folders to assign to which taxonomy categories. Some categories may map directly to a folders. Other categories may use content from several folders.

Once you determine which content and folders will be assigned to which taxonomy categories, sign on to **Ektron CMS400.NET** and set up those relationships.

## Creating a Taxonomy in the Workarea




**NOTE** Only administrators or users to whom the Taxonomy-Administrator role has been assigned see the **Modules > Taxonomy** option. See Also: "Defining Roles" on page 704

1. Go to **Workarea > Modules > Taxonomy**.
2. Click the Add Category button (.
3. The Add Taxonomy or Category screen appears. Enter a title and description.



---


**Add Taxonomy**


**Breadcrumb :** Root

**Taxonomy Title :**  [English (U.S.)]

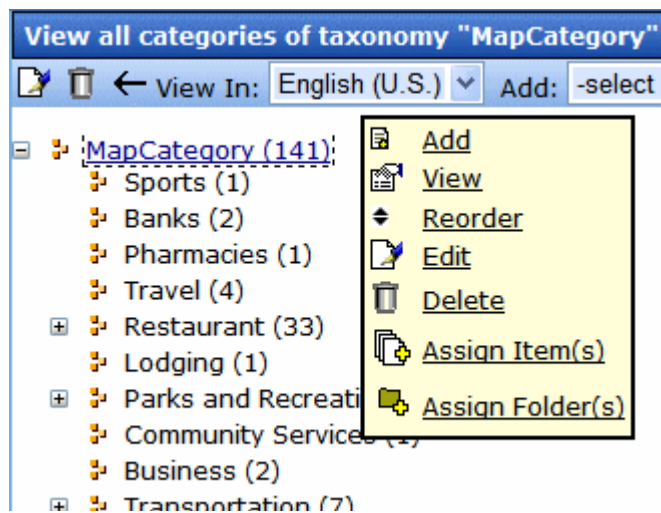
**Taxonomy Description :**

**Template: :**  

**Inherit: :** No

4. If desired, select a template to apply to the taxonomy or category. For more information, see ["Applying a Template to a Taxonomy or Category"](#) on page 610.
5. Click the Save button (.
6. The View All Taxonomy screen reappears, and you can see the new taxonomy.
7. Next, assign content and/or folders to the taxonomy. To do that, click it from the View All Taxonomy screen.
8. Hover the cursor over the taxonomy. A context-sensitive menu appears.

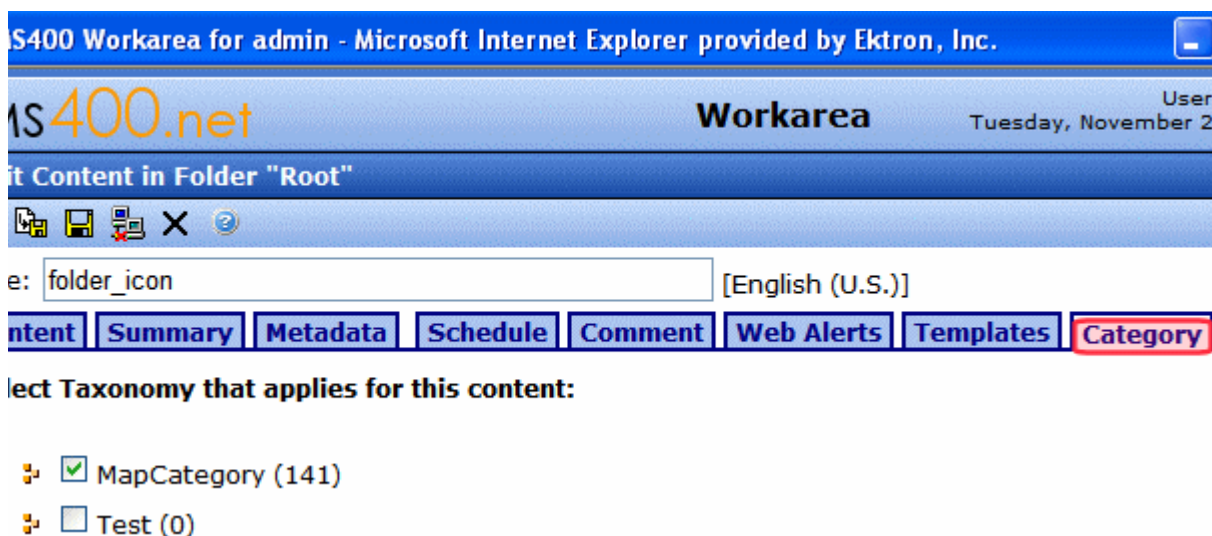




9. Click **Assign Item(s)** or **Assign Folder(s)**. These procedures are more fully explained in ["Assigning Content Items to a Taxonomy/Category"](#) on page 615 and ["Remove Content from a Taxonomy/Category"](#) on page 626.

**NOTE**

You can also assign a Taxonomy to any content item using the Edit Content in Folder screen's **Category** tab (illustrated below).





## Applying a Template to a Taxonomy or Category

Taxonomy categories are applied to **Ektron CMS400.NET** content in order to help site visitors find that content. To facilitate a taxonomy search, your developer places a Directory server control on a Web page.

By default, when a user clicks a hyperlink on such a Web page, it uses the template assigned to the linked content. See *Also:* ["Creating/Updating Templates" on page 72](#)

The screenshot shows a web application interface titled "View Content 'Ektron Products'". It features a toolbar with various icons and a language dropdown set to "English (U.S.)". Below the toolbar are several tabs: "Properties", "Content", "Summary", "Metadata", "Comment", and "Task". The "Properties" tab is active, displaying a list of content attributes. The "Template" field is highlighted with a red rectangular border and contains the text "wiki.aspx".

| Properties                |                                   |
|---------------------------|-----------------------------------|
| Content Title:            | Ektron Products                   |
| Content ID:               | 766                               |
| Content Language          | English (U.S.)                    |
| -----                     |                                   |
| Smart Form Configuration: | [None Specified] HTML Content Ass |
| <b>Template</b>           | <b>wiki.aspx</b>                  |
| Path                      | \Wiki_Example                     |
| Rating                    | this content has not been rated.  |
| Content Searchable:       | True                              |

If you want to display the linked content using a different template, follow these steps.

1. When creating or editing a taxonomy or category, select the appropriate template at the **Template** pull-down field.



**Edit Taxonomy**

**Breadcrumb :** Ektron Products > eWebEditPro

**Taxonomy Title :** eWebEditPro

**Taxonomy Description :**

**Template:** therapies.aspx

**Inherit:** ☐ (check here to inherit from the parent template)

**NOTE** Alternatively, any category below the root level can inherit its parent's taxonomy template. Use the **Inherit** checkbox to do this.

You may need a developer's help with the rest of these steps.

2. In Visual Studio.Net, open the .aspx page that contains the directory server control.
3. Look at the server control's **MarkupLanguage** property.
4. If the property is blank, open the following file: *site root/workarea/template/taxonomy/taxonomy.ekml*.

If the property displays an .ekml file, open that file. Its path may be listed in the property. If the .ekml file's path is blank, it is *workarea/template/taxonomy/*.

5. Find the following line:

```
[ $HyperLink ] <br /> [ $Teaser ]
```

6. Replace it with the following:

```
<a href="[ $TemplateQuickLink ]">[ $Title ]</a><br />[ $Teaser ]
```

7. Save the .ekml file.

The content selected from this Directory server control will now use the template assigned to the taxonomy/category.



If no template is assigned to a taxonomy/category, the template assigned to the content is used.

## Numbers on the View Categories Screen

On the View All Categories of Taxonomy screen, the number to the right of any taxonomy/category is a *cumulative* total of all content items assigned to it and its subcategories. In the example below, the three subcategories have a total of 13 content items (2 + 1 + 10).



Since the number to the right of the parent category is equal to number assigned to all subcategories, you know that no content is assigned to the parent category.

Also, the number of items is a combination of individual items plus all items in any assigned folders. So, for example, if one content item and one folder are assigned to a category, and the folder has five items, the number assigned to a category is six.

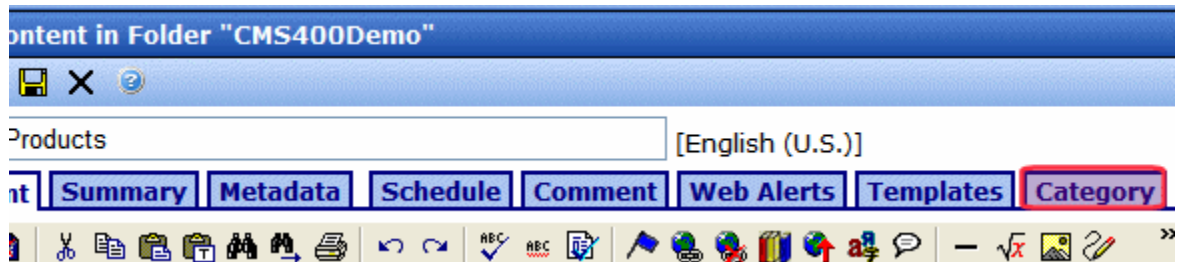
## Making a Taxonomy Available to a Folder

**Ektron CMS400.NET** lets you control which taxonomies are available to a folder's content. For example, a folder's content consists of restaurants, and you want to restrict users to the



Restaurants taxonomy -- users cannot assign other taxonomies to that folder's content.

The taxonomy folder property only affects users' ability to assign taxonomy categories via the Edit Content in Folder screen's Category tab (shown below).



It has no effect on the assignment of taxonomy categories via the **Modules > Taxonomy > View all Categories of Taxonomy** screen.

To make a taxonomy available to any folder, follow these steps.

1. Navigate to the folder.
2. Choose **View > Folder Properties**.
3. In the Taxonomy section of the properties screen (shown below), uncheck the **Inherit Parent Taxonomy Configuration** checkbox.

**NOTE** [To inherit taxonomy settings from any folder's parent folder, check this box.](#)

4. Check one or more taxonomies to make available to this folder.



**Edit Properties for the folder "Root"**

← ?

**Properties** | **Metadata** | **Web Alerts** | **Smart Forms** | **Breadcrumb**




**Foldername:**  
Root

**Description**

**Style Sheet filename for this folder: (leave blank to inherit)**  
/CMS400Demo/

**Page Templates**

☐ **Inherit Parent Template Configuration**

| Default  | Page Template Name |
|--|--------------------|
|  dynamic.aspx   |                    |
| <input type="text" value="[Select Template]"/>   |                    |

**Add Template**

**Taxonomy**

☐ **Inherit Parent Taxonomy Configuration** ☐ **Required atleast one category selection**

☒ MapCategory

## Inheriting Taxonomies from a Parent Folder

Unlike some folder properties, a set of Taxonomies is not inherited from a parent folder.

If the set of Taxonomies that you want to apply to a folder is already applied to its parent folder, go to the folder's properties screen and check the **Inherit Parent Taxonomy Configuration** checkbox.

## Requiring Content to Have at Least One Category Assigned

At the folder level, you can require all content to be assigned at least one taxonomy category. If you do, as content in that folder is



submitted for publishing, **Ektron CMS400.NET** checks the content for at least one taxonomy category. If none is found, an error message appears, and the user must assign a taxonomy category before the content can be published.

To set a folder-level requirement for all content to be assigned a taxonomy category, follow these steps.

1. Navigate to the folder.
2. Choose **View > Folder Properties**.
3. In the Taxonomy section of the properties screen (shown below), check the **Require at Least One Category Selection** checkbox.

## Assigning Content Items to a Taxonomy/Category

There are two ways to assign a taxonomy or category to a content item.

- from the **Modules > Taxonomy** screen
- from the content item

Each method is explained below.

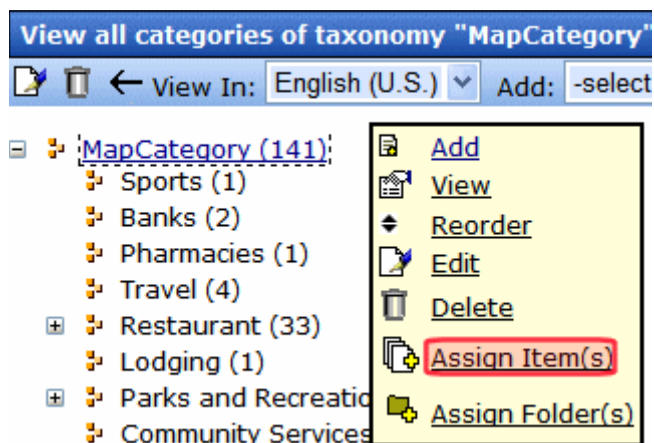
### *Assigning a Taxonomy or Category to Content via Modules > Taxonomy*

**NOTE** [Only administrators or users to whom the Taxonomy-Administrator role has been assigned see the \*\*Modules > Taxonomy\*\* option. See Also: "Defining Roles" on page 704](#)

---

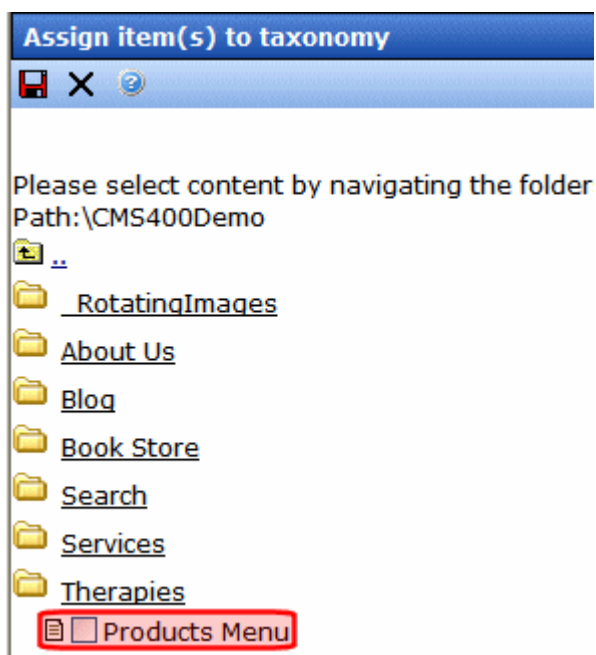
1. From the Workarea, go to **Modules > Taxonomy**.
2. Select the taxonomy from the View All Taxonomy Screen.
3. Select the taxonomy or category under which you want to assign one or more content items.
4. Click **Assign Item(s)**.





5. Navigate to the folder that contains the content you want to assign to the taxonomy or category.


**NOTE** Folder content appears below the folder list (see below).

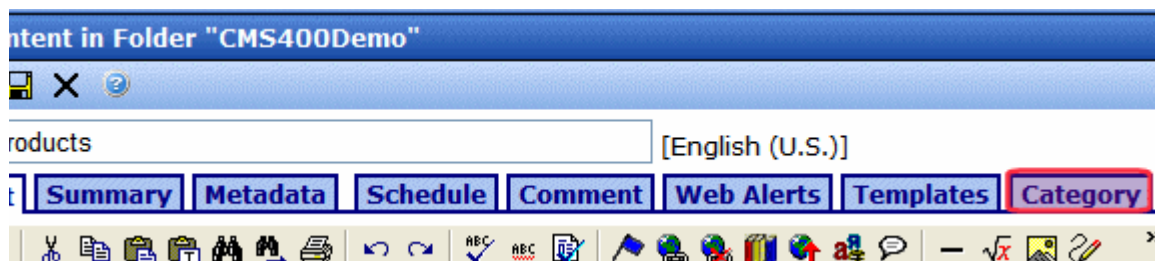




6. Check the box to the left of content you want to assign. You can assign all types of content, even blogs.

### **Assigning a Taxonomy or Category to Content via the Edit Content Screen**

1. Navigate to the content item.
2. From the View Content screen, click the Edit button ()
3. Click the **Category** tab.



4. Check the taxonomies or categories to apply.

**NOTE** Your system administrator can restrict at the folder level which taxonomies can be assigned to content. So, a taxonomy available in one folder may not be available in another.

5. Save the content.

### **Taxonomy Categories and Assets**

If you drag and drop assets into **Ektron CMS400.NET**, any taxonomy categories applied to the folder are available to that asset. If a category is required for the folder, you must assign one of the categories before you can publish the asset.

### **Assigning a Folder to a Taxonomy/Category**

If you assign a folder to a taxonomy, it displays published content in the folder *when the page is viewed*. As content is assigned to or removed from the folder, the taxonomy on the Web page changes dynamically.



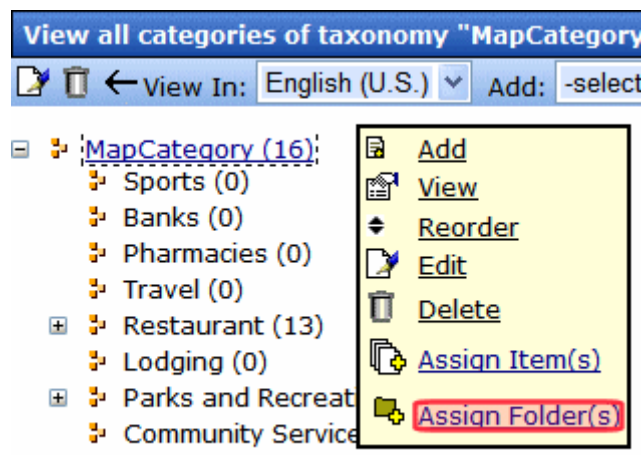
For example, if you have a “Top News Stories” folder, in which old news items are frequently removed and new ones assigned, the page displaying the taxonomy only shows the latest news items. The updating of content on the Web page is automatically handled by the taxonomy.

When assigning a folder, an option to assign its subfolders is available.

**NOTE** Only administrators or users to whom the Taxonomy-Administrator role has been assigned see the **Modules > Taxonomy** option. See Also: “Defining Roles” on page 704

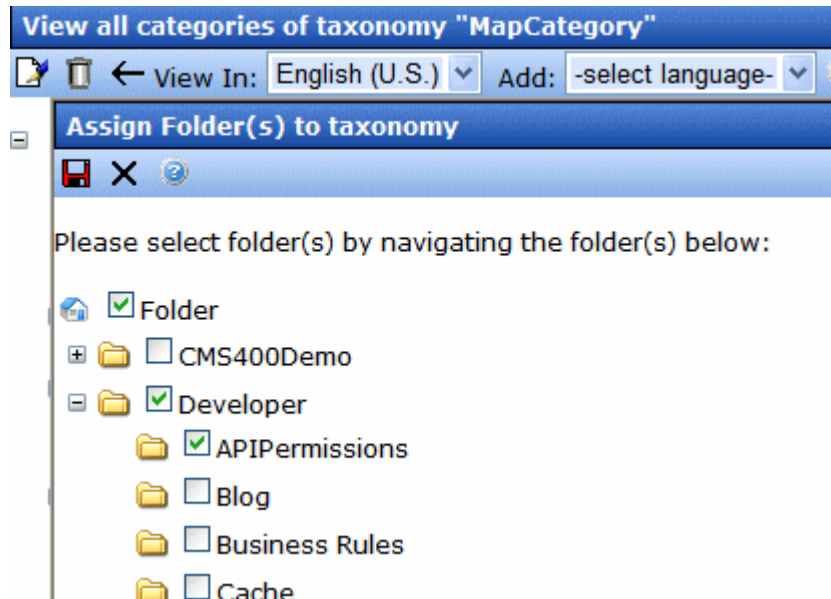
To assign a folder to a taxonomy category, follow these steps.

1. From the Workarea, go to **Modules > Taxonomy**.
2. Select the taxonomy from the View All Taxonomy Screen.
3. Select the taxonomy or category under which you want to assign a folder.
4. Click **Assign Folder(s)**.



5. Navigate to the folder you want to assign to the taxonomy or category.
6. Check the box to the left of any folder you want to assign.



**IMPORTANT!**

Only folders you check are assigned to the taxonomy/category. Checking a parent folder has no effect on its child folders.

## Insert the Directory Server Control on a Web Page

See the **Ektron CMS400.NET** Developer Manual chapter “Introduction to Ektron CMS400.NET Server Controls” > “Directory Server Control.”

## Additional Taxonomy/Category Tasks

The following sections explain additional tasks you can perform when working with a Taxonomy or its categories.

- “Viewing All Taxonomies” on page 620
- “Viewing a Taxonomy” on page 620
- “Edit Taxonomy/Category Title, Description, and Template” on page 624
- “Delete a Taxonomy/Category” on page 624
- “Add a Category to a Taxonomy/Category” on page 625






- ["Remove Content from a Taxonomy/Category" on page 626](#)
- ["Remove Folder from a Taxonomy/Category" on page 627](#)
- ["Change Order of Categories Assigned to a Taxonomy/Category" on page 628](#)
- ["Change Order of Content Assigned to a Taxonomy/Category" on page 629](#)
- ["Importing and Exporting a Taxonomy" on page 629](#)

## Viewing All Taxonomies

The View All Taxonomies screen displays all taxonomies currently in **Ektron CMS400.NET**. The language pull down lets you sort the list by a language.

To work with any taxonomy, select it. When you do, it appears within the View All Categories of Taxonomy screen.

You can also use the View All Taxonomies screen to perform these tasks.

| Button  | Task                          | For more information, see  |
|---|-------------------------------|--|
|    | Add new taxonomy              | <a href="#">"Creating a Taxonomy in the Workarea" on page 607</a>                            |
|   | Delete one or more taxonomies | <a href="#">"Deleting a Taxonomy/Category from the View All Taxonomy Screen" on page 624</a> |
|  | Import a taxonomy             | <a href="#">"Importing and Exporting a Taxonomy" on page 629</a>                             |

See Also: ["Taxonomy" on page 605](#)

## Viewing a Taxonomy

The View All Categories of Taxonomy screen exposes all categories in a selected taxonomy.




Use this screen to perform tasks on a taxonomy or one of its categories, such as adding new categories, assigning content to a category, and changing the order of items in a category.

**TIP!** [On the View All Categories of Taxonomy screen, a dashed box indicates the selected Taxonomy/category \(see below\).](#)





Tasks you can perform from this screen are listed below.

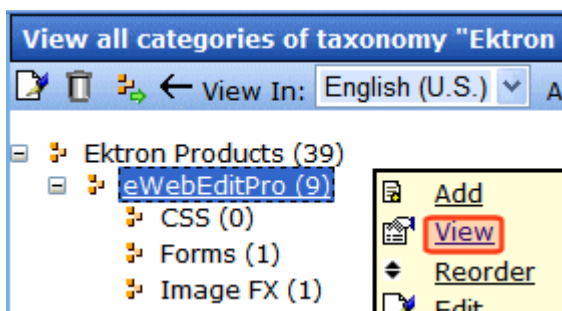
| Task  | How to initiate   | For more information, see  |
|---|---|--|
| Edit the taxonomy title, description, and template. | Click Edit toolbar button (  )<br>or<br>1. Place the cursor over the taxonomy/category.<br>2. Click <b>Edit</b> from the popup menu. | "Edit Taxonomy/Category Title, Description, and Template" on page 624            |
| Delete the taxonomy                                 | Click Delete toolbar button (  )   | "Deleting a Taxonomy/Category from the View All Taxonomy Screen" on page 624     |
| Export a taxonomy                                   | Click Export Taxonomy toolbar button (  )  | "Exporting a Taxonomy" on page 630   |
| Add a taxonomy category                             | 1. Select the taxonomy/category under which the new category should appear.<br>2. Click <b>Add</b> from the popup menu.   | "Assigning a Taxonomy or Category to Content via Modules > Taxonomy" on page 615 |
| View a taxonomy category                            | 1. Place the cursor over the taxonomy/category.<br>2. Click <b>View</b> from the popup menu.  |  |



| Task   | How to initiate  | For more information, see  |
|--|--|--|
| Change the order of items in a taxonomy/category | <ol style="list-style-type: none"> <li>1. Place the cursor over the taxonomy/category.</li> <li>2. Click <b>Reorder</b> from the popup menu.</li> </ol>          | "Change Order of Categories Assigned to a Taxonomy/Category" on page 628     |
| Delete a category                                | <ol style="list-style-type: none"> <li>1. Place the cursor over the taxonomy/category.</li> <li>2. Click <b>Delete</b> from the popup menu.</li> </ol>           | "Deleting a Taxonomy/Category from the View All Taxonomy Screen" on page 624 |
| Assign content items to a category               | <ol style="list-style-type: none"> <li>1. Place the cursor over the taxonomy/category.</li> <li>2. Click <b>Assign Item(s)</b> from the popup menu.</li> </ol>   | "Assigning Content Items to a Taxonomy/Category" on page 615                 |
| Assign folders to a category                     | <ol style="list-style-type: none"> <li>1. Place the cursor over the taxonomy/category.</li> <li>2. Click <b>Assign Folder(s)</b> from the popup menu.</li> </ol> | "Assigning a Folder to a Taxonomy/Category" on page 617                      |

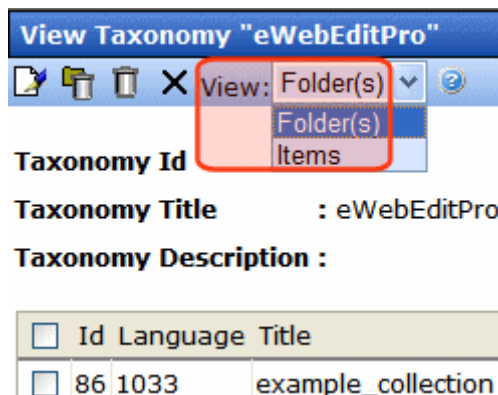
## Viewing a Taxonomy or Category

To view any taxonomy or category, move the cursor over it then select **View** from the popup menu.





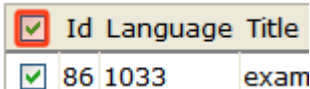


The View screen displays the taxonomy/category's title and description. You also see assigned content items *or* folders, depending on how the View dropdown is set.





From here you can perform these tasks.


| Task   | Press toolbar button  | Directions  |
|--|---|---|
| Edit taxonomy/category title and description                           |    | <ol style="list-style-type: none"><li>1. Click the button and update the fields.</li><li>2. Click the Save button ().</li></ol>  |
| Delete the selected taxonomy/ category                                 |  | <ol style="list-style-type: none"><li>1. Click the toolbar button.</li><li>2. A confirmation window appears</li><li>3. Click <b>OK</b>.</li></ol>   |
| Remove items (content or folders) from the selected taxonomy/ category |  | <ol style="list-style-type: none"><li>1. From the <b>View</b> dropdown list, select <b>Folders</b> or <b>Items</b>, whichever you want to delete.</li><li>2. Check the box next to each item you want to delete. To delete all items, check the box in the title bar.<br/></li><li>3. Click the button.</li></ol> |

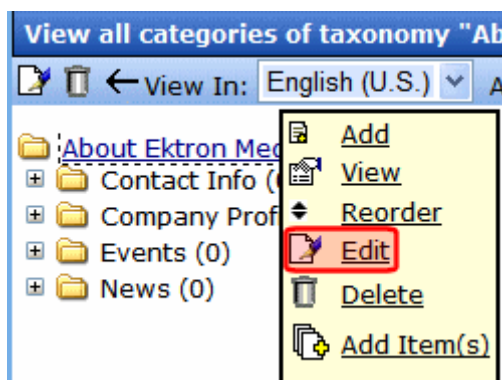


## Edit Taxonomy/Category Title, Description, and Template

To edit a Taxonomy's title, description or template, follow these steps.

**NOTE** Only administrators or users to whom the Taxonomy-Administrator role has been assigned see the **Modules > Taxonomy** option. See Also: "Defining Roles" on page 704

1. From the Workarea, go to **Modules > Taxonomy**.
2. Select the taxonomy from the View All Taxonomy Screen.
3. Click the Edit button (  ) or hover the cursor over the taxonomy and select **Edit** from the popup menu.




See Also: "Applying a Template to a Taxonomy or Category" on page 610

## Delete a Taxonomy/Category

There are two ways to delete a taxonomy or category.

### *Deleting a Taxonomy/Category from the View All Taxonomy Screen*

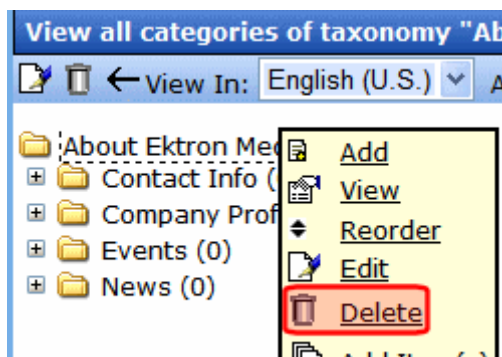
**NOTE** Only administrators or users to whom the Taxonomy-Administrator role has been assigned see the **Modules > Taxonomy** option. See Also: "Defining Roles" on page 704

1. From the Workarea, go to **Modules > Taxonomy**.
2. From the View All Taxonomy Screen, check the box to the left taxonomy you want to delete.
3. Click the delete button (  ).



## Deleting a Taxonomy/Category from the View All Categories of Taxonomy Screen

1. From the Workarea, go to **Modules > Taxonomy**.
2. Select the taxonomy from the View All Taxonomy Screen.
3. Hover the cursor over the taxonomy and select **Delete** from the popup menu.



## Add a Category to a Taxonomy/Category

Follow these steps to add a category to a taxonomy, or to add a subcategory to a category.

**NOTE** Only administrators or users to whom the Taxonomy-Administrator role has been assigned see the **Modules > Taxonomy** option. See Also: "Defining Roles" on page 704

1. From the Workarea, go to **Modules > Taxonomy**.
2. Select the taxonomy from the View All Taxonomy Screen.
3. Select the taxonomy or category under which you want to create a new category.
4. Click **Add** from the popup menu.
5. The Add Taxonomy or Category screen appears.



6. Enter the name and description of the new category.
7. Click the Save button ( ).

## Remove Content from a Taxonomy/Category

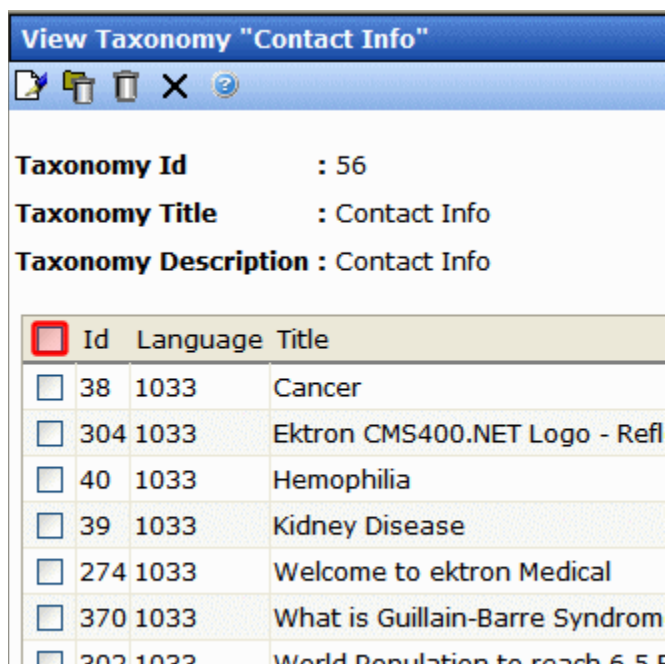
**NOTE** Only administrators or users to whom the Taxonomy-Administrator role has been assigned see the **Modules > Taxonomy** option. See Also: "Defining Roles" on [page 704](#)

1. From the Workarea, go to **Modules > Taxonomy**.
2. Select a taxonomy from the View All Taxonomy Screen.
3. Select the taxonomy or category that has content that you want to edit.
4. Click **View** from the popup menu.
5. The View Taxonomy screen appears.
6. From the View dropdown, select **Item(s)**.



7. Check the box to the left of content you want to remove.

**TIP!** To remove all content, check the box in the title bar.



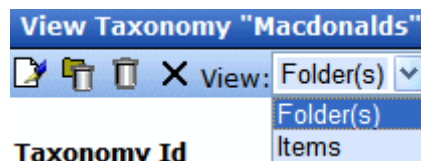
8. Click the delete button ( ).

## Remove Folder from a Taxonomy/Category

**NOTE** Only administrators or users to whom the Taxonomy-Administrator role has been assigned see the **Modules > Taxonomy** option. See Also: "Defining Roles" on page 704

1. From the Workarea, go to **Modules > Taxonomy**.
2. Select a taxonomy from the View All Taxonomy Screen.
3. Select the taxonomy or category that has folder that you want to delete.
4. Click **View** from the popup menu.
5. The View Taxonomy screen appears.
6. From the View dropdown, select **Folder(s)**.





7. Check the box to the left of folders you want to remove.

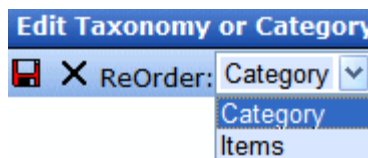
**TIP!** To remove all content, check the box in the title bar.


8. Click the delete button (  ).

## Change Order of Categories Assigned to a Taxonomy/Category

**NOTE** Only administrators or users to whom the Taxonomy-Administrator role has been assigned see the **Modules > Taxonomy** option. See Also: "Defining Roles" on page 704

1. From the Workarea, go to **Modules > Taxonomy**.
2. Select the taxonomy from the View All Taxonomy Screen.
3. Select the taxonomy or category that has content that you want to reorder.
4. Click **Reorder** from the popup menu.
5. Set the reorder pull-down list to **Category**.



6. Select an item that you want to move up or down.
7. Click the up or down arrow to move the item in that direction.
8. Continue steps 5 and 6 until all content is in the desired order.
9. Click the save button (  ).

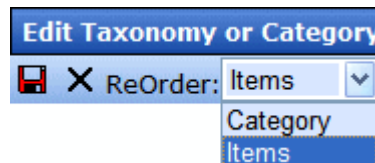



## Change Order of Content Assigned to a Taxonomy/Category

### NOTE

Only administrators or users to whom the Taxonomy-Administrator role has been assigned see the **Modules > Taxonomy** option. See Also: "Defining Roles" on page 704

1. From the Workarea, go to **Modules > Taxonomy**.
2. Select the taxonomy from the View All Taxonomy Screen.
3. Select the taxonomy or category that has content that you want to reorder.
4. Click **Reorder** from the popup menu.
5. Set the reorder pull-down list to **items**.



6. Select an item that you want to move up or down.
7. Click the up or down arrow to move the item in that direction.
8. Continue steps 5 and 6 until all content is in the desired order.
9. Click the save button (  ).

## Importing and Exporting a Taxonomy

You can *export* any taxonomy as an xml file. Then, you can reuse it or send it to someone else, who would *import* it in order to bring a copy of it onto their computer.

You can use the Export/Import feature like a "save as" feature. For example, you want to create a taxonomy that is similar to an existing one but has some differences. The easiest way to do this is to export an existing one, then import it under a new name and edit it.

Below is an example of part of a taxonomy saved as an XML document.


```
<?xml version="1.0" ?>
- <TaxonomyData xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://
www.w3.org/2001/XMLSchema">
```



```
<TaxonomyName>MapCategory</TaxonomyName>
<TaxonomyDescription>map</TaxonomyDescription>
- <Taxonomy>
- <TaxonomyData>
  <TaxonomyName>Sports</TaxonomyName>
  <TaxonomyDescription>sports</TaxonomyDescription>
</TaxonomyData>
- <TaxonomyData>
  <TaxonomyName>Banks</TaxonomyName>
  <TaxonomyDescription>Banks</TaxonomyDescription>
</TaxonomyData>
- <TaxonomyData>
  <TaxonomyName>Pharmacies</TaxonomyName>
  <TaxonomyDescription>Pharmacies</TaxonomyDescription>
</TaxonomyData>
- <TaxonomyData>
  <TaxonomyName>Travel</TaxonomyName>
  <TaxonomyDescription>Travel</TaxonomyDescription>
</TaxonomyData>
- <TaxonomyData>
  <TaxonomyName>Restaurant</TaxonomyName>
  <TaxonomyDescription>Restaurant</TaxonomyDescription>
</Taxonomy>
- <TaxonomyData>
  <TaxonomyName>American</TaxonomyName>
  <TaxonomyDescription>American</TaxonomyDescription>
</TaxonomyData>
- <TaxonomyData>
  <TaxonomyName>Indian</TaxonomyName>
  <TaxonomyDescription>Indian</TaxonomyDescription>
</TaxonomyData>
```

## ***Exporting a Taxonomy***

Exporting a taxonomy means saving it as an .xml file on your computer or network drive. To export a taxonomy, follow these steps.

1. Go to **Modules > Taxonomy**.
2. All taxonomies appear.
3. Click a taxonomy that you want to export.
4. Click the Export Taxonomy button ().
5. You are prompted to select a folder into which to save it.

## ***Importing a Taxonomy***



1. Go to **Modules > Taxonomy**.
2. All taxonomies appear.
3. Click the Import Taxonomy button (🔗📄).
4. The Import Taxonomy screen appears.

5. Use the language dropdown box to select the language of your taxonomy.

6. In the **Title** field, enter a name for your new taxonomy.
7. Click the **Browse** button.
8. Navigate to the taxonomy file you want to import.
9. The path appears in the **File** field.

**NOTE** Alternatively, you can enter or paste the xml into the **XML** box.

10. Click the Save button (💾).



**NOTE** If you assign a name that is already given to a taxonomy, **Ektron CMS400.NET** appends a number to the title, beginning with 1.

---



# Managing Users and Permissions

## Managing Users & User Groups

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

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

**IMPORTANT!**

---

If your system uses the Active Directory Integration Feature, proceed to ["Active Directory Feature"](#) on page 709 to learn about user management functions. This chapter only applies to systems that do not use Active Directory Integration.

---

**IMPORTANT!**

---

If your system uses LDAP Authentication, proceed to ["LDAP Authentication"](#) on page 761. Some functionality in this chapter does apply to LDAP. The LDAP chapter explains which information is applied.

---

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

- ["Accessing the Users and User Groups Folders"](#) on page 634
- ["Creating a New User"](#) on page 635
- ["Viewing a User"](#) on page 638
- ["Editing a User"](#) on page 638
- ["Deleting a User"](#) on page 640
- ["Assigning Users To User Groups"](#) on page 641



**NOTE**

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

---

## Accessing the Users and User Groups Folders

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

### Accessing the User Folder

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

1. Access the Workarea.
2. Click the **Settings** button in the lower left frame.
3. Click the **Users** folder from the folder tree.
4. All Ektron CMS400.NET users appear.

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

### Accessing the User Group Folder

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

1. Access the Workarea.
2. Click the **Settings** folder from the left frame of the Workarea window.
3. Click the **User Group** folder.
4. All user groups appear.

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



# Managing Users

## IMPORTANT!

If you are using Active Directory to Manage users, see "Associating User Information in AD with Ektron CMS400.NET" on page 723.

The following topics explain how to manage users.


- "Creating a New User" on page 635
- "Viewing a User" on page 638
- "Editing a User" on page 638
- "Deleting a User" on page 640
- "Removing Users from User Groups" on page 640

## Creating a New User

## IMPORTANT!

If you are using Active Directory to add a new user, see "Manually Adding AD User Information to Ektron CMS400.NET" on page 725. If you are using LDAP, see "Adding User Information from an LDAP Server to Ektron CMS400.NET" on page 767.

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


1. Access the User folder, as described in "Accessing the User Folder" on page 634.
2. Click the Add User button (  ).
3. The Add a New User to the System screen appears.
4. Enter the following information about the user.

| Field   | Description   |
|---|---|
| Username                                      | Insert a username for the user you want to create.  |
| Organization<br>Organizational Unit<br>Domain | These fields are only available when using LDAP Authentication. See Also: "Adding User Information from an LDAP Server to Ektron CMS400.NET" on page 767. |
| First Name                                    | Enter the first name of the user.   |




| Field            | Description   |
|------------------|---|
| Last Name        | Enter the last name of the user.  |
| Password         | <p>Enter a password for the user.</p> <p><u>Note: Passwords can be either case-sensitive or case-insensitive. For more information, see "Making Passwords Case Sensitive" on page 6.</u></p>  |
| Confirm Password | Confirm the password by typing it again.  |
| User Language    | <p>Select the language in which the user will view Ektron CMS400.NET screens and messages. The language also determines the default value whenever a drop-down list of languages appears within <b>Ektron CMS400.NET</b>.</p> <p>The dropdown list of choices at this field is derived from the Language Settings screen, available from the <b>Settings&gt; Configuration</b> folder.</p> <p>Do not confuse the system language with the user's ability to create and edit foreign editions of content. This field does not prevent a user from working with multiple language content.</p> <p>See Also: "Multi-Language Support" on page 779</p> <p><u>Note: If the selected language is not English, French or German, it is only supported after you download the <b>Ektron CMS400.NET</b> Language Support Program from Ektron and translate the Web site.</u></p> |
| Email Address    | Enter the email address of the user.  |
| Forum Editor     | <p>Determines which editor will be used when this user replies to a Discussion Board.</p> <p>See Also: "Using Discussion Boards on Your Web Site" on page 496</p>   |



| Field  | Description   |
|--|---|
| Avatar   | <p>An image or icon to represent you in the Forum.</p> <p>Type in a web path to image. For example: <a href="http://www.example.com/smileyface.gif">http://www.example.com/smileyface.gif</a></p>             |
| Disable Receiving of System Notification Email | <p>Select to disable the email notifications for the user. If you do, the user will not receive the automatic email notification described in <a href="#">"Automatic eMail Notification" on page 919</a>. However, this field has no effect on the user's ability to receive instant email.</p> |
| Any custom user properties                     | <p>See <a href="#">"Custom User Properties" on page 665</a></p>   |

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

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

**NOTE** When you add a new user, he is automatically placed in the Everyone user group. To assign users to other groups, see ["Assigning Users To User Groups" on page 641](#).

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

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



## Viewing a User

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

To view a user, follow these steps.

1. Access the user folder as described in ["Accessing the User Folder" on page 634](#).
2. Click the **Username** of the user you want to view.
3. The View User Information screen is displayed.

To learn about the fields, see ["Enter the following information about the user." on page 635](#) and ["The following fields are only available when editing a user." on page 639](#)

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

## Editing a User

### IMPORTANT!

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If you are using Active Directory to edit a user, see ["Editing User Information in Ektron CMS400.NET" on page 726](#).

---

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

- Account Locked
- Work Page Size
- Landing Page after login

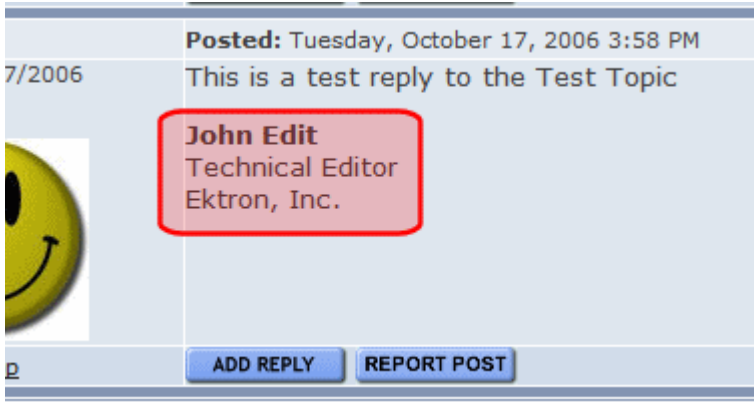
To edit a user, follow these steps.


1. Access the view user screen of the user you want to edit as described in ["Viewing a User" on page 638](#).
2. Click the **Username** of the user you want to edit.
3. The View User Information screen is displayed.
4. Click the Edit button ().



5. The Edit User screen is displayed. To learn about most fields, see ["Enter the following information about the user."](#) on page 635.

The following fields are only available when editing a user.

| Field                    | Description   |
|--------------------------|---|
| Account Locked           | See <a href="#">"Restricting Login Attempts"</a> on page 7  |
| Forum Editor             | Determines which editor will be used when this user replies to a Discussion Board. See Also: <a href="#">"Using Discussion Boards on Your Web Site"</a> on page 496   |
| Forum Signature          | <p>Adds a signature to your posts in the forum. You do not see the signature in the editor. It is added after you click the <b>Post</b> button.</p>  |
| Work Page Size           | See <a href="#">"Work Page Size"</a> on page 29   |
| Landing Page after login | See <a href="#">"Landing Page after login"</a> on page 30   |

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




## Deleting a User

**IMPORTANT!** If you are using Active Directory to delete a user, see ["Deleting Users" on page 726](#).

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

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

To delete a user, follow these steps.


1. Access the view user screen for the user you want to delete, as described in ["Viewing a User" on page 638](#).
2. Click the **Username** of the user you want to delete.
3. The View User Information screen is displayed.
4. Click the Delete button (  ).
5. A confirmation message is displayed.
6. Click **OK**.

## Removing Users from User Groups

**IMPORTANT!** If you are using Active Directory to remove a user from a group, see ["Removing Users from a Group" on page 722](#).

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

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

1. Access the User Groups folder, as described in ["Accessing the User Group Folder" on page 634](#).
2. Click the User Group that includes the user you want to remove.
3. Members of the selected group appear.
4. Click the user to remove.
5. The View User Information screen is displayed.
6. Click the Delete button (  ) to delete the user from the group.



7. A confirmation message is displayed.
8. Click **OK**.



## Managing User Groups

The following topics explain how to manage User Groups.

- ["Creating a New User Group" on page 641](#)
- ["Assigning Users To User Groups" on page 641](#)
- ["Viewing the Users in a User Group" on page 643](#)
- ["Editing a User Group" on page 643](#)
- ["Deleting a User Group" on page 644](#)
- ["Removing Users from User Groups" on page 640](#)

### Creating a New User Group

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

1. Access the User Groups folder in the administrator Workarea, as described in ["Accessing the User Group Folder" on page 634](#).
2. Click the Add User Group button (  ).
3. The Add a New User Group to the System screen is displayed.
4. Enter a name and brief description of the user group you want to create.
5. Click the Save button (  ).

### Assigning Users To User Groups

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

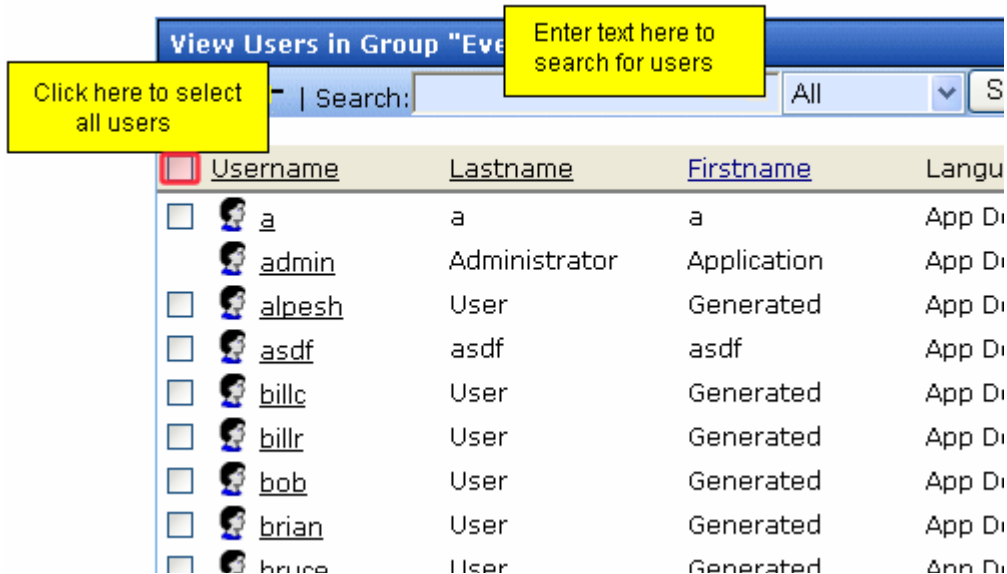
1. Access the User Groups folder in the Workarea.
2. Click the user group to which you want to add a user.
3. The View Users in Group screen appears with all current members of the group.




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

Note that you can select any number of users by checking the box to the left of their name. To select all users, check the box in the column header row.

You can also sort the display by **Username**, **Lastname** or **Firstname**.



And, you can enter characters into the **Search** field and find only users that match them. For example, you could enter **bill**, click the **Search** button, and see only users with those characters in their name.

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



## Viewing the Users in a User Group

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

1. Access the User Group folder in the administrator Workarea, as described in ["Accessing the User Group Folder" on page 634](#).
2. Click the user group whose members you want to view.
3. The View Users in Group screen appears with a list of users who are members of the group.

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

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

| View Users in Group "Everyone" |               |             |             |                                     |
|--------------------------------|---------------|-------------|-------------|-------------------------------------|
|                                |               |             |             |                                     |
| Username                       | Lastname      | Firstname   | Language    | <input type="checkbox"/> All        |
| <a href="#">admin</a>          | Administrator | Application | App Default | <input checked="" type="checkbox"/> |
| <a href="#">jedit</a>          | Edit          | John        | App Default | <input type="checkbox"/>            |

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

## Editing a User Group



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

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

To edit a user group, follow these steps.

1. Access the View Users in Group screen for the user group you want to edit, as described in ["Viewing the Users in a User Group" on page 643](#).




2. Click the User Group you want to edit.
3. The View Users In Group screen is displayed.
4. Click the Edit button ().
5. The Edit User Group screen is displayed.
6. Make the necessary changes.
7. Click the Update button ().

## Deleting a User Group

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

**NOTE** You cannot delete the Administrator and Everyone groups.

To delete a user group, follow these steps.

1. Access the View Users in Group screen for the user group you want to delete, as described in "[Viewing the Users in a User Group](#)" on page 643.
2. Click the User Group you want to delete.
3. The View Users In Group screen is displayed.
4. Click the Delete button ().
5. A confirmation message is displayed.
6. Click **OK**.
7. The User Group is deleted from the Ektron CMS400.NET Web site.

## Removing Users from User Groups

See "[Removing Users from User Groups](#)" on page 640.



# Membership Users and Groups

Membership users are a category of users who have limited privileges to **Ektron CMS400.NET**. Unlike regular CMS users, they cannot use the Workarea. When a membership user logs in, he can view, add and edit content from the Web site (as permitted) -- all other functionality is disabled.

Membership users can also be granted permission to view private content. This is helpful if your organization has partners who need access to Web pages that should not be visible to the general public.

You can use Membership groups to group similar membership users.

## Privileges of Membership Users

- They can create, edit, and view content after log in. *See Also:* ["Community Folders" on page 50](#)
- They can be granted permission to view private content. *See Also:* ["Membership User/User Group Example" on page 646](#) and ["Private Content" on page 660](#)
- They can self-subscribe to receive Web Alerts. *See Also:* ["Web Alert Feature" on page 855](#)
- If a Discussion Board requires sign in, they can view and post to them. *See Also:* ["Discussion Boards" on page 450](#)
- If a blog requires authentication, they can post blog comments. *See Also:* "Working with Folders and Content" > "Blogs" in the **Ektron CMS400.NET** User Manual
- If a poll or survey is set up to track participating users, membership users' names appear on the Form reports.



## Membership User/User Group Example

A typical membership scenario is a Partners section of your Web site that contains private content for partners only. Set up a membership user group to include users from your partner's organization. The group is given add and edit permissions to the Partners section. As a result, any partner can log into Ektron CMS400.NET and view, add, or edit the private content.

This topic is more fully explained through the following subtopics.

- ["Accessing the Membership Module Folder" on page 646](#)
- ["Working with Membership Users" on page 647](#)
- ["Membership User Groups" on page 654](#)
- ["Assigning Permissions for Memberships" on page 657](#)
- ["Troubleshooting Problems with Membership Users and Groups" on page 659](#)

## Accessing the Membership Module Folder

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

1. Navigate to the **Workarea > Modules**.
2. Click the **Memberships** folder to view its subfolders.

| Folder Name        | More Information   |
|--------------------|--|
| Users              | <a href="#">"Working with Membership Users" on page 647</a>              |
| Users not Verified | <a href="#">"What Happens if Verification email is Used" on page 889</a> |
| User Groups        | <a href="#">"Membership User Groups" on page 654</a>                     |
| Messages           | <a href="#">"What Happens if Verification email is Used" on page 889</a> |



## Working with Membership Users

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


- ["Adding Membership Users" on page 647](#)
- ["Adding Membership Users to a Membership User Group" on page 649](#)
- ["Setting Permissions on Private Content for Membership Users" on page 649](#)
- ["Viewing Membership User Information" on page 649](#)
- ["Editing Membership Users" on page 651](#)
- ["Deleting Membership Users" on page 653](#)

### Adding Membership Users

**NOTE**

If you are using the Web Alert feature, any site visitor can sign up to be a membership user. That represents another way to add membership users. For more information, see ["How Users Sign up for Subscriptions" on page 887](#).

To add a new membership user, follow these steps.

1. From the Workarea, click **Modules > Memberships > Users**.
2. Click the Add Membership User button ().
3. The Add Membership User screen is displayed.
4. Complete the form using the following table as a reference.

| Field      | Description                                      |
|------------|--|
| Username   | Enter a unique username for the membership user. |
| First Name | Enter the first name of the user.                |
| Last Name  | Enter the last name of the user.                 |



| Field         | Description   |
|---------------|---|
| Password      | Enter a password for the user.  |
| Confirm Pwd   | Re-type the password to confirm it is correct.  |
| User Language | <p>Select the language in which the user will view Ektron CMS400.NET screens and messages. The language also determines the default value whenever a drop-down list of languages appears within <b>Ektron CMS400.NET</b>.</p> <p>The dropdown list of choices at this field is derived from the Language Settings screen, available from the <b>Settings&gt; Configuration</b> folder.</p> <p>Do not confuse the system language with the user's ability to create and edit foreign editions of content. This field does not prevent a user from working with multiple language content.</p> <p>See Also: <a href="#">"Multi-Language Support" on page 779</a></p> <p><u>Note: If the selected language is not English, French or German, it is only supported after you download the <b>Ektron CMS400.NET</b> Language Support Program from Ektron and translate the Web site.</u></p> |
| Email Address | Enter an email address for the user.  |
| Forum Editor  | <p>Determines which editor will be used when this user replies to a Discussion Board.</p> <p>See Also: <a href="#">"Using Discussion Boards on Your Web Site" on page 496</a></p>   |



| Field  | Description  |
|--------|--|
| Avatar | <p>An image or icon to represent the user in the Forum.</p> <p>Type in a web path to image. For example: <code>http://www.example.com/smileyface.gif</code></p>  <p>The screenshot shows a forum post interface. On the left, a user profile is displayed with the username 'JE', 'Joined: 3/7/2006', and 'Posts: 2'. Below this is a yellow smiley face avatar, which is highlighted by a red rectangular box. To the right of the profile, the post content is visible, starting with 'Posted: Tuesday, O' and 'This is a test repl'. Below the post content, there is a 'John Edit' section with the text 'Technical Editor Ektron, Inc.' and buttons for 'ADD REPLY' and 'REPO'.</p> |

5. Click the Save button (  ).

## Adding Membership Users to a Membership User Group

See ["Adding Membership Users to a Membership User Group"](#) on page 655.

## Setting Permissions on Private Content for Membership Users

See ["Assigning Permissions for Memberships"](#) on page 657.

## Viewing Membership User Information

To view membership user information, follow these steps.

1. Access the membership users folder, as described in ["Accessing the Membership Module Folder"](#) on page 646.

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

**Page 1 of 2**  
[\[First Page\]](#) [\[Previous Page\]](#) [\[Next Page\]](#) [\[Last Page\]](#)



The View Users in Group All\_Members screen lets you add new users, as well as sort and search for existing users. See ["Sorting Membership Users" on page 650](#) and ["Searching for Membership Users" on page 650](#).

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

## Sorting Membership Users

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

- Username
- Last Name
- First Name

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

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

## Searching for Membership Users

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





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

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




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

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

## Editing Membership Users


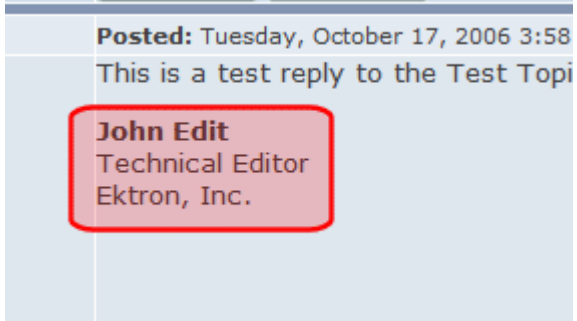
To edit a membership user, follow these steps.

1. Access the View Membership User screen of the membership user you want to edit, as described in "[Viewing Membership User Information](#)" on page 649.
2. Click the Edit button (.
3. The Edit Membership User Information screen is displayed.
4. Use the following table to assist with editing the membership user's information.



| Field         | Description   |
|---------------|---|
| Username      | Enter a unique username for the membership user.  |
| First Name    | Enter the first name of the user.   |
| Last Name     | Enter the last name of the user.  |
| Password      | Enter a password for the user.  |
| Confirm Pwd   | Re-type the password to confirm it is correct.  |
| User Language | <p>Select the language in which the user will view Ektron CMS400.NET screens and messages. The language also determines the default value whenever a drop-down list of languages appears within <b>Ektron CMS400.NET</b>.</p> <p>The dropdown list of choices at this field is derived from the Language Settings screen, available from the <b>Settings&gt; Configuration</b> folder.</p> <p>Do not confuse the system language with the user's ability to create and edit foreign editions of content. This field does not prevent a user from working with multiple language content.</p> <p>See Also: <a href="#">"Multi-Language Support" on page 779</a></p> <p><u>Note: If the selected language is not English, French or German, it is only supported after you download the <b>Ektron CMS400.NET</b> Language Support Program from Ektron and translate the Web site.</u></p> |
| Email Address | Enter an email address for the user.  |
| Forum Editor  | <p>Determines which editor will be used when this user replies to a Discussion Board.</p> <p>See Also: <a href="#">"Using Discussion Boards on Your Web Site" on page 496</a></p>   |




| Field           | Description  |
|-----------------|--|
| Avatar          | <p>An image or icon to represent the user in the Forum.<br/>Type in a web path to image. For example: <a href="http://www.example.com/smileyface.gif">http://www.example.com/smileyface.gif</a></p>  |
| Forum Signature | <p>Adds a signature to the membership user's posts in the forum. You do not see the signature in the editor. It only appears after you click the <b>Post</b> button.</p>                            |

5. Click the Update button (  ).

## Deleting Membership Users

To delete a membership user, follow these steps.

1. Access the View Membership User screen of the membership user you want to edit, as described in "[Viewing Membership User Information](#)" on page 649.
2. Click the Delete button (  ).



- 3. A confirmation message is displayed.
- 4. Click **OK**.

## Membership User Groups

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



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

[View Advanced Permissions](#)

| User or Group Name    | Read | Only | Edit | Add | Delete | Restore | Library | Add  | Add    | Add   | Overwrite  |
|-----------------------|------|------|------|-----|--------|---------|---------|------|--------|-------|------------|
|                       |      |      |      |     |        |         | Read    | Only | Images | Files | Hyperlinks |
| <a href="#">admin</a> | x    |      | x    | x   | x      | x       | x       |      | x      | x     | x          |
| <a href="#">Bob</a>   | x    |      | x    | x   | x      | x       |         |      |        |       |            |



The following sections explain membership user group management.

- "Adding Membership User Groups" on page 655
- "Viewing Users in a Membership User Group" on page 655
- "Adding Membership Users to a Membership User Group" on page 655
- "Setting Permissions on Private Content for Membership User Groups" on page 656
- "Editing Membership User Group Name" on page 656
- "Deleting User from Membership User Group" on page 656
- "Deleting Membership User Groups" on page 657



## Adding Membership User Groups

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

1. Access the membership user group folder, as described in ["Accessing the Membership Module Folder" on page 646](#).
2. Click the Add Membership User Group button ().
3. The Add a New User Group screen is displayed.
4. Enter a unique name for the group.
5. Click the Save button (.

See Also: ["Membership User Groups" on page 654](#)

## Viewing Users in a Membership User Group

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

1. Access the membership user group folder, as described in ["Accessing the Membership Module Folder" on page 646](#).
2. Click the membership user group you want to view.
3. The View Users In Group screen is displayed.

See Also: ["Membership User Groups" on page 654](#)


## Adding Membership Users to a Membership User Group

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

---

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

---

1. Access the View Membership User Group screen for the membership user group to which you want to add a membership user, as described in ["Viewing Users in a Membership User Group" on page 655](#).
2. Click the Add Membership User button (.
3. The Add User to Group screen is displayed.

---

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

---

4. Click the user you want to add.



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

See Also: "[Membership User Groups](#)" on page 654



## Setting Permissions on Private Content for Membership User Groups

See "[Assigning Permissions for Memberships](#)" on page 657

## Editing Membership User Group Name

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


**NOTE** The membership user group, `All_members`, cannot be edited.

1. Access the View Membership User Group screen for the membership group you want to edit, as described in "[Viewing Users in a Membership User Group](#)" on page 655.
2. Click the Edit button ()
3. The Edit User Group screen is displayed.
4. Change the membership group name.
5. Click the Update button ()

See Also: "[Membership User Groups](#)" on page 654

## Deleting User from Membership User Group


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

1. Access the View Membership User Group screen for the membership user group that contains the membership user you want to delete, as described in "[Viewing Users in a Membership User Group](#)" on page 655.
2. Click the name of the membership user you want to remove.
3. The View User Information screen is displayed.
4. Click the Delete button ()
5. A confirmation message is displayed.
6. Click **OK**.



## Deleting Membership User Groups

To delete a membership user group, follow these steps.

1. Access the View Membership User Group screen for the membership user group you want to delete, as described in ["Viewing Users in a Membership User Group" on page 655](#).
2. Click the Delete button ()
3. A confirmation message is displayed.
4. Click **OK**.

## Assigning Permissions for Memberships

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

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

| For             | See  |
|-----------------|--|
| Content folders | <a href="#">"Setting Permissions for a Content Folder" on page 690</a> |
| Content         | <a href="#">"Setting Permissions for Content" on page 693</a>          |

2. If necessary, break the inheritance for the content or folder. See *Also*: ["Inheritance" on page 688](#)
3. If desired, set the folder or item to **Private**. See *Also*: ["Private Content" on page 660](#)
4. Click **View MemberShip Users** on the right side of the permissions table.



### View Permissions for Folder "CMS400Demo"



allow this object to inherit permissions.

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

#### Advanced Permissions

[View MemberShip users](#)

| Owner or Group Name | Read | Only Edit | Add | Delete | Restore | Library Read | Only Images | Add | Add | Add | Overwrite |
|---------------------|------|-----------|-----|--------|---------|--------------|-------------|-----|-----|-----|-----------|
| <u>everyone</u>     | x    | x         | x   | x      | x       | x            | x           | x   | x   | x   |           |

- The membership users/user groups added to the permissions table are displayed.
- Click the Add button ().
- The Add Permissions screen is displayed.
- Click a username or user group name to add to the permissions table.
- The Add Permissions Options screen is displayed.
- Check appropriate permissions for the membership user or group.
- Click the Save button ().



# Troubleshooting Problems with Membership Users and Groups

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

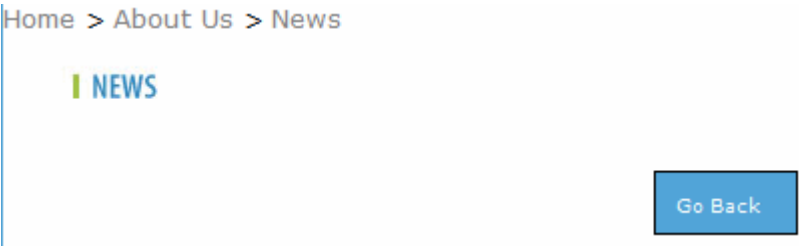


# Private Content

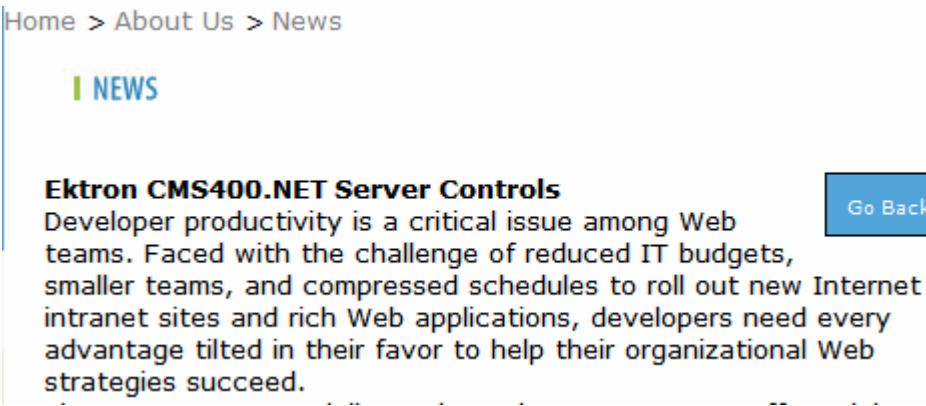
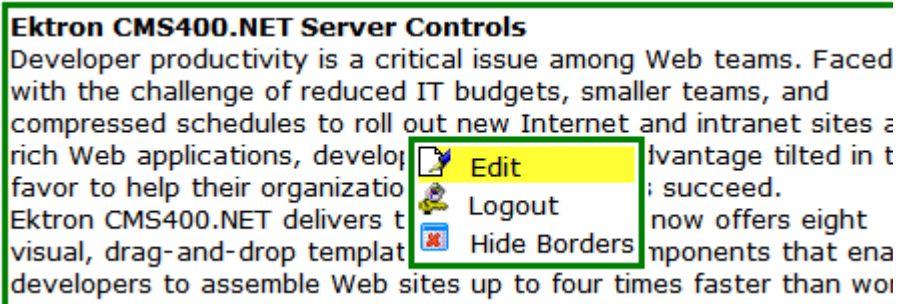
Private content is only available to CMS users or membership users with at least Read-Only permissions for its folder. Those users must log in to work with the private content. Unauthorized site visitors cannot see it.

You can designate a folder to be private. In that case, all content in it and its subfolders is private (if they inherit permissions). Alternatively, you can designate specific content items as private.

To demonstrate private content, the following table shows how a user’s status affects the display of content in three scenarios.

| Scenario     | Private Content Web Page  |
|--------------|---|
| Site visitor |  |




| Scenario   | Private Content Web Page  |
|--|---|
| <p>Logged in user with read-only permissions</p> |   |
| <p>Logged-in user with edit permissions</p>      |  |

## Making a Folder Private

**NOTE** You can only set content to private when inheritance is broken. See Also: "Inheritance" on page 688.

To make a folder private, follow these steps.

1. In the Workarea, navigate to the folder that you want to make private.
2. Click **View > Folder Properties**.
3. Click the View Permissions button (.




4. If necessary, uncheck the box that says **Allow this object to inherit permissions**. (Inheritance must be disabled before you can make the content private.)
5. Check the box that says **The content in this folder is private and can only be viewed by authorized users and members**.
6. A confirmation message is displayed.
7. Click **OK**.

All content in the folder is now private. As new content is added, it is automatically set to private.

## Making Content Private

To make any content private, follow these steps. See Also: "[Making Assets Private](#)" on page 662

1. In the Workarea, navigate to the folder that contains the content you want to make private.
2. Click the content item you want to make private.
3. Click the View Permissions button (.
4. If necessary, uncheck the box that says **Allow this object to inherit permissions**. (Inheritance must be disabled before you can make the content private.)
5. Check the box that says **This content is private and is NOT viewable on the public Web site**.
6. A confirmation message is displayed.
7. Click **OK**.

The content is now private.

## Making Assets Private

If assets are set to private, they are handled like other private content with one important exception: Unless you follow the procedure described below, anyone can access the asset by *typing the URL of the asset into the browser's address field*.



If a user attempts to access the asset in any other way (such as, linking to it from a Web page), the regular methods of making content private work. See ["Making a Folder Private" on page 661](#) and ["Making Content Private" on page 662](#).

To make assets private even if someone types their URL into the browser's address field, follow these steps.

**NOTE**

If site users receive a 404 Page Not Found Error when trying to view private assets, make sure you have completed all of the steps below.

1. In the web.config file, change the `ek_RedirectorInstalled` key to `True`.

```
<add key="ek_RedirectorInstalled" value="True"/>
```

2. Ensure the following line is uncommented. It is uncommented by default. To do so, remove dashes and the exclamation point (!):

```
<!--add verb="*" path="*/privateAssets/*.*" type="Ektron.ASM.FileHandler.AssetHttpHandler"/-->
```

3. Add the following code directly below the line from the previous step.

```
<add verb="*" path="default.aspx" type="URLRewrite.StaticFileHandler,Ektron.Cms.URLRewriter"/>
```

Adding this line prevents `default.aspx` from producing a 404 Page Not Found error when you add wildcard mapping in IIS.

4. Enable the `httpHandlers` section of `Web.config`. To do so, uncomment the following tags by removing dashes and the exclamation point (!):

To uncomment the opening tag, remove the characters in red below:

```
<!--add verb="*" path="*.asmx"
```

```
type="System.Web.Services.Protocols.WebServiceHandlerFactory,
System.Web.Services, Version=1.0.5000.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a"
validate="false"/>
```

To uncomment the closing tag, remove the characters in red below:

```
<add verb="*" path="*" type="URLRewrite.URLRewriter,Ektron.Cms.URLRewriter" /-->
</httpHandlers>
```

5. Update the IIS Application Mappings. See ["Updating IIS Application Mappings for Windows 2000 and XP" on page 553](#) and ["Updating IIS Application Mappings for Windows 2003 Server" on page 558](#).



6. Make either the asset (content) or its folder private. See ["Making a Folder Private" on page 661](#) or ["Making Content Private" on page 662](#).



# Custom User Properties

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

Examples of Custom User Properties might be:

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

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

- ["The View Custom Properties Screen" on page 666](#)
- ["Adding a Custom User Property" on page 667](#)
- ["Editing a Custom User Property" on page 677](#)
- ["Deleting a Custom User Property" on page 678](#)
- ["Setting the Custom User Properties Order" on page 679](#)
- ["Using Custom User Properties for Non-English Languages" on page 681](#)







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

## The View Custom Properties Screen

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



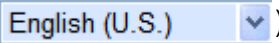
- add a new custom property. See ["Adding a Custom User Property" on page 667](#)
- edit a custom property. See ["Editing a Custom User Property" on page 677](#)
- reorder the way custom properties appear on the users and membership users screen. See ["Setting the Custom User Properties Order" on page 679](#)
- work with custom properties in different languages. See ["Using Custom User Properties for Non-English Languages" on page 681](#)

Below is an example of the View Custom Properties screen.

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

The table below describes the View Custom Properties screen.



| Buttons, Dropdown Boxes or Fields   | Description  | For More Information   |
|---|--|--|
| Add button (  )                          | Add custom user properties.  | <a href="#">"Adding a Custom User Property" on page 667</a>              |
| Reorder button (  )                      | Change the order in which the custom properties appear on the Users or Membership User Properties screen.  | <a href="#">"Setting the Custom User Properties Order" on page 679</a>   |
| Language Selection Dropdown List<br>(  ) | Allows you to view custom user properties by language.   | <a href="#">"Viewing Custom User Properties By Language" on page 684</a> |
| Title Field   | Displays the title of a custom user property. When viewing by language, the title changes to the title used in a specific language if it has been defined. Click a <b>Title</b> to edit the property.<br><br><u>Note: The title and label are the same field. On some screens, <b>Title</b> is used; on others <b>Label</b> is used.</u> | <a href="#">"Editing a Custom User Property" on page 677</a>             |
| Type Field  | Shows the Type that was chosen for a custom user property.   | <a href="#">"Type" on page 669</a>                                       |
| Required Field  | Shows whether the field is required.   | <a href="#">"Required" on page 669</a>                                   |

## Adding a Custom User Property

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



The screenshot shows the 'User Properties' dialog box in the Ektron CMS400.NET interface. The dialog is titled 'User Properties' and is highlighted with a red rounded rectangle. It contains several input fields for user information: Birthday, Phone Number, Street Address, State Code, Zip Code (with a dropdown arrow), and Credit Card Info. To the left of the dialog is a sidebar with a tree view containing 'Settings', 'Users', 'User Groups', 'Help', and 'Configuration'. Below the tree is a list of icons for 'Content', 'Forms', 'Library', 'Modules', and 'Settings' (which is highlighted). To the right of the dialog, text indicates 'This User currently belongs to these User Groups: • Everyone' and lists 'Task permissions' as 'Create Task' and 'Redirect Task'.

This User currently belongs to these User Groups:

- Everyone

**Task permissions**

Create Task  
Redirect Task

**User Properties**

Birthday

Phone Number


Street Address

State Code

Zip Code

Credit Card Info

Follow these steps to add a custom user property.

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



**Add Custom Property**

Label:

Type: String ▼

Input Type: TextBox ▼

Validation: No Validation ▼

Message:

5. Complete the screen according to the table below.

## The Custom User Properties Fields

The following table describes the custom user properties fields

| Field      | Description   | More Information                   |
|------------|---|------------------------------------|
| Label      | Title of the property you are adding. For example, Employee ID.<br><u>Note: The Title and Label are the same field. On some screens the word Title is used, on others the word Label is used.</u> |                                    |
| Type       | The property's data type. Once a type is selected and saved, you cannot change it. You must delete the custom property and re-enter it.   | "The Type Field" on page 670       |
| Required   | Forces the user completing the screen to enter a value. If you make the property a requirement, a red asterisk appears next to its label. For example:<br><br>*Employee ID <input type="text"/>   |                                    |
| Input Type | Choose how a user is able to enter a response to the property.  | "The Input Type Field" on page 671 |
| Validation | Ensures the right type of data is entered in a text box or text area.   | "Validation" on page 672           |



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

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

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

### ***The Type Field***

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


| Types          | Description                                       | Input Types Available   | Validations Available  |
|----------------|---|---|--|
| <b>String</b>  | Accepts all alpha, numeric, and symbol characters | <ul style="list-style-type: none"> <li>Text Box</li> <li>Text Area</li> <li>Hidden</li> </ul> | All validations<br>See Also:<br><a href="#">"Validation" on page 672</a> |
| <b>Boolean</b> | Accepts a true or false response                  | <ul style="list-style-type: none"> <li>Check Box</li> </ul>                                   | None   |




| Types                   | Description  | Input Types Available                                      | Validations Available  |
|-------------------------|--|--|--|
| <b>Numeric</b>          | Accepts numbers only   | <ul style="list-style-type: none"> <li>Text Box</li> </ul> | <ul style="list-style-type: none"> <li>No Validation</li> <li>Cannot be blank</li> <li>Numeric Only</li> <li>U.S. Zip Code</li> <li>Dollar Amount</li> </ul> |
| <b>Date</b>             | Only a date can be entered.  | <ul style="list-style-type: none"> <li>Text Box</li> </ul> | <ul style="list-style-type: none"> <li>No Validation</li> <li>Cannot be blank</li> <li>Date Only</li> </ul>  |
| <b>SelectList</b>       | Select a response from a list of choices.<br>See Also: <a href="#">"SelectList Field" on page 674</a>  | NA   | NA   |
| <b>Multi SelectList</b> | Select any number of responses from a list of choices. See Also: <a href="#">"MultiSelectList Field" on page 676</a>   | NA   | NA   |
| <b>Category</b>         | A system-defined type that appears when the first subscription is created. One entry covers all subscriptions.<br>See Also: <a href="#">"Defining Subscriptions" on page 877</a> . | NA   | NA   |

### The Input Type Field

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

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



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

## Validation

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

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



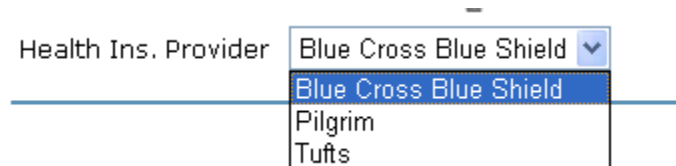
| Validation                                   | Description  | An Option When Used With  |
|--|--|---|
| <b>Date Only</b>                             | The response must be entered in the following format: mm/dd/yyyy.  | <ul style="list-style-type: none"> <li>String</li> <li>Date</li> </ul>    |
| 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



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

### SelectList Field

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



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



**Add Custom Property**

Label:

Type: **SelectList** ▼

Add items you want to display in select list

Text:

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

### Completing a SelectList Field Entry

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

You can then

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

### Using the First List Item to Prompt a Response

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

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



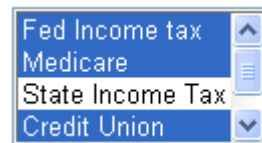
Properties screens. The user completing the screen must choose any selection other than the first item. If he tries to file the screen without choosing a different item, the following error message appears:

**Please fill in all required fields (\*)**

### ***MultiSelectList Field***

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

Deductions



Selected items are indicated by a blue background.

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



**Add Custom Property**

Label:

Type: **MultiSelectList** ▼

Add items you want to display in select list

Text:

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

For information about completing the screen, see ["Completing a SelectList Field Entry" on page 675](#).

## Editing a Custom User Property

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

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

To learn how to:

- edit a custom user property. See ["Editing a Custom User Property" on page 678](#).
- delete a custom property. See ["Deleting a Custom User Property" on page 678](#).
- create a custom property for a non-English language. See ["Create a Custom User Property for a Non-English Language" on page 681](#).



## Editing a Custom User Property

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

Follow these steps to edit a custom user property.

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

For descriptions of these fields, see ["The Custom User Properties Fields" on page 669](#)


---

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

---

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

---

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


## Deleting a Custom User Property

If you delete a custom user property, it is removed from all users and membership users. Any information that has been collected about users and membership users for that property will be lost. In

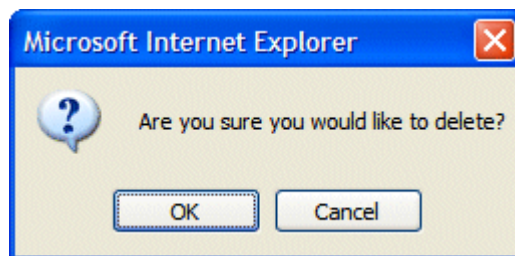


addition, any language versions of the custom user property are deleted.

Follow these steps to delete a custom user property.

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


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



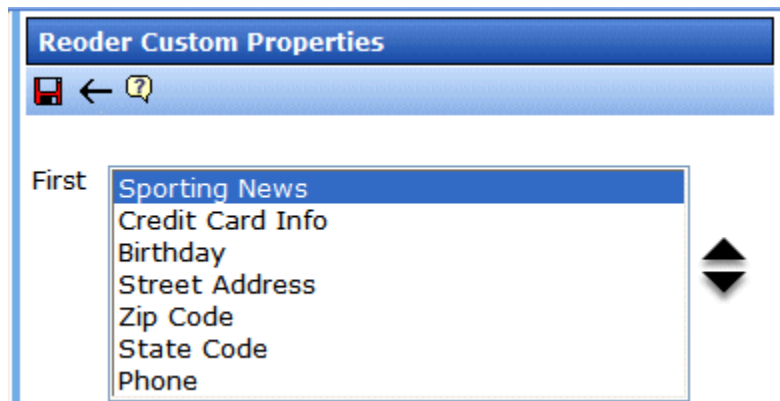
4. Click **OK**.
5. The View Custom Properties screen appears, and the property is no longer available.



## Setting the Custom User Properties Order

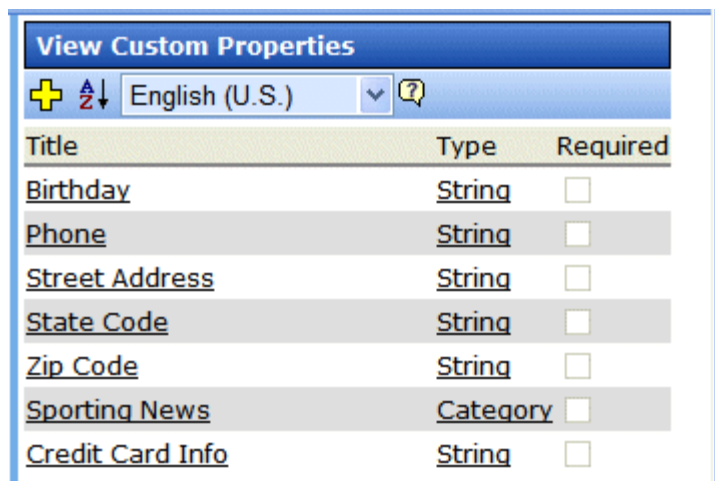
From the View Custom Properties screen, you can set the order in which the properties appear on the User and Membership Users Properties screen. To set the custom user properties order, complete these steps.

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





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





**User Properties**

Birthday

Phone

Street Address

State Code

Zip Code

☐ Basketball

Sporting News ☐ Football

☐ Hockey

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

Credit Card Info

## Using Custom User Properties for Non-English Languages

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

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

### Create a Custom User Property for a Non-English Language

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



**IMPORTANT!**

All custom user properties in languages other than English are tied to the English version of the property. If you delete the English version of the property, all other language versions of the properties are deleted also. However, you can remove a non-English language version of the custom properties without deleting the English version. See ["Removing a Non-English Custom User Property Title"](#) on page 682

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

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



4. The Translate Custom Property Label screen appears.
5. Enter a **Label** for the property in the language you have chosen. For example, if you are creating a French version of a Birthday custom user property, you would enter Anniversaire in the label text field. For information on the Label property, see ["Label"](#) on page 669
6. Click the **Save** button (💾).

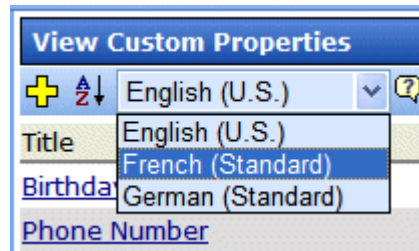
## Removing a Non-English Custom User Property Title

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

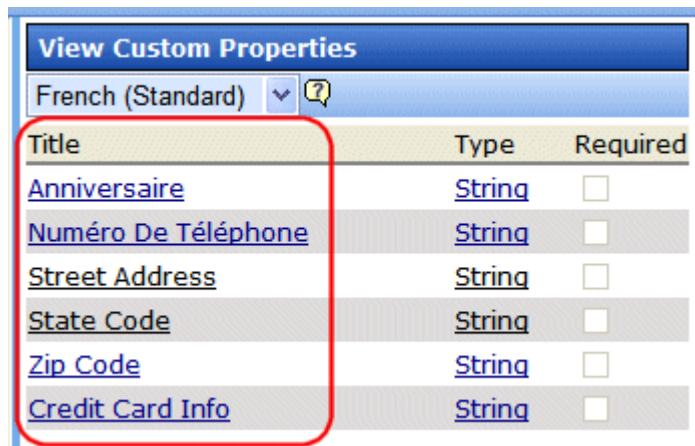
1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.




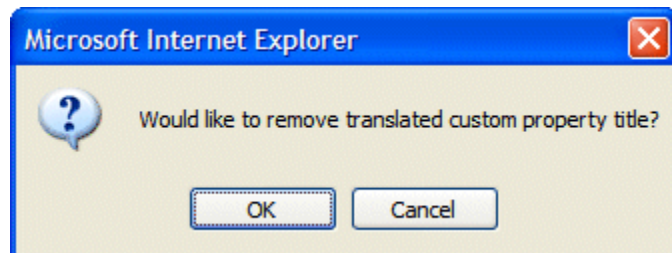
- Choose the language in which the custom user property appears from the **Language Dropdown Box**.




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



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



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



**WARNING!**

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

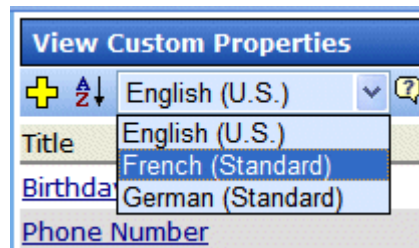
## Viewing Custom User Properties By Language

From the View Custom Properties screen, you can view the custom users properties by languages. When viewing by languages, it is important to remember that if there is only an English version of the property, the English version appears in all the languages.

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

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


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



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



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

| View Custom Properties  |                        |                          |
|---|------------------------|--------------------------|
| French (Standard)  |                        |                          |
| Title   | Type                   | Required                 |
| <a href="#">Anniversaire</a>  | <a href="#">String</a> | <input type="checkbox"/> |
| <a href="#">Numéro De Téléphone</a>   | <a href="#">String</a> | <input type="checkbox"/> |
| <a href="#">Street Address</a>  | <a href="#">String</a> | <input type="checkbox"/> |
| <a href="#">State Code</a>  | <a href="#">String</a> | <input type="checkbox"/> |
| <a href="#">Zip Code</a>  | <a href="#">String</a> | <input type="checkbox"/> |
| <a href="#">Credit Card Info</a>  | <a href="#">String</a> | <input type="checkbox"/> |



# Setting Permissions

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

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

Permissions are explained through the following topics:

- ["Who Is Authorized to Set Permissions" on page 686](#)
- ["Setting Permissions through the Permissions Table" on page 686](#)
- ["Inheritance" on page 688](#)
- ["Standard & Advanced Permissions" on page 688](#)
- ["Setting Permissions for a Content Folder" on page 690](#)
- ["Setting Permissions for Content" on page 693](#)

## Who Is Authorized to Set Permissions

Only Ektron CMS400.NET administrators and users identified on the Manage Members for Role: Folder User Admin screen can set permissions. See Also: ["Using the Roles Screens" on page 705](#)

## Setting Permissions through the Permissions Table

**IMPORTANT!**

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




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

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

#### NOTE




You can use the Roles screens to assign additional permissions that are not defined in the Permission Table, such as the ability to create tasks. See Also: "Defining Roles" on page 704

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

#### Best Practice





If you need to assign multiple users the same permission, Ektron recommends placing them in a user group and assigning the group to the Permission Table. If you assign too many users in the Permission Table, your system's response time may degrade.

View Permissions for Folder "abc"

☐ Allow this object to inherit permissions.
   
☐ The content in this folder is private and is NOT viewable on the public Web site.

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

| User or Group Name   | Read Only | Edit | Add | Delete | Restore | Library<br>Read Only | Add<br>Images | Add<br>Files | Add<br>Hyperlinks | Overwri<br>Librai |
|--|-----------|------|-----|--------|---------|----------------------|---------------|--------------|-------------------|-------------------|
|  <a href="#">admin</a>          | x         | x    | x   | x      | x       | x                    | x             | x            | x                 | x                 |
|  <a href="#">jedit</a>          | x         | x    | x   |        |         |                      |               |              |                   |                   |
|  <a href="#">Administrators</a> | x         | x    | x   | x      | x       | x                    | x             | x            | x                 | x                 |
|  <a href="#">Everyone</a>       | x         |      |     |        |         |                      |               |              |                   |                   |



## Inheritance

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

- Modify the permissions of the parent folder - see ["Setting Permissions for a Content Folder" on page 690](#)
- Break inheritance and add permissions to a folder

### Breaking Inheritance

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

1. Access the Permissions Table for a content folder or content in your Workarea, as described in ["Accessing the Permissions Table" on page 690](#).
2. Remove the check mark from the box that says **Allow this object to inherit permissions**.
3. A confirmation message appears.
4. Click **OK**.

### Restoring Inheritance

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

1. Access the Permissions Table as described in ["Accessing the Permissions Table" on page 690](#).
2. Place a check in the box that says **Allow this object to inherit permissions**.
3. A confirmation message appears.
4. Click **OK**.

## Standard & Advanced Permissions

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

- Standard Permissions - basic functions



- Advanced Permissions - administrator level functions

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

| Category        | Permission         | Allows user/user group to perform this action on content in selected folder  |
|-----------------|--------------------|--|
| <b>Standard</b> | Read Only          | View content   |
|                 | Edit               | Edit content   |
|                 | Add                | Add content  |
|                 | Delete             | Delete content   |
|                 | Restore            | Restore old versions of content  |
|                 | Library Read Only  | View items in the corresponding library folder<br><i>See Also: "Managing Library Items" on page 173</i>                        |
|                 | Add Images         | Upload images to the corresponding library folder  |
|                 | Add Files          | Upload files to the corresponding library folder   |
|                 | Add Hyperlinks     | Add hyperlinks to the corresponding library folder   |
|                 | Overwrite Library  | Overwrite images and files to the corresponding library folder   |
| <b>Advanced</b> | Collections        | Manage collections <i>See Also: "Collections" on page 585</i>  |
|                 | Add Folders        | Add sub folders <i>See Also: "Search Content Folder" on page 69</i>  |
|                 | Edit Folders       | Edit folder properties <i>See Also: "Folder Properties" on page 43</i>   |
|                 | Delete Folders     | Delete the current folder or its subfolders  |
|                 | Traverse Folders   | View the subfolders under the main content folder. By default, the everyone user group has permission to view all subfolders.  |
|                 | Modify Preapproval | Set or update a folder's preapproval group. <i>See Also: "Automatic Creation of Tasks Associated with Content" on page 376</i> |





## Setting Permissions for a Content Folder

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






### Accessing the Permissions Table

To access the Permissions Table, follow these steps.

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





**View Permissions for Folder "abc"**

☐ Allow this object to inherit permissions.

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

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

| User or Group Name   | Read Only | Edit | Add | Delete | Restore | Library<br>Read Only | Add<br>Images | Add<br>Files | Add<br>Hyperlinks | Over<br>Libr |
|--|-----------|------|-----|--------|---------|----------------------|---------------|--------------|-------------------|--------------|
|  <a href="#">admin</a>          | x         | x    | x   | x      | x       | x                    | x             | x            | x                 | >            |
|  <a href="#">jedit</a>          | x         | x    | x   |        |         |                      |               |              |                   |              |
|  <a href="#">Administrators</a> | x         | x    | x   | x      | x       | x                    | x             | x            | x                 | >            |
|  <a href="#">Everyone</a>       | x         |      |     |        |         |                      |               |              |                   |              |



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



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

### ***Actions You Can Perform from the Permissions Table***

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

| Action  | How to perform it  | For more information, see  |
|---|--|--|
| View advanced permissions                               | Click <b><u>View Advanced Permissions</u></b>  | "Standard & Advanced Permissions" on page 688                          |
| Add user or group to permission table                   | Click   | "Adding a User or User Group to the Permissions Table" on page 692     |
| Remove user or group from permission table              | Click   | "Deleting Users or User Groups from the Permissions Table" on page 693 |
| View membership users                                   | Click <b><u>View MemberShip users</u></b>  | "Community Folders" on page 50   |
| Have this folder inherit permissions from parent folder | Check box next to <b>Allow this object to inherit permissions</b>  | "Inheritance" on page 688  |
| Make content in this folder private                     | Check box next to <b>The content in this folder is private and can only be viewed by authorized users and members</b><br><br><u>Note: If <b>Allow this object to inherit permissions</b> is checked, you cannot check this box. In that case, this folder is inheriting this setting from its parent folder.</u> | "Private Content" on page 660  |




## Adding a User or User Group to the Permissions Table

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

**NOTE** Before adding users or groups, you must break inheritance. See ["Inheritance"](#) on page 688.

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

**NOTE** You can only assign Read Only permission to a Membership user or user group. See *Also*: ["Membership Users and Groups"](#) on page 645

1. Access the Permissions Table for the content folder or content, as described in ["Accessing the Permissions Table"](#) on page 690.
2. Click the Add button (  ).
3. The Add Permissions screen appears. Only users and groups not assigned to the Permissions Table appear.
4. Click a user or group to add to the Permissions Table.
5. The Add Permissions screen appears.
6. Check the standard and advanced permissions for the user or group. Refer to ["Standard & Advanced Permissions"](#) on page 688 for a description of permission options.

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

7. Click the Save button (  ).

## Editing User or User Group Permissions

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

1. Access the Permissions Table for the content folder or content, as described in ["Accessing the Permissions Table"](#) on page 690.




2. Click the user or group for which you want to edit permissions.
3. The Edit Permissions screen appears.
4. To assign any permission, check the box. To remove any permission, uncheck the box.

**NOTE** Remember to toggle between standard and advanced permissions.

5. Click the Update button ().

## Deleting Users or User Groups from the Permissions Table


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

1. Access the Permissions Table for the content folder or content, as described in ["Accessing the Permissions Table" on page 690](#).
2. Click the Delete button ().
3. The Remove Permissions screen appears.
4. Click the user or group to remove from the Permissions Table.
5. A confirmation message appears.
6. Click the **OK** button.

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

## Setting Permissions for Content

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

1. Access the content by navigating to its folder, selecting a language, and clicking on it.
2. Click the View Permissions button (.



3. Uncheck the box next to **Allow this object to inherit permissions**.
4. A confirmation message appears. Press **OK**.
5. You can perform any action on the content that you can perform on a folder. These options are described in "[Actions You Can Perform from the Permissions Table](#)" on page 691.



# Setting Approval Chains

## What is an Approval Chain?

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

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

An approval chain can include any number of users or user groups. However, to be eligible, a user or user group *must* have permissions to the content folder or content item. See *Also*: ["Setting Permissions" on page 686](#)

---

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

---

You can set up an approval chain for a content folder or a content item as well as a language. See *Also*: ["Multi-Language Approval Chains" on page 807](#)

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

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

- ["Examples of Approval Chains" on page 696](#)
- ["Inheritance and the Approval Chain" on page 696](#)
- ["Creating an Approval Chain for a Content Folder" on page 696](#)
- ["Editing an Approval Chain For Content" on page 701](#)



- ["The Approval Method" on page 701](#)

**NOTE**

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

---

## Examples of Approval Chains

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

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

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

## Inheritance and the Approval Chain

By default, every content folder and item inherits the approval chain from its parent folder. To modify an approval chain, either modify the parent's approval chain or break inheritance. This procedure is described in ["Inheritance" on page 688](#).

## Creating an Approval Chain for a Content Folder

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



See Also:

- ["Viewing a Folder's Approval Chain" on page 697](#)
- ["Adding Approvers" on page 698](#)
- ["Editing the Approval Order" on page 699](#)
- ["Deleting Approvers" on page 700](#)








## Viewing a Folder's Approval Chain


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

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

View Approvals for the Folder "Content"






Content Language: English (U.S.)

**Approval Method:**  
Do Not Force All Approvers

| User or Group Name  | ID | Approval Order |
|---|----|----------------|
|  jedit | 14 | 1              |





This screen shows the following information about the approval chain.

- its language
- every user and user group in the approval chain
- the approval order
- the approval method (See also: ["Changing the Approval Method" on page 702](#))
- toolbar buttons for modifying the approval chain and method

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




From this screen, you can perform these actions.

| Action  | Button  | See this section for details                                 |
|---|---|--|
| Add approvers                                   |  | <a href="#">"Adding Approvers" on page 698</a>               |
| Remove approvers                                |  | <a href="#">"Deleting Approvers" on page 700</a>             |
| Change the order of users in the approval chain |  | <a href="#">"Editing the Approval Order" on page 699</a>     |
| Change the approval method                      |  | <a href="#">"Changing the Approval Method" on page 702</a>   |
| Change the language of the approval chain       | <b>Content Language</b>   | <a href="#">"Multi-Language Approval Chains" on page 807</a> |

## Adding Approvers

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

1. Access the approval table, as described in ["Viewing a Folder's Approval Chain" on page 697](#).
2. Select the language of the approval chain. The chain only applies to content in this language.
3. Click the Add button (  ).
4. The Add Approvals screen appears.

### NOTE

[Only users and user groups with permissions to the folder appear. See "Adding a User or User Group to the Permissions Table" on page 692 for more information.](#)

#### Best Practice

Ektron suggest assigning user groups to the approval chain, as opposed to individual users. In this way, if someone is out of the office for a day, another group member can still approve the content.



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

**NOTE**

If you assign a user group to an approval chain, only one member of the group needs to approve the content, not all members.


## Editing the Approval Order

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

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

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

To edit the approval order, follow these steps.

1. Access the approval table as described in "[Viewing a Folder's Approval Chain](#)" on page 697.
2. Select the language.
3. Click the Reorder button (  ).
4. The Edit Approval Order screen appears.



- Click the user or group whose approval order you want to change.



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



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

## Deleting Approvers


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

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

- Access the approval table as described in "[Viewing a Folder's Approval Chain](#)" on page 697.
- Select the language.
- Click the Remove button (🗑️).
- The Remove Approval screen appears.
- Click the user or group that you want to remove from the approval chain.
- A confirmation message appears.
- Click **OK**.











## Editing an Approval Chain For Content

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

### Viewing an Approval Chain for Content

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

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

| View Approvals for the Folder "Content"  |    |                |
|--|----|----------------|
|      Content Language: English (U.S.) |    |                |
| <b>Approval Method:</b>  |    |                |
| Do Not Force All Approvers   |    |                |
| User or Group Name   | ID | Approval Order |
|  jedit  | 14 | 1              |

After viewing the content's approval chain, you can perform the same actions on it as you can perform on a folder. This list of actions is available from ["Actions You can Perform from the Approvals Screen"](#) on page 697.

## The Approval Method

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



Two approval methods are available.

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

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


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

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


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

## Changing the Approval Method

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

1. Access the approval table, as described in "[Viewing a Folder's Approval Chain](#)" on page 697.
2. Click the Edit button ().
3. The Edit Approval Method screen appears.



4. Select an approval method by clicking the radio button.
5. Click the Save button ().



# Defining Roles

**Ektron CMS400.NET** contains an Administrators User Group. Any user who is a member of that group automatically has full administrator privileges. See Also: ["Guidelines for Using The Folder-User Admin Role" on page 707](#)

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

## Best Practice

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

## NOTE

The Permissions Table lets you control which users can manage a folder's properties, its content, library items, and create or edit collections. (See Also: ["Setting Permissions" on page 686](#)) So, together, the Roles feature and the Permission Table give you the ability to assign administrative privileges to users who are not members of the Administrators group.

This section explains the use of Roles through the following topics.

- ["Using the Roles Screens" on page 705](#)
- ["Guidelines for Using The Folder-User Admin Role" on page 707](#)
- ["List of Administrator Privileges" on page 707](#)



## Using the Roles Screens

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

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

The following table describes the Roles screens.

| Screen                    | Lets you give a user or user group the ability to   | For more information, see  |
|---------------------------|---|--|
| Alias-Edit                | Assign a manual alias to content  | "Permissions for Manual Aliasing" on page 562                    |
| Calendar- Admin           | Create, edit and delete calendars   | "Calendar Permissions" on page 530                               |
| Collection and Menu Admin | Create, edit and delete Collections and Menus via the <b>Modules</b> tab.<br><br><u>Note: To manage permissions for creating collections and menus via the folder's New &gt; Collection or New&gt; Menu option, use folder permissions. See Also: "Setting Permissions" on page 686</u> | "Collection Permissions" on page 586; "Menu Feature" on page 597 |
| Collection Approver       | If approval is required for a collection, approve changes to it, including the deletion of a collection.  | "Setting up Approval for Collections" on page 589                |
| Metadata-Admin            | View, create and edit metadata definitions  | "Metadata" on page 115   |
| Business Rule Editor      | Create or edit Business Rules and Rulesets  | "Business Rules" on page 569                                     |
| Smart Forms Admin         | Create or edit Smart Forms  | "Working with Smart Forms" on page 182                           |
| Task Create               | Create tasks  | "Task Permissions" on page 366                                   |



| Screen                 | Lets you give a user or user group the ability to  | For more information, see   |
|------------------------|--|---|
| Task Delete            | Delete tasks   | <a href="#">"Task Permissions" on page 366</a>                        |
| Task Redirect          | Redirect tasks   | <a href="#">"Task Permissions" on page 366</a>                        |
| Taxonomy Administrator | Create and manage taxonomies   | <a href="#">"Taxonomy" on page 605</a>                                |
| Template Configuration | View, create, update, and delete system templates  | <a href="#">"Creating/Updating Templates" on page 72</a>              |
| User-Admin             | Create, view, edit, and delete users and user groups   | <a href="#">"Managing Users &amp; User Groups" on page 633</a>        |
| XLIFF-Admin            | Use the Language Xport feature, which copies content into XLIFF files that can be submitted to a translation agency.   | <a href="#">"Using the Language Export Feature" on page 794</a>       |
| Taxonomy               | View, create, update, and delete taxonomies and their categories   | <a href="#">"Taxonomy" on page 605</a>                                |
| Personalization        | Personalize a web page on your site  | <a href="#">"Permissions that Affect Personalization" on page 594</a> |
| Folder-User Admin      | View and edit folder properties. These users can update properties, permissions, the approval chain, metadata, Web alerts, purge history, etc.<br><br>For example, create a user group and give it permission to manage the top-level marketing folder. Members of the group can do everything to that folder and its subfolders, but lack authority over other folders.<br><br><i>See Also:</i> <a href="#">"Guidelines for Using The Folder-User Admin Role" on page 707</a> | <a href="#">"Folder Properties" on page 43</a>                        |
| Custom Permissions     | Would be used by a developer when extending <b>Ektron CMS400.NET</b> 's standard features.   |   |



## Guidelines for Using The Folder-User Admin Role

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

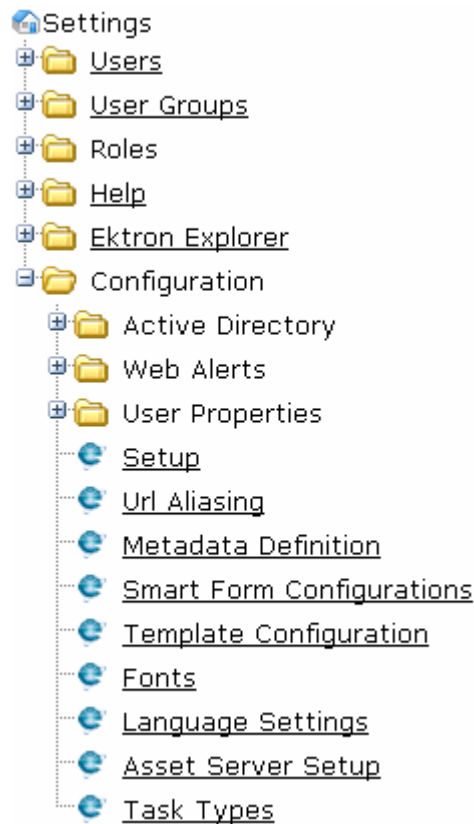
- After being identified on the Manage Members for Role: Folder User Admin screen, users or groups must also be given at least Read-Only permission for individual folders on the **Folder Properties > View Permissions for Folder** screen. See Also: ["Setting Permissions" on page 686](#)
- You *must* use the same identity on the Manage Members for Role: Folder User Admin and Folder properties screens. So, if a user group is listed for the role, use the same group when assigning folder permissions, not simply a group member. Conversely, if individual users are listed on the role screen, they must be specified in the folder permission.
- Ektron *strongly* recommends adding only user groups to the Folder User Admin role, not individual users.

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

## List of Administrator Privileges

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





Administrators can also

- edit folder properties (including Web alerts, metadata, permissions, and the approval chain)
- manually alias content
- add, edit, or delete a calendar
- create, view, edit, and delete metadata definitions
- create, view, edit, and delete taxonomies
- create, redirect, and delete tasks
- require a collection to go through an approval process
- export content for translation to another language using XLIFF
- perform all personalization functions



# Active Directory Feature

The Active Directory feature allows you to retrieve user and user group information from the Microsoft Windows Active Directory (AD) into Ektron CMS400.NET. As a result, you can administer user information from one place only, and users need to remember only one password/username combination to sign on to the network and Ektron CMS400.NET.

To learn more about Active Directory, see <http://www.microsoft.com/windowsserver2003/technologies/directory/activedirectory/default.mspx>.

This feature is described through the following top-level topics.

- "Setup Guidelines" on page 710
- "Implementing Active Directory Integration" on page 713
- "Active Directory Integration" on page 713
- "User Authentication Only Mode" on page 748
- "Logging into a System that Uses AD Integration" on page 752



# Setup Guidelines

**WARNING!** Ektron strongly recommends configuring a secure socket layer (SSL), especially if you are using Active Directory Integration. SSL encrypts passwords that are otherwise sent as clear text to the Ektron CMS400.NET server. See SSL Support in the **Ektron CMS400.NET** Setup Manual for more information.

The two ways to set up Active Directory are contrasted in the table below. Below the table are instructions for each setup option.

| Method           | When to Use   | How setup is done  |
|------------------|---|--|
| Advanced Domains | <ul style="list-style-type: none"> <li>You are using a firewall</li> <li>The <b>Ektron CMS400.NET</b> server need not be part of an Active Directory domain</li> <li>You are connecting to multiple Active Directory domains, even ones that do not see each other</li> </ul> | <b>Ektron CMS400.NET</b> Workarea. For setup instructions, see <a href="#">"Setting Up Active Directory via the Advanced Domains Method"</a> on page 710.                  |
| Legacy           | You are using auto discovery and Active Directory single signon.  | The domain connects to the AD domain within the web.config.<br>For setup instructions, see <a href="#">"Setting Up Active Directory via the Legacy Method"</a> on page 711 |

## Setting Up Active Directory via the Advanced Domains Method

1. Make sure each AD user to be used in Ektron CMS400.NET is defined correctly in the Active Directory. Remember that, when you enable AD integration, logon name and domain are copied from AD to Ektron CMS400.NET.



2. If you have multiple domains in your Active Directory Forest, decide if you want Ektron CMS400.NET to reference all domains or if you want to choose a specific one. (You will use this when completing the **Domain** field of the Active Directory Setup Screen.)
3. Set the following elements in the Web.config.
  - Set the `ek_ADEnabled` element to **true**. It should look like this:  

```
<add key="ek_ADEnabled" value="true"/>
```
  - Set the `ekADAdvanced` element to **true**. It should look like this:  

```
<add key="ekADAdvanced" value="true"/>
```
  - Set the `ek_AUTH_Protocol` element to **LDAP**. It should look like this:  

```
<add key="ek_AUTH_Protocol" value="LDAP"/>
```
4. Set up your domains on the Edit Domains screen. See ["The Edit Domains Screen" on page 727](#)
5. Configure the AD setup page. See ["The Active Directory Setup Screen" on page 731](#).
6. Assign AD groups to **Ektron CMS400.NET** user groups. See ["Copying User Groups from AD to Ektron CMS400.NET" on page 717](#)

## Setting Up Active Directory via the Legacy Method

1. Make sure each AD user to be used in Ektron CMS400.NET is defined correctly in the Active Directory. Remember that, when you enable AD integration, logon name and domain are copied from AD to Ektron CMS400.NET.
2. If you have multiple domains in your Active Directory Forest, decide if you want Ektron CMS400.NET to reference all domains or if you want to choose a specific one. (You will use this when completing the **Domain** field of the Active Directory Setup Screen.)
3. Set the following elements in the Web.config.
  - For the `authentication` element, change the value of the `impersonate` attribute to **false**. It should look like this:  

```
<identity impersonate="false" userName="" password="" />
```
  - Set the `ek_ADEnabled` element to **true**. It should look like this:



```
<add key="ek_ADEnabled" value="true"/>
```

- Make sure the `ekADAdvanced` element is set to **false**. (This is the default value.)
- Set the `ek_AUTH_Protocol` element to **GC**. It should look like this:

```
<add key="ek_AUTH_Protocol" value="GC"/>
```

- declare a domain account through `ek_adusername` and `ek_adpassword`. It should look like this:

```
<add key="ek_ADUsername" value="[username]@domain" />
```

```
<add key="ek_ADPassword" value="YourPasswordHere" />
```

**NOTE**

---

Before entering the password, encrypt it using Ektron's password encryption utility. To access that utility, go to the Windows **Start** menu > **All Programs** > **Ektron > CMS400 7.0 > Utilities > Encrypt Email Password**.

---

4. Configure the AD setup page. See ["The Active Directory Setup Screen" on page 731](#).
5. Assign AD groups to **Ektron CMS400.NET** user groups. See ["Copying User Groups from AD to Ektron CMS400.NET" on page 717](#)



# Implementing Active Directory Integration

The Active Directory feature has two implementation modes, described in the following table. Choose the mode that best meets your needs.

| Mode                         | Information Shared between AD and CMS   | How to Implement  | For more information, see                                   |
|------------------------------|---|---|---|
| user authentication only     | <ul style="list-style-type: none"><li>• user logon name</li><li>• domain</li><li>• password</li></ul>   | On the Active Directory Setup screen, check <b>Enable Active Directory authentication</b> .   | <a href="#">"User Authentication Only Mode" on page 748</a> |
| active directory integration | <ul style="list-style-type: none"><li>• user logon name</li><li>• domain</li><li>• password</li><li>• user's first and last name</li><li>• email address</li><li>• user groups</li><li>• user's group memberships</li></ul> | <p>On the Active Directory Setup screen, check <b>Enable Active Directory authentication</b> and <b>Enable Active Directory integration</b>.</p> <p>You may also want to check <b>Enable automatic addition of user from AD</b> and <b>Enable automatic addition of user to groups</b>.</p> | <a href="#">"Active Directory Integration" on page 713</a>  |

## Active Directory Integration

This section covers the following topics:

- ["How Information is Transferred from AD to Ektron CMS400.NET" on page 714](#)



- "Which Information is Transferred from AD to Ektron CMS400.NET" on page 714
- "Copying User Group Information from AD to Ektron CMS400.NET" on page 717
- "Associating User Information in AD with Ektron CMS400.NET" on page 723
- "The Screens of the Active Directory Feature in Active Directory Integration Mode" on page 727
- "Disabling AD Integration" on page 746

## **How Information is Transferred from AD to Ektron CMS400.NET**

Ektron CMS400.NET does not write to the AD – it only reads from it. This results in the following changes to how user information is handled within Ektron CMS400.NET.

- Once you enable AD integration, all changes to user and user group information must be made in the AD -- the Ektron CMS400.NET Edit User and User Group screens change to primarily view screens.
- When adding a new user or user group to Ektron CMS400.NET, you can only select users and groups in the AD. If the user or user group does not exist in the AD, create them there first, and then import the user or group into Ektron CMS400.NET.

## **Which Information is Transferred from AD to Ektron CMS400.NET**

Ektron CMS400.NET accesses the following AD user information.

- Authentication (password, user logon name, and domain) for signing in to Ektron CMS400.NET.  
The password is not stored in Ektron CMS400.NET – the application only refers to the password during sign in.
- User information, listed in the following table



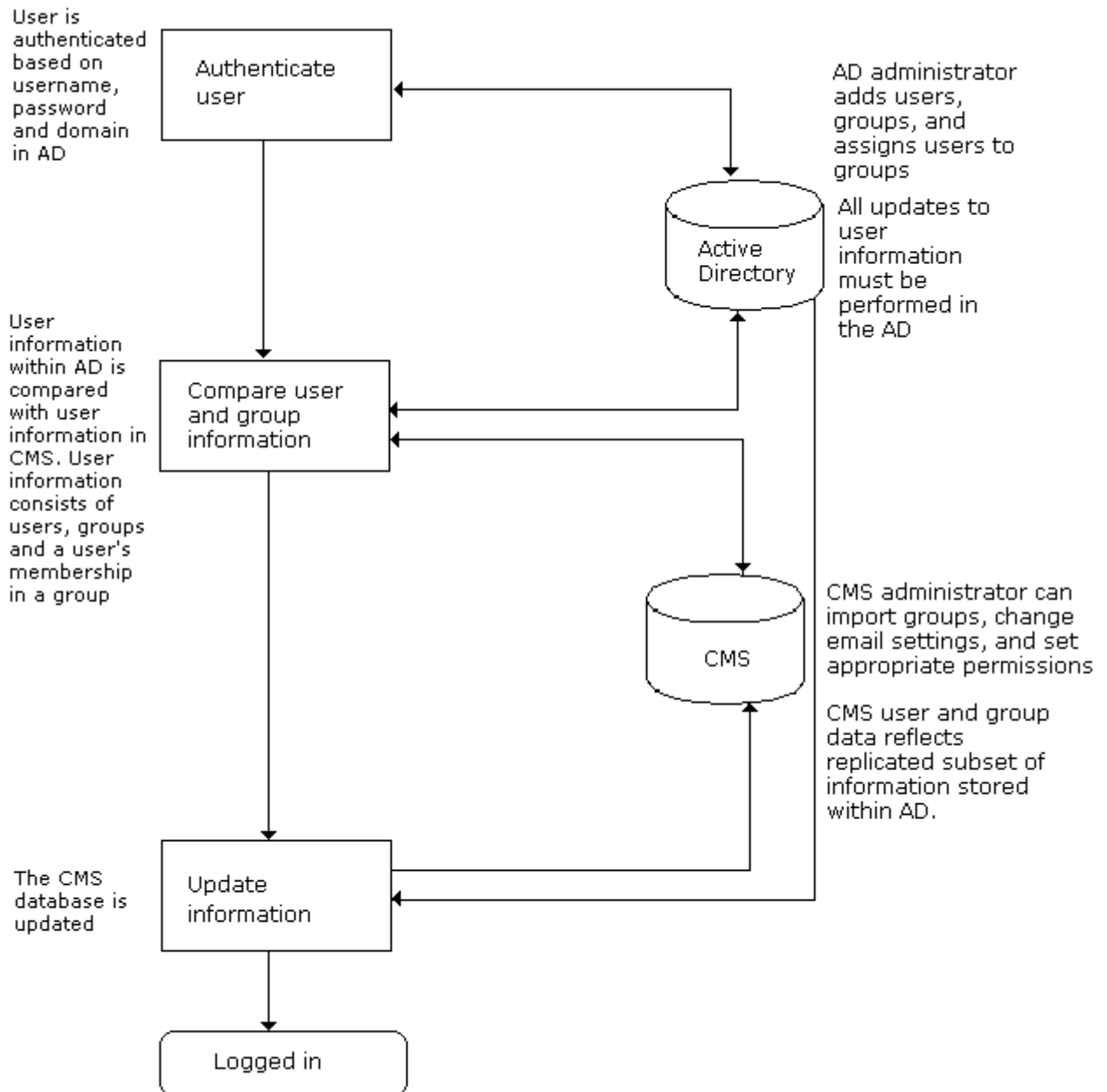
| Field in AD                        | AD attribute   | Corresponding field in Ektron CMS400.NET   |
|------------------------------------|----------------|--|
| User logon name (pre-Windows 2000) | sAMAccountName | Domain and Username<br><u>Note: Users can share a name in different domains. For example, juser/example.com and juser/example.net. Otherwise, user names must be unique.</u> |
| Last Name                          | sn             | Lastname   |
| First Name                         | givenName      | Firstname  |
| Email                              | mail           | email Address  |

- user group information, listed in the following table.

| Field in AD                   | AD attribute | Corresponding field in Ektron CMS400.NET  |
|-------------------------------|--------------|---|
| Group Name (pre-Windows 2000) | cn           | Domain and User group name<br><u>Note: User groups can share a name in different domains. For example, editors/example.com and editors/example.net. Otherwise, user group names must be unique.</u> |

The following diagram illustrates the components of the Active Directory feature.





## Overview of Active Directory Integration



## Copying User Group Information from AD to Ektron CMS400.NET

This section explains how a user's group membership is copied from the AD to the Ektron CMS400.NET system when integration is first enabled, and then on an ongoing basis. Once assigned to a group, the user automatically receives all Ektron CMS400.NET privileges and workflow responsibilities associated with it.

### NOTE

---

The Active Directory has two kinds of user groups: security and distribution. Ektron CMS400.NET does not distinguish between them – as long as a user is a member of either kind of group, group information is imported to Ektron CMS400.NET.

---

This section explains the following topics.


- "Copying User Groups from AD to Ektron CMS400.NET" on page 717
- "Associating a User's AD Group Information with Ektron CMS400.NET" on page 718
- "Mapping the Administrator Group" on page 720
- "User Belongs to AD Group that Does Not Exist in Ektron CMS400.NET" on page 721
- "User Belongs to Ektron CMS400.NET Group that Does Not Exist in AD" on page 721
- "Removing Users from a Group" on page 722
- "Adding User Groups" on page 722
- "Adding a User to a Group" on page 722
- "Replacing a User Group" on page 722
- "Deleting a User Group" on page 722

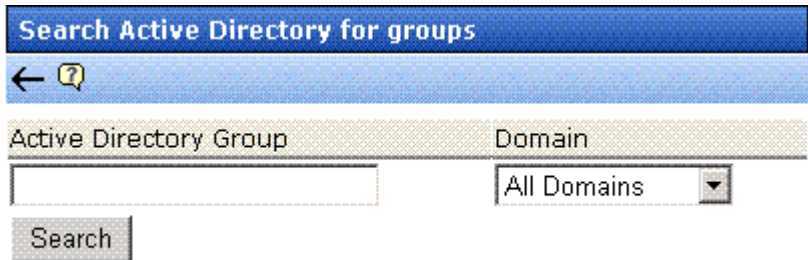
### ***Copying User Groups from AD to Ektron CMS400.NET***

Before using the AD integration feature, copy all AD groups you will use in your Web site into Ektron CMS400.NET. To do that, follow these steps.

1. From the left side of the Workarea, click **Settings > User Groups**.



2. Click the Add Groups button (  ).
3. The Search Active Directory for Groups screen appears.




4. From the **Domain** drop-down list, select the domain from which you want to add a user group.

---

**NOTE** The Active Directory Setup screen can restrict AD integration to one domain. If it does, you can only search within that domain.

---

5. Enter as much information as you know into the Active Directory Group field.
6. Click the **Search** button.
7. A new screen displays all groups that satisfy the search criteria.
8. Click the check box under the **Add** column to add the user group to Ektron CMS400.NET.
9. Click the Save button (  ).

## ***Associating a User's AD Group Information with Ektron CMS400.NET***

### **When Integration is First Enabled**

#### *Ektron CMS400.NET User Database Already Exists*

If **Auto Add User To Group** is checked (on the Active Directory Setup screen), a user's group membership is first copied from the AD to Ektron CMS400.NET when a user logs in or is added. At this time, any AD group memberships overwrite Ektron CMS400.NET group memberships *except* the Everyone group, to which all users belong.

---

**NOTE** The Everyone group, unlike other Ektron CMS400.NET groups, is not associated with an AD group. It is an all-encompassing group with no special permissions.

---



If a user belongs to an AD user group that does not exist in Ektron CMS400.NET, nothing happens because the feature assumes that all AD groups are not meaningful in Ektron CMS400.NET.

If a user belongs to an Ektron CMS400.NET user group that does not exist in AD, the discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. From these screens, you can copy the AD group information into Ektron CMS400.NET.


See Also: ["Associating User Group Membership with Active Directory User Group Membership" on page 739](#) and ["Associating Groups with Active Directory Groups" on page 740](#)

To learn how membership is updated from then on, see ["After Integration is Enabled" on page 719](#).

*Ektron CMS400.NET is Being Installed, so No User Groups Exist*  
Follow the procedure described in ["Copying User Groups from AD to Ektron CMS400.NET" on page 717](#) to copy AD user groups to Ektron CMS400.NET. As users in those groups are added to Ektron CMS400.NET, their group membership is copied from AD to Ektron CMS400.NET.

### After Integration is Enabled

A user's group membership is updated in Ektron CMS400.NET when all of the following are true:

- The **Enable automatic addition of user to groups** field is checked on the Active Directory Setup screen
- A user is added to Ektron CMS400.NET or his group membership changes in the Active Directory
- The user logs in or someone clicks on the Refresh button () on the user's View User Information screen

On the other hand, if **Enable automatic addition of user to groups** field is *unchecked*, you can add the user to groups and remove him from groups independently of his AD group memberships.



## Mapping the Administrator Group

On the Ektron CMS400.NET Active Directory Setup screen, you can identify an AD user group that maps to the Ektron CMS400.NET Administrator group.



### Active Directory Authentication is Enabled and Requires More Configuration.

#### Active Directory Installed:

##### Active Directory Authentication:

Enabled

##### Active Directory /LDAP Authentication:

Enabled

##### Auto Add User:

Enabled

##### Auto Add User To Group:

Enabled

#### User Property Association

| CMS Property | Active Directory Property |
|--------------|---------------------------|
| EmailAddr1   | mail                      |
| FirstName    | givenName                 |
| LastName     | sn                        |

#### CMS Administrator Group Association

##### AD Group Name @ AD Domain

Administrators @ planets.com

#### Domain

All Domains



Administrators have access to all functions documented in this documentation. (Unlike other Ektron CMS400.NET user groups, whose names are copied from the AD, the Administrator and Everyone group names cannot be changed.)

For example, if the AD has a user group named CMSAdmin whose members should have the privileges of Ektron CMS400.NET administrators, assign that group to Administrators on the Active Directory Setup screen. If such a group does not exist in AD yet, you should create it and then assign it on the Active Directory Setup screen.

Note that only one AD group can be mapped to the Ektron CMS400.NET Administrator group -- you cannot have an AD administrator group within each AD domain.

See Also: ["The Active Directory Setup Screen" on page 731](#)

### ***User Belongs to AD Group that Does Not Exist in Ektron CMS400.NET***

If user is assigned to an AD user group that does not exist in Ektron CMS400.NET, nothing happens. The AD integration feature assumes that an Ektron CMS400.NET administrator only maintains user groups that are meaningful to Ektron CMS400.NET, and not all AD groups may be meaningful to Ektron CMS400.NET.

**NOTE** [If a user belongs to a user group that is given Membership permissions, but also to a group that has CMS permissions, the user will only receive Membership permissions if logged into Ektron CMS400.NET.](#)

---

### ***User Belongs to Ektron CMS400.NET Group that Does Not Exist in AD***

If a user was a member of a user group in Ektron CMS400.NET before integration was enabled, but does not belong to that group in the AD, this discrepancy is flagged on the Active Directory Setup and Active Directory Status screens.

If the user should belong to the AD group, add the group membership within the AD. Then, refresh the user on these screens to copy AD group information into Ektron CMS400.NET.

See Also: ["Associating Groups with Active Directory Groups" on page 740](#)



## **Removing Users from a Group**

If you delete a user from an AD group, the user is automatically removed from the associated Ektron CMS400.NET group the next time the user's information is updated (as explained in ["Copying User Group Information from AD to Ektron CMS400.NET" on page 717](#)).

## **Adding User Groups**



Once AD integration is enabled, you can only add new user groups in the AD. In Ektron CMS400.NET, use the Search Active Directory for Groups screen to copy an AD user group to Ektron CMS400.NET. You can only add groups that do not already exist in Ektron CMS400.NET. This procedure is described in ["Copying User Groups from AD to Ektron CMS400.NET" on page 717](#).

## **Adding a User to a Group**

You cannot add a user to a user group within Ektron CMS400.NET -- you must do so in the Active Directory.

## **Replacing a User Group**

If you realize that you have associated the wrong AD user group with an Ektron CMS400.NET user group, you can replace the user group. Follow these steps to do so.

1. From the left side of the Workarea, click **User Groups**.
2. Click the user group that you want to replace.
3. Click the Associate Ektron CMS400.NET Group with Different AD Group button (.
4. Select a group to replace the group you selected in Step 2.
5. Click the Save button () to finalize the change.

## **Deleting a User Group**

### **Deleting a User Group in AD**

If you delete a user group in AD and users are assigned to the group within Ektron CMS400.NET, the group is not automatically deleted in Ektron CMS400.NET. However, any Ektron



CMS400.NET users who were members of the group are no longer members the next time their Ektron CMS400.NET information is updated. The discrepancy is flagged on the Active Directory Setup and Active Directory Status screens.

### **Deleting a User Group in Ektron CMS400.NET**

If you delete a user group in Ektron CMS400.NET and users are assigned to that group within AD, nothing happens. This is because the AD Integration Feature assumes that, in Ektron CMS400.NET, the administrator only sets up user groups that are meaningful to Ektron CMS400.NET, and some AD groups are not meaningful to Ektron CMS400.NET.

## **Associating User Information in AD with Ektron CMS400.NET**

A key component of the Active Directory Integration feature is to maintain consistent information between the AD and Ektron CMS400.NET. This section explains the transfer of user information between AD and Ektron CMS400.NET when integration is first enabled and on an ongoing basis.

This section covers the following topics.

- ["Automatically Copying AD User Information When Integration is First Enabled" on page 723](#)
- ["Automatically Copying AD User Information after Integration is Enabled" on page 725](#)
- ["Manually Adding AD User Information to Ektron CMS400.NET" on page 725](#)
- ["Editing User Information in Ektron CMS400.NET" on page 726](#)
- ["Deleting Users" on page 726](#)
- ["Replacing a User" on page 727](#)

### ***Automatically Copying AD User Information When Integration is First Enabled***



## Ektron CMS400.NET Database Already Implemented

If **Enable automatic addition of user from AD** is checked on the Active Directory Setup screen, user information is copied from the AD to Ektron CMS400.NET when that user logs in or is added to Ektron CMS400.NET.

See Also: ["The Active Directory Setup Screen" on page 731](#)

The first time the user information is copied, the AD information overwrites all Ektron CMS400.NET information. To learn how information is updated from then on, see ["Copying User Group Information from AD to Ektron CMS400.NET" on page 717](#).

If two or more AD users have the same Ektron CMS400.NET user logon name but different domains (for example, JDoe in Eng.Example.com and JDoe in Mkt.Example.com) and that username (JDoe) also exists in Ektron CMS400.NET, the Active Directory Setup and Active Directory Status screens indicate this discrepancy by the following message:

**CMS users need to be associated with Active Directory users.**

Click the message to proceed to the Associate Ektron CMS400.NET Users to Active Directory Users screen and associate an AD user with the Ektron CMS400.NET user.

See Also: ["Associating Ektron CMS400.NET Users with Active Directory Users" on page 738](#)

## Ektron CMS400.NET is Being Installed, so No User Database Exists

Go to the Search Active Directory for Users Screen and select AD users that will use Ektron CMS400.NET. When you add a user, the user information is copied from the AD to Ektron CMS400.NET.

See Also: ["The Search Active Directory for Users Screen" on page 743](#)


### NOTE

You can only select AD users that do not already exist in Ektron CMS400.NET. Also, the Active Directory Setup screen can restrict AD integration to one domain. If it does, you can only search for users within that domain.



## ***Automatically Copying AD User Information after Integration is Enabled***

User information is copied from the AD to Ektron CMS400.NET when either of these events occurs:

- the user logs in
- someone clicks the Refresh button () on the user's View User Information screen

See Also: ["The View User Information Screen" on page 741](#)


If a user's last name, first name, email field, or group membership changed in the AD, those changes are copied to Ektron CMS400.NET. However, if a user's *logon name* changed in the AD, that change is not copied to Ektron CMS400.NET because Ektron CMS400.NET uses that field to identify the user. Instead, that discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should proceed to the Associate Ektron CMS400.NET Users to Active Directory Users screen, where you can update the AD user associated with the Ektron CMS400.NET user.

See Also: ["Associating Ektron CMS400.NET Users with Active Directory Users" on page 738](#)

## ***Manually Adding AD User Information to Ektron CMS400.NET***

Before using the AD integration feature, add all AD users that will use your Web site to Ektron CMS400.NET. This can be done automatically, as explained ["Automatically Copying AD User Information When Integration is First Enabled" on page 723](#).


If you want to manually add an AD user to **Ektron CMS400.NET**, follow these steps.

1. From the left side of the Workarea, click **Users**.
2. Click the Add Users button ()



3. The Search Active Directory for Users screen appears.

| Username             | Firstname            | Lastname             | Domain      |
|----------------------|----------------------|----------------------|-------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | All Domains |

4. From the **Domain** pull-down list, select the domain from which you want to add a user.
5. Enter as much information as you know into the other fields.
6. Click the **Search** button.
7. A new screen displays all users that satisfy the search criteria.
8. Click the check box under the **Add** column to add users to Ektron CMS400.NET.
9. Click the Save button (.

### ***Editing User Information in Ektron CMS400.NET***

Because **Ektron CMS400.NET** does not write to the AD, you can only change the **User Language** and **Disable email Notifications** fields within the Ektron CMS400.NET Edit User screen. You must edit all other user fields from the AD.

### ***Deleting Users***

If a user is deleted in AD, Ektron CMS400.NET does not automatically delete the user. However, the user's login fails because he cannot be authenticated.

The user remains in Ektron CMS400.NET, and the discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should delete the user from Ektron CMS400.NET using the Delete User function.

See Also: ["Deleting a User" on page 640](#)

#### **NOTE**



If you mistakenly delete all users with administrative privileges, you can still sign in using the builtin user's username and password. For more information, see ["BuiltIn User" on page 33](#).



## Replacing a User

If you associate the wrong AD user with a Ektron CMS400.NET user, you can replace the user. If you do, all Ektron CMS400.NET privileges and workflow responsibilities assigned to the old user transfer to the new one.

Follow these steps to associate a Ektron CMS400.NET user with a new AD user.

1. From the left side of the Workarea, click **Users**.
2. Click the user you want to replace.
3. Click the Associate CMS User with Different AD User button ()
4. Select a user to replace the user you selected in Step 2.
5. Click the Save button (.

When you complete this procedure, the first user is deleted from Ektron CMS400.NET.

## The Screens of the Active Directory Feature in Active Directory Integration Mode

The Active Directory feature uses the following screens:

- "The Edit Domains Screen" on page 727
- "The Active Directory Setup Screen" on page 731
- "The Active Directory Status Screen" on page 736
- "The View Users Screen" on page 740
- "The View User Groups Screen" on page 743

This section explains how to use each screen.

### The Edit Domains Screen

Use this screen to identify each network domain you will use with **Ektron CMS400.NET**'s Active Directory feature. You would use this when you want to define domains, as opposed to using auto discovery to find them.



This feature is described through the following subtopics.

- "Enabling the Edit Domains Screen" on page 728
- "Accessing the Edit Domains Screen" on page 728
- "Fields of the Edit Domains Screen" on page 729
- "How Domains are Used" on page 730

### Enabling the Edit Domains Screen

To have the Edit Domains screen appear, set the following web.config file values as shown below.

| web.config value    | Setting   |
|---------------------|---|
| ek_ADEnabled        | True  |
| ek_ADAdvancedConfig | True  |
| ek_ADUsername       | blank (username entered in Edit Domains screen) |
| ek_ADPassword       | blank (username entered in Edit Domains screen) |
| ek_AUTH_Protocol    | LDAP  |

### Accessing the Edit Domains Screen

After you modify web.config as described above, access the Edit Domains screen by going to **Workarea > Settings > Configuration > Active Directory > Domains**.

Below is a sample of the screen.



**Edit Domains**

[Add New Domain](#) | [Remove Last Domain](#)

[Remove Domain](#)

**Domain DNS:** corp.company.com

**NetBIOS:**

☒ Same as domain name

**Username:** jsmith@corp.company.com *ex: name@domain.com*

**Password:** ●●●●●●●●

**Domain Controller IP:** 192.658.0.12

The screen lets you add new domains, modify existing ones, or delete obsolete ones.

### Fields of the Edit Domains Screen

When defining a domain, enter the following information.

| Field      | Description   |
|------------|---|
| Domain DNS | Enter the domain's DNS. Contact your server administrator for this information. For example, <b>corp.example.com</b> .  |
| NetBIOS    | If your NetBios is the same as your domain name, leave the checkbox box checked. Otherwise, uncheck the box and enter your NetBIOS setting. Contact your server administrator for this information. |



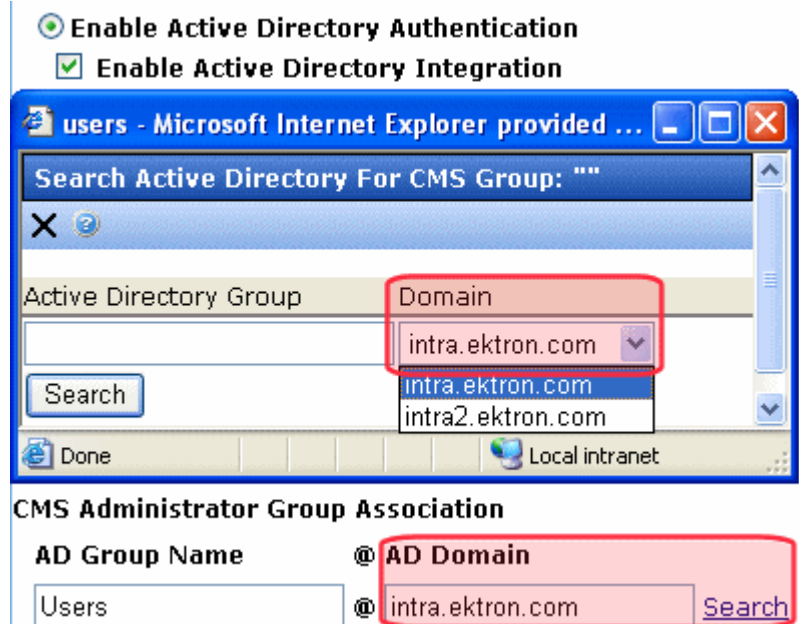
| Field                | Description  |
|----------------------|--|
| Username             | Enter the name of the user with permission to sign on to the domain server. The name is in the format <i>username@domainDNS</i> . For example, <b>jsmith@corp.example.com</b> .  |
| Password             | Enter the password of the user identified above.   |
| Domain Controller IP | Enter the IP address or DNS name of your domain controller.<br><u><a href="#">Note: If using Active Directory across a firewall, the IP address should be that of the firewall. On the firewall, traffic on port 389 (LDAP) should be allowed.</a></u> |

### How Domains are Used

Domains defined on this screen are referenced when defining the user group that maps to the hard coded Ektron CMS400.NET administrator group. See *Also: "The Screens of the Active Directory Feature in Active Directory Integration Mode" on page 727*

While defining the user group, first select a domain. **Ektron CMS400.NET** creates a selection list of Active Directory user groups in that domain. In this way, you must choose a user group within the selected domain.





### ***The Active Directory Setup Screen***

The Active Directory Setup screen (illustrated below) lets you enable and disable the Active Directory feature, as well as determine other aspects of AD management, such as whether users and groups are automatically updated. To access the screen, click **Settings > Configuration > Active Directory > Setup** from the left panel of the Workarea.





**Active Directory Authentication is Enabled and Requires More Configuration.**

**Active Directory Installed:**

**Active Directory/LDAP Authentication:**

Enabled

**Active Directory Integration:**

Enabled

**Auto Add User:**

Enabled

**Auto Add User To Group:**

Enabled

**User Property Association**

**CMS Property    Active Directory Property**

EmailAddr1    mail

FirstName    givenName

LastName    sn

**CMS Administrator Group Association**

**AD Group Name @ AD Domain**

Administrators    @ planets.com

**Domain**

All Domains

The following table describes the fields on the screen.



See Also: "Messages Near the Top of the Active Directory Setup Screen" on page 735

| Field  | Description  | For more information, see   |
|--|--|---|
| <b>Active Directory Installed</b>                |  |   |
| Disable Active Directory and LDAP Authentication | Disables the use of Active Directory and LDAP Authentication.  | "Disabling AD Integration" on page 746  |
| Enable LDAP Authentication                       | If enabled, you need to fill out the following five fields. These fields are explained in the LDAP Authentication chapter.   | "Enabling LDAP" on page 763   |
| LDAP Server                                      | Explained in LDAP Authentication chapter.  | "Enabling LDAP" on page 763   |
| Port   | Explained in LDAP Authentication chapter.  | "Enabling LDAP" on page 763   |
| Organization                                     | Explained in LDAP Authentication chapter.  | "Enabling LDAP" on page 763   |
| Domain   | Explained in LDAP Authentication chapter.  | "Enabling LDAP" on page 763   |
| Organizational Unit                              | Explained in LDAP Authentication chapter.  | "Enabling LDAP" on page 763   |
| Active Directory Authentication                  | If enabled, user authentication is functional, and you can enable the following three fields.  | "User Authentication Only Mode" on page 748<br>For information on LDAP, see "LDAP Authentication" on page 761 |
| Active Directory Integration                     | If enabled, the Active Directory feature is functional.<br><br><u>Note: Can only be enabled if Active Directory Authentication is enabled.</u>   | "Active Directory Integration" on page 713  |
| Auto Add User                                    | If enabled, user information is copied from the AD to Ektron CMS400.NET when that user logs in or when the user is added to Ektron CMS400.NET.<br><br><u>Note: Can only be enabled if Active Directory Integration is enabled.</u> | "Associating User Information in AD with Ektron CMS400.NET" on page 723                                       |

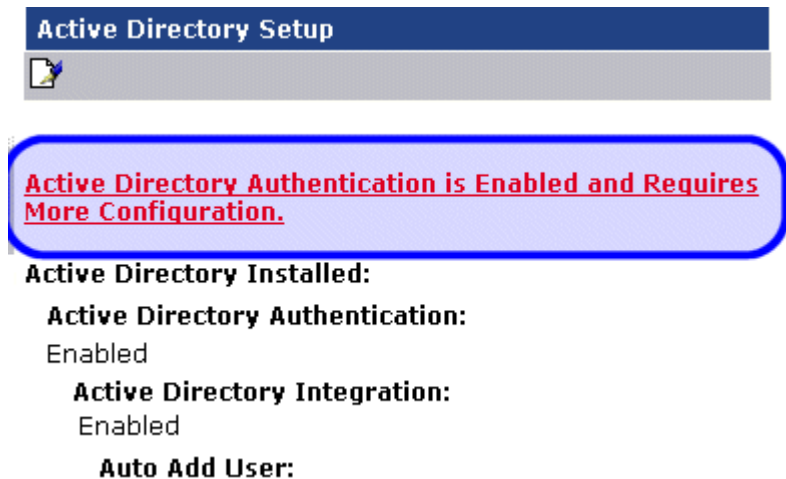


| Field  | Description  | For more information, see   |
|--|--|---|
| Auto Add User To Group                               | <p>If enabled, a user's group membership is first copied from the AD when a user logs in or is added.</p> <p><u>Note: Can only be enabled if Active Directory Integration is enabled.</u></p>  | "The Screens of the Active Directory Feature in Active Directory Integration Mode" on page 727  |
| <b>User Property Mapping</b>                         |  |   |
| FirstName  | Enter the Active Directory Property that maps to the user's first name in Ektron CMS400.NET. By default, this is set to <code>givenName</code> , but you can change it to any AD property.   | MSDN Library ( <a href="http://msdn.microsoft.com/library/default.asp">http://msdn.microsoft.com/library/default.asp</a> ) > Active Directory, ADSI and Directory Services > Directory Services > Active Directory > Active Directory Reference > Active Directory User Interface Mappings. |
| LastName   | Enter the Active Directory Property that maps to the user's last name in Ektron CMS400.NET. By default, this is set to <code>sn</code> , but you can change it to any AD property.   | same reference as FirstName (above)   |
| EmailAddr1   | Enter the Active Directory Property that maps to the user's last name in Ektron CMS400.NET. By default, this is set to <code>mail</code> , but you can change it to any AD property.   | same reference as FirstName (above)   |
| <b>Ektron CMS400.NET Administrator Group Mapping</b> |  |   |
| AD Group Name @ AD Domain                            | Enter the Active Directory user group and domain name that maps to the hard coded Ektron CMS400.NET administrator group. If you do not have an AD user group that includes all Ektron CMS400.NET administrators, you should create one and enter its name and domain here. | "Mapping the Administrator Group" on page 720   |



| Field  | Description   | For more information, see |
|--------|---|---------------------------|
| Domain | <p>If you want to restrict the search of new users and groups to one AD domain, select that domain.</p> <p>If you do, the Search Active Directory for Users and Search Active Directory for Groups screens let you search in the selected domain only.</p> <p>Also, if any Ektron CMS400.NET user or group names include a domain (for example, admin@saturn.example.com) that is excluded by your selection, those users/groups are flagged on the Active Directory Setup and Active Directory Status screens because the names now include an invalid domain.</p> |                           |

### Messages Near the Top of the Active Directory Setup Screen



| Message   | Explanation  |
|---|--|
| Active Directory Authentication is Enabled and Requires More Configuration. | Some Ektron CMS400.NET users are not associated with AD users. Also, if you are using full active directory integration mode, user groups and/or user group relationships may not be associated. |



| Message  | Explanation  |
|--|--|
| Active Directory Authentication is disabled, but needs further configuration | <p>Some Ektron CMS400.NET users and/or groups are no longer unique.</p> <p>This happens because, in the AD, users and groups can share a logon name as long as their domains are different.</p> <p>But, when AD authentication is disabled, two Ektron CMS400.NET users or groups can no longer share a name -- each must be unique.</p> |

If you see either message, click it. You proceed to the Active Directory Status screen, which helps you resolve the discrepancies.

See Also: ["The Active Directory Status Screen" on page 736](#)

### ***The Active Directory Status Screen***

Use the Active Directory Status screen to resolve the following discrepancies between Ektron CMS400.NET and AD.

- an Ektron CMS400.NET user needs to be associated with an AD user
- an Ektron CMS400.NET user group needs to be associated with an AD user group
- an Ektron CMS400.NET user's group membership need to be associated with the same AD user's group membership

To access the screen, click **Configuration > Active Directory > Status** from the left panel of the Workarea.



## Active Directory Status



Active Directory is Enabled and Requires More Configuration:

[CMS users need to be associated with Active Directory users.](#)

[CMS groups need to be associated with Active Directory groups.](#)

[CMS relationships need to be associated with Active Directory relationships.](#)

There are several reasons why such discrepancies may occur. To learn more about why

- an Ektron CMS400.NET user is not associated with an AD user, read ["Associating User Information in AD with Ektron CMS400.NET" on page 723.](#)
- an Ektron CMS400.NET user's group membership is not associated with the user's AD group membership, read ["Associating a User's AD Group Information with Ektron CMS400.NET" on page 718](#)
- an Ektron CMS400.NET group is not associated with an AD group, read ["The Screens of the Active Directory Feature in Active Directory Integration Mode" on page 727](#)

If you click any link on the Active Directory Status screen, a new screen appears that allows you to resolve the discrepancy. For information on how to use these screens, see the following topics.




- ["Associating Ektron CMS400.NET Users with Active Directory Users" on page 738](#)
- ["Associating User Group Membership with Active Directory User Group Membership" on page 739](#)
- ["Associating Groups with Active Directory Groups" on page 740](#)








## Associating Ektron CMS400.NET Users with Active Directory Users

If you click **CMS users need to be associated with Active Directory users** on the Active Directory Status screen, the Associate Ektron CMS400.NET Users with Active Directory Users screen appears (illustrated below). Use this screen to associate Ektron CMS400.NET users with AD users.

Associate CMS Users with Active Directory Users






5 users are displayed at a time [Show All](#)

| CMS Username   | AD Username          | @ | AD Domain            | Search                 | Delete                   |
|--|----------------------|---|----------------------|------------------------|--------------------------|
|  EkExplorerUser | <input type="text"/> | @ | <input type="text"/> | <a href="#">Search</a> | <input type="checkbox"/> |
|  jedit          | <input type="text"/> | @ | <input type="text"/> | <a href="#">Search</a> | <input type="checkbox"/> |
|  jmember        | <input type="text"/> | @ | <input type="text"/> | <a href="#">Search</a> | <input type="checkbox"/> |
|  jsmith         | <input type="text"/> | @ | <input type="text"/> | <a href="#">Search</a> | <input type="checkbox"/> |
|  tbrown       | <input type="text"/> | @ | <input type="text"/> | <a href="#">Search</a> | <input type="checkbox"/> |

If a user with the same username exists in the AD, that name and domain appear by default in the **AD Username** and **AD Domain** fields. If the user exists in the more than one AD domain (as illustrated in the first example above), select a domain from the pull-down list.

If there is no default and you know the AD user name to associate with an Ektron CMS400.NET user, enter that in the **AD Username** and **AD Domain** fields. If you do not know the AD username, click **Search** to find the user in the AD.

If you decide to change the username in AD to match the Ektron CMS400.NET username, make the change in the AD. Then, click the Refresh button () to update Ektron CMS400.NET and resolve the discrepancy.






Finally, if a user should not exist in Ektron CMS400.NET, click the box under the **Delete** column to delete the user from Ektron CMS400.NET.

After you make all necessary changes, click the Save button ().

### Associating User Group Membership with Active Directory User Group Membership


If you click **CMS relationships need to be associated with Active Directory relationships** on the Active Directory Status screen, the Associate Ektron CMS400.NET Relationships with Active Directory Relationships screen appears (illustrated below). Use this screen to coordinate Ektron CMS400.NET user group membership with AD user group membership.

The screen displays a user's group membership that exists in Ektron CMS400.NET, but does not exist in the AD.


| Associate CMS Relationships with Active Directory Relationships  |                 |                          |
|--|-----------------|--------------------------|
|    |                 |                          |
| Username   | User Group Name | Delete                   |
| Kristin@planets.com  | editors         | <input type="checkbox"/> |

See Also: "[Associating a User's AD Group Information with Ektron CMS400.NET](#)" on page 718

After viewing the discrepancy on the screen, you have two choices:

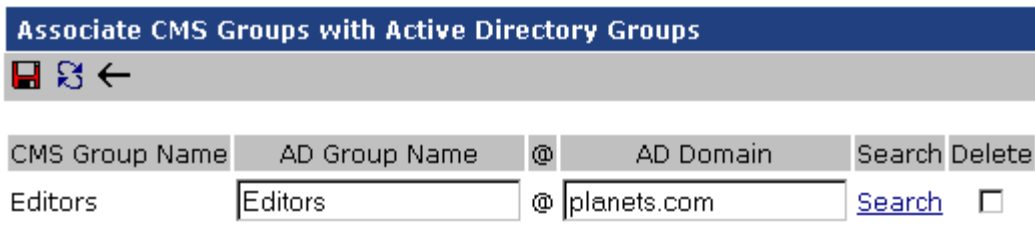
- To associate the user with the same user group in AD, go to the AD and assign the user to the group. Then, return to this screen and click the Refresh button () to update the user group information in Ektron CMS400.NET.



- To remove the user's group membership in Ektron CMS400.NET, check the box under the **Delete** column and click the Save button ().

### Associating Groups with Active Directory Groups

If you click **CMS groups need to be associated with Active Directory groups** on the Active Directory Status screen, the Associate Ektron CMS400.NET User Groups with Active Directory Groups screen appears (illustrated below). Use this screen to associate Ektron CMS400.NET groups with AD groups.




| CMS Group Name | AD Group Name | @ | AD Domain   | Search                 | Delete                   |
|----------------|---------------|---|-------------|------------------------|--------------------------|
| Editors        | Editors       | @ | planets.com | <a href="#">Search</a> | <input type="checkbox"/> |

If a group with the same groupname exists in the AD, that name appears by default in the **AD Group Name** field. If the group exists in the more than one domain within the AD, select a domain from the pull-down list.

If there is no default and you know the AD group name to associate with an Ektron CMS400.NET group, enter that in the **AD Group Name** and **AD Domain** fields. If you do not know the AD groupname, click **Search** to find the group in the AD.

Finally, if this group should not exist in the Ektron CMS400.NET database, click the box under the **Delete** column to delete the group from Ektron CMS400.NET.

After you make all necessary changes, click the Save button () to save them.

### The View Users Screen

The View Users screen (illustrated below) lists all users in the Ektron CMS400.NET database. To access the screen, click **Users**

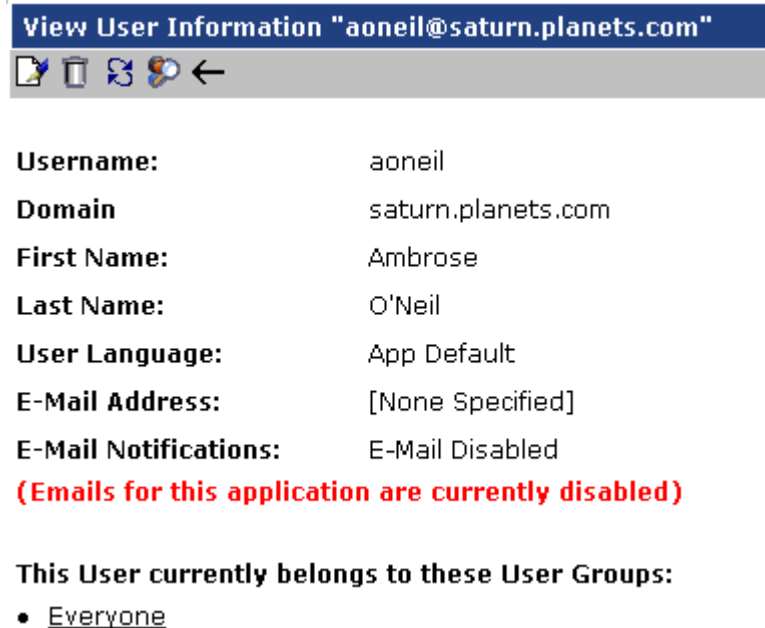


from the left panel of the Workarea. To view more information for a user, click that user to move to the View User Information screen.



The View Users screen also provides a toolbar button () that lets you add AD users to the Ektron CMS400.NET database. When you click it, the Search Active Directory for Users Screen appears.

### The View User Information Screen



The View User Information Screen displays the user's








- username and domain
- first and last name
- language
- email address and whether the user receives email notifications
- user groups

If you are using *user authentication mode*, **username** and **domain** can only be edited in the AD. You can edit all other fields on this screen.


If you are using *full AD Integration mode*, you can only edit **language** and whether the user receives email notifications. You must edit the other fields in the AD.

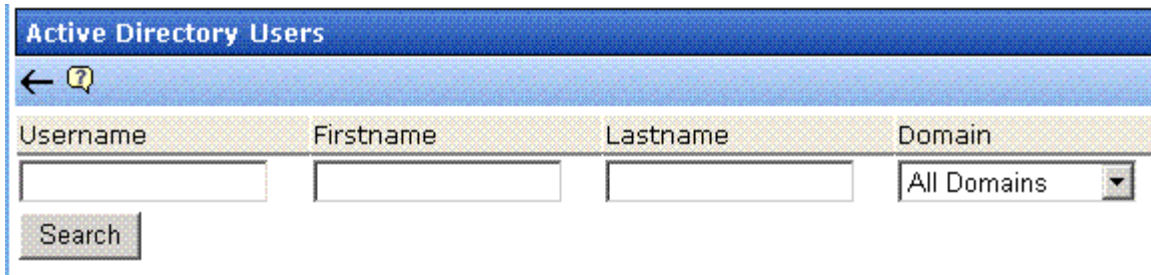
The screen also displays the following buttons.

| Button  | Description  |
|---|--|
|    | Edit information on screen   |
|   | Delete user<br><i>See Also:</i> <a href="#">"Deleting Users" on page 726</a>   |
|  | Retrieve latest information from AD into Ektron CMS400.NET<br><i>See Also:</i> <a href="#">"Copying User Group Information from AD to Ektron CMS400.NET" on page 717</a><br><u><i>Note:</i> This toolbar button does not appear if you are using user authentication mode.</u> |
|  | Replace user<br><i>See Also:</i> <a href="#">"Replacing a User" on page 727</a>  |
|  | Return to previous screen  |



## The Search Active Directory for Users Screen


Use this screen to add AD users to Ektron CMS400.NET. To access the screen, click **Users** from the left panel of the Workarea, then click the Add button (.



| Username             | Firstname            | Lastname             | Domain      |
|----------------------|----------------------|----------------------|-------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | All Domains |

Enter as much search criteria as you know to reduce the number of users that the search yields. For example, if you know that the user's last name is Jackson and the user is in the planets domain, enter those criteria and you will get fewer hits.

When the Active Directory Users screen appears, click the box next to users that you want to create in Ektron CMS400.NET.









Then, click the Save button () to copy their information into Ektron CMS400.NET.

## The View User Groups Screen


The View User Groups Screen displays all AD user groups that have been copied into Ektron CMS400.NET. (See ["Copying User Groups from AD to Ektron CMS400.NET" on page 717](#)).



To access the screen, click **User Groups** from the left panel of the Workarea.

| View User Groups   |                 |
|--|-----------------|
|   |                 |
| User Group Name  | Number of Users |
|  <a href="#">Account Operators @ planets.com</a>        | 0               |
|  <a href="#">Account Operators @ saturn.planets.com</a> | 0               |
|  <a href="#">Account Operators @ venus.planets.com</a>  | 0               |
|  <a href="#">Administrators @ planets.com</a>           | 0               |
|  <a href="#">Administrators @ saturn.planets.com</a>    | 0               |
|  <a href="#">Administrators @ venus.planets.com</a>     | 0               |
|  <a href="#">Backup Operators @ planets.com</a>         | 0               |

To view more information for a group, click that group to move to the View Users in Group screen.

The View User Groups screen also provides a toolbar button () that lets you add AD groups to the Ektron CMS400.NET database. When you click it, the Search Active Directory for Groups screen appears.

### View Users in Group Screen

The View Users in Group Screen displays, for each user in the group

- username and domain
- first and last name
- language



The screenshot shows a window titled "View Users in Group 'Domain Users'". It features a search bar with a magnifying glass icon, a back arrow, and a dropdown menu set to "All". Below the search bar is a table with four columns: Username, Lastname, Firstname, and Language. The table lists three users: admin@planets.com, aoneil@saturn.planets.com, and bbolt@planets.com, all with "App Default" as their language.

| Username                  | Lastname | Firstname | Language    |
|---------------------------|----------|-----------|-------------|
| admin@planets.com         | admin    | admin     | App Default |
| aoneil@saturn.planets.com | O'Neil   | Ambrose   | App Default |
| bbolt@planets.com         | Bolt     | Bob       | App Default |

The screen also displays the following buttons.

| Button | Description   |
|--------|---|
|        | Replace group<br>See Also: <a href="#">"Replacing a User Group" on page 722</a> |
|        | Return to previous screen   |

### The Search Active Directory for Groups Screen

The screenshot shows a window titled "Search Active Directory for Users". It has a search bar with a magnifying glass icon and a back arrow. Below the search bar are three input fields labeled Username, Firstname, and Lastname. A "Search" button is located at the bottom left of the search area.

Use this screen to add AD groups to Ektron CMS400.NET. Enter as much search criteria as you know to reduce the number of groups that the search yields.




**NOTE**

You can only select AD groups that do not already exist in Ektron CMS400.NET. Also, the Active Directory Setup screen can restrict AD integration to one domain. If it does, you can only search for groups within that domain.

---

For example, if you know that a group begins with S and is in the planets domain, enter those criteria and you will get fewer hits.

After you click Search, a new screen appears listing all AD groups that satisfy the search criteria. Click the box next to groups that you want to create in Ektron CMS400.NET. Then, click the Save button () to copy their information.

## Disabling AD Integration

If you decide to disable AD authentication or integration, edit the Active Directory Setup screen and uncheck the box next to **Enable Active Directory Authentication** or **Enable Active Directory Integration**.

See Also: ["The Active Directory Setup Screen" on page 731](#)

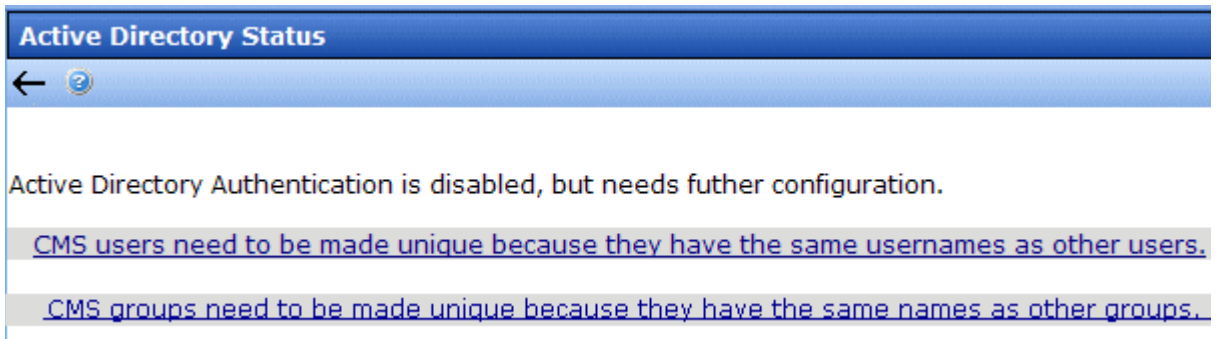
If you do this, and any users or groups share the same name within different domains, the following message appears on the screen.

### **Active Directory Authentication is disabled, but needs further configuration**

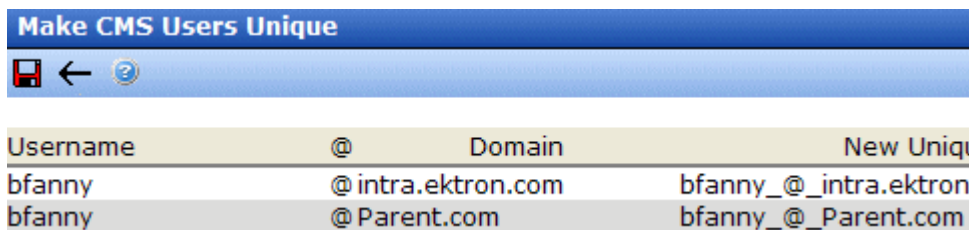
For example, two users are named JJackson@example.net and JJackson@example.com. When AD was enabled, the domain names made the two users unique. However, when you disable integration, the domain names are dropped, so the user names are now identical. You need to make the users unique.



If you click the message (above) on the Active Directory Setup screen, you move to the Active Directory Status screen. The following messages may appear.



Click the message to proceed to the Make Ektron CMS400.NET Users Unique screen (illustrated below).






This screen lists all users whose user names are not unique and suggests a new, unique Ektron CMS400.NET username. The new name consists of the user name, underscore, at sign (@), underscore, the domain name. So, for example, JJackson@example.net would appear as JJackson\_@\_example.net.

The same is true for user groups. For example, if you had two groups name Account Operators, one in the example.com domain



and another in the saturn.example.com domain, the Make Ektron CMS400.NET Groups Unique screen would look like this.

| Make CMS Groups Unique  |                      |  |
|---|----------------------|--|
|   |                      |  |
| User Group Name   | @ Domain             | New Unique User Group Name             |
| Account Operators   | @ planets.com        | Account Operators_@_planets.com        |
| Account Operators   | @ saturn.planets.com | Account Operators_@_saturn.planets.com |

Ektron recommends that you accept the suggested new names. Click the Save () button to do so.

One advantage of using the new name format is that, if you later decide to re-enable AD integration, the software can automatically associate the AD and Ektron CMS400.NET users or groups.

## User Authentication Only Mode

In user authentication mode, the sharing between AD and **Ektron CMS400.NET** is limited to user logon name, domain, and password.

The following topics explain how to work with user authentication mode.

- ["How Information is Transferred from Active Directory to Ektron CMS400.NET" on page 749](#)
- ["Which Information is Transferred from Active Directory to CMS400.NET" on page 749](#)
- ["User Groups" on page 749](#)
- ["Adding User Information from AD to Ektron CMS400.NET" on page 749](#)
- ["Editing User Information in Ektron CMS400.NET" on page 750](#)
- ["Deleting Users" on page 750](#)
- ["Replacing a User" on page 750](#)
- ["The Screens of the Active Directory Feature in User Authentication Mode" on page 750](#)



- ["Disabling AD Authentication" on page 751](#)

## How Information is Transferred from Active Directory to Ektron CMS400.NET

Ektron CMS400.NET does not write to the AD – it only reads from it. This results in the following changes to how the username, domain, and password are handled within Ektron CMS400.NET.

- Changes to user logon name, domain and password must be made in the AD — you cannot update these fields in the Ektron CMS400.NET Edit User screens.
- When adding a new user to Ektron CMS400.NET, you can only select AD users. If the user does not exist in the AD, create the user there, and then import the user into Ektron CMS400.NET.

## Which Information is Transferred from Active Directory to CMS400.NET

CMS refers to the following AD sign-in authentication information during sign-in: password, user logon name, and domain. Note that the password is not stored in CMS — CMS only refers to the password during sign-in.

## User Groups

User authentication mode has no effect on user groups. To learn more about user groups, see ["Managing User Groups" on page 641](#).

## Adding User Information from AD to Ektron CMS400.NET


See ["Manually Adding AD User Information to Ektron CMS400.NET" on page 725](#)

## *Changing the User Login Name in AD*

If a user's *logon name* changes in the AD, it no longer matches the Ektron CMS400.NET logon name. This discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should proceed to the Associate Ektron CMS400.NET Users to Active Directory Users screen, where you can update the user information.



Alternatively, you could

1. Go to the View User Information screen.
2. Select the user whose AD name changed.
3. Click the Associate the Ektron CMS400.NET user with Different AD user toolbar button ()
4. Select the AD user and domain.

See Also: ["Associating Ektron CMS400.NET Users with Active Directory Users" on page 738](#)

## Editing User Information in Ektron CMS400.NET

Ektron CMS400.NET does not write to the AD. This means that you can only change the **Username** and **Domain** fields from the AD.

You can change the **First Name**, **Last Name**, **email Address**, **User Language** and **Disable email Notifications** fields on the Ektron CMS400.NET Edit User screen.

## Deleting Users

See ["Deleting Users" on page 726](#)

## Replacing a User

See ["Replacing a User" on page 727](#)

### IMPORTANT!

If you replace a user in user authentication-only mode, the user's first name, last name, and email address are not overwritten with information in the active directory.

---

## The Screens of the Active Directory Feature in User Authentication Mode

Since the scope of user authentication mode is limited, only some fields on the AD screens are used. For example, on the Active Directory setup screen, the only relevant fields are authentication and domain.

See Also: ["The Active Directory Setup Screen" on page 731](#)



Also, on the Active Directory Status Screen, only one discrepancy message may appear:

**CMS user needs to be associated with an AD user**

See Also: ["Associating Ektron CMS400.NET Users with Active Directory Users" on page 738](#)

The View Users Screen works the same for both modes.

See Also: ["The View User Information Screen" on page 741](#)

## **Disabling AD Authentication**

See ["Disabling AD Integration" on page 746](#)



# Logging into a System that Uses AD Integration

Because usernames and passwords are stored in the AD by domain, the AD sign on procedure requires you to select a domain name. So, if AD integration is enabled, the sign on screen includes a drop-down list that prompts the user to select a domain.

A screenshot of a web browser window with the address bar showing 'http://192.168.0.189 ...'. The browser window displays a login form with a light blue background. The form contains the text 'Enter your username and password.' followed by three input fields: 'User:', 'Pwd:', and 'Domain:'. The 'Domain:' field is a dropdown menu with 'intra.ektron.com' selected. Below the input fields is a 'LOGIN' button.

**NOTE** [Your organization determines AD domain names.](#)

For more information about logging in, see ["Logging Into an Ektron CMS400.NET Web Site" on page 6.](#)

This feature is explained through the following topics.

- ["Single Sign On" on page 752](#)
- ["Setting up Single Sign On" on page 753](#)

## Single Sign On

You can implement a Single Sign On feature that lets a user bypass the Login screen. The feature retrieves the user's Windows login information from the server to authenticate access to **Ektron CMS400.NET**.

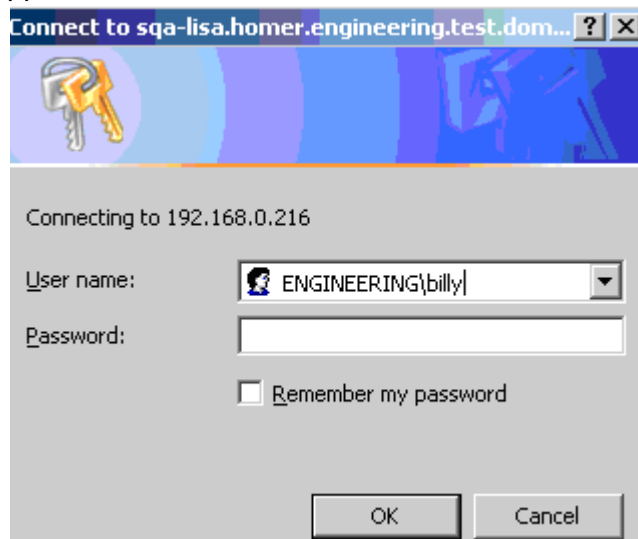


## How Single Sign on Works

The feature uses a variable called `User.Identity.Name`. This holds the user's account/domain in Active Directory, and has the format `[domain]\[username]`. For example, `EKTRON1\skearney`. This variable is set when a user authenticates against a Windows server.

The user logs in to **Ektron CMS400.NET** by going to the site and clicking the login server control. If the variable is passed and Active Directory is enabled, the server control opens the `autologin.aspx` page. Next, the opening window refreshes just like a normal login, except the user is not prompted to enter a username, password, and domain.

However, if the user's computer is not on a domain, not on the same domain as **Ektron CMS400.NET**, or does not include the **Ektron CMS400.NET** server as a trusted site, the following login screen appears.



If Active Directory is not enabled, the normal `login.aspx` page appears.

## Setting up Single Sign On

The Single Sign On login process uses two files: `autologin.aspx` (in the `workarea/SSO` directory) and `login.aspx` (in the `workarea` directory). Once set up, user authentication is enabled from any domain that this server can reach. For example, if **Ektron CMS400.NET** is



located in a third level domain, users from third, second, and first level domains can authenticate.

Setting up Single Sign On involves these procedures.

- ["Modifying Web.config for Single Sign On" on page 754](#)
- ["Adjusting Security Settings for the Site Root Folder" on page 754](#)
- ["Adjusting Security Settings for autologin.aspx" on page 756](#)
- ["Adjusting Security Settings for login.aspx" on page 759](#)
- ["Adjusting the Login Server Control" on page 760](#)

After completing these procedures, enable Active Directory within **Ektron CMS400.NET** (if it isn't already enabled). See Also: ["Disabling AD Integration" on page 746](#)

Ektron recommends turning on the auto add options (user and group).

## Modifying Web.config for Single Sign On

1. Open the web.config file, located on your site's root folder.
2. Find the `ek_AUTH_protocol` element.
3. Change its value to **GC**. It should look like this:

```
<add key="ek_AUTH_Protocol" value="GC" />
```

4. Find the `authentication` element.
5. Change the value of the `impersonate` attribute to **true**. It should look like this:

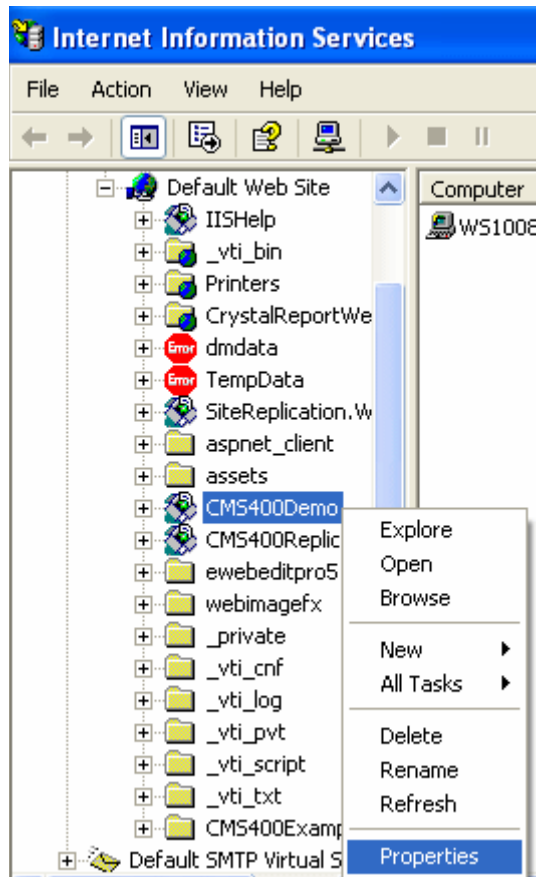
```
<authentication mode="Windows" />
```

```
<identity impersonate="true" userName="" password="" />
```

## Adjusting Security Settings for the Site Root Folder

1. Go to **Windows Control Panel > Administrative Tools > Internet Information Services**.
2. Within IIS, go to **Web Sites > Default Web Site > CMS400 Demo**.
3. Right click the CMS400 Demo folder and select **Properties**.





4. Click the **File security** tab then the **Edit** button.
5. Uncheck everything except **Anonymous Access**. The **Account used for anonymous access** should specify a domain account, preferably the root of the Active Directory tree.



☒ Anonymous access

No user name/password required to access this resource.

Account used for anonymous access:

User name:

Password:

☒ Allow IIS to control password

**Authenticated access**

For the following authentication methods, user name and password are required when

- anonymous access is disabled, or
- access is restricted using NTFS access control lists

☐ Digest authentication for Windows domain servers

☐ Basic authentication (password is sent in clear text)

Default domain:

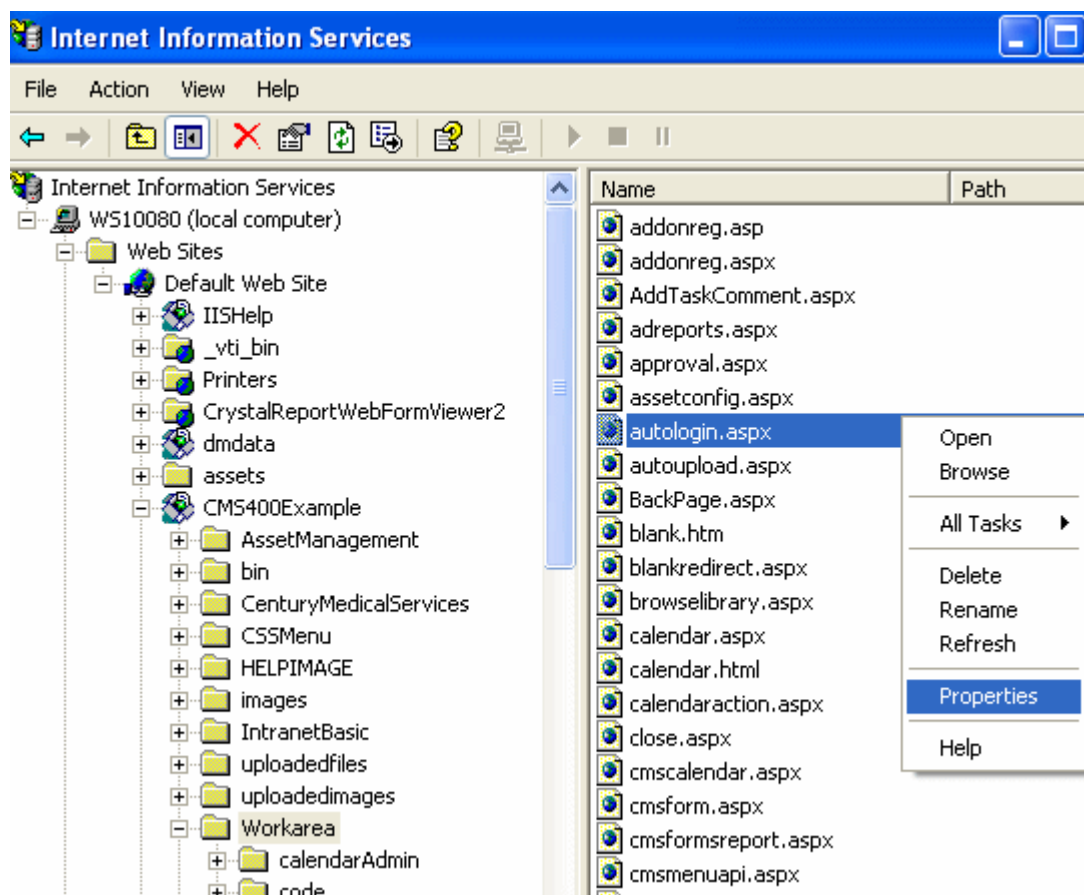
Realm:

☐ Integrated Windows authentication

## Adjusting Security Settings for autologin.aspx

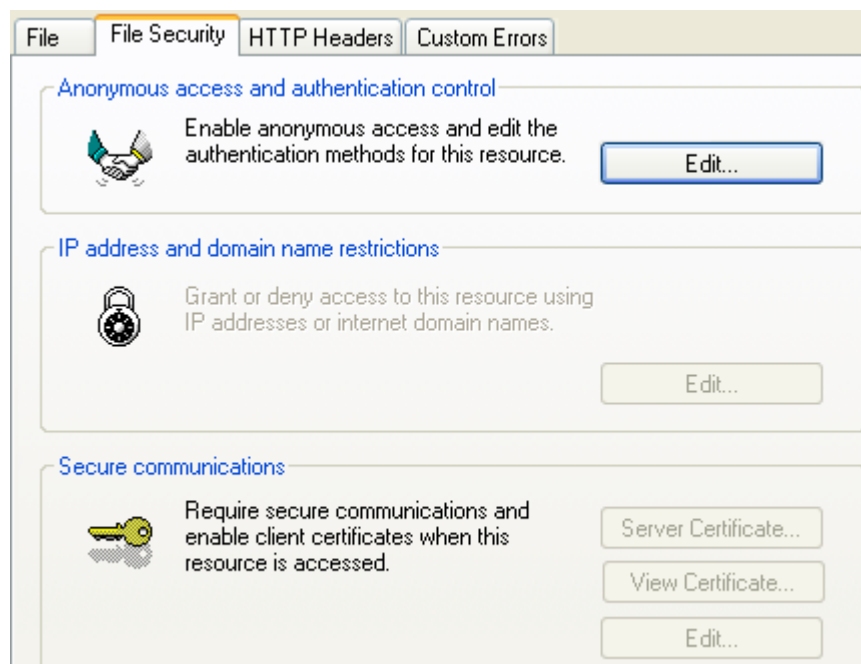
1. Go to **Windows Control Panel > Administrative Tools > Internet Information Services**.
2. Within IIS, go to **Web Sites > Default Web Site > your Web site's root folder > Workarea > SSO > autologin.aspx**.
3. Right click autologin.aspx and select **Properties**.





4. Click the **File security** tab and the **Edit** button.





5. Under **Authenticated Access**, uncheck all except **Integrated Windows Authentication**.



The screenshot shows the 'Security' tab of the 'Internet Options' dialog box. It is divided into two sections: 'Anonymous access' and 'Authenticated access'. In the 'Anonymous access' section, the checkbox 'Anonymous access' is checked. Below it, text states 'No user name/password required to access this resource.' and 'Account used for anonymous access:'. There are input fields for 'User name:' and 'Password:', with a 'Browse...' button next to the 'User name:' field. Below these is an unchecked checkbox 'Allow IIS to control password'. The 'Authenticated access' section has a title 'Authenticated access' in blue. It states 'For the following authentication methods, user name and password are required when' followed by a bulleted list: '- anonymous access is disabled, or' and '- access is restricted using NTFS access control lists'. There are two unchecked checkboxes: 'Digest authentication for Windows domain servers' and 'Basic authentication (password is sent in clear text)'. Below these are input fields for 'Default domain:' and 'Realm:', each with a 'Select...' button. The 'Realm:' field contains the text 'intra.ektron.com'. At the bottom, the checkbox 'Integrated Windows authentication' is checked.

As a result, autologin.aspx will pass credentials from the logged-in user's desktop.

## Adjusting Security Settings for login.aspx

1. Within **IIS > Web Sites > Default Web Site > your web site root > Workarea**, right click login.aspx and select **Properties**.
2. Click the **File security** tab then the **Edit** button.
3. Uncheck everything except **Anonymous Access**. The **Account used for anonymous access** should specify a domain account, preferably the root of the Active Directory tree.



☒ **Anonymous access**  
 No user name/password required to access this resource.  
 Account used for anonymous access:  
 User name:    
 Password:   
☒ Allow IIS to control password

**Authenticated access**  
 For the following authentication methods, user name and password are required when  
 - anonymous access is disabled, or  
 - access is restricted using NTFS access control lists

☐ Digest authentication for Windows domain servers  
☐ Basic authentication (password is sent in clear text)

Default domain:    
 Realm:    
☐ Integrated Windows authentication

## Adjusting the Login Server Control

In Visual Studio.NET, open the Login server control and set the AutoLogin property to **True**. (Server Controls are explained in the **Ektron CMS400.NET Developer's Manual**.)

Properties

**Login1** Ektron.Cms.Controls.Login

|                  |               |
|------------------|---------------|
| (DataBindings)   |               |
| (ID)             | <b>Login1</b> |
| AccessKey        |               |
| Authenticated    | False         |
| <b>AutoLogin</b> | <b>True</b>   |
| BackColor        | True          |
| BorderColor      | False         |
| BorderStyle      | not set       |
| BorderWidth      |               |



# LDAP Authentication

LDAP is short for Lightweight Directory Access Protocol. It is a set of protocols that enable corporate directory entries to be arranged in a hierarchical structure which reflects geographic and organizational boundaries.

Ektron CMS400.NET's LDAP feature lets you retrieve user Login information from an LDAP server to Ektron CMS400.NET. As a result, you can administer user information from one place, and users only need to remember one password/username combination to sign on to the network and Ektron CMS400.NET.

The hierarchical structure of LDAP authentication can look a few different ways. For example, if you had the following LDAP structure, the domain would typically span multiple countries.

**NOTE**

---

Here is a list of the abbreviations: CN = Common Name, OU = Organizational Unit, O = Organization, DN = Distinguished Name.

---

CN=Pitchers Name, OU=Pitchers, O=Baseball Team, C=US, DN=example.com

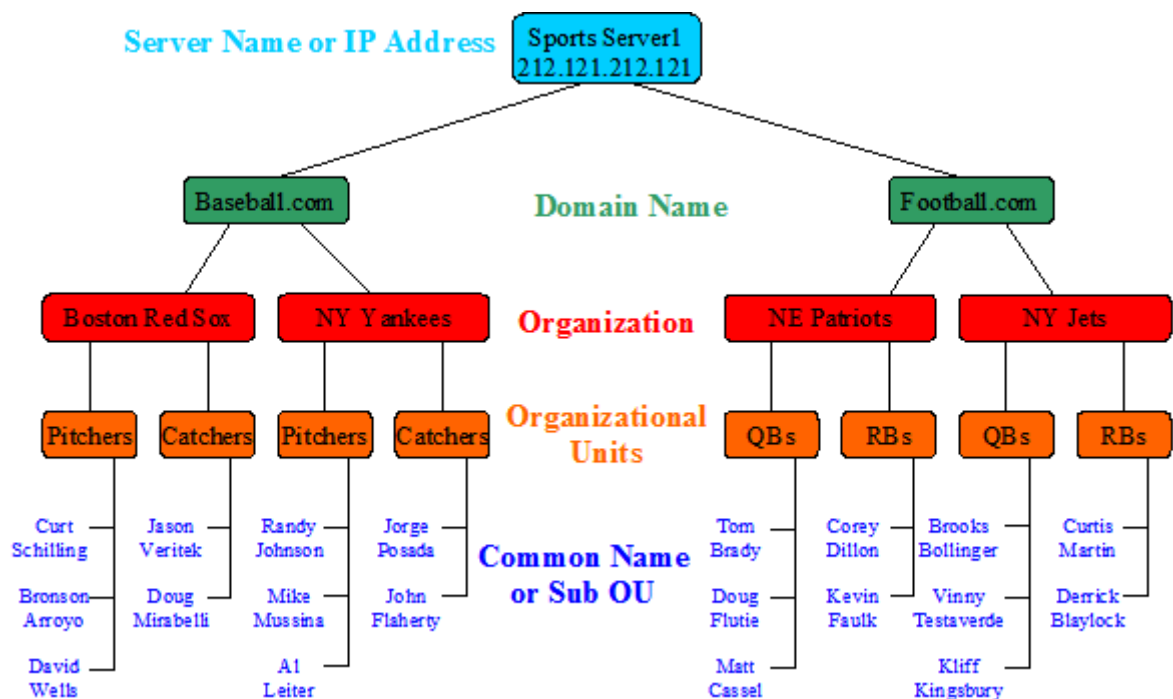
By changing the order of C and DN, the hierarchy indicates that the domain example.com is located in the US.

CN=Pitchers Name, OU=Pitchers, O=Baseball Team, DN=example.com, C=US.

In some instances, it may be necessary to have an Organization appear below an Organizational Unit. This might happen if you have your Organization Unit has it own Organizations.

Below is a visual example of an LDAP hierarchical structure.





This chapter covers the following topics:

- "Using LDAP with Ektron CMS400.NET" on page 762
- "LDAP Screen Descriptions" on page 774
- "Disabling LDAP Authentication" on page 778

## Using LDAP with Ektron CMS400.NET

### NOTE

Active Directory and LDAP are not the same. While they can perform some similar functions, LDAP when used with Ektron CMS400.NET only verifies user login information and creates the user in the everyone group. Active Directory can be used to verify user login information only or it can become completely integrated with Ektron CMS400.NET. To learn more about using Active Directory with Ektron CMS400.NET, see "Active Directory Feature" on page 709

The following sections explain how to use LDAP with Ektron CMS400.NET.



- "Enabling LDAP" on page 763
- "Adding an Organizational Unit During Setup" on page 766
- "Adding User Information from an LDAP Server to Ektron CMS400.NET" on page 767
- "Editing User Information in Ektron CMS400.NET" on page 773
- "Deleting Users" on page 774

## Enabling LDAP

You enable LDAP through the Active Directory Setup screen. To enable the LDAP functionality in Ektron CMS400.NET, follow these steps. *See Also:* "The Active Directory Setup Screen" on page 774


### IMPORTANT!

Before enabling LDAP in Ektron CMS400.NET, make sure your LDAP server is set up and ready for use. Be sure to include an Ektron CMS400.NET administrator account for yourself. Once you enable LDAP, the only account available to access Ektron CMS400.NET without LDAP authentication is the BuiltIn account. For more information on the BuiltIn account, see "BuiltIn User" on page 33.

1. In the `webroot\siteroot\web.config` file, change the following line:  

```
<add key="ek_AUTH_Protocol" value="None"/>
```

becomes  

```
<add key="ek_AUTH_Protocol" value="GC"/>
```
2. Save and close the `Web.config` file.
3. In the Workarea, navigate to the **Settings > Configuration > Active Directory > Setup screen**.
4. Click the **Edit** button ()
5. On the Active Directory Setup screen, choose **Enable LDAP Authentication**.
6. Fill in the following fields.



| Field        | Description  | For more information, see                     |
|--------------|--|---|
| Type         | <p>Choose the type of LDAP authentication you are using.</p> <p><u>Note: Depending on your choices, the fields below may be required or disallowed.</u></p> <p>The following choices are available:</p> <ul style="list-style-type: none"> <li>Active Directory (LDAP) - Domain allowed, Organization is not.</li> <li>Novell eDirectory/NDS - Organization allowed, Domain is not.</li> <li>Sun Iplanet/JSDS - Domain allowed, Organization is not.</li> <li>Other - Allows both Domain and Organization</li> </ul> | "Using Active Directory for LDAP" on page 765 |
| LDAP Server  | The IP Address or name of the LDAP server  |   |
| Port         | <p>The LDAP server port that Ektron CMS400.NET communicates with.</p> <p>If you are unsure, consult the documentation provided with your Directory Service (such as, Novell, iPlanet, Microsoft, or Red Hat).</p>  |   |
| Organization | <p>The name of your company or organization. For example, Ektron, Inc.</p> <p>This field can be blank if you enter a domain in the <b>Domain</b> field.</p>  |   |
| Domain       | <p>The name of the domain you are using. For example, www.ektron.com. This should be the same name you used when you received your license key.</p> <p>This field can be blank if you enter an organization in the <b>Organization</b> field.</p>  |   |
| Path         | <p>The next levels below your Organization or Domain. These can include multiple levels of Organizational Units. For example, Content Editors, Marketing, East Coast.</p>  |   |



| Field  | Description  | For more information, see  |
|--------|--|--|
| Add    | <p>Enter your the path you would like access to in the text field and click the <b>Add</b> link.</p> <p>When adding Organizational Units, the paths are comma separated and run from specific to general. For example, ou=Amherst,ou=New Hampshire,o=US</p> <p>Do not add individual Common Names here. Only add Organizational Units that contain the people who should have access to Ektron CMS400.NET.</p> <p><b>Important:</b> You can have additional Organizations below your Organization Units as long as the path on your LDAP server is the same.</p> | <p>"Adding an Organizational Unit During Setup" on page 766</p> <p>To add a single individual from a different Organizational Unit, see "Adding User Information from an LDAP Server to Ektron CMS400.NET" on page 767</p> |
| Delete | Choose any Organizational Unit from the multi-selection box and click the <b>Delete</b> link.  |  |

7. Click the Save button (.

## Using Active Directory for LDAP

In the `webroot\siteroot\Web.Config` file, add the Username and Password for `ek_ADUsername` and `ek_ADPassword`. For example:

```
<add key="ek_ADUsername" value="mwright@ektron.com" />
```

```
<add key="ek_ADPassword" value="mypasswordisthis" />
```

When using LDAP to connect to Active Directory, use the following settings in the Workarea.

**NOTE** LDAP using AD is NOT the same as AD integration. LDAP integration (independent of server type) does not support groups, only user authentication.

| Field       | Needed Information                       |
|-------------|--|
| Type        | Active Directory (LDAP)                  |
| LDAP Server | [IP Address of the AD domain controller] |



| Field               | Needed Information   |
|---------------------|--|
| Port                | 389  |
| Organization        | [leave this blank]   |
| Domain              | [dns name of the AD domain]<br>For example: intra.ektron.com   |
| Organizational Unit | [any OUs that you want to draw users from]<br>For example: Support,Users,Ektron Corporate also<br>Engineering,Users,Ektron Corporate |

## Adding an Organizational Unit During Setup

Things to consider when adding Organizational Units are:

- Should everyone in the OU have access to Ektron CMS400.NET?

Once LDAP is enabled, users are added to the everyone group upon login. While everyone in the OU has access to Ektron CMS400.NET, every user does not necessarily have permission to edit content. To control permissions, set up user groups, adding each user to a group, and assigning permissions to the group. For more information on user groups, see ["Managing Users & User Groups" on page 633](#). For more information on assigning permissions, see ["Setting Permissions" on page 686](#).

- Do users in other Organizational Units need access?

Sometimes, managers or editors are in a different OU. They need to be added manually, or you need to add their OU.

When adding an Organizational Unit, several entries might cover the same hierarchical path. For example, you might have:

- ou=Pitchers,ou=Players,o=Team
- ou=Players,o=Team
- o=Team

This allows you to authenticate users listed in Pitchers, Players, and Team.



## Adding User Information from an LDAP Server to Ektron CMS400.NET

Users at each level are automatically available for adding to Ektron CMS400.NET. You do not have to be at the OU or CN level to add a user. If a user is at the DC or OU level, they are available.

There are three ways to add LDAP user information to Ektron CMS400.NET.

- Have the user log in after LDAP is enabled. As a result, the user appears in the Users list and is added to the Everyone group.


### NOTE

After a user logs in, some fields on the Add User screen can be filled in manually, such as first and last name. For a description of these fields, see "Fill out the fields according to the table below." on page 770.

- Search an LDAP server for LDAP users using the LDAP Search feature. See *Also*: "Searching an LDAP Server for Users." on page 767
- Add the user's LDAP information manually. See *Also*: "Steps to Manually Add an LDAP User" on page 769.
- A combination of browsing for the user, then manually completing the remaining fields. See *Also*: "Using the Browse Feature to Add an LDAP User" on page 771

### Searching an LDAP Server for Users.

The following steps explain how to search for a user on an LDAP server and add them to the CMS400.NET.

1. Enable LDAP by following the instructions in "Enabling LDAP" on page 763.
2. From the left side of the Workarea, click **Users**.
3. Click the Add Users button (  ).



4. The Add a New User to the System screen appears.

**Add a New User to the System**

Username:

Path:

First Name:

Last Name:

Display Name:


User Language:

E-Mail Address:

Forum Editor:

☐ Disable Receiving of System Notification Email

**(System notification sending email is currently disabled)**

5. Click the Browse LDAP button (  ).
6. The Search LDAP Users screen appears.

**Search LDAP users**

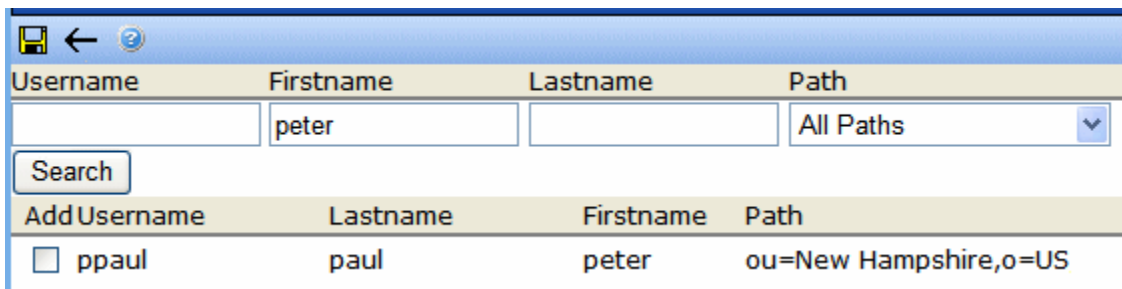
← ?

| Username             | Firstname            | Lastname             | Path                                   |
|----------------------|----------------------|----------------------|--|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="All Paths"/> |

7. Enter search criterion for any of the categories to search.
- **Username** - the username of the user on the LDAP server.
  - **Firstname** - the first name of the user on the LDAP server.
  - **Lastname** - the last name of the user on the LDAP server
  - **Path** - select a path from the drop down list. The paths that are available are the same paths that are enabled when configuring the CMS400.NET for use with your LDAP server. If you select a path and enter no other information, you get back all of the users in that path.
8. Click the **Search** button.



9. The search returns any users that match the criteria entered.



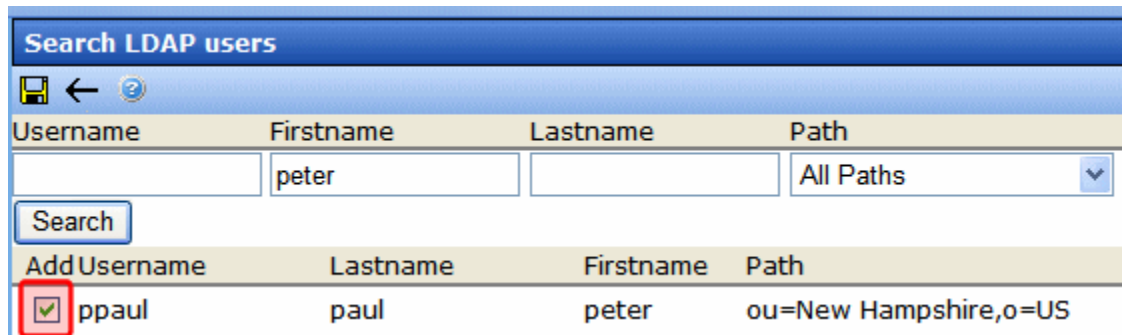
The screenshot shows a web interface for searching LDAP users. At the top, there is a search bar with fields for Username, Firstname, and Lastname. The Firstname field contains 'peter'. Below the search bar is a 'Search' button. Below the search bar is a table with the following columns: AddUsername, Lastname, Firstname, and Path. The table contains one row with the following data: AddUsername is 'ppaul', Lastname is 'paul', Firstname is 'peter', and Path is 'ou=New Hampshire,o=US'.

| Username | Firstname | Lastname | Path      |
|----------|-----------|----------|-----------|
|          | peter     |          | All Paths |

Search

| AddUsername                    | Lastname | Firstname | Path                  |
|--------------------------------|----------|-----------|-----------------------|
| <input type="checkbox"/> ppaul | paul     | peter     | ou=New Hampshire,o=US |

10. Click the check box next to the user to be added.



The screenshot shows the same web interface as before, but now the checkbox next to 'ppaul' in the 'AddUsername' column is checked. The checkbox is highlighted with a red square.

| Username | Firstname | Lastname | Path      |
|----------|-----------|----------|-----------|
|          | peter     |          | All Paths |

Search


| AddUsername                               | Lastname | Firstname | Path                  |
|---|----------|-----------|-----------------------|
| <input checked="" type="checkbox"/> ppaul | paul     | peter     | ou=New Hampshire,o=US |

11. Click the Save button (  )

12. The user is now added to Ektron CMS400.NET and added to the Everyone group. To learn about how to assign this user to a specific group, see ["Assigning Users To User Groups" on page 641](#).

### ***Steps to Manually Add an LDAP User***

The following steps explain how to add an LDAP user manually.

1. Enable LDAP by following the instructions in ["Enabling LDAP" on page 763](#).
2. From the left side of the Workarea, click **Users**.
3. Click the Add Users button (  ).



4. The Add a New User to the System screen appears.

**Add a New User to the System**

Username:

Path:

First Name:

Last Name:

Display Name:

User Language:

E-Mail Address:

Forum Editor:


☐ Disable Receiving of System Notification Email  
**(System notification sending email is currently disabled)**

5. Fill out the fields according to the table below.

| Field        | Description  |
|--------------|--|
| Username     | The username of the person logging in, as found on the LDAP server.  |
| Path         | The path on the LDAP server to the user. For example:<br>ou=Amherst,ou=New Hampshire,o=US,dc=local   |
| First Name   | The first name of the user.  |
| Last Name    | The last name of the user.   |
| Display Name | The name of the user that is displayed in the Forums when using Discussion Boards feature. See Also: <a href="#">"Discussion Boards" on page 450</a> |



| Field                      | Description   |
|----------------------------|---|
| User Language              | <p>Select the language in which the user will view Ektron CMS400.NET screens and messages. The language also determines the default value whenever a drop-down list of languages appears within Ektron CMS400.NET.</p> <p>The dropdown list of choices at this field is derived from the Language Settings screen, available from the Settings &gt; Configuration folder.</p> <p>Do not confuse the system language with the user's ability to create and edit foreign editions of content. This field does not prevent a user from working with multiple language content.</p> <p>See Also: <a href="#">"Multi-Language Support" on page 779</a></p> <p><u>Note: If the selected language is not English, French or German, it is only supported after you download the Ektron CMS400.NET Language Support Program from Ektron and translate the Web site.</u></p> |
| E-Mail Address             | Enter the email address of the user.  |
| Forum Editor               | If you are using Discussion Boards feature, specify which editor this user uses when editing in the Forums. Choose from eWebEditPro or a Javascript Editor. For information on Discussion Boards, see <a href="#">"Discussion Boards" on page 450</a>   |
| Disable Email Notification | Select to disable email notifications for this user. If you do, the user will not receive the automatic email notification described in <a href="#">"Automatic eMail Notification" on page 919</a> . However, this field has no effect on the user's ability to receive instant email.  |

6. Click **Save** () to add LDAP users to Ektron CMS400.NET.
7. The View Users in Group Everyone screen appears, displaying the new user and the other Ektron CMS400.NET users. To learn about how to assign this user to a specific group, see ["Assigning Users To User Groups" on page 641](#).


### **Using the Browse Feature to Add an LDAP User**

The Browse LDAP feature provides a more friendly and intuitive way to find the username, domain/organization and organizational unit(s).








**IMPORTANT** The default server IP/DNS name and port are taken from the settings specified in the **Configuration > Setup** page. These settings must be specified before connecting to the LDAP server. See Also: "Enabling LDAP" on page 763

**IMPORTANT** An Organizational Unit that can see the user to be added must be specified in the **Configuration > Setup** page before using the browse feature. See Also: "Enabling LDAP" on page 763

1. Enable LDAP by following the instructions in "Enabling LDAP" on page 763.
2. From the left side of the Workarea, click **Users**.
3. Click the Add Users button (  ).
4. The Add a New User to the System screen appears.

Add a New User to the System

Username:


Path:

First Name:

Last Name:


Display Name:

User Language:


App Default 

E-Mail Address:

Forum Editor:

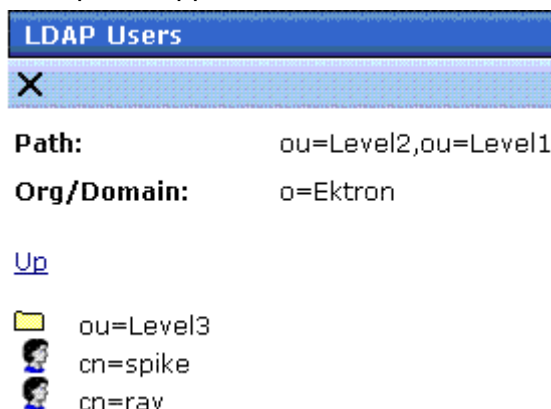
eWebEditPro 

☐ Disable Receiving of System Notification Email  
**(System notification sending email is currently disabled)**

5. Click the Browse LDAP button (  ).



6. The LDAP Explorer appears.



7. Navigate the LDAP server's folders by clicking on the folder images. Each folder represents an Organizational Unit (OU). When you choose an OU level, its users appear.

**NOTE** In the LDAP Explorer, the Path and Org/Domain fields update dynamically as you navigate through the LDAP tree.


8. Select a user.
9. The user is now added to Ektron CMS400.NET and added to the Everyone group. To learn about how to assign this user to a specific group, see ["Assigning Users To User Groups" on page 641](#).

## Editing User Information in Ektron CMS400.NET


It is important to note that **Ektron CMS400.NET** does not write to the LDAP server. So, while you can change any fields when editing a user in Ektron CMS400.NET, you also need to make these changes in the LDAP server.

### *Steps to Edit an LDAP User's Information*

The following steps explain how to edit an LDAP user's information.

1. In the Workarea, click **Settings > Users**.
2. In the Username column, click a user to edit.
3. The View User Information screen appears.
4. Click the Edit button (.



5. Change the information as needed. For more information on the fields you can edit, see ["Fill out the fields according to the table below." on page 770.](#)
6. Click Save ().

## Deleting Users

If a user is deleted in an LDAP server, Ektron CMS400.NET does not automatically delete the user. However, the user's login fails because he cannot be authenticated.

In this case, you should delete the user from Ektron CMS400.NET using the Delete User function. See Also: ["Deleting a User" on page 640](#)

### NOTE

If you mistakenly delete all users with administrative privileges, you can still sign in using the builtin user's username and password. For more information, see ["BuiltIn User" on page 33.](#)

---

## LDAP Screen Descriptions

The LDAP feature uses the following screens:

- ["The Active Directory Setup Screen" on page 774](#)
- ["The View Users Screen" on page 775](#)



This section explains how to use each screen.

## The Active Directory Setup Screen

The Active Directory Setup screen (illustrated below) lets you enable and disable the Active Directory or LDAP features, as well as determine other aspects of AD management, such as whether users and groups are automatically updated. To access the screen, click **Configuration -> Active Directory -> Setup** from the left panel of the Workarea.



**Active Directory Setup**

**Active Directory Installed:**

**Active Directory/LDAP Authentication:**  
LDAP Authentication Enabled

**Active Directory Integration:**  
Disabled

**Auto Add User:**  
Disabled

**Auto Add User To Group:**  
Disabled

**User Property Association**

| CMS Property | Active Directory Property |
|--------------|---------------------------|
| EmailAddr1   | mail                      |
| FirstName    | givenName                 |
| LastName     | sn                        |

**CMS Administrator Group Association**

| AD Group Name @ AD Domain |
|---------------------------|
| Administrators @          |






**Domain**  
All Domains


For a description of the fields, see the Active Directory section ["The Active Directory Setup Screen" on page 731](#).

## The View Users Screen

The View Users screen (illustrated below) lists all users in the Ektron CMS400.NET database. To access the screen, click **Users** from the left panel of the Workarea. To view more information for a user, click that user to move to the View User Information screen.

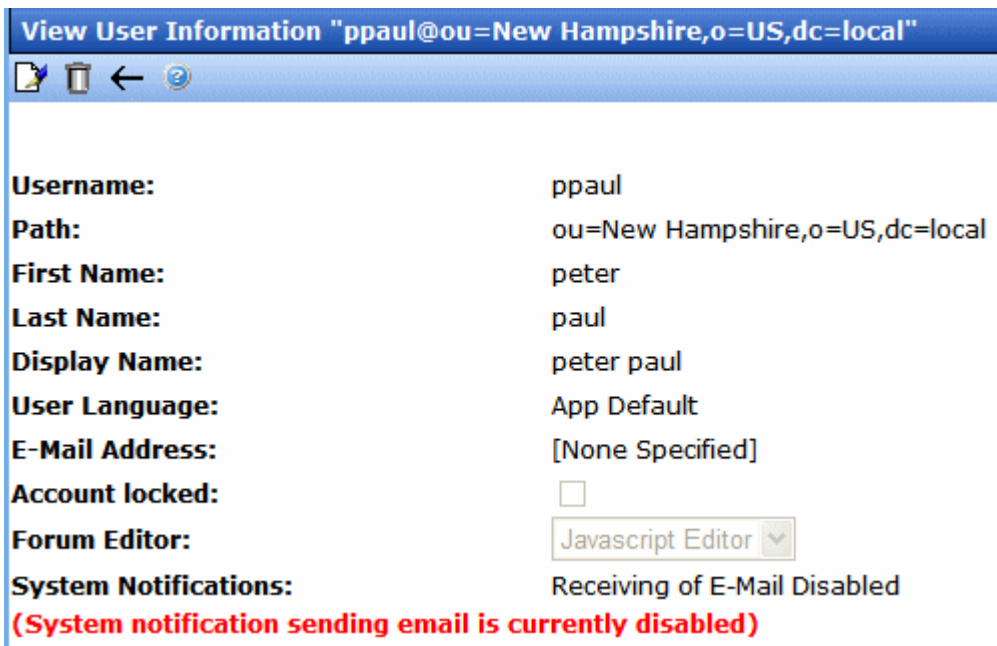


| View Users in Group "Everyone"  |                 |                  |             |  |
|---|-----------------|------------------|-------------|--|
|     |                 |                  |             |  |
| <u>Username</u>   | <u>Lastname</u> | <u>Firstname</u> | Language    | <input type="checkbox"/> All   |
|  <a href="#">admin</a>   | Administrator   | Application      | App Default | <input type="checkbox"/>  |
|  <a href="#">CSchilling</a>  | Schilling       | Curt             | App Default | <input type="checkbox"/>  |
|  <a href="#">idocwriter</a>  | Docwriter       | John             | App Default | <input type="checkbox"/>  |
|  <a href="#">jedit</a>   | Edit            | John             | App Default | <input type="checkbox"/>  |
|  <a href="#">ismith</a>  | Smith           | John             | App Default | <input type="checkbox"/>  |
|  <a href="#">tbrown</a>  | Brown           | Tina             | App Default | <input type="checkbox"/>  |
|  <a href="#">tjones</a>  | Jones           | Tim              | App Default | <input type="checkbox"/>  |
|  <a href="#">vs</a>  | vs              | vs               | App Default | <input type="checkbox"/>  |

The View Users screen also provides a toolbar button () that lets you add LDAP users manually to the Ektron CMS400.NET database. This is useful if you want to add a single user from an Organization that is does not have the same Organizational Unit as the rest of your users, and you do not want to add any other users from that Organization.

### ***The View User Information Screen***









|   |                                |
|---|--------------------------------|
| <b>View User Information "ppaul@ou=New Hampshire,o=US,dc=local"</b> |                                |
| <b>Username:</b>  | ppaul                          |
| <b>Path:</b>  | ou=New Hampshire,o=US,dc=local |
| <b>First Name:</b>  | peter                          |
| <b>Last Name:</b>   | paul                           |
| <b>Display Name:</b>  | peter paul                     |
| <b>User Language:</b>   | App Default                    |
| <b>E-Mail Address:</b>  | [None Specified]               |
| <b>Account locked:</b>  | <input type="checkbox"/>       |
| <b>Forum Editor:</b>  | Javascript Editor ▼            |
| <b>System Notifications:</b>  | Receiving of E-Mail Disabled   |
| <b>(System notification sending email is currently disabled)</b>    |                                |

The View User Information Screen displays the user's

- username
- Path
- first and last name
- language
- email address and whether the user receives email notifications
- whether the account is locked
- which Forum Editor the user is using
- user groups
- user properties (if any)



The screen also displays the following buttons.

| Button  | Description   |
|---|---|
|  | Edit information on screen  |
|  | Delete user<br>See Also: <a href="#">"Deleting Users" on page 774</a> |
|  | Return to previous screen   |
|  | Launches a help screen  |

## Disabling LDAP Authentication

If you decide to disable LDAP authentication or integration, edit the Active Directory Setup screen and select **Disable Active Directory and LDAP Authentication**.

See Also: ["The Active Directory Setup Screen" on page 774](#)



---

# Multi-Language Support

There are several aspects to translating within **Ektron CMS400.NET**. They are listed below.

| Type of Translation                               | Seen by                                     | For more information, see   |
|---|---|---|
| Content   | Content contributors; visitors to your site | <a href="#">"Working with Multi-Language Content" on page 779</a> |
| Spell check dictionary                            | Visitors to your site                       | <a href="#">"Set the Language of Spell Checking" on page 818</a>  |
| Special Character Encoding                        | Visitors to your site                       | <a href="#">"Character Encoding" on page 818</a>                  |
| Workarea screen labels, alt text, system messages | Content contributors                        | <a href="#">"Translating the Workarea" on page 819</a>            |

## Working with Multi-Language Content

**Ektron CMS400.NET** supports the creation of content in any language supported by the Unicode standard. This section explains how to create and work with content in any language.

### Overview

First, determine the languages in which your site's content should appear (see ["Determining Which Languages are Available" on page 783](#)). Then, for any content, you can provide editions in each supported language.

To provide multi-language content, you can either create new content or copy and edit existing content. For example, you can begin the creation of German content by copying English content into it, then translating that content into German and deleting the English content.

All editions of content have the same ID number but are differentiated by the language attribute. As a result, your Web page template can link to a single content item, but what is displayed is



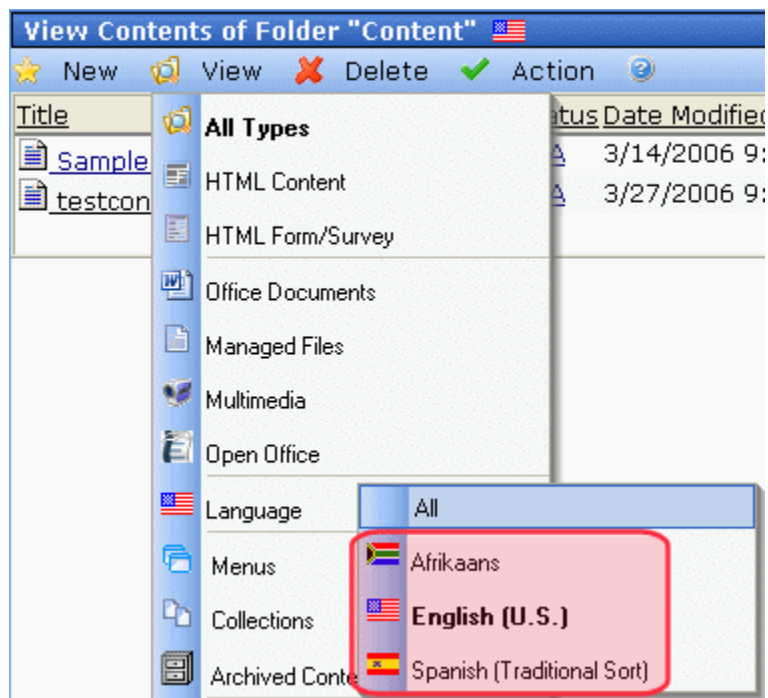
determined by the selected language. There are two ways that content's language can be selected:

- a language cookie, which is created when a visitor enters your site and selects a language
- the link to another page includes the language (`langType`) parameter. For example, `mytemplate.aspx?LangType=1033`.

#### NOTE

For a list of the decimal values for each supported language, see "Appendix C: List of Supported Languages" on page 979.

The View Contents of Folder screen's **View** field lets you choose a language then view and create content in that language. You can also view *all* content in the folder, regardless of language. This field makes it easy to find and work on content editions in a selected language.



The View Contents of Folder screen also displays the language of each content item. This helps you distinguish them when viewing all content.



Finally, you can set up a separate approval chain for each edition of a content, and can assign collections and tasks in any supported language.

This section describes how to work with a multiple language Web site through the following topics.

- ["Enabling/Disabling Support for Multiple Language Content" on page 781](#)
- ["Viewing Your Site in Another Language" on page 781](#)
- ["Determining Which Languages are Available" on page 783](#)
- ["The Default Language" on page 786](#)
- ["Creating New Content" on page 787](#)
- ["Translating Content" on page 788](#)
- ["Additional Multi-Language Topics" on page 807](#)
- ["Setting Up a Multilingual Web Site" on page 809](#)
- ["Using a Language Other than American English as the Default" on page 813](#)
- ["Resolving Conversion Issues" on page 814](#)

## Enabling/Disabling Support for Multiple Language Content

Support for multi-language content is enabled in the web.config file. To enable or disable it, follow these steps.

1. Open the file `webroot\yourwebsite\web.config`.
2. To enable multi-language content, set the value of `ek_EnableMultilingual` to 1. To disable it, set it to zero (0).
3. Save and close web.config.

## Viewing Your Site in Another Language

It's easy for your site visitors to view your site in any enabled language. On any screen, your developer can display a language drop-down list (circled in red below).



## Lots of new features in Ektron CMS300!

### Welcome to RC International!

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

#### Trinity In-Line Pipe

and manifold are for rear exhaust now used in both the Sportster and th the manifold and pipe are made / aluminum. This new pipe is more withstand a bad crash.

#### NEW PRODUCT: Introducing the RC Redstar

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

on, Inc. Sample Site



(For more information about the LanguageSelect Server Control which displays this drop-down list, see the **Ektron CMS400.NET Developer's Manual**.) On the sample site provided with **Ektron CMS400.NET**, this drop-down list appears in the lower left corner of the home page, but your developer can place it anywhere on any page.

Another way to indicate which language-edition of content to display is by adding the language parameter (`langType`) to the Quicklink. For example, `products.aspx?LangType=1033` displays the English (US) edition of the products.aspx content. This syntax automatically sets the language cookie.



---

**NOTE** For a list of the decimal values for each supported language, see "Appendix C: List of Supported Languages" on page 979.

---

See Also: "What Happens if Chosen Language is Not Available" on page 783

---

## What Happens if Chosen Language is Not Available

A visitor to your site uses one of the methods listed above to select a language. **Ektron CMS400.NET** uses the following criteria to determine which language edition to display for content.

1. If an edition of the content is available in the selected language, display that.
2. If option 1 is not available, display an edition of the content in the default language (defined in the `ek_DefaultContentLanguage` variable in `web.config`).

---

**NOTE** When **Ektron CMS400.NET** is installed, the default language is English. See Also: "The Default Language" on page 786

---

3. If neither edition is available, display nothing.

## Determining Which Languages are Available

To determine which languages are available for creating content, go to the Workarea and click **Settings > Configuration > Language Settings**. The Language Settings screen lists all languages in which content can be created on your site.

---

**NOTE** Only members of the Administrator User Group can view, add, or edit language settings.


---

To change the list, follow these steps.

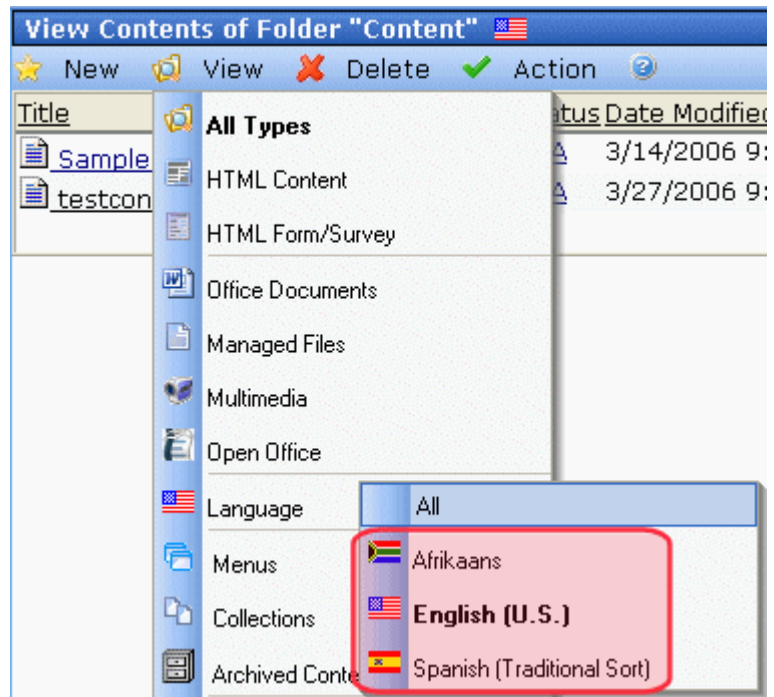
1. Click the Edit button ()
2. The Edit Language Setting screen appears.



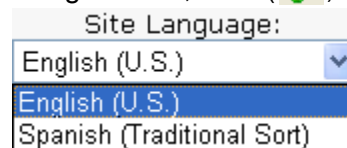
| Language settings   |   |  |      |       |      |
|---|---|--|------|-------|------|
|    |   |  |      |       |      |
|    |  | Name   | Code | ID    | Hex  |
| <input type="checkbox"/>  | <input checked="" type="checkbox"/>   |  English (U.S.)             | en   | 1033  | 0409 |
| <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/>   |  Spanish (Traditional Sort) | es   | 1034  | 040a |
| <input type="checkbox"/>  | <input checked="" type="checkbox"/>   |  Dutch (Netherlands)        | nl   | 1043  | 0413 |
| <input type="checkbox"/>  | <input checked="" type="checkbox"/>   |  Italian (Standard)         | it   | 1040  | 0410 |
| <input type="checkbox"/>  | <input type="checkbox"/>  |  Afrikaans                  | af   | 1078  | 0436 |
| <input type="checkbox"/>  | <input type="checkbox"/>  |  Albanian                   | sq   | 1052  | 041c |
| <input type="checkbox"/>  | <input type="checkbox"/>  |  Arabic (Algeria)           | ar   | 5121  | 1401 |
| <input type="checkbox"/>  | <input type="checkbox"/>  |  Arabic (Bahrain)           | ar   | 15361 | 3c01 |

3. Each language has two check boxes. They are described below.
  - To enable a language in the Workarea only, click (). If this column is checked, the language populates the language drop-down lists within **Ektron CMS400.NET**, as shown below.





- To enable a language in the Workarea *and* let site visitors select it when viewing the site, click ( ).



So, you can enable languages in the column when you are translating the site but are not ready to make those content items publicly available. When you complete the translation, check the column.

#### NOTE

If you select , the check box in the column is checked automatically. This is because, if you let users view the language on the site, it must be enabled in the Workarea.

#### NOTE

The default content language on a dropdown list is determined in the `ek_DefaultContentLanguage` element of the `web.config` file.



If you choose only one language on the Language Settings screen, fields that prompt the user to select a language do not appear in **Ektron CMS400.NET**. Instead, all content is created in that language.

## The Default Language

The default language determines which edition of content to display when a visitor to your site does not select a language.

It is also used if a visitor selects a language other than the default, then navigates to page for which content does not exist in the selected language. In that case, **Ektron CMS400.NET** displays that content in the default language (if available).

Within **Ektron CMS400.NET**, the default language determines the default value on the language drop-down lists that appear on every page on which a user can select a language.

When you install **Ektron CMS400.NET**, the default language is English.

Use the following procedure to change the default language for your multi-language Web site.

1. Open the folder `webroot\yourwebsite`.
2. Within that folder, open `web.config`.
3. Set the value of `ek_DefaultContentLanguage` to the locale id of the default language. For example, 1031 for German.

---

**NOTE** For a list of locale ids, see ["Appendix C: List of Supported Languages" on page 979](#).

---

4. Save and close `web.config`.

See Also: ["Using a Language Other than American English as the Default" on page 813](#)

## Disabling a Language

To disable any language, uncheck the accompanying checkbox on the Edit Language Setting screen. (For more information, see ["Determining Which Languages are Available" on page 783](#).)



If you want to disable the default language, you must first assign a new default language. See Also: ["The Default Language" on page 786](#) explains what a default language is and how to assign one.

### ***What Happens to Content When You Disable Its Language***

If you disable a language for which content exists, that content remains in the database but no one can access it, either from within **Ektron CMS400.NET** or when visiting your site.

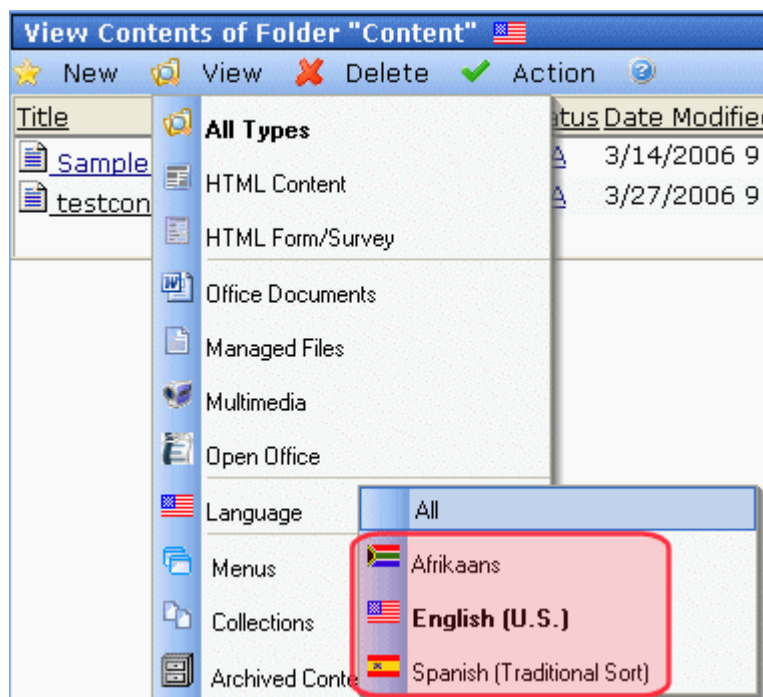
If you later enable that language, the content is once again available.

### **Creating New Content**


To create content in a non-English language, follow these steps.

1. Navigate to the content folder in which you want to create the content. (You must have permission to add content to the folder.)
2. From the language drop-down list, select the language in which you want to create the content.





If the desired language is not available, see ["Determining Which Languages are Available"](#) on page 783.

3. Click the Add Content button (  ) and create the content as you would any content. See Also: ["Adding Content"](#) on page 81
4. In order to add metadata to a content, metadata specifications must have been created for the selected language. See Also: ["Metadata"](#) on page 115

## Translating Content

When translating content into a foreign language, you have three options.

| Option   | For more information, see                                  |
|--|--|
| Copy original content into a new content item in a new language. Then, translate content manually. | <a href="#">"Translating Content Manually"</a> on page 789 |



| Option  | For more information, see                                       |
|---|---|
| Use the computer-based translation tool provided with <b>Ektron CMS400.NET</b> .  | <a href="#">"Using Machine Translation" on page 791</a>         |
| Create an XLIFF or XHTML file from existing content. The files are sent to a translation agency and return translated in the new language(s). Then, you import the translated files into the CMS. | <a href="#">"Using the Language Export Feature" on page 794</a> |

## Translating Content Manually

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

For example, an editor is translating content from French to German. The editor copies the French edition to new content whose language is German. As the editor translates the French edition into German, he deletes the French content. Any images in the content would usually remain, and all formatting (tables, bullets, etc.) is retained.

After signing in to **Ektron CMS400.NET**, you copy content into new content of a different language by either


- navigating the Web site, or
- accessing the Workarea and navigating the folder structure

After copying the original content, translate it into the new language then delete the original text. Both procedures are described below.

### Accessing Content via the Web Site

1. Navigate to a page on which you can select the site language. See Also: ["Viewing Your Site in Another Language" on page 781](#)
2. Select the language into which you want to translate the content.



3. Navigate to content that you want to translate. You must have privileges to add content to this folder. See Also: ["Setting Permissions" on page 686](#)
4. Right click within the content's border and a small menu appears.
5. Click the Add New Language option (  ).
6. The original language content appears. Translate into the new language then delete the original content.

**NOTE**

At this point, you can click the Translate Content button (  ) to have the software translate the content. You can then edit it as needed to perfect the translation.

7. In order to add metadata to content, metadata specifications must have been created for the selected language. See Also: ["Metadata" on page 115](#)
8. When you save the content, it is saved as the edition of that content in the selected language.

**Accessing Content via its Content Folder**

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

1. Go to the View Content screen for the content you want to translate. Its status must allow editing (it cannot be submitted or pending).
2. From the View drop-down list, select a original language.
3. Click the content you want to translate.
4. It appears on the View Content screen.
5. Use the **Add** drop down list in the upper right corner to select the language into which you want to translate the content.





6. The original language content appears. Translate into the new language then delete the original content.
7. In order to add metadata to content, metadata specifications must have been created for the selected language. *See Also: "Metadata" on page 115*
8. When you save the content, it is saved as the edition of that content in the selected language.

## Using Machine Translation

**Ektron CMS400.NET** includes a machine translation feature, which can automatically translate content from/to the following languages.

- English
- Dutch
- French
- German
- Italian
- Portuguese (Brazil)
- Spanish

---

**NOTE** *Currently, machine translation is not supported for all languages in the Language Settings screen.*

---

Like most software-based translation, someone fluent in the new language should review the translated content to verify that the translation is appropriate within the context of the page.

The machine translation feature lets you choose a glossary (that is, a field, industry, or subject area). This helps the software find the best translation for a term or phrase with different meanings in different fields.

To use the machine translation feature, follow these steps.

### Accessing Content via the Web Site


1. Navigate to a page on which you can select the site language. *See Also: "Viewing Your Site in Another Language" on page 781*



2. Select the language into which you want to translate.
3. Navigate to content you want to translate.


**NOTE**

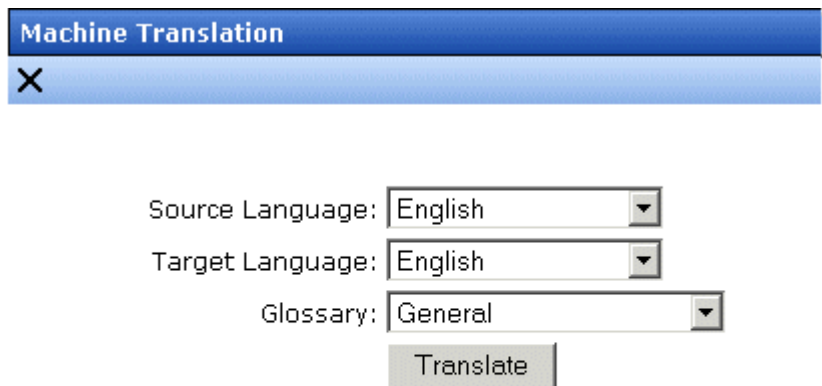
You must have privileges to add content to the folder. See Also: ["Setting Permissions"](#) on page 686

4. Right click within the content's border. A menu appears.
5. Click the Add Content button ().
6. The original language content appears.
7. If the screen uses a Smart Form, select the text that you want to translate.

**NOTE**

You cannot use Machine Translation to translate field names in a Smart Form. XLIFF files are a good way to translate XML field names. See Also: ["Using the Language Export Feature"](#) on page 794

8. Click the Translate Content button (.
9. The Translation screen appears.



The image shows a 'Machine Translation' dialog box with a blue title bar and a close button (X). Inside the dialog, there are three dropdown menus and a 'Translate' button. The first dropdown is labeled 'Source Language:' and is set to 'English'. The second dropdown is labeled 'Target Language:' and is also set to 'English'. The third dropdown is labeled 'Glossary:' and is set to 'General'. The 'Translate' button is located at the bottom right of the dialog.

### Lots of new features in [Ektron CMS400!](#)

10. Select the source (old) and target (new) languages.
11. If the content should refer to a specific glossary, select one from the dropdown list.
12. Click the **Translate** button.
13. The translation appears. If it looks OK, press **Paste Content**.

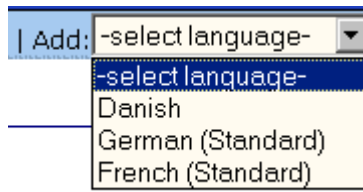



14. The translated content replaces the original content in the editor. Modify as needed.
15. In order to add metadata to content, metadata specifications must have been created for the selected language. See *Also: "Metadata" on page 115*
16. When you save the content, it is saved as the edition of that content in the selected language.

### Accessing Content via its Content Folder

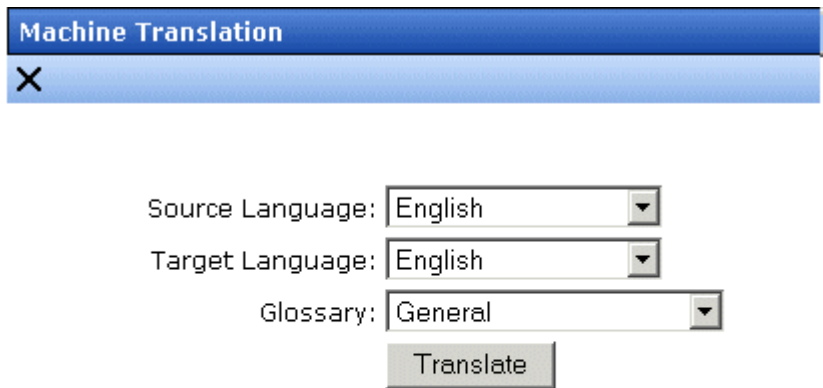
To machine translate content by identifying its content folder, follow these steps.

1. Log into the Workarea and go to the View Content screen for the content you want to translate. Its status must allow editing (that is, its status cannot be submitted or pending).
2. From the View drop-down list, select an original language (that is, the language from which it will be translated).
3. Click the content you want to translate.
4. It appears on the View Content screen.
5. Use the **Add** drop down list in the upper right corner to select the language into which you want to translate the content. It must be a language supported for machine translation (English, Dutch, French, German, Italian, Portuguese (Brazil), or Spanish).



6. The original language content appears. Edit the title if appropriate.
7. Click the Translate Content button (  ).
8. The Translation screen appears.





The image shows a 'Machine Translation' dialog box with a blue header and a close button (X) in the top left corner. Below the header, there are three dropdown menus: 'Source Language' set to 'English', 'Target Language' set to 'English', and 'Glossary' set to 'General'. At the bottom right of the dialog is a 'Translate' button.

### Lots of new features in [Ektron CMS400!](#)

9. Select the source (old) and target (new) languages.
10. If the content should refer to a specific glossary, select one from the dropdown list.
11. Click the **Translate** button.
12. The translation appears. If it looks OK, press **Paste Content**.
13. The translated content replaces the original content in the editor. Modify as needed.
14. In order to add metadata to content, metadata specifications must have been created for the selected language. See *A/so*: ["Metadata" on page 115](#)
15. When you save the content, it is saved as the edition of that content in the selected language.

## Using the Language Export Feature

The Language Export feature lets you copy content into XLIFF files that can be submitted to a translation agency. The agency translates the files and returns them. In the final stage, you import the translated content back into **Ektron CMS400.NET**.

The Language Export feature lets you translate the following kinds of CMS information.



- content, including summary, comments, and meta data
- forms, including response message, comments, and meta data
- all menus (you cannot choose individual menus)
- file assets (files managed by the DMS, including Office documents, Open Office documents, managed files, etc.)

The Language Export Feature is explained through the following topics.

- ["What is XLIFF?" on page 795](#)
- ["Overview of Exporting/Importing Translation Files" on page 796](#)
- ["Creating the .zip File" on page 796](#)
- ["Importing Translated Files into Ektron CMS400.NET" on page 801](#)
- ["Applying Translated Metadata to Translated Content" on page 804](#)

## What is XLIFF?

XLIFF (XML Localization Interchange File Format) is a format that's used to exchange localization data between participants in a translation project. This special format enables translators to concentrate on the text to be translated, without worrying about text layout. The XLIFF standard is supported by a large group of localization service providers and localization tools providers.

To learn more about XLIFF, visit these Web sites:

- <http://www-106.ibm.com/developerworks/xml/library/x-localis/>
- <http://www-106.ibm.com/developerworks/xml/library/x-localis2/>
- <http://www.xliff.org/>

## Supported Versions of XLIFF

**Ektron CMS400.NET** supports the following versions of the XLIFF standard: 1.0, 1.1, and 1.2. You specify the version you are exporting in the web.config file, using the `ek_XliffVersion` element. Any version listed above can be imported.




## Overview of Exporting/Importing Translation Files

1. You select content to translate. You can select:
  - a content item
  - a folder (all content in the selected folder is selected; all subfolders of the selected folder may be included)
  - all menus
2. **Ektron CMS400.NET** converts the selected content to XLIFF files. You can prepare the files for translation into several languages at once.  
 A separate .xlf file is created for each item. Then, all .xlf files for a language are compressed into one .zip file. A separate .zip file is created for each language.
3. Transmit the .zip files to a translation agency, which converts them into the new language(s).
4. The translation agency returns the files.
5. Import them into **Ektron CMS400.NET**. If the editions of the content do not exist in the target language, they are created.

## Creating the .zip File

To create one or more .zip files for translation, follow these steps.

**Note** [Only members of the Administrator User Group and those defined in the Manage Members for Role: XLIFF-Admin screen can create or import XLIFF files. See Also: "Using the Roles Screens" on page 705.](#)

1. To translate *one content item*, navigate to its View Content screen.  
 To translate *all content in a folder* (and, if desired, all of its subfolders), navigate to its View Contents of Folder screen.  
 To translate a menu, go to **Modules > Menus**.
2. Click the Export for Translation button (). (On the View Contents of Folder Screen, click **Action > Export for Translation**.)
3. The Export for Translation screen appears.



Export for Translation Folder "CMS400Demo"

☒ Include subfolders

**Source Language**

English (U.S.)

**Target Language(s)**

| <input checked="" type="checkbox"/> | Name               | Code  | ID   |
|-------------------------------------|--------------------|-------|------|
| <input checked="" type="checkbox"/> | Nederlands [Dutch] | nl-NL | 1043 |
| <input checked="" type="checkbox"/> | Français [French]  | fr-FR | 1036 |
| <input checked="" type="checkbox"/> | Deutsch [German]   | de-DE | 1031 |
| <input checked="" type="checkbox"/> | Italiano [Italian] | it-IT | 1040 |
| <input checked="" type="checkbox"/> | Español [Spanish]  | es-ES | 1034 |

The **Include Subfolders** field only appears if you click the Export for Translation button from the View Contents of Folder screen.


- If you want to include content in all of the selected folder's subfolders, check **Include Subfolders**. To translate just the selected folder, uncheck it.
- The language of items being translated appears in the **Source Language** pull-down. If this is not the correct source language, click the down arrow and select the correct one.
- All languages enabled in the Language Settings screen are selected under **Target Language(s)**. (See Also: "[Determining Which Languages are Available](#)" on page 783).
- To translate the content into *all* languages, proceed to the next step.

To translate the content into *some* languages, uncheck the languages that you do not want. You can uncheck the box in



the header row (illustrated below) to uncheck all, then only check the ones you want.



8. Click the box in the left column for each language into which you want to translate the content.
9. Click the Create XLIFF Files for Translation button (  ).
10. **Ektron CMS400.NET** creates one .zip file for each language. The .zip file includes an XLIFF file for each selected content item.






#### NOTE

If any selected folder contains content in a target language whose edit date is more recent than the source language edition, that content is excluded from the .zip file. Ektron CMS400.NET assumes that, since a more recent target-language edition exists, you do not want to translate the corresponding source language edition.

The **History** section of the Export for Translation screen displays the translated files.




## Target Language(s)

|                                     | Language   | Locale ID | Hexadecimal | Code |
|-------------------------------------|--|-----------|-------------|------|
| <input checked="" type="checkbox"/> |  Dutch (Netherlands)        | 1043      | 0413        | nl   |
| <input checked="" type="checkbox"/> |  French (Standard)          | 1036      | 040c        | fr   |
| <input checked="" type="checkbox"/> |  German (Standard)          | 1031      | 0407        | de   |
| <input checked="" type="checkbox"/> |  Italian (Standard)         | 1040      | 0410        | it   |
| <input checked="" type="checkbox"/> |  Spanish (Traditional Sort) | 1034      | 040a        | es   |

## History

|   |  |           |                    |
|---|--|-----------|--------------------|
|  | Exported Folder "Form_Example"   | 2/13/2006 | Complete           |
|  | Downloadable Zipped XLIFF Files for Translation  | 2/13/2006 | Complete           |
|  |  →  <b>French (Standard)</b>   |           | <b>6,412 bytes</b> |
|  |  →  <b>Dutch (Netherlands)</b> |           | <b>6,415 bytes</b> |
|  | Extracted Form_Example   | 2/13/2006 | Complete           |

The history lists the .zip file created for each language. (.zip files are indicated by the WinZip icon (  ).) To the right of the icon are

- the flag of the source language
- an arrow indicating the direction of the translation
- the flag and name of the destination language
- the size of the zip file

**NOTE** The top of the history window display the most recently exported/imported files.

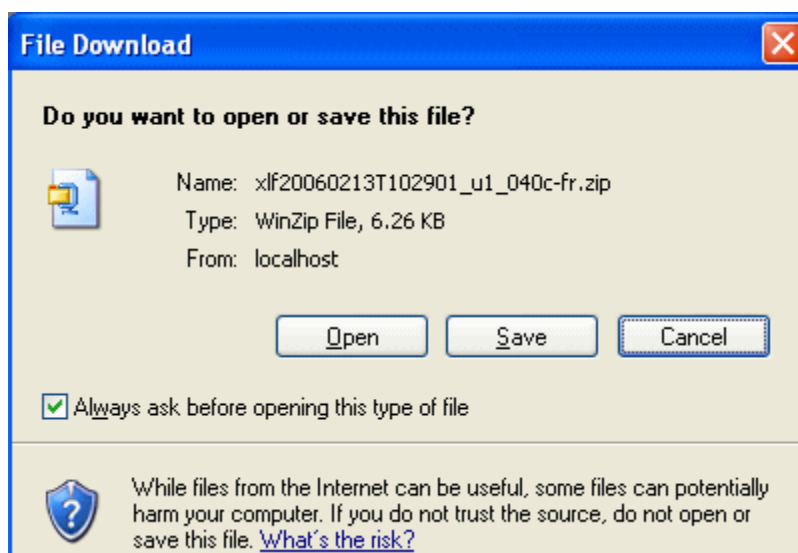
11. If you want to review the items in a zip file, click the plus button next to **Extracted**. When you do, each content item's ID number, title, and last edit date appear.



## History

|  |   |                    |           |
|--|---|--------------------|-----------|
|  | Exported Folder "Form_Example"                  | 2/13/2006          | Complete  |
|  | Downloadable Zipped XLIFF Files for Translation | 2/13/2006          | Complete  |
|  | → <b>French (Standard)</b>                      | <b>6,412 bytes</b> |           |
|  | → <b>Dutch (Netherlands)</b>                    | <b>6,415 bytes</b> |           |
|  | Extracted Form_Example                          | 2/13/2006          | Complete  |
|  | 393 Breakroom Survey                            |                    | 1/31/2006 |
|  | 380 Contact Information                         |                    | 12/2/2005 |
|  | 394 Poll: My favorite feature                   |                    | 2/1/2006  |

12. Click the blue text of a .zip file. The File Download window appears.



**NOTE** If you want to review the XLIFF files within the .zip file, click **Open**.

13. Click the **Save** button. The Save As window appears. Navigate to the folder where you want to place the zip file and click **Save**.
14. Transmit the files to the translation agency.



**NOTE** When XLIFF files are returned by the translation agency, their extension must be .xlf. Other than that, the file name is not important.

## File Naming Patterns

| File Type | Pattern   |
|-----------|---|
| XLIFF     | <p><i>item identifier</i>[<i>item ID</i>][_<i>new language hexadecimal code</i>][<i>two letter new language code</i>].xlf</p> <ul style="list-style-type: none"> <li><i>item identifier</i> options: <ul style="list-style-type: none"> <li>content: <b>cont</b></li> <li>form: <b>form</b></li> <li>menu: <b>s</b></li> <li>menu item: <b>s</b></li> </ul> </li> <li><i>item ID</i> varies, depending on whether the item is content, a form, a menu, or a menu item <ul style="list-style-type: none"> <li>content: content ID number</li> <li>form: form ID number</li> <li>Menu: menu ID number</li> <li>Menu item: menu ID number</li> </ul> </li> </ul> |
| Zip       | <p>xlf[<i>timestamp in format yyyyymmddThhmmss</i>][_u[<i>user ID</i>] _ [<i>new language hexadecimal code</i>]-<br/>[<i>two letter language code</i>].zip</p> <p>The user ID indicates which user performed the export or import.</p>  |


## Importing Translated Files into Ektron CMS400.NET

To import the translated files into **Ektron CMS400.NET**, follow these steps.


**Note** [Only members of the Administrator User Group and those defined in the Manage Members for Role: XLIFF-Admin screen can create or import XLIFF files. See Also: "Using the Roles Screens" on page 705.](#)

1. Go to **Workarea > Modules > Import XLIFF Files**.
2. Click the **Browse** button and navigate to the folder that contains the translated files.
3. Select the files to import.



4. Click the Upload and Import button (.
5. **Ektron CMS400.NET** creates new or updates existing foreign-language editions of the imported content.
6. Information about the imported file appears in the history area of the Import XLIFF Files screen. You can click plus signs (+) to reveal increasing levels of information about the imported content.









Import Translated XLIFF Files



Select XLIFF files to upload and import. Files must have a .xlf or .zip extension.

|  |           |
|--|-----------|
|  | Browse... |
|  | Browse... |
|  | Browse... |
|  | Browse... |
|  | Browse... |

### History

|   |   |
|---|---|
| <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">   Imported CONT40~1.XLF </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">   Merged (1) </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">   403 Bonjour </div> <div style="border: 1px solid #ccc; padding: 5px;">   CONT40~1.XLF </div> | <div style="margin-bottom: 5px;">2/13/2006    Complete</div> <div style="margin-bottom: 5px;">2/13/2006    Complete</div> <div style="margin-bottom: 5px;">Translated</div> |
|---|---|

When you import the file, the comment **Translated** appears next to it.

For each new edition:

- If the content title is the same as the source edition, the next available number is appended to the title to distinguish it from the source. For example: **Henry Williams(1)**.



- its status matches the status of the source content. Typically, its status is checked out. When imported, it can enter the approval process just like other content.
- its history indicates it was checked in at the time the report was run
- for content, the following properties are inherited from the original content:
  - status
  - Smart Form
  - content searchable
  - approval method
- date created and last edit date are captured from when the content is imported
- the last user to edit is captured by user who imported the file

After you import the translation files, **Ektron CMS400.NET** removes them from the file system.

**NOTE**

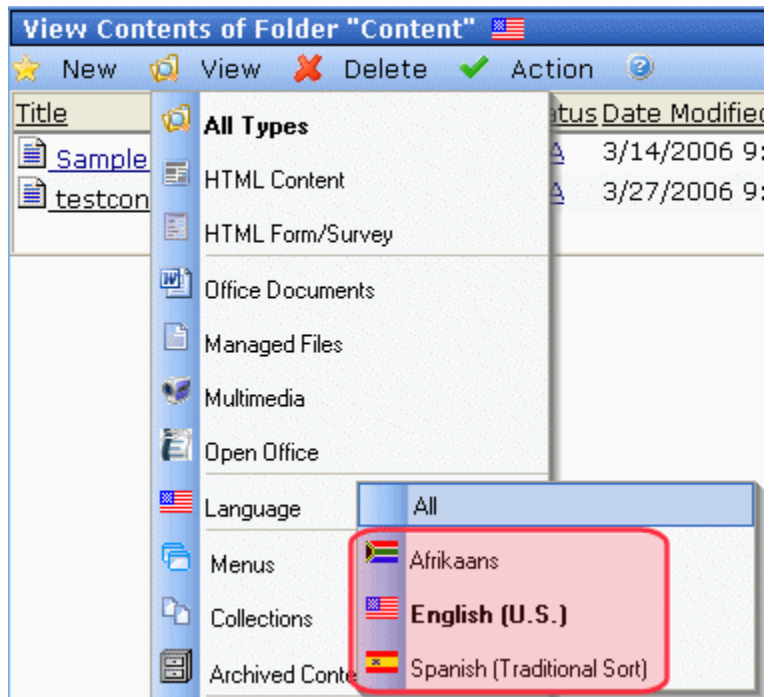
If an error exists in any of the files, the erroneous files are moved into a subdirectory. The directory is created using a timestamp. For example:  
`uploadedFiles\localization\merged\xlf20060208T141841_u1\error\.`

---

### ***Viewing Foreign Language Content***

1. Navigate to the folder that contains the content.
2. Click **View > Language** and select the desired language.





- Only content in that folder and the selected language appears. You can perform the same activities with this content as any other content.

### ***Applying Translated Metadata to Translated Content***

Unfortunately, translated metadata is ignored when importing XLIFF files. This section describes how to have translated metadata applied to the translated content.

#### **Background Information**

Although metadata exists in the XLIFF files, it does not appear in the content's metadata even if metadata is defined for that language. This is because metadata definitions have unique IDs across languages.

**NOTE** While a content ID is the same for a corresponding content block in other languages, the same is not true for metadata.



As a result, the ID for the source language (for example, English) metadata is not automatically mapped to metadata for other languages (for example, Spanish).

To solve this problem, create a mapping between the IDs of metadata definitions of different languages that are synonymous. For example, consider the following metadata definitions.

| ID  | Name                         | Language |
|-----|------------------------------|----------|
| 102 | Paper form number            | en-US    |
| 104 | Original page count          | en-US    |
| 106 | Número de papel de la forma  | es-ES    |
| 108 | Cuenta de la página original | es-ES    |
| 110 | Estado de la minoría         | es-ES    |

In this example, IDs 102 and 106 are synonymous as are 104 and 108. Definition 110, however, only exists in Spanish.

The mapping is stored in an XML file. The mapping informs the XLIFF import process that metadata for ID 102 in English corresponds to ID 106 in Spanish and likewise with 104 and 108.

### Setting up the Process to Apply Translated Metadata to Content

1. Open the folder `site root/workarea/xslt/` and look for the file `metadatadeinitions.xml`. If it exists, go to step 2. If it does not, download it from Ektron at [http://dev.ektron.com/uploadedFiles/DevCenter/Support/KB\\_Articles/XliffMetadata.zip](http://dev.ektron.com/uploadedFiles/DevCenter/Support/KB_Articles/XliffMetadata.zip).

The zip file includes modified XSLT files that access the XML file.

2. Create metadata definitions in the other language(s). Be sure to use the same data type.

To do this, log in, open the workarea, go to **Settings > Configuration > Metadata Definition**.



3. Make note of the definitions in the original language (for example, English).
4. Switch to view another language (for example, Spanish) and add a new definition. Assign it the same data type and other properties as the original. Make note of the new ID numbers.  
Create metadata definitions in all languages you wish to support. You may add other languages and define more metadata definitions at any time.
5. Edit `workarea/xslt/metadataDefinitions.xml`. For each Metadata Definition, enter a `<dd>` element within the `<dl>` element. The `<dd>` element has the following form.

```
<dd title="Name of the metadata definition">

    <dfn id="ID" xml:lang="language-country code"/>

    <dfn id="ID" xml:lang="language-country code"/>

    :

</dd>
```

For example,

```
<dl>

    <dd title="Paper form number">

        <dfn id="102" xml:lang="en-US"/>

        <dfn id="106" xml:lang="es-ES"/>

    </dd>

    <dd title="Original page count">

        <dfn id="104" xml:lang="en-US"/>

        <dfn id="108" xml:lang="es-ES"/>

    </dd>

</dl>
```

The definition for ID 110 is not included because it applies to only one language.

Now that you have set up the xml file, the XLIFF import process accesses the `metadataDefinitions.xml` file to determine which definitions in the target language (for example, Spanish)



correspond to the definitions in the source language (for example, English).

## Additional Multi-Language Topics

- "Multi-Language Approval Chains" on page 807
- "Working with Tasks in a Multi-Language System" on page 808
- "Working with Collections in a Multi-Language System" on page 808
- "Working with Calendars in a Multi-Language System" on page 808
- "Working with Menus in a Multi-Language System" on page 808
- "Creating an External Link to a Page of Foreign Content" on page 809

### Multi-Language Approval Chains

Just as you can create separate editions of content for each enabled language, you can set up a language-specific approval chain and method. When determining a folder's approval chain, first select a language then select users and groups with authority to approve content in that folder and that language.

The screen below shows the language selection drop-down list on the View Approvals screen.

**View Approvals for the Folder "Content"**

| Approval Type: English (US)

**Approval Method:**  
 Force All Approvers

| User or Group Name | ID |
|--------------------|----|
|--------------------|----|

Only users in the language-specific approval chain for a folder can approve content in that language.



You can also set a language-specific approval method. See Also: ["The Approval Method" on page 701](#)

## Working with Tasks in a Multi-Language System

If you create content then add a task to it, the task can be in any enabled language. This would be helpful if, for example, you review English content then want to assign the task of translating it into another language in that language.

If you create a task then try to assign content to it, you can only choose from content in the language of the task.

## Working with Collections in a Multi-Language System

In a multi-language **Ektron CMS400.NET** system, you can create a language-specific edition of each collection. For information about doing this, see the **Ektron CMS400.NET** User Manual section "Working with Collections."

## Working with Calendars in a Multi-Language System

Calendars can be created in any supported language. Once you enter the calendar and event information in the foreign language, the calendar display (that is, day and month names) automatically appears in that language. Also, regional conventions for first-last days of the week, and date and time formats are maintained.

For more information, see ["Creating a Foreign Language Calendar" on page 540](#).

## Working with Menus in a Multi-Language System

**NOTE** [If you are not familiar with the Ektron CMS400.NET's menus feature, please read "Menu Feature" on page 597 and the Ektron CMS400.NET User Manual section "Working with Menus."](#)

---



You can create an edition of any menu in every supported language. When a site visitor selects a language, navigates to a page that has a menu and clicks the menu link, **Ektron CMS400.NET** displays the menu in the selected language if it is available. If a menu in that language is not available, nothing appears.

Before creating or translating a menu, it's a good idea to create or translate all content that will be on the menu. In this way, you can link these content items to the new menu. However, after creating a menu, you can always add new items to it.

For details about translating menus, see the **Ektron CMS400.NET** User Manual section "Working with Menus", "Managing Menus", "Working with Menus in a Multi-Language System."

## Creating an External Link to a Page of Foreign Content

If another Web site links to a multilingual page on your site, the URL must include the language ID parameter. For example:

`www.ektron.com/web-content-management-solutions.aspx?LangType=1036`

## Setting Up a Multilingual Web Site

**Ektron CMS400.NET** supports multi-lingual content. This section lists steps to follow when setting up such a site.

See Also: "Creating Web Pages that Support Several Languages" on page 811

| Step   | For details, see   |
|--|--|
| 1. In web.config, make sure multilingual support is enabled. | "Enabling/Disabling Support for Multiple Language Content" on page 781 |



| Step   | For details, see  |
|--|---|
| <p>2. Set a default content language, one that will be used by the majority of your site's content.</p> <p>If you had a previous version of <b>Ektron CMS400.NET</b> and selected a default language on the Database Upgrade Utility, be sure that default language matches the one in web.config.</p> | "The Default Language" on page 786  |
| 3. Enable languages your site will support.  | "Determining Which Languages are Available" on page 783   |
| 4. Add language selection function to templates.   | "Viewing Your Site in Another Language" on page 781   |
| 5. Create a metadata definition for each supported language.   | "Adding a Metadata Definition" on page 125  |
| 6. Create or translate content.  | <ul style="list-style-type: none"> <li>• "Creating New Content" on page 787</li> <li>• "Translating Content" on page 788</li> </ul> |
| <p>7. Change the language of content not in the default language.</p> <p><u>Note: Only needed if Web site previously had multi-lingual content.</u></p>  | "Resolving Conversion Issues" on page 814   |
| 8. Set up approval chains for new content.   | "Multi-Language Approval Chains" on page 807  |
| 9. Set up multilingual collections.  | "Working with Collections in a Multi-Language System" on page 808   |
| 10. Set up multilingual menus.   | "Working with Menus in a Multi-Language System" on page 808   |
| 11. Modify text on templates.  | "Modifying Page Content Based on Language Selection" on page 811  |
| 12. Translate graphics.  | "Modifying Images Based on Language Selection" on page 812  |



## Creating Web Pages that Support Several Languages

When thinking about setting up your Web site to support content in multiple languages, consider these three actions.

| Action   | For more information, see   |
|--|---|
| Create language-specific content, menus, collections | <ul style="list-style-type: none"> <li>• <a href="#">"Translating Content" on page 788</a></li> <li>• <a href="#">"Working with Collections in a Multi-Language System" on page 808</a></li> <li>• <a href="#">"Working with Menus in a Multi-Language System" on page 808</a></li> </ul> <p>After you create these items, have the page invoke that item dynamically. When <b>Ektron CMS400.NET</b> receives a request to display an item that includes a language and item id number, it returns the language-specific edition. To learn about letting the user select a language from a Web page, see <a href="#">"Viewing Your Site in Another Language" on page 781</a>.</p> |
| Adjust template content to user language             | <a href="#">"Modifying Page Content Based on Language Selection" on page 811</a>  |
| Translate text in images                             | <a href="#">"Modifying Images Based on Language Selection" on page 812</a>  |

## Modifying Page Content Based on Language Selection

If a template's text should change according to a user's language selection, use a case statement to provide the language-specific content. A good example of this is the template used on the RC international sample site (Illustrated below).



Assume you want to create editions of the menu that runs across the header (**Home**, **Products**, etc.) in three languages:

- English



- French
- German

To do so, follow these steps.

**Note** This procedure uses the header.asp file delivered with the RC international sample site as an example.

1. In the template file, declare each menu option a variable. For example:

```
Dim t_search, t_products, t_support, t_news, t_careers, t_calendar, t_home, t_login,  
t_site_lang, t_contact, t_copyright, calendar_id
```

2. Enter case statements that provide the value of each variable in each language. (1031 is the decimal code for German, 1036 for French.) The following illustrates how to do this for the search menu option.

```
Select Case ContentLanguage
```

```
Case "1031"
```

```
    t_search = "Suche"
```

```
Case "1036"
```

```
    t_search = "Recherche"
```

```
Case else
```

```
    t_search = "Search"
```

```
End Select
```

Now, when a user visits a page controlled by this template and selects French or German as the site language, the page is refreshed and the translated values appear on the template.

## Modifying Images Based on Language Selection

Many Web page templates also include images that require translation. You can set up templates to invoke images in the user-selected language by following these steps.

1. Add to the library each image that should change when the language changes. For example, if your company's tag line is translated into three languages, upload the three images into the library.



It's a good idea to include the language in the title of the image. For example, tagline\_English, tagline\_French.

2. Create a separate content block for each language-specific image. Each content block must have a unique ID number.
3. Insert the appropriate image into a content block for each language. For example, insert the tagline\_English image into the English content block.
4. Insert the content blocks into the appropriate templates. For example, insert the English content block into the English template.

## Using a Language Other than American English as the Default

Use this procedure if your site supports one language only, and it is not American English (1033).

To set your site's default language to something other than American English, follow these steps.

1. Install a new site. Do not log in at this point.
2. Open your site's web.config file (located in your site root folder.) Set `ek_EnableMultilingual` to zero (0). Set `ek_DefaultContentLanguage` to the four digit locale id for the desired language. See ["Appendix C: List of Supported Languages" on page 979](#)
3. Log in to **Ektron CMS400.NET**.
4. Go to **Settings > Configuration > Language Settings**.
5. Enable the desired language, and disable all other languages.
6. Go to **Settings > Configuration > Setup**.
7. Make sure the desired language is the **Default Application Language**.
8. Go to **Settings > Users > Edit User Information**. Set the **User Language** to the desired language. Do *not* leave **App Default** as the value.
9. Repeat Step 7 for every **Ektron CMS400.NET** user.



# Resolving Conversion Issues

## IMPORTANT!

This section is only relevant to Web sites that upgrade to **Ektron CMS400.NET** Release 4.7 or higher and which, prior to the upgrade, had content in more than one language. If your site does not meet both criteria, you can ignore this section.

When you upgrade to 4.7 or higher, the Database Upgrade utility prompts you to select a language. All content in your site is then assigned that language. (Prior to Release 4.7, content did not have a language attribute.) If all content is not in the selected language, you must resolve that discrepancy.

For example, assume for the sake of simplicity that your pre-4.7 Web site had four content items: three English and one French. During the database upgrade, you select English. Three content items are assigned the correct language, but the fourth content item, which should be assigned French, is also assigned English. You cannot simply change the content's language assignment. When resolving the discrepancy, there are two possible scenarios.

## Scenario 1

Prior to 4.7, your site had unique content in French (id number 4). To resolve this, copy the content to a new French edition with the same id number. Then, delete the English edition.

### *Before Upgrade*

| Content id | Language attribute | Actual language |
|------------|--------------------|-----------------|
| 1          | not available      | English         |
| 2          | not available      | English         |
| 3          | not available      | English         |
| 4          | not available      | French          |

### *After Upgrade*



| Content id | Language attribute | Actual language |
|------------|--------------------|-----------------|
| 1          | English            | English         |
| 2          | English            | English         |
| 3          | English            | English         |
| 4          | English            | French          |

***After Following Procedure Listed Below***

| Content id  | Language attribute | Actual language |
|-------------|--------------------|-----------------|
| 1           | English            | English         |
| 2           | English            | English         |
| 3           | English            | English         |
| 4 (deleted) | English            | English         |
| 4           | French             | French          |

### ***Procedure for Scenario 1***

To change a content item's language, follow these steps.

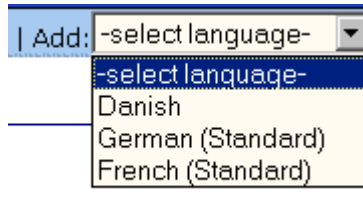
#### **NOTE**

Before beginning this procedure, make sure

- the correct language for the content is enabled. See "Determining Which Languages are Available" on page 783.
- metadata has been defined for the new language. See "Adding a Metadata Definition" on page 125

1. Within **Ektron CMS400.NET**, navigate to the View Content screen on content item 4.
2. From the Add drop-down list, select French.





3. **Ektron CMS400.NET** creates a French edition of the content.
4. Check in that edition of the content.
5. Delete the English edition of the content.

## Scenario 2

Prior to 4.7, your site had English and French content (id numbers 3 and 4) that presented the same content in each language. You want to leave the English content alone, create a French edition of that content with the same id number, then delete the French content.

The advantage of this solution is that both editions of the content have a single id number. So, when a site visitor selects a language and navigates to that page, **Ektron CMS400.NET** displays the edition of the content for the selected language.

To resolve this, create a French edition of the English content, copy the French content, then delete the French content.

### *Before Upgrade*

| Content id | Language attribute | Actual language |
|------------|--------------------|-----------------|
| 1          | not available      | English         |
| 2          | not available      | English         |
| 3          | not available      | English         |



|   |               |        |
|---|---------------|--------|
| 4 | not available | French |
|---|---------------|--------|

***After Upgrade***

| Content id | Language attribute | Actual language |
|------------|--------------------|-----------------|
| 1          | English            | English         |
| 2          | English            | English         |
| 3          | English            | English         |
| 4          | English            | French          |

***After Following Procedure Listed Below***

| Content id  | Language attribute | Actual language |
|-------------|--------------------|-----------------|
| 1           | English            | English         |
| 2           | English            | English         |
| 3           | English            | English         |
| 3           | French             | French          |
| 4-(deleted) | na                 | na              |

***Procedure for Scenario 2***

To solve the language conversion issue explained in scenario 2, follow these steps.

**NOTE**

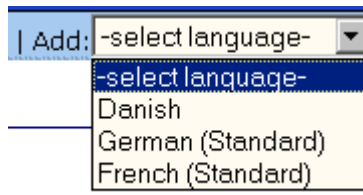
Before beginning this procedure, make sure

- the correct language for the content is enabled. See "Determining Which Languages are Available" on page 783.



- [metadata was defined for the new language. See "Adding a Metadata Definition" on page 125](#)

1. Within **Ektron CMS400.NET**, navigate to the View Content screen of content id 3.
2. From the Add drop-down list, select French.



3. **Ektron CMS400.NET** creates a French edition of content id 3.
4. Translate the title into French.
5. Delete the English elements of content id 3 (content, summary, metadata, schedule, and comments).
6. Check in the French edition of content id 3.
7. Copy and paste all relevant elements of the French content (id 4) into the French edition of content id 3 (content, summary, metadata, schedule, and comments).
8. Delete content id 4. See [Also: "Deleting Content" on page 90](#)

## Set the Language of Spell Checking

To specify which dictionary to reference when checking spelling, specify a language in Microsoft Word, version 2000 or later. To do this, open Word and select **Tools > Language > Set Language**.

## Character Encoding

The following Ektron Knowledge Base articles describe issues surrounding the display of special characters within **Ektron CMS400.NET**. Note that these articles refer to eWebEditPro, Ektron's WYSIWYG editor embedded within **Ektron CMS400.NET**.

Wherever these articles contain references to eWebEditPro's configuration data or file (config.xml), you should instead update the web.config file, located in your site's root folder.



- HOWTO: produce UTF-8 ([www.ektron.com/developers/ewebeditpro\\_tutorials.cfm?id=403](http://www.ektron.com/developers/ewebeditpro_tutorials.cfm?id=403))
- INFO: Character Encoding ([www.ektron.com/developers/ewebeditprokb.cfm?id=1807](http://www.ektron.com/developers/ewebeditprokb.cfm?id=1807))
- INFO: Encoding special characters ([www.ektron.com/developers/ewebeditprokb.cfm?id=384](http://www.ektron.com/developers/ewebeditprokb.cfm?id=384))

## Translating the Workarea

When **Ektron CMS400.NET** is delivered, the Workarea is in English. If you want to translate it to another language, read this section.

**NOTE** [Ektron provides American English strings in a text file. You must translate them.](#)

### Prerequisites

- The alphabetical, four-character identifier of the country/ language into which you are translating. See [CultureInfo Class](#) from the MSDN Web site ([http://msdn2.microsoft.com/en-us/library/system.globalization.cultureinfo\(vs.71\).aspx](http://msdn2.microsoft.com/en-us/library/system.globalization.cultureinfo(vs.71).aspx)).
- The server that hosts **Ektron CMS400.NET** must have Visual Studio.NET

### Procedure for Translating Workarea Strings

All Workarea text (that is, screen titles, Workarea menus, messages, alt text for buttons, etc.) is stored in a *resource file*. Resource files are installed to the `siteroot\Workarea\resources` directory.

**NOTE** [Workarea images that include text are stored in the `workarea/images/language` folder. For example, `workarea\images\french\_standard`.](#)

**Ektron CMS400.NET** provides a resource files for the following languages. The English resource file is complete. The others are partially complete.

- German
- English (United States)
- Spanish



- French
- Italian
- Dutch - Netherlands
- Dutch - Belgium

Regardless of the list above, to translate your Workarea, translate the English file into the desired language.

## ***Procedure Overview***

A resource file is not human-readable. To make it so, use Microsoft's resgen utility. Next, translate the human-readable, .txt version of the file. Here is a portion of it.

```
add menu title=Add Menu
lbl ad serverip=Domain Controller IP
btn quickdeploy=Replicate
alt: remove collection items text=Click here to remove items from
this collection
```

Notice that, for each string in the file, an English description appears first. The description includes information about where the text appears. For example, `btn` text appears on a button. Next is an equal sign (=), then English text.

Translate the text to the right of the equal sign. You can send the file to an agency or do it yourself.

Then, run the resgen utility on the .txt file again, indicating the translate-to language. This converts the file back to a machine-readable format. Finally, move that file to the appropriate language folder under `workarea/images`, and enable the new language in the Workarea.

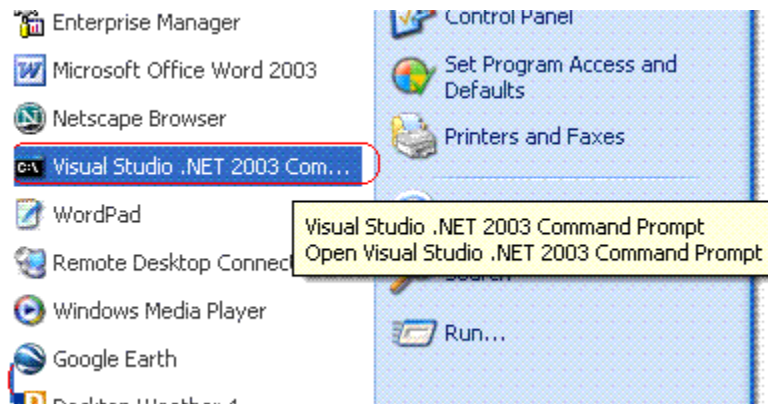
## ***Step by Step Instructions***

To perform this procedure, follow these steps.

1. The resgen.exe utility is located in `C:\Program Files\Microsoft Visual Studio 8\SDK\v2.0\Bin`. Copy it to the *your web site*\Workarea\resources folder.



2. Go to **Windows Start button > Microsoft Visual Studio 2005 > Visual Studio Tools > Visual Studio 2005 Command Prompt** to open a command window.



3. Within the command window, change the directory to the *your web site*\Workarea\resources folder. For example, `cd C:\Inetpub\wwwroot\CMS400Min\Workarea\resources`.
4. Insert the following text: `resgen EKResource.en-US.resources anyfilename.txt`

**NOTE** You can assign any name to the .txt file.

5. A .txt file of resource strings converted to a human-readable format is created in the `resources` directory. (You assigned its name in Step 4.) Open the file.
6. Replace any single backslashes (\) with a double backslash (\\).
7. Translate the text following every equal sign (=). Be careful not to change any occurrences of n surrounded by double backslashes (\\n\\).

**NOTE** You can send the file to a translation house or translate the strings yourself.

8. Save and close the .txt file.
9. Open the command window (as described in Step 2) and insert the following: `resgen anyfilename.txt EKResource.two-character country code-two-character language code.resources`  
Replace `anyfilename.txt` with the file you named in Step 4. In this example, the .txt file is named `span_translation.txt`.



For example, to indicate that the Workarea is being translated into the Spanish/Spain, enter `resgen.exe span_translation.txt EkResource.es-ES.resources`.

When the conversion is complete, **Writing Resource File ...Done** appears in the command window.

10. The `Workarea\resources` folder includes several resource files. If one exists for the translate-to language, it is overwritten. If one does not exist, it is created.

To follow our example, the `EkResource.es-ES.resources` file was updated with changes you made in Step 7.

11. Move the updated resource file to the appropriate language folder under `Workarea/images`. To continue our example, move the file to the `Workarea/images/spanish_traditional_Sort` folder.

If a folder does not exist for the new language, create one under `Workarea/images`.

12. Enable the new language in the Language Settings screen. See ["Determining Which Languages are Available" on page 783](#)
13. Make the new language the default language in the Configuration Setup screen. See ["Default Application Language" on page 27](#).



# **Managing Ektron CMS400.NET**



# Mapping Feature

The Mapping feature displays a map that flags locations of interest to your site visitors. Using Ektron's GeoMapping functionality, content can be tagged with longitude and latitude coordinates to leverage Microsoft® Virtual Earth™ and Google Earth.

Each location is a CMS content item to which map information was added. For example, if your site hosts a school district, each map location could represent one school in the district.

For information on installing and using the Mapping Feature, see the **Ektron CMS400.NET** Developer Manual section "Introduction to **Ektron CMS400.NET** Server Controls" > "Map Server Control."



# Site Replication and Quick Deploy

Site Replication and Quick Deploy are **Ektron CMS400.NET** features that move files between your staging and production servers. Site Replication moves an entire site, while Quick Deploy typically moves content to production as soon as it is published on staging.

Because these features are an extra cost option, they are documented in a separate manual, the **Ektron CMS400.NET** Site Replication Manual. It is available from <http://www.ektron.com/web-content-management-solutions.aspx?id=4020>.



# Content Analytics Feature

The Content Analytics feature lets you track statistics about visits to your Web site. You can use it to determine the following kinds of information:

- how often your content was viewed
- how many site visitors viewed for first time, and how many returned
- the most popular *referral pages* (that is, the Web page from which visitors clicked to arrive on your site)

Several options for selecting a date range let you compare activity across different weeks, months, and years.

This section explains the Content Analytics feature through the following subtopics.

- ["Enabling the Content Analytics Feature" on page 826](#)
- ["Determining Which Templates are Tracked" on page 827](#)
- ["Specifying the Frequency of Writing to the Database" on page 829](#)
- ["The Statistical Data" on page 829](#)
- ["Writing to the IIS Log" on page 831](#)
- ["Content Analytics Reporting" on page 831](#)
- ["Changing the Date Range of the Statistical Data" on page 837](#)

## Enabling the Content Analytics Feature

By default, the Content Analytics feature is enabled in the web.config file, under the `<analyticsSettings>` tag. To disable it, set the value of the `enableAnalytics` property to `false`.

```
<analyticsSettings>
```



```
<!-- globally enables or disabled all visitor tracking -->  
  
<add key="enableAnalytics" value="true" />
```

If this property is set to `true`, and you later change it to `false`, statistical data remains within **Ektron CMS400.NET**, but no additional data is collected.

## Determining Which Templates are Tracked

Analytic data is tracked for every template that has a Content Analytics server control.

**NOTE** Ektron CMS400.NET can only track template views if the viewer's browser's cookies are enabled.

## Inserting a Content Analytics Server Control

For details about dropping this server control onto a template, see the **Ektron CMS400.NET** Developer Manual section "Content Analytics Server Control."

### Best Practice

Drop the control onto an area that does not disrupt the template layout, such as the bottom.

## Tracking Templates vs. Individual Content Items

To track visitor activity to a template (for example, `customerservice.aspx`), drop the server control onto it. To track activity for a content item within that template, set the **DefaultContentID** property to the ID of that content.

**NOTE** You can only track one content item per template.

## Display of Analytic Data on Template

If a user is logged in, each template that has a server control displays statistics for that template. So, you can immediately see how many times a template has been viewed, and by how many visitors (as illustrated below).



## Our Company Intranet

At the heart of Acme is our commitment to our customers, and our dedication to finding a better way to conduct business effectively and efficiently. Our mission is to develop best-of breed solutions that encompass scalability, flexibility, and ease of use without losing focus of being affordable.

In 1998, William Acme founded Acme Services — based on the philosophy that services should be simple and affordable. Today, Acme is based on the same principle.

Acme released its first product, a services tool that allows users to deliver services quickly and easily. Because this tool is so easy to integrate and use, sales grew and Acme expanded with offices in Amherst, New Hampshire, the United Kingdom, and Germany. Acme's services tool has become a leader in the industry and partnerships have been made with every major services vendor.

As a result, Mr. Acme and his team have had the unique opportunity to work with and listen to thousands of service providers learning exactly how they were using our tool, as well as what challenges they faced and what they most valued in a services solution. Based on this valuable feedback, Acme developed its first services management platform solution built around Acme's market-leading tool. The solution was outstanding, as it became immediately clear that there was a real need for services management solutions that are easy-to-use and integrate.

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

---

Visitors: 1  
Views: 16

You can get a more detailed breakdown of activity for a template by viewing the Top Templates statistics. See Also: ["Top Templates" on page 836](#)



# Specifying the Frequency of Writing to the Database

**NOTE**

The following feature only works with a SQL database. It does not work with Oracle.

Once you set up the Content Analytics feature, your database is subject to a continuous barrage of write activity, generated by visits to your site.

To mitigate the effect of this activity on your database's performance, you can hold visit activity in application server memory until a predetermined amount of data is collected. When that amount is collected, it is moved in one packet to the database. So, the database is "hit" much less frequently.

You can specify the amount of data saved in memory prior to being written to the database using these web.config file elements.

- `recordsBeforeWrite` - the number of unique template visits
- `timeBeforeWrite` - the number of seconds since the last time a database write occurred

When either element reaches the value set in web.config, all records stored in application server memory are written to the database. That event also resets the value of both elements to zero (0).

## The Statistical Data

For every template view, the following statistical information is captured:

- **url** - the visited page
- **content\_id** - the ID of the visited content. Only captured if a content block ID was entered in the server control's **DefaultContentID** property. See Also: ["Tracking Templates vs. Individual Content Items" on page 827](#)
- **visitor\_id** - a unique GUID that identifies a visitor
- **hit\_date** - date and time when a page view occurred



- **referring\_url** - the URL a user was viewing before jumping to the visited page
- **visit\_type** - zero (0) indicates new visitor, 1 indicates returning visitor, 2 indicates all other views. See Also: "[Tracking Site Visitors](#)" on page 830

In a session, the first page hit tracks the visit as zero (0) (if the user is new) or 1 (if the user previously visited the page). From then on, 2 is logged.

## Tracking Site Visitors

The Content Analytics feature provides information about visits made by *new* versus *returning* visitors. To capture this data, the feature asks this question whenever a page is visited: is the user logged in as either a membership or regular user?

- If *yes*, capture the user ID with the statistical data
- If *no*, place a cookie on the visitor's computer

So, the first time a user visits a page, either user information is captured or a cookie is created.

The next time the user visits that page, the feature checks the visit history for the user ID, or for a cookie. If either is found, the visit is considered a return.

## New Visitor Statistical Tracking

The same user visit may be considered new on one view but not on another. For example, someone visits on January 30 (Monday) then again February 2 (Thursday). On the monthly statistics, that visitor is new, but on the weekly statistics, the February 2 hit would be a return visit (his second this week).

Now consider a second visitor, who browses to your site on the first and 20th of the month. These visits would appear on weekly statistics as two new visits, but on the monthly statistics, only the first visit would show up on that month's tally of new visitors. The second visit would add to the return visitor statistics.



## Writing to the IIS Log

In addition to writing Site Analytic data to the database, you can write it to the IIS log. To do this, enable the `appendToIISLog` element in the web.config file.

Note that if you set `appendToIISLog` to `true`, Site Analytic data is written to the IIS log, but does not appear in the Workarea. Only data written to the database appears in the Workarea.

## Content Analytics Reporting

The Content Analytics feature has extensive reporting features which are based on drilling down from a top-level view of the entire site, to individual templates, all the way down to individual content items (if specified).

To access Content Analytics Reports, follow these steps.

*Either*

1. Browse to a content item for which analytic data is being captured.
2. Right click the mouse.
3. Click **View Template Activity** to see analytic data for the current content item (to learn more about data captured for one content item, see ["Top Content" on page 835](#)).
4. Click **View Site Analytics** to view analytic data for the entire Web site.

*or*

1. Go to **Modules > Site Analytics** to view analytic data for the entire Web site.

Five levels of reporting are available.

- ["Site Statistics" on page 832](#)
- ["Site Activity" on page 833](#)
- ["Top Content" on page 835](#)
- ["Top Templates" on page 836](#)
- ["Top Referrers" on page 837](#)



## Summary of Statistical Data Available

The following table lists the kinds of analytic statistics that can be viewed at each level of the site.

| Type of Statistical Information                                    | Site-wide | Template-Level | Content-Level |
|--|-----------|----------------|---------------|
| Views of Any Template  | X         | X              | X             |
| Visitors: New and Return   | X         | X              | X             |
| Pie Chart of New vs. Return Visitors                               | X         | X              | X             |
| Pie Chart of Views/Visitors Ratio                                  | X         | X              | X             |
| Bar Graph of Views/Visitors Ratio                                  | X         | X              | X             |
| Visited Pages  | X         |                |               |
| Visited Content Blocks   | X         | X              |               |
| URLs from which Site Visitors Accessed<br><b>Ektron CMS400.NET</b> | X         |                |               |

## Site Statistics

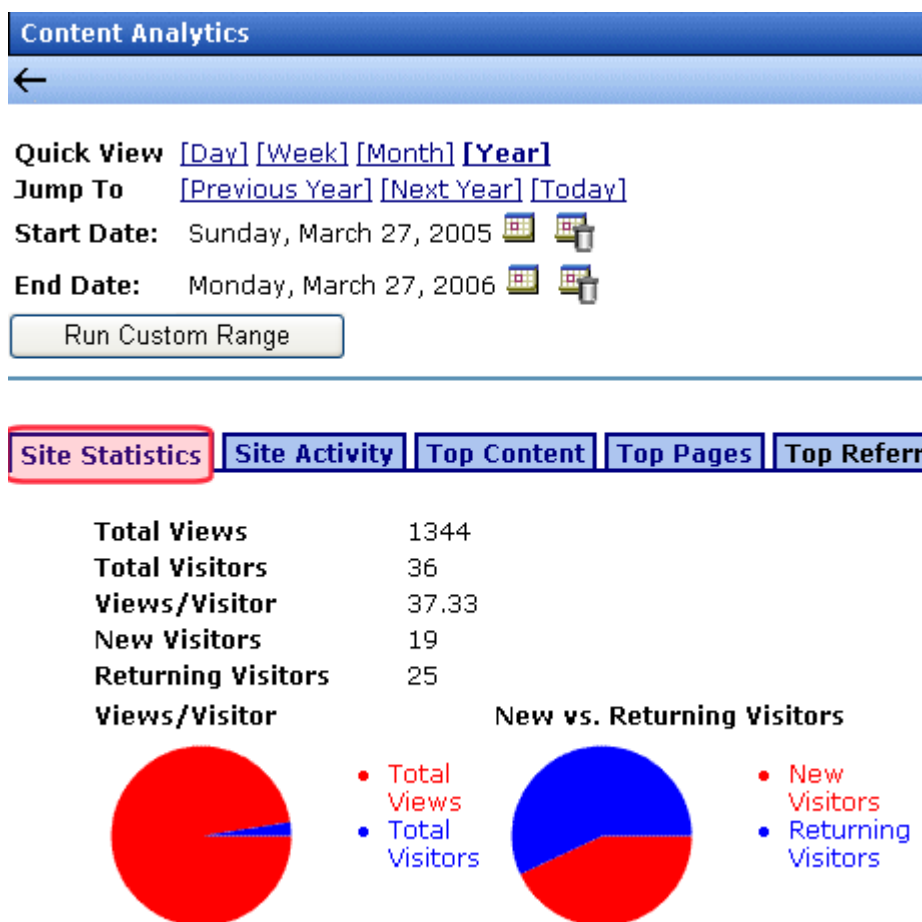
The Site Statistics screen offers an overview of all tracked activity within the selected date range. You see actual data for the

- number of views
- number of visitors
- ratio of visitors per view
- number of new and returning visitors
- ratio of new to return visitors

Below this data are pie charts of the ratio of views to visitors and new vs. return visitors.



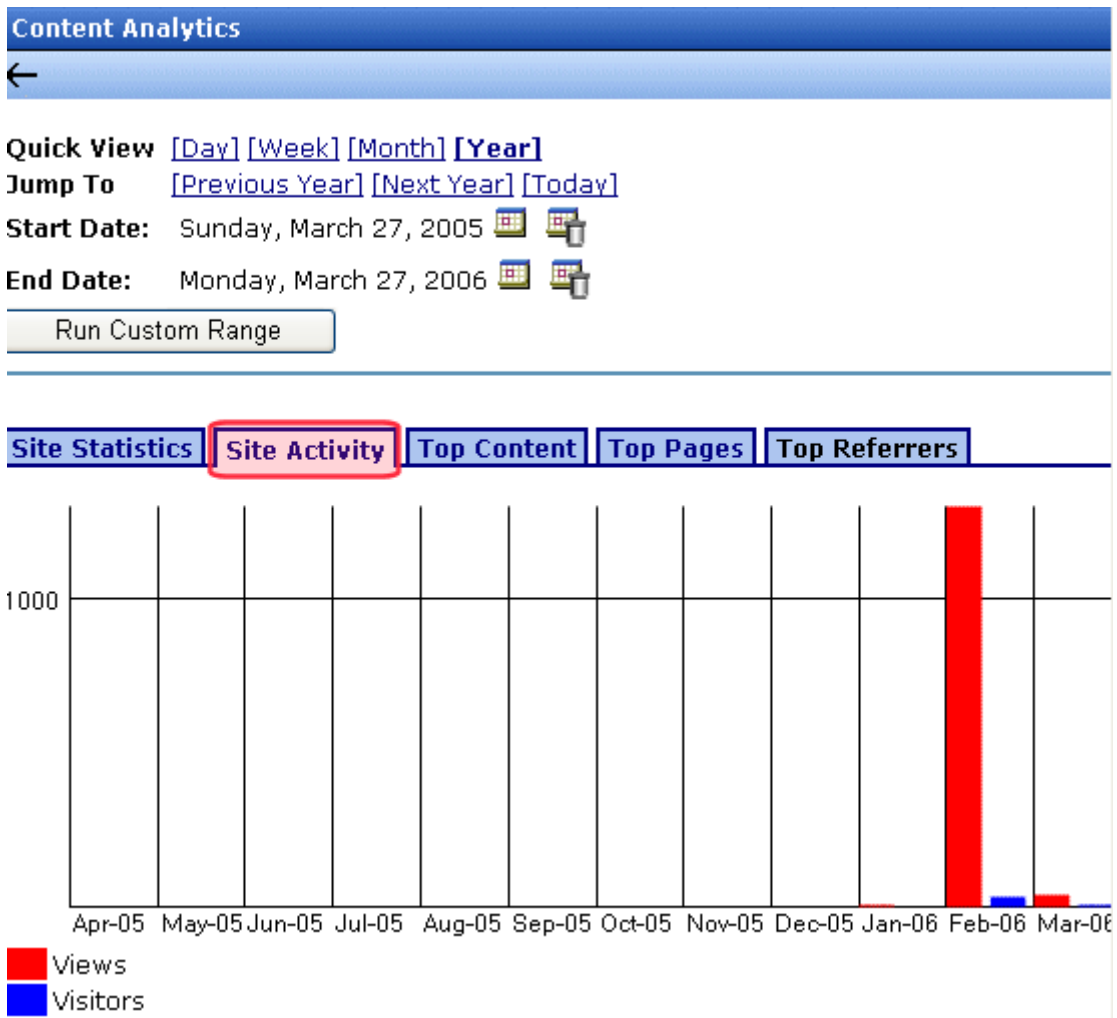
**NOTE** To understand how new and returning visitors are tracked, see "Tracking Site Visitors" on page 830.



## Site Activity

The Site Activity view shows relative activity during the selected time period. The red bar indicates views, and the blue bar indicates visitors.





### ***Site Activity Time Increments***

The graph's time increments are one level below the **Quick View** selection. For example, in the screen above, **Quick View** is set to **Day**. So, the statistics are broken down by *hours* of the day.

The following table lists the Site Activity time increments for each Quick View selection.



| Quick view time increment | Site Activity Graph display broken down by these units |
|---------------------------|--|
| day                       | hourly   |
| week                      | daily  |
| month                     | weekly   |
| year                      | monthly  |

## Top Content

The Top Content View shows the most frequently-accessed content items on your Web site.

See Also: "[Tracking Templates vs. Individual Content Items](#)" on page 827;

Content Analytics

←

Quick View

[Day] [Week] [Month] [Year]

Jump To

[Previous Year] [Next Year] [Today]

Start Date:

Sunday, March 27, 2005

End Date:

Monday, March 27, 2006

Run Custom Range

---

Site Statistics

Site Activity

Top Content

Top Pages

Top Referrers

| Content Title   | ContentID | Visitors | Vi |
|---|-----------|----------|----|
| <a href="#">Build Health: Want To Prevent Or Cure Cancer?</a> | 92        | 1        | 13 |
| <a href="#">The Diet / Cancer Link</a>                        | 89        | 1        | 3  |
| <a href="#">Cancer</a>  | 28        | 1        | 2  |

You can click on any content item to view



- **Content Statistics** - statistics for that content item only (See Also: "Site Statistics" on page 832)
- **Content Activity** - relative activity for that content item only (See Also: "Site Activity" on page 833)
- **Audit Content** - all users who viewed the selected content item; to the right of each user are the date and time when the content was viewed

**NOTE** Only users who viewed the content after logging in appear on the list. Visitors to your site who do not log in affect statistics but are not tracked on this report.

## Top Templates

The Top Templates View shows all viewed templates on your Web site, with the most frequently-accessed templates on top.

By default, the templates at the top of the list are those with the highest number of unique visitors. You can change the sort by clicking on any column header. For example, to sort the templates by the number of views, click **Views**.

Content Analytics

Quick View [Day] [Week] [Month] [Year]

Jump To [Previous Day] [Next Day] [Today]

Start Date: Tuesday, June 13, 2006

End Date: Tuesday, June 13, 2006

Run Custom Range

Site Statistics

Site Activity

Top Content

Top Templates

Top Referrers

| Template                  | Visitors |
|---------------------------|----------|
| /cms400demo/default.aspx  | 9        |
| /CMS400Demo/forum.aspx    | 3        |
| /CMS400Demo/search.aspx   | 2        |
| /CMS400Demo/services.aspx | 2        |

You can click on any template to view



- **Template Statistics** - statistics for that template only (See *Also: "Site Statistics" on page 832*)
- **Template Activity** - relative activity for that template only (See *Also: "Site Activity" on page 833*)
- **Content in Template** - if a content items was specified for the template in the Content Analytic server control, this view show statistics for the template. You can click the template to view Template Level activity. (See *Also: "Top Templates" on page 836*)

## Top Referrers

The Top Referrers View shows the Web pages from which your site was most frequently accessed.

The screenshot shows the 'Content Analytics' interface. At the top is a blue header with the text 'Content Analytics'. Below it is a navigation bar with a back arrow. The main area contains several links: 'Quick View' with sub-links '[Day]', '[Week]', '[Month]', and '[Year]'; 'Jump To' with sub-links '[Previous Year]', '[Next Year]', and '[Today]'; 'Start Date:' set to 'Sunday, March 27, 2005' with a calendar icon; and 'End Date:' set to 'Monday, March 27, 2006' with a calendar icon. Below these is a button labeled 'Run Custom Range'. A horizontal line separates this from a row of five tabs: 'Site Statistics', 'Site Activity', 'Top Content', 'Top Pages', and 'Top Referrers'. The 'Top Referrers' tab is highlighted with a red border. Below the tabs is a table with a single header 'Page' and two rows of data containing URLs.

**Content Analytics**

←

Quick View [\[Day\]](#) [\[Week\]](#) [\[Month\]](#) [\[Year\]](#)

Jump To [\[Previous Year\]](#) [\[Next Year\]](#) [\[Today\]](#)

Start Date: Sunday, March 27, 2005  

End Date: Monday, March 27, 2006  

---

[Site Statistics](#) [Site Activity](#) [Top Content](#) [Top Pages](#) [Top Referrers](#)

Page

<http://192.168.0.203/CMS400Demo/workarea/explorer/main.html>

[http://192.168.0.203/CMS400Demo/WorkArea/library.aspx?LangType=10220.action=ViewLibraryItem&id=51&parent\\_id=0](http://192.168.0.203/CMS400Demo/WorkArea/library.aspx?LangType=10220.action=ViewLibraryItem&id=51&parent_id=0)

## Changing the Date Range of the Statistical Data

When you first view statistical data, the default date range is today (one day).



If you view statistics for different date ranges, when you return to the screen, the last selected date range is the default selection. You can change it if needed.

### Using Quick View Options

Use **Quick View** options to view analytic statistics for any of the following time periods.

- one day
- one week
- one month
- one year

When you click **Quick View [week], [month] or [year]**, the current end date is used as the *last* day of the range. Here are some examples.

| Quick View Option | If end date is today, begin date is |
|-------------------|-------------------------------------|
| Week              | one week earlier than today         |
| Month             | one month earlier than today        |
| Year              | one year earlier than today         |

### Using Jump To Options

Use **Jump To** options to view analytic statistics for a time period before and after the current date range. The time period is determined by the Quick View increment. For example, if the Quick View option is Day, you can *jump to* the previous day, the following day, or today.

Regardless of the Quick View increment, you can always view statistics for today.



| Quick View Option | “Jump to” options   |
|-------------------|---|
| Day               | <ul style="list-style-type: none"><li>• previous day</li><li>• next day</li><li>• today</li></ul>     |
| Week              | <ul style="list-style-type: none"><li>• previous week</li><li>• next week</li><li>• today</li></ul>   |
| Month             | <ul style="list-style-type: none"><li>• previous month</li><li>• next month</li><li>• today</li></ul> |
| Year              | <ul style="list-style-type: none"><li>• previous year</li><li>• next year</li><li>• today</li></ul>   |



# Support for Multiple Sites

**Ektron CMS400.NET's** Multi-site Support feature lets you set up and manage several Web sites under one CMS. For example:

- `www.example.com`
- `support.example.com`
- `forums.example.com`

All sites share a single database. The Multi-site Support feature does not support multiple databases.

Multisite support is explained through the following topics.

- ["Advantages of Multiple Sites" on page 840](#)
- ["Prerequisites" on page 841](#)
- ["Using Multiple Sites" on page 841](#)
- ["Installing the Multi-site Support Feature" on page 842](#)
- ["Using Site Replication in a Multisite Environment" on page 854](#)

## Advantages of Multiple Sites

- The URL can communicate to site visitors the nature of the site.
- All sites can share
  - common content, but appear within their own site and templates
  - the library of images and files. These files can be stored once, yet authors can insert them into content from any site.



## Prerequisites

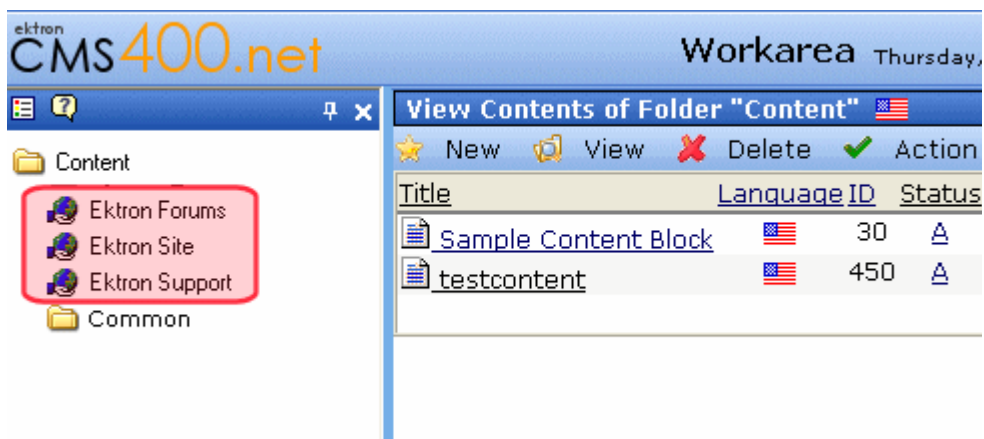
- The server must run Windows Server 2003 or 2005

**NOTE** Windows XP supports only one Web site.

- All sites must reside on the same server

## Using Multiple Sites

Within the Workarea, sites appear under **Ektron CMS400.NET's** folder structure but the icon is a globe (see illustration below). So, an author can create and edit content in the additional site the same way he creates/edits content in the root site.



Authors log into a root site then begin editing content in the additional site. Regardless of which site he is using, an author can use the library to insert hyperlinks, images, files, and quicklinks.

When a folder has a production domain assigned to it, it is a *domain folder*. Links to content in a domain folder are activated via linkit.aspx, which redirects to the appropriate domain name and uses the appropriate template for the folder or content.

### **WARNING!**

You cannot create a hyperlink within content, a collection, menu, etc. to a form that resides in another site.



# Installing the Multi-site Support Feature

There are four major steps to setting up each new site.

- "Step 1: Create a New IP Address" on page 842
- "Step 2: Create New Folders in the File System" on page 846
- "Step 3: Create New Sites in IIS" on page 847
- "Step 4: Assign Multi-site Capabilities in Ektron CMS400.NET" on page 852

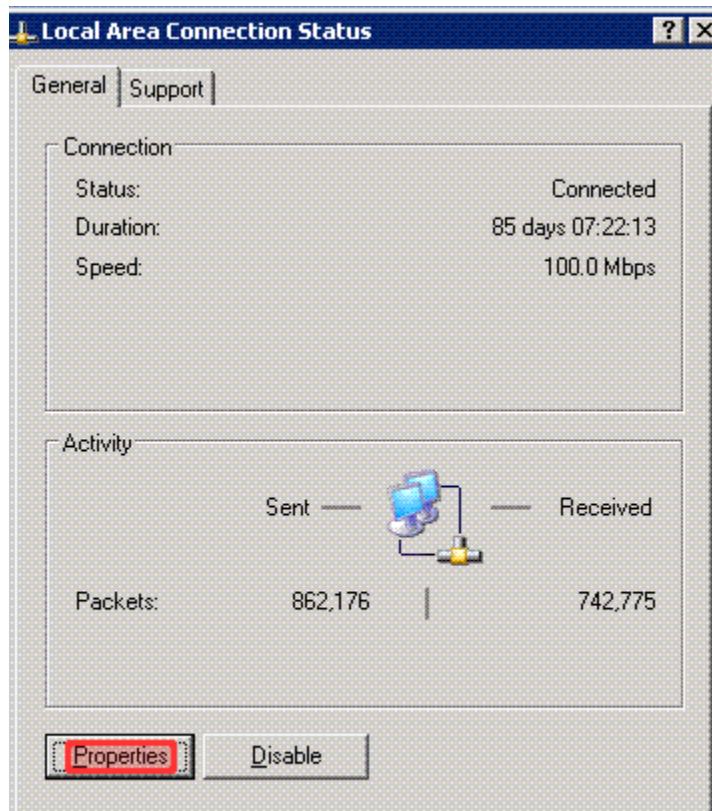
## Step 1: Create a New IP Address

**NOTE** If you already created new IP addresses for new sites, you can ignore this step.

To create a new IP address for each additional site, follow these steps.

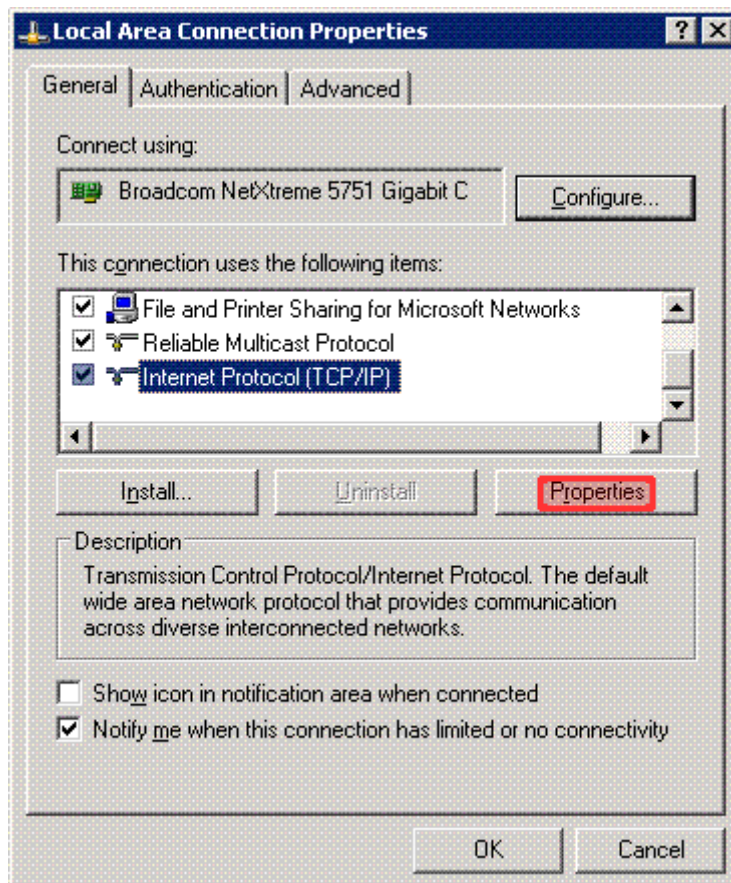
1. Go to **Control Panel > Network Connections >** right click **Local Area Connection** and choose **Properties**.





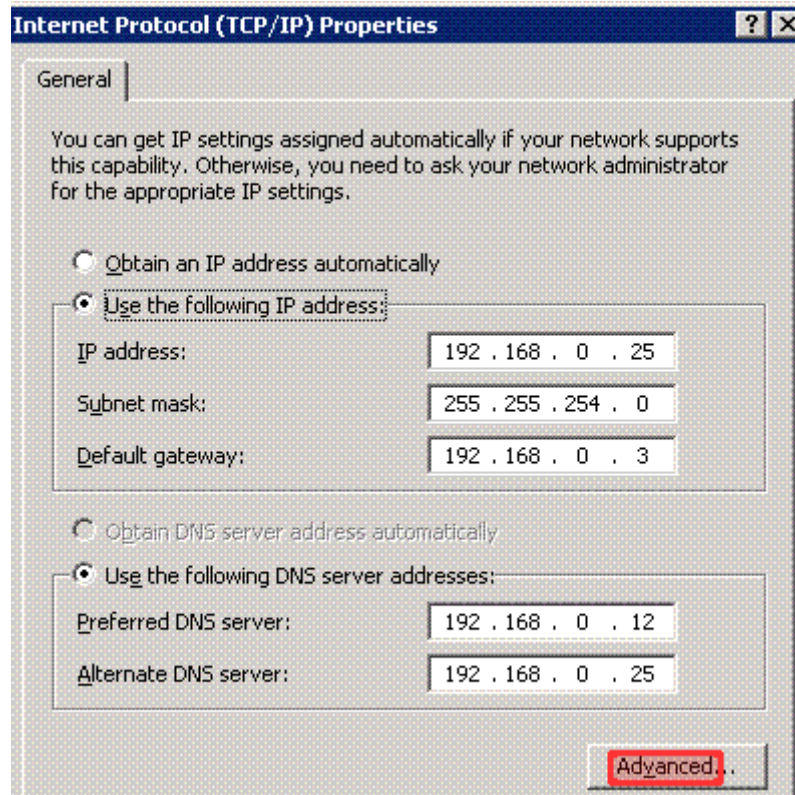
2. On the Local Area Connection Properties screen, click **TCP/IP** then **Properties**.



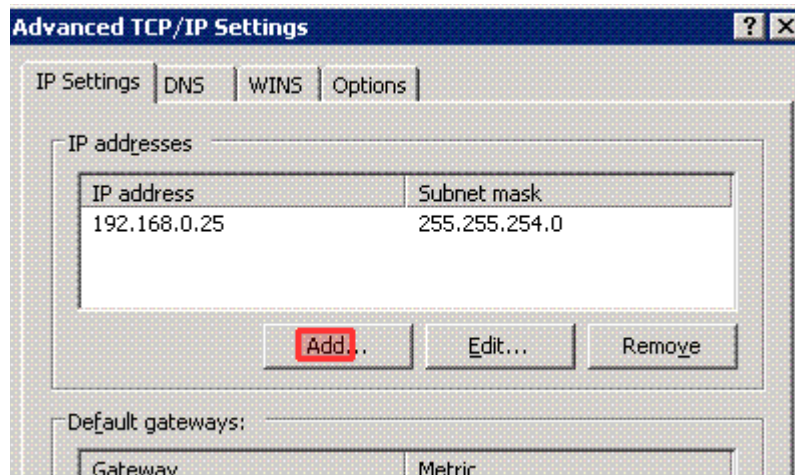


3. On the Internet Protocol Properties screen, click the **Advanced** button.



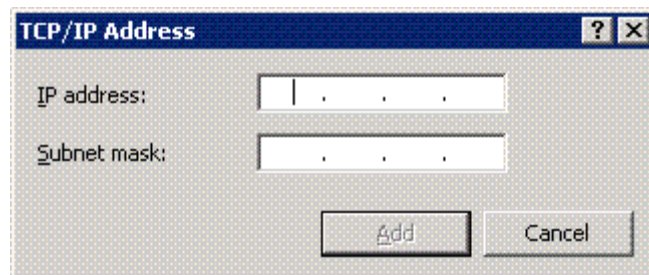


4. On the Advanced TCP/IP Settings screen, under **IP addresses**, click the **Add** button.





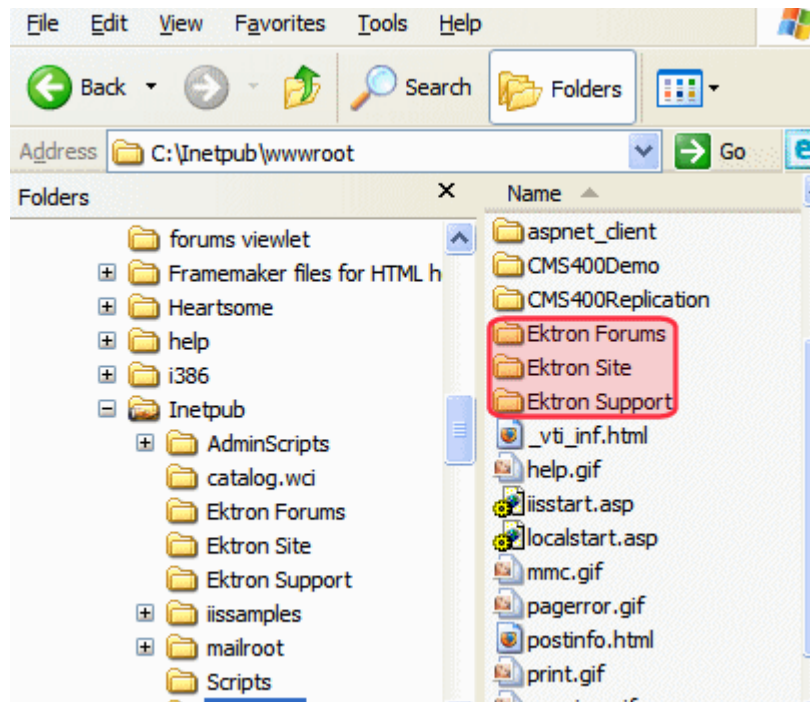
5. On the TCP/IP Address window, enter the new IP address.



6. Repeat this procedure for each new site.

## Step 2: Create New Folders in the File System

1. Using Windows Explorer, create a new folder for each site.





2. Copy the following CMS files and folders from the original CMS site to your new multisite folder.
  - all individual files (not subdirectories)
  - these subdirectories:
    - bin
    - WorkArea
    - App\_Code
3. Within each new folder, open the web.config file. Update the value of `ek_sitePath` with your CMS site path.

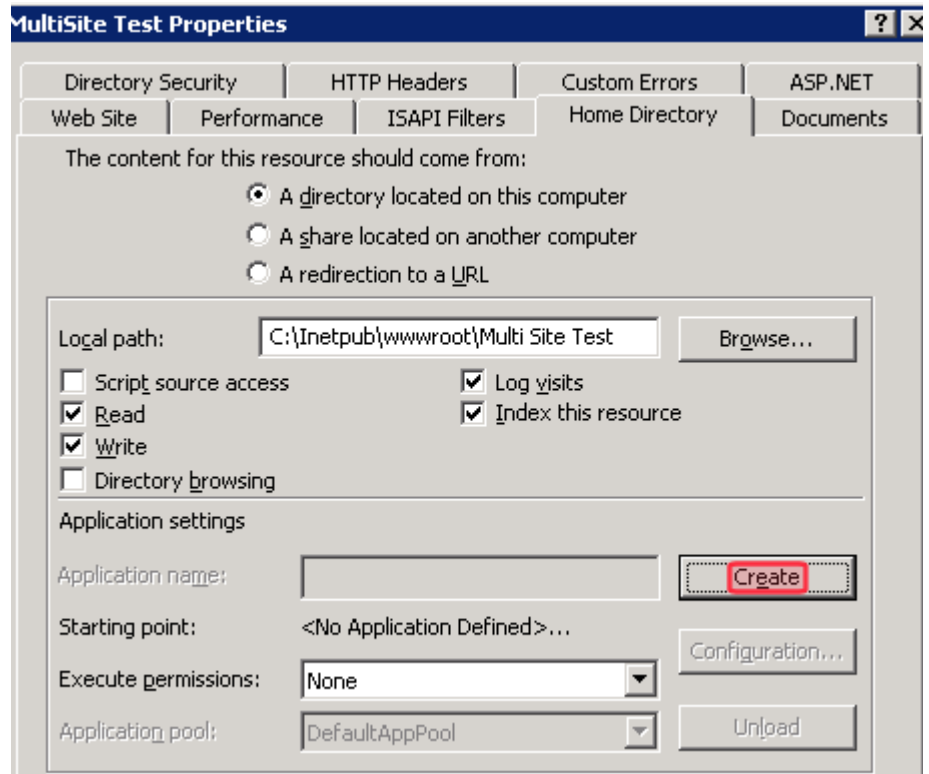
For example, if your CMS site is in the Web site root, enter slash (/). If it is in a subdirectory of the Web site, enter the subdirectory name. For example, If your web site root is `C:\inetpub\wwwroot` and you have a subdirectory called `CMS400Min`, you would enter `CMS400Min` as the site path name.

### Step 3: Create New Sites in IIS

Follow these steps to create each new site in IIS.

1. Go to **Programs > Administrative Tools > IIS Manager**.
2. Right click on the Web Sites folder and click **New > Web Site**.
3. A wizard screen appears. Click **Next**.
4. Enter a name for the new Web site.
5. On the IP Address and Port Settings screen, enter the IP address of your new Web site or the host header. Press **Next**.
6. On the Web Site Home Directory screen, browse to the folder you created for the new site in ["Step 2: Create New Folders in the File System" on page 846](#).
7. On the Web Site Access Permission screen, make sure that **Read** and **Write** are checked.
8. You are notified that you have completed the new site.
9. Make the new site an application. To do this, right click the site, and select **Properties**. Then click the **Home Directory** tab. Under **Application Settings** area, click the **Create** button then click **OK**.





## Create Virtual Folders in IIS

In IIS, for each new Web site, create one new virtual folder for the following shared folders:

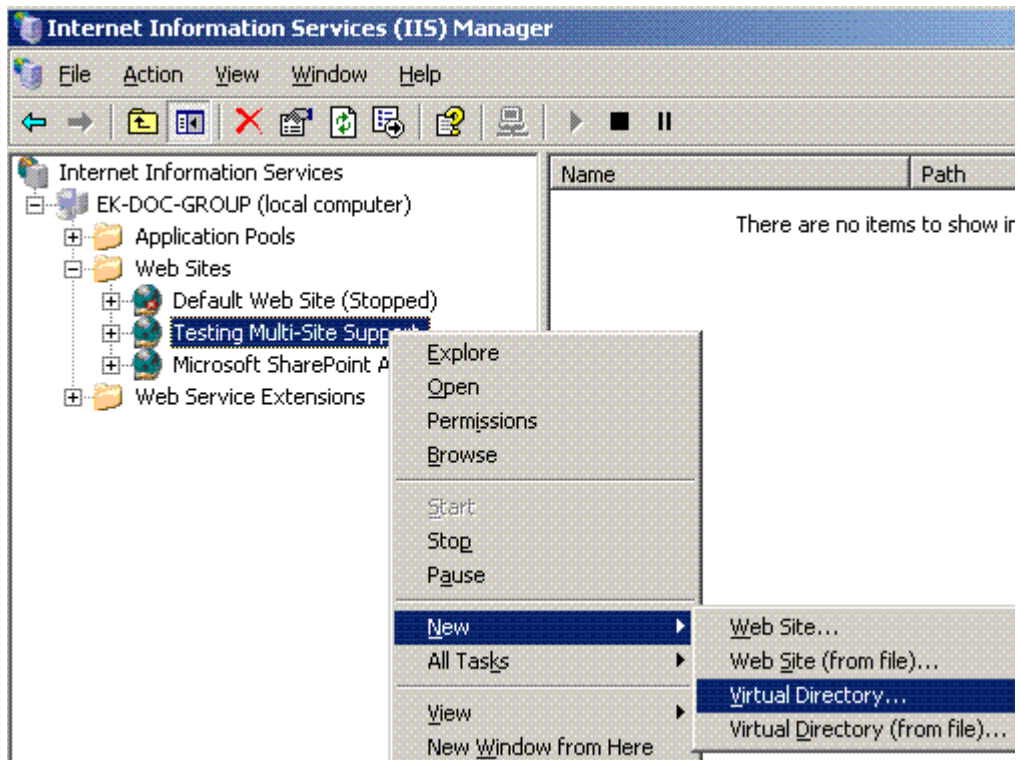
- assets
- uploadedfiles
- uploadedimages

These folders are created when you install **Ektron CMS400.NET**. If you did a normal installation, they reside under the site directory. For example, C:\Inetpub\wwwroot\CMS400Min\uploadedimages.

To create virtual versions of these folders, follow these steps.

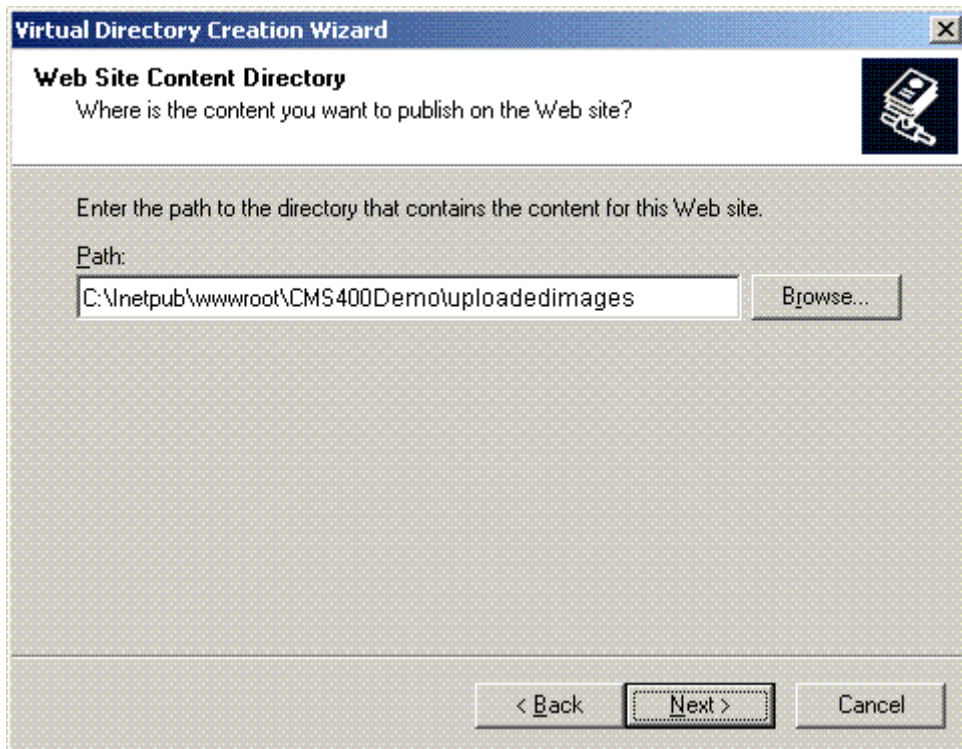


1. In IIS, select the new site folder you created in "Step 3: Create New Sites in IIS" on page 847.
2. Right click the mouse and select **New > Virtual Directory**.



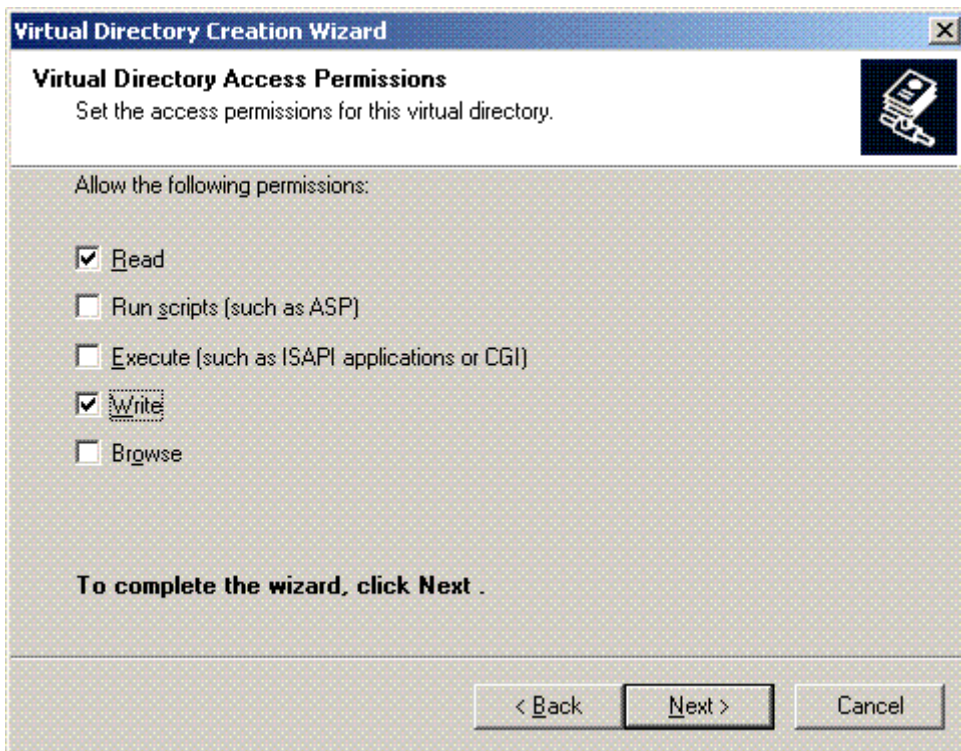
3. Identify the corresponding subfolder in the root folder.





4. Assign Read and Write permissions to the virtual directory.



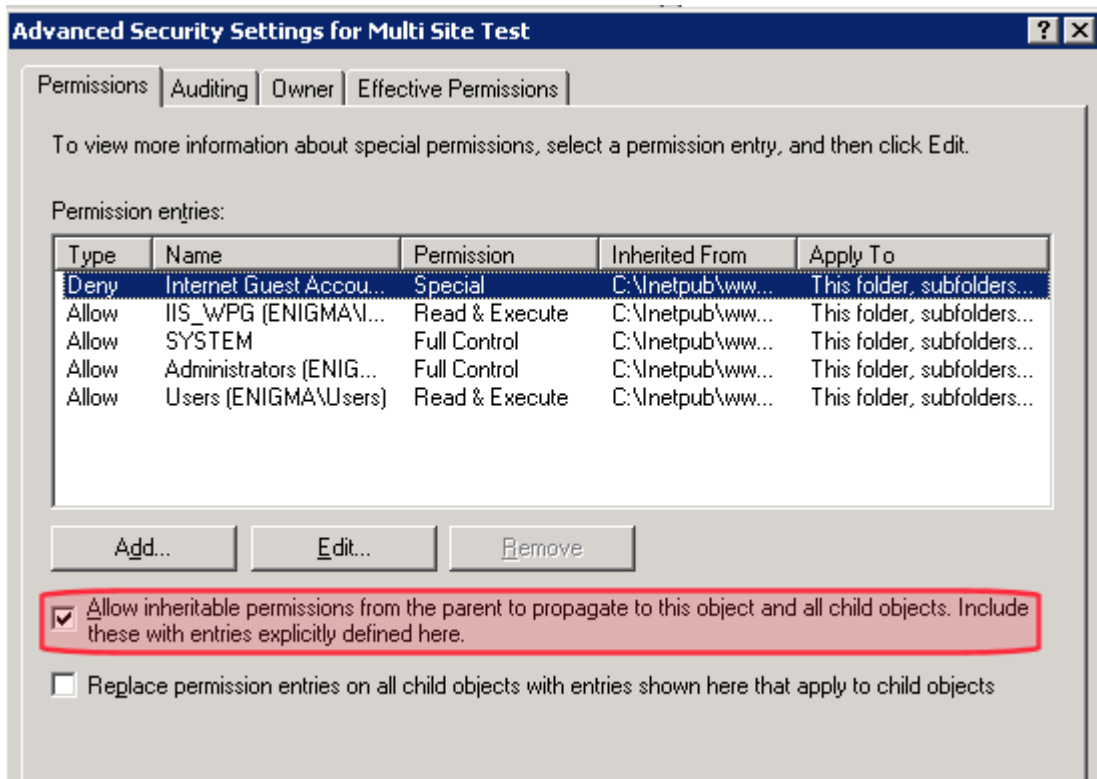


### ***Set File System Permissions on New Folders***

To do this, follow these steps:

1. Using Windows Explorer, navigate to the new folder(s) you created in ["Step 2: Create New Folders in the File System" on page 846](#).
2. Right click the folder and click **Properties**.
3. Click the **Security** tab.
4. Click the **Advanced** button.
5. Click the check box next to **Allow Inheritable Permissions from the Parent to Propagate...**





## Step 4: Assign Multi-site Capabilities in Ektron CMS400.NET

### NOTE

If the server is used as a staging server with the Site Replication Feature, go to the **Ektron CMS400.NET** Workarea then **Settings > Configuration > Setup**. Edit the setup screen and make sure the **This is a staging server** checkbox is checked. See Also: The **Ektron CMS400.NET** Site Replication Manual

1. In the **Ektron CMS400.NET** Workarea, create a new top-level folder for each site. Each folder must reside within the site root folder.
2. Assign folder properties as you did for the root folder.
3. The Multi-Site Configuration fields appear on the lower section of the screen (illustrated below).



**Edit Properties for the folder "CMS400Demo"**

**Properties** | **Metadata** | **Web Alerts** | **Smart Forms**

**Foldername:**

**Description**

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

**The inherited style sheet for this folder is: /CMS400Demo/default.css**

**Page Templates**

☐ **Inherit Parent Template Configuration**

| Default                          | Page Template Name | Action                                      |
|----------------------------------|--------------------|---|
| <input checked="" type="radio"/> | dynamic.aspx       | <a href="#">View</a> <a href="#">Remove</a> |

[Add](#)

[Add a New Template](#)

**Multi-Site Domain Configuration**

☐ **Domain for this folder**

Staging Domain - http://

Production Domain - http://

4. Check the **Domain for this folder** checkbox.
5. In the **Production Domain** field, insert your domain.
6. Save the screen.

**NOTE** The **Staging Domain** field appears only if **This is a staging server** is checked on the Configuration > Setup screen.

Within **Ektron CMS400.NET**, the new domains are indicated by a globe icon.





## Using Site Replication in a Multisite Environment

See “Using Site Replication with Multiple Sites” in the **Ektron CMS400.NET** Site Replication Manual



# Web Alert Feature

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

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

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

**NOTE**

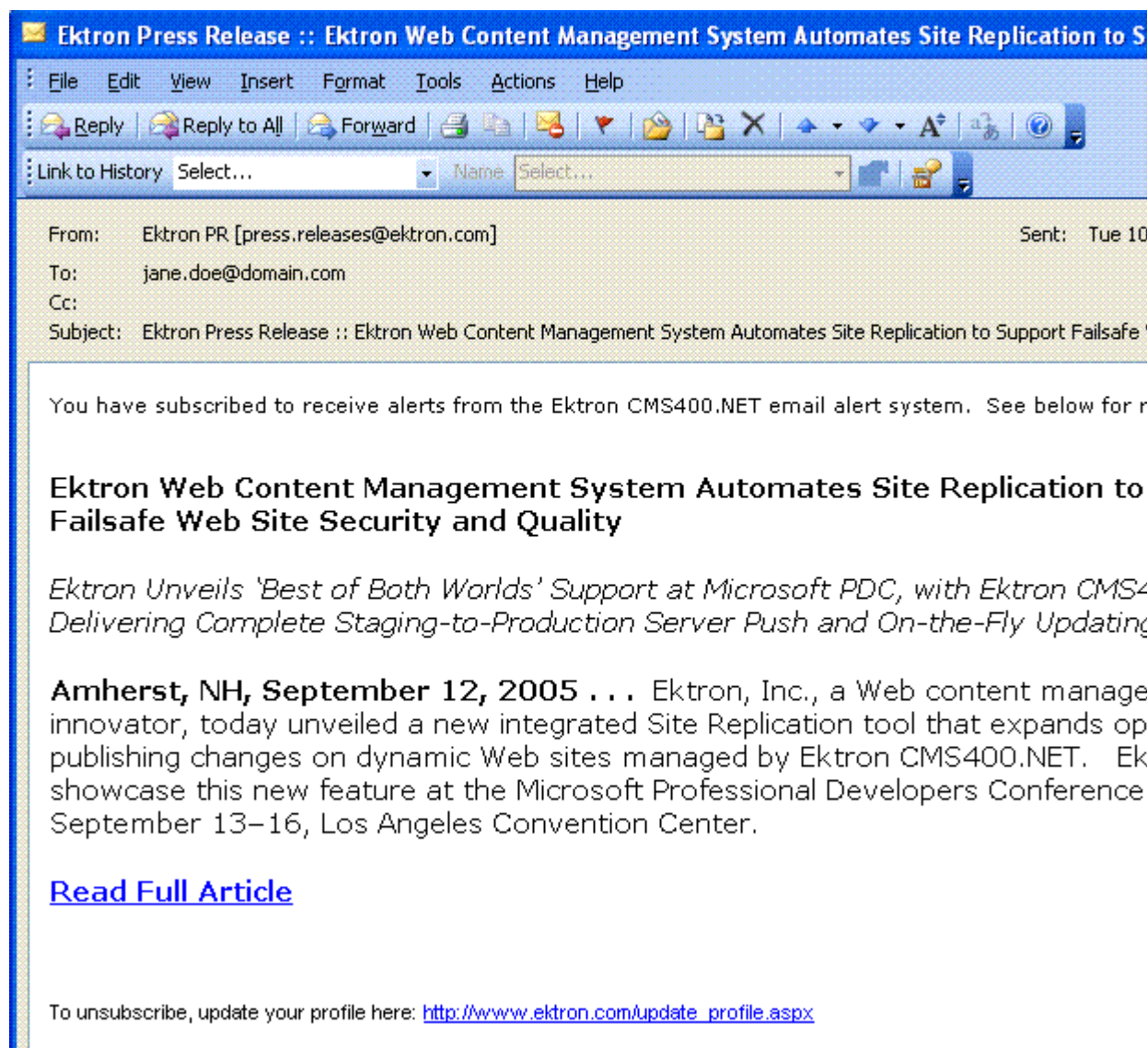
---

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

---



## Sample Web Alert email



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

- "How Web Alert Works" on page 857
- "Server Configuration" on page 858



- "Enabling the Web Alert Feature" on page 860
- "Setting Up the Message Queue and Asynchronous Processor" on page 861
- "Creating the email Message" on page 870
- "Defining Subscriptions" on page 877
- "Assigning Web Alert Information to Folders and Content" on page 880
- "How Users Sign up for Subscriptions" on page 887

## How Web Alert Works

The following explains how Web Alert email works.

1. Content is published.
2. **Ektron CMS400.NET** checks the **This is a staging server** checkbox on the Configuration > Application Setup screen. If it is unchecked, proceed to the next step. If the box is checked, no Web alerts will be issued for this server.
3. **Ektron CMS400.NET** checks to see if any subscriptions are assigned to the folder or content. (Subscriptions can be assigned at the folder or content level.)  
  
If no subscriptions are assigned, the **Web Alerts** tab does not appear when editing content.
4. If any subscription is assigned, **Ektron CMS400.NET** checks to see if an email should be created for this content. The settings appear under **Web Alerts** tab.  
  
For example, some content only triggers an email when it is first published, while other items always generate an email.
5. If an email should be generated, **Ektron CMS400.NET** builds the email content by retrieving information from fields on the Folder Properties screen. These are identified under the **Web Alert Contents** section of the Web Alerts tab.
6. **Ektron CMS400.NET** determines which subscription lists should receive the email. These are identified on the **Available Web Alerts** area of the Web Alerts tab. Each list contains the email address of every subscribed user.



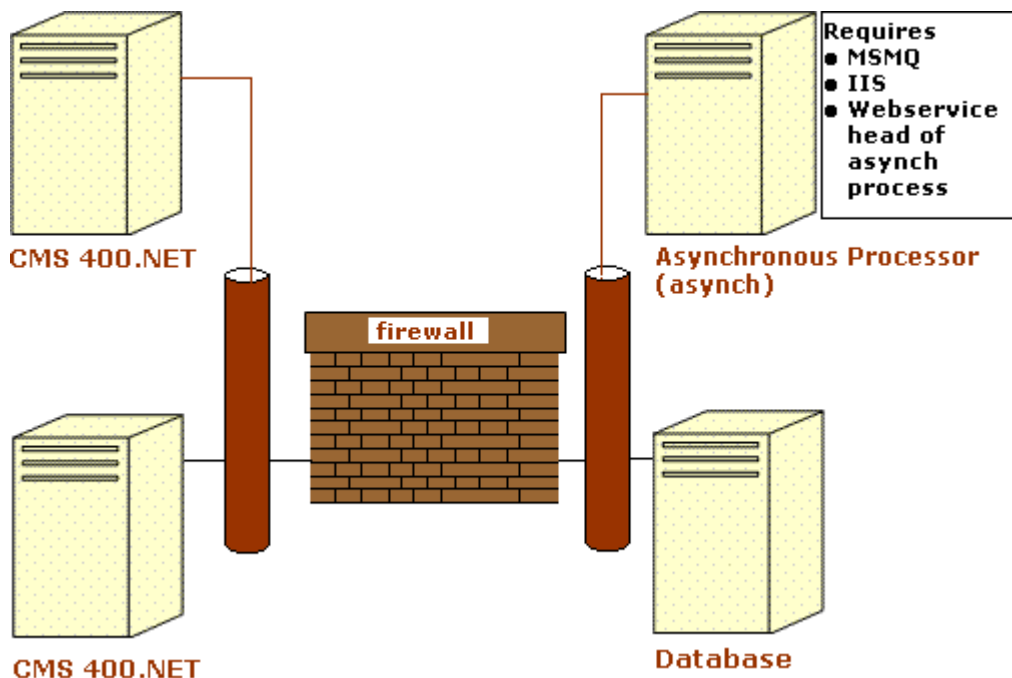
**Available Web Alerts:****Assigned Name**

- ☐ Automobiles
- ☐ Motorcycles
- ☐ Trucks

*Note: These are just examples of subscriptions*

## Server Configuration

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



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



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

You must create a message queue on the Async machine and record its name. The message queue is specified in the exe.config file for the service, and in 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 asynchronous processor 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 asynchronous processor service picks it up and places it in the journaled messages.
  - turning on logging for the Ektron asynchronous processor 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 Ektron asynchronous processor service can download a file, open a Web browser on the Async machine and connect to the location of the notification command files. Attempt to download one.

## Enabling the Web Alert Feature

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

| Step  | Description   | For more information, see  |
|---|---|--|
| 1. Set up message queue and asynchronous processor.     |   | <a href="#">"Setting Up the Message Queue and Asynchronous Processor" on page 861</a>                  |
| 2. Create messages.                                     | Define components of the email to be sent to subscribers.   | <a href="#">"Creating the email Message" on page 870</a>   |
| 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.  | <a href="#">"Defining Subscriptions" on page 877</a>   |
| 4. Assign Web Alert information to folders and content. | Assign Web Alert information to folders and content items which, when published, trigger emails.<br>For each folder or content item to which you assign subscriptions, determine <ul style="list-style-type: none"> <li>• activities that trigger emails (for example, only upon initial publication of content)</li> <li>• the content of the email</li> <li>• the subscription list(s) to whom the email is sent</li> </ul> | <a href="#">"Assigning Web Alert Information to Folders and Content" on page 880</a>                   |
| 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.<br><br><u><a href="#">Note: This task is typically done by a developer.</a></u>   | Developer's Manual > "Introduction to Ektron CMS400.NET Server Controls" > "Membership Server Control" |



| Step   | Description  | For more information, see                         |
|--|--|---|
| 6. Site visitors subscribe to lists of interest.                   | Someone signs up to be notified when changes in a selected subscription (category) are published on your Web site.   | "How Users Sign up for Subscriptions" on page 887 |
| 7. CMS users can also subscribe.                                   |  | "CMS User Subscription Sign Up" on page 891       |
| 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:

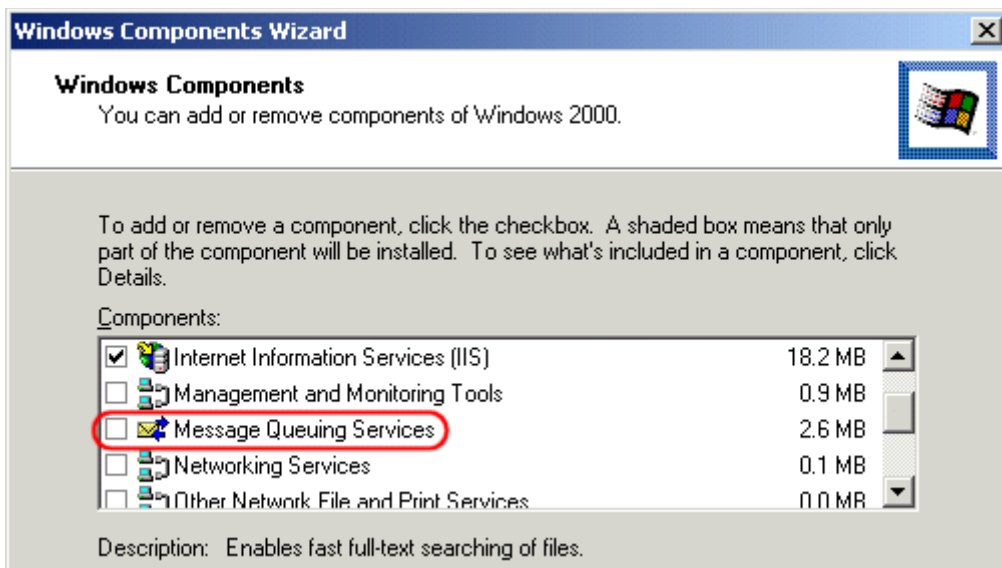
- C:\Program Files\Ektron\CMS400versionnumber\EktronAsyncProcessor\_Service\
- C:\inetpub\wwwroot\CMS400Min\bin\EktronAsyncProcessorWS.dll
- C:\inetpub\wwwroot\CMS400Min\Workarea\webservices\EktronAsyncProcessorWS.asmx

### NOTE

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

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





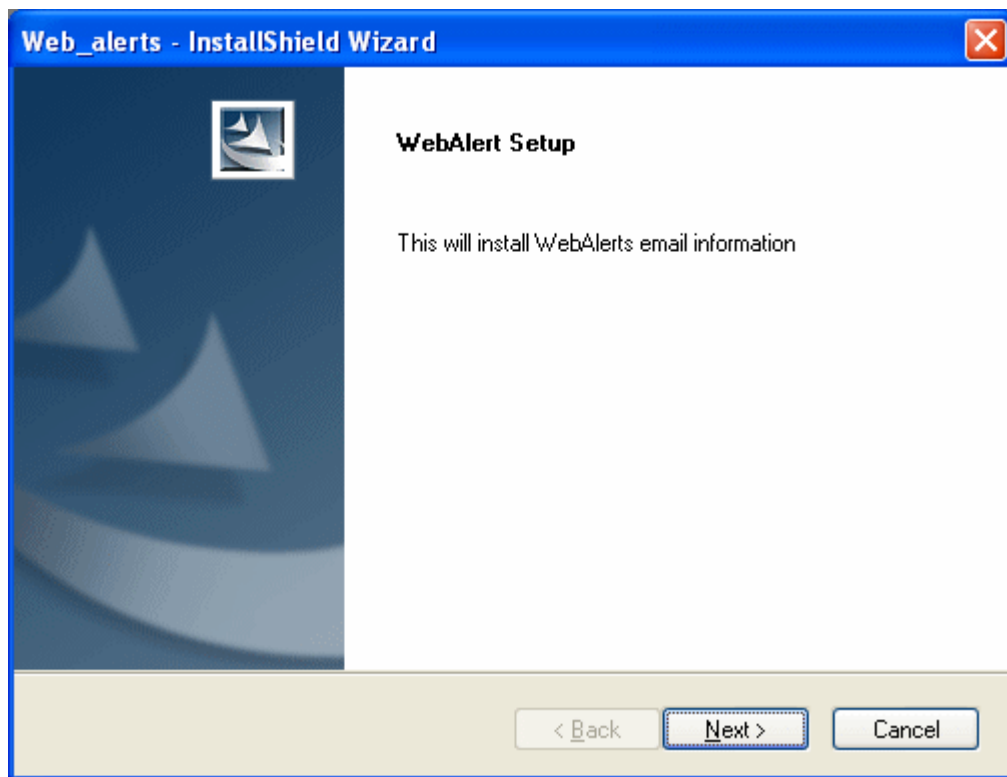
**NOTE** On Windows 2003, it is within the Application Server Components group.

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 867.

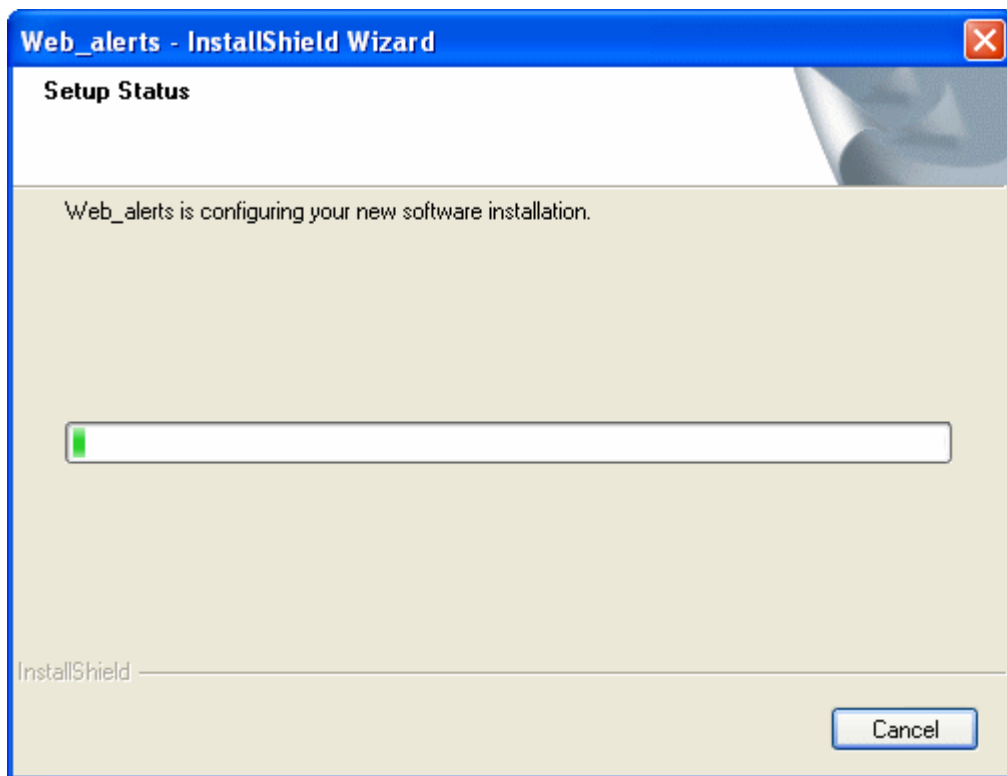
4. From the Windows Start Menu, click **All Programs > Ektron > CMS400 > Utilities > Web Alerts Setup**.
5. The Web Alert Wizard setup screen appears.





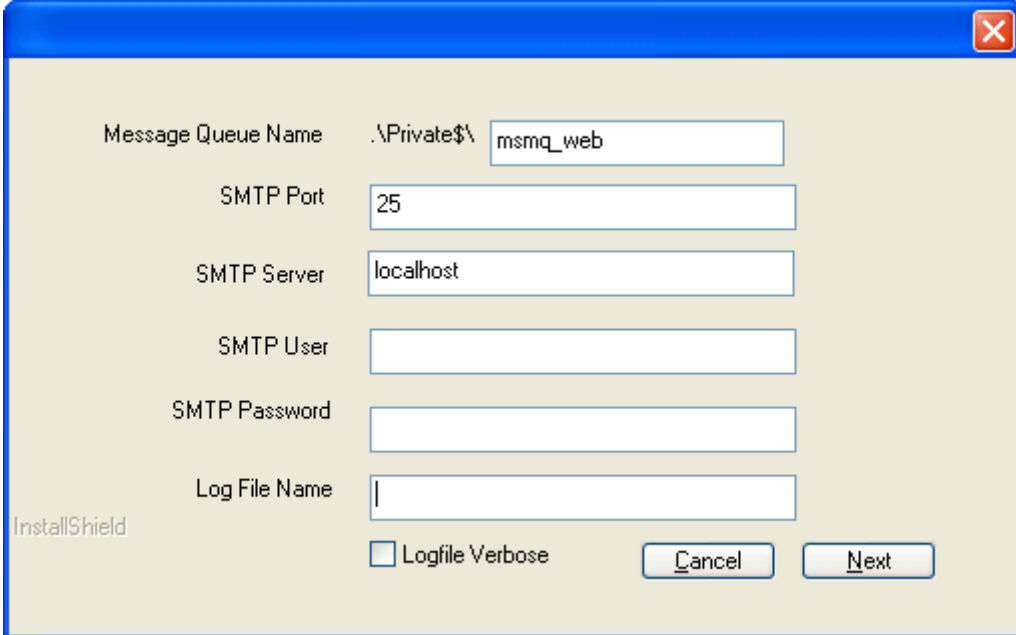
6. Press **Next**. The wizard begins installing the Web Alerts feature.





7. The following screen appears.





Message Queue Name .\Private\$\msmq\_web

SMTP Port 25

SMTP Server localhost

SMTP User

SMTP Password

Log File Name

☐ Logfile Verbose

Cancel Next

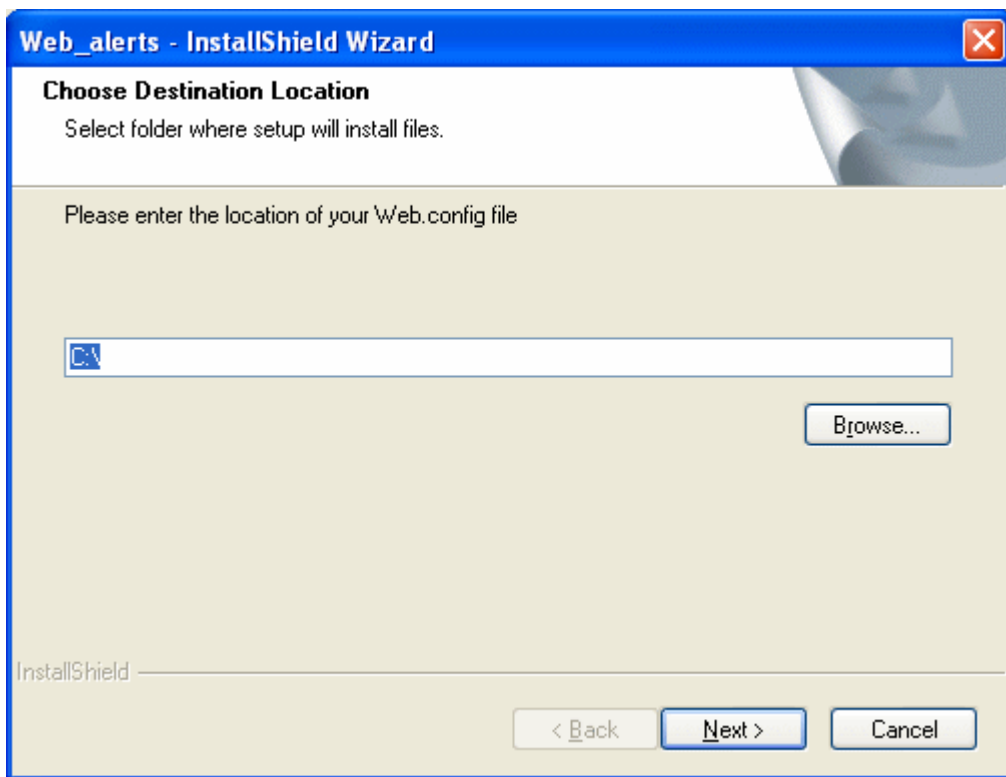
InstallShield

8. Enter the username and password that will be used to send and receive email.
9. 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.

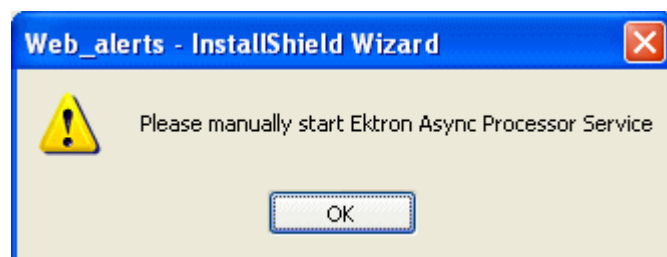
The file resides in the C:\Program Files\Ektron\CMS400versionnumber\EktronAsyncProcessor\_Service folder. It is also available from the Workarea. See ["Asynchronous Log File Reporting" on page 869](#).

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.



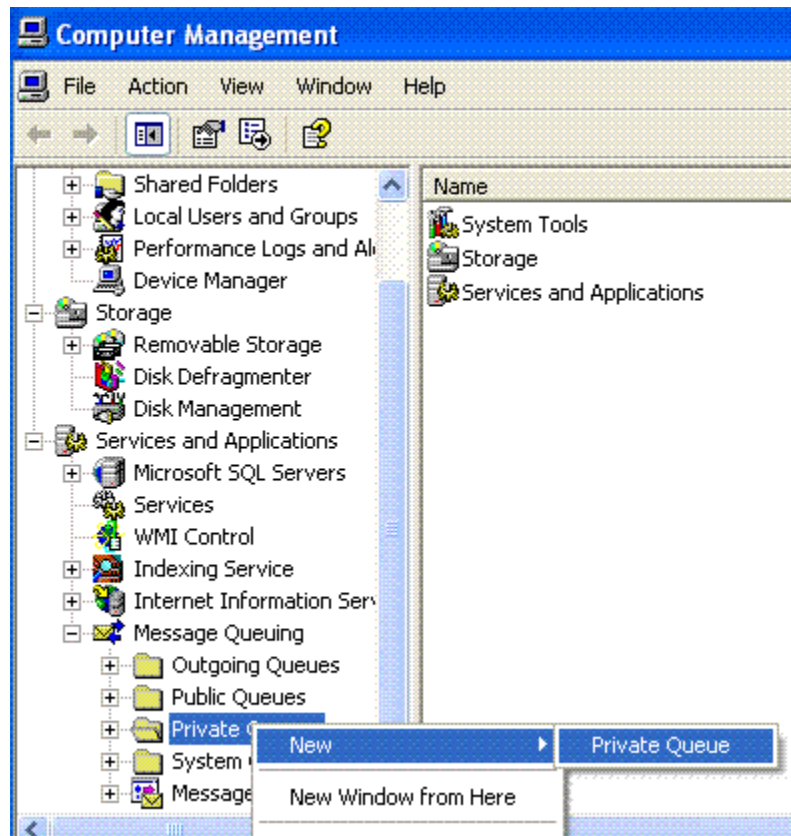
14. If you see this message, press **OK** then click **Finish**.
15. Go to **Control Panel > Administrative Tools > Computer Management > Services and Applications > Services**. Start the Ektron Async Processor Service.



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

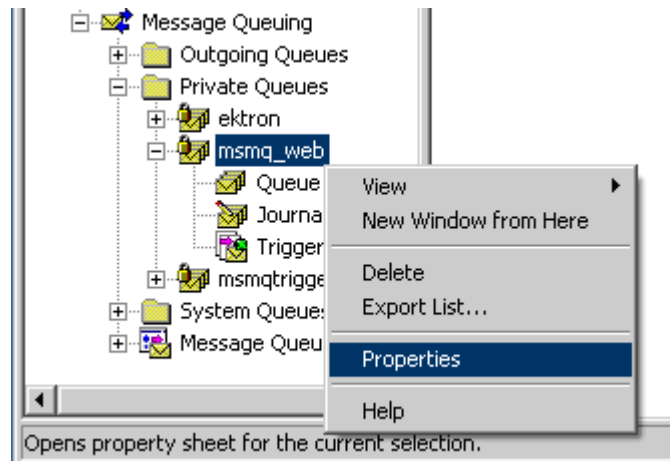
This section describes manual steps for setting up the Message Queue and Asynchronous Processor. You can use this procedure if you had a problem using the wizard, or you want to know which files are being installed to your server.

1. Go to **Control Panel > Administrative Tools > Computer Management > Services and Applications > Message Queuing**.
2. 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:

```
C:\Program
Files\Ektron\CMS400v52\EktronAsyncProcessor_Service\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.

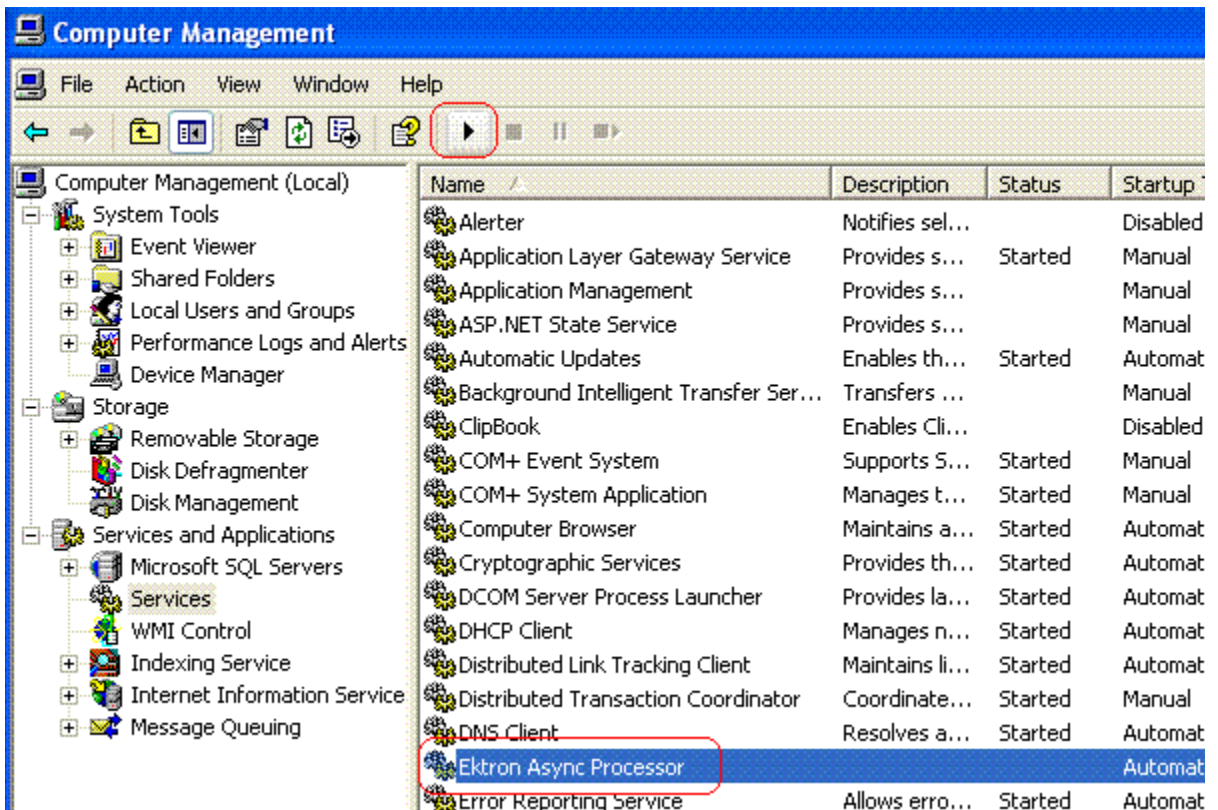
Or, from a command line or **Start Menu > Run**, enter:

```
C:\Windows\Microsoft.NET\Framework\v1.1.4322\installutil
"C:\program
```



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







- default message text
- opt out message
- unsubscribe message
- “from” address

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

These message components are later inserted into an email message that is sent to your subscribers. See Also: [“Creating the email Message” on page 870](#)

## Creating Default Message Text

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

### Including Variables in the Default Message

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

The following content was recently updated: @AppContentLink@

In the email, this text might read:

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



You can use the following variables in the body of a Web Alert message.

| Variable          | Displays this information in the email           |
|-------------------|--|
| @appContentTitle@ | The title of the content block.                  |
| @appCRLF@         | A carriage return. Moves the text down one line. |



| Variable                | Displays this information in the email  |
|-------------------------|---|
| @appContentLink@        | The link to the content block on the Web site.<br><a href="#">Note: You must be logged in to see the changes.</a> |
| @appContentURL@         | The URL of the content, from the quicklink and domain.  |
| @appSubscriptionNames@  | Comma separated list of subscriptions that a user selected.   |
| @appComment@            | The comments for 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.  |

To create default message text, follow these steps.

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

## Creating Opt Out Message Text



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

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

You can add variables to the Opt Out text. See Also: ["Including Variables in the Default Message" on page 871](#)



To create Opt-Out message text, follow these steps.



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

### ***Creating Unsubscribe Message Text***

An Unsubscribe message lets the person receiving the email remove himself from the subscription list.

You can add variables to the Unsubscribe text. See *Also: "Including Variables in the Default Message" on page 871*

To create Unsubscribe message text, follow these steps.



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

### ***Creating "From" Addresses***

Any email generated by the Web Alert feature must have a "from" address. To create one or more "from" addresses, follow these steps.

1. Go to **Settings > Configuration > Web Alerts > Email From List**.



2. Click the Add email From Address button (.
3. Enter an email address that will be used in the From field of messages generated by the Web Alert feature.
4. Click the Save button (.


## Combining Message Components to Create the Message

You create the content of an email message by configuring the following components. Some are required. Then, when content is published, **Ektron CMS400.NET** retrieves the field values to create the email Web Alert.

**NOTE** To set or modify this information, you must have permission to edit the folder.

| Component          | Comment   | Required? |
|--------------------|---|-----------|
| 1. Subject line    | Plain text you enter on the Web Alerts tab of the Folder Properties screen  | No        |
| 2. From address    | See <a href="#">"Creating "From" Addresses" on page 873</a>   | Yes       |
| 3. Opt out message | See <a href="#">"Creating Opt Out Message Text" on page 872</a>   | Yes       |
| 4. Default message | See <a href="#">"Creating Default Message Text" on page 871</a>   | No        |
| 5. Content Summary | <p>The Summary of the content item whose creation or change generates the email.</p> <p><u><a href="#">Note: The Summary can include variables that retrieve information about the content item. See "Including Variables in the Default Message" on page 871</a></u></p> | No        |



| Component               | Comment  | Required? |
|-------------------------|--|-----------|
| 6. Any CMS content item | <p>Identify CMS content to include within the email content.</p> <ul style="list-style-type: none"> <li>To identify an existing content item, click <b>Select</b> next to the <b>Use Content</b> checkbox. Then, navigate to the content item.</li> </ul> <hr/> <p><u>Note: If the content item is an Office document or a managed file, a <i>link</i> to that item appears within the email message, not the item itself.</u></p> <hr/> <ul style="list-style-type: none"> <li>To insert this content item (that is, the one whose creation or change triggers this Web Alert), click <b>Use Current</b>.</li> <li>To create a new content block to insert into this message, click <b>Select</b> next to the <b>Use Content</b> checkbox. When the folder navigation window appears, click the Add Content button (). Then, see "Adding HTML Content" on page 82.</li> </ul> | No        |
| 7. Unsubscribe message  | See "Creating Unsubscribe Message Text" on page 873  | Yes       |




The elements appear within the email in the sequence shown above.

## Previewing the email Message

You can preview the email message at any time by clicking the preview button, which appears to the right of the **Web Alert Contents:** label on the Web Alerts tab (see below).



**Edit Content in Folder "Content"**

Title:  [English (U.S.)]

[Content](#)
[Summary](#)
[Metadata](#)
[Schedule](#)
[Comment](#)
[Web Alerts](#)


**Web Alert Options:**

☒ Notify Always  
☐ Suspend Next Notification (Override)  
☐ Notify Only on Initial Publication  
☐ Send Next Notification (Override)  
☐ Notify Never

**Web Alert Subject:**

**Web Alert Email From Address:**

▼

**Web Alert Contents:**  **Web Alerts preview**

☒ Opt Out Message

The button appears on the Web Alerts tab for folders as well as content.

When you click the preview button, a new window displays the body of the email message. (The components used in an email message are listed in ["Combining Message Components to Create the Message" on page 874.](#))

After previewing the message, you can change any message components and click the button again to review the updated message. You don't need to save or check in the content to update the preview.



## Defining Subscriptions


Create a subscription for each type of information site visitors might want to be notified about. For example, if your site sells electronics, you could set up one subscription for televisions, another for computers, and a third for stereo equipment. Site visitors can then subscribe to appropriate areas of interest.

CMS and membership users can also sign up for subscriptions.

To create one or more subscriptions, follow these steps.

1. Go to **Settings > Configuration > Web Alerts > Subscriptions**.
2. Click the Add Subscription button (shown below).



3. Enter a name for the subscription. The name should indicate the kind of information that it will cover.
4. Use the **Enabled** check box to indicate if the subscription is currently active.
5. Press the Save button (  ).

### Effect on Custom User Properties

When you create the first subscription, a new entry is automatically created in the Custom User Properties screen. By default, its name is **Subscriptions**, and its type is **Category**. This occurs because all custom user properties appear on the Site Visitor Registration screen. In this way, users visiting that page can select areas of interest about which to be notified when content is updated.



The default name (**Subscriptions**) appears on the Site Visitor Registration screen. You may want to change it to something more helpful, such as **Select Areas of Interest**. To do this, select the Subscriptions entry and edit the **Label** field in the Custom User Properties screen.

The following graphic illustrates the relationship among the Subscriptions, Custom Properties, and Site Visitor Registration screens.

**View All Subscriptions**

View: English (U.S.)

| Subscription Name  | ID | Enabled                             | Language |
|--------------------|----|-------------------------------------|----------|
| <u>Automobiles</u> | 10 | <input checked="" type="checkbox"/> | 1033     |
| <u>Motorcycles</u> | 12 | <input checked="" type="checkbox"/> | 1033     |
| <u>Trucks</u>      | 11 | <input checked="" type="checkbox"/> | 1033     |

**View Custom Properties**

English (U.S.)

| Title                          | Type     | Required                            |
|--------------------------------|----------|-------------------------------------|
| <u>Check areas of interest</u> | Category | <input checked="" type="checkbox"/> |

First Name: John

Last Name: Edit

Password: ••••

Confirm Pwd: ••••

E-Mail Address: jedit@ektrron.com

☒ Automobiles

☒ Motorcycles

☐ Trucks

\*Check areas of interest

Notification will send in la

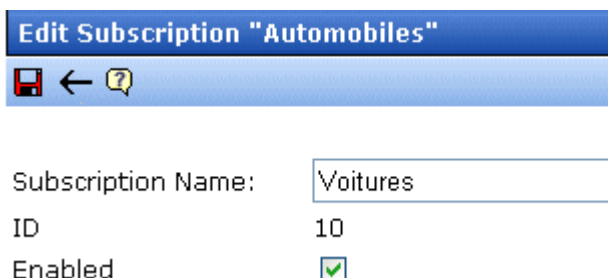
Register Reset



If you add more subscriptions later, they have no effect on the **Subscriptions** entry in the Custom User Properties screen -- that single entry covers all subscriptions.

## Using Subscriptions in a Multi-Language System



When you create a subscription, a version of it is created for every enabled language in your system. You can edit the subscription name and **Enabled** values for any language but the ID number cannot be changed.



The screenshot shows a window titled "Edit Subscription 'Automobiles'". Below the title bar, there are three icons: a floppy disk (Save), a left arrow (Back), and a speech bubble (Help). The main content area contains three fields:

|                    |                                       |
|--------------------|---------------------------------------|
| Subscription Name: | <input type="text" value="Voitures"/> |
| ID                 | 10                                    |
| Enabled            | <input checked="" type="checkbox"/>   |

To translate any subscription, follow these steps.

1. Go to **Settings > Configuration > Subscriptions**.
2. From the View Languages dropdown list, select the language into which you want to translate the subscription.
3. Click the subscription that you want to translate.
4. Click the Edit button ()
5. Enter the translation for the subscription name. If desired, you can check or uncheck the **Enabled** checkbox. Only enabled subscriptions appear on the Site Visitor Registration screen.
6. Click the Save button ()



# Assigning Web Alert Information to Folders and Content

After creating predefined messages (as explained in ["Predefining Message Components" on page 870](#)) and subscriptions (as explained in ["Defining Subscriptions" on page 877](#)), you need to identify which folders include content that, when updated, trigger a Web Alert. For example, new product announcements are placed in the Marketing folder.

**NOTE**

In order to set or modify Web Alert information, you must have permission to edit the folder.

For each folder, you can assign the following kinds of message information.

- whether Web Alert information is *inherited* from a parent folder or customized
- whether a folder's Web Alert information is inherited by all content items in the folder
- *when* email is sent: always, only on initial publication, or never
- the *content* of the Web Alert email
- the subscriptions assigned to the folder. These determine which recipients receive email when content in this folder is created or updated.

## Customizing Web Alert Information for a Folder


Like other folder-level information in **Ektron CMS400.NET**, Web Alert information is inherited from a parent folder. By default, all folders inherit these settings from the root (Content) folder.

However, inheritance can be broken and customized at any folder level or even the content level. Breaking inheritance means that custom settings can be made at any folder level. Subsequent changes to Web Alert settings at the parent level are ignored.

See Also: ["Assigning Web Alert Information to Content" on page 884](#)

To view, enter, or modify folder-level Web Alert information, follow these steps.



1. Navigate to the folder whose Web Alert information you want to edit.
2. Click the Folder Properties button ()
3. Click the **Web Alerts** tab.
4. Scroll down to view the Web Alert options.




**Properties** **Metadata** **Web Alerts****Web Alert Settings:**☐ Break Inheritance**Web Alert Options:**

- ☒ Notify Always  
☐ Notify Only on Initial Publication  
☐ Notify Never

**Web Alert Subject:****Web Alert Email From Address:****Web Alert Contents:**☒ Opt Out Message☐ Use Default Message☐ Use Summary☐ Use Content☒ Unsubscribe Message**Available Web Alerts:****Assigned Name**☐ Automobiles



5. To change any value, click the Edit Properties button ().
6. The following table describes the fields.

### Web Alert Fields

| Field Group                              | Description  |
|--|--|
| Web Alert Settings:<br>Break Inheritance | To inherit Web Alert settings (described below) from this folder's parent folder, leave this box ( <b>Break Inheritance</b> ) empty.<br>To assign custom Web Alert settings for this folder, check this box and use the fields below to customize the settings.  |
| Web Alert Options                        | Check <i>when</i> Web Alert emails are sent as content in this folder is published. <ul style="list-style-type: none"> <li>• <b>Notify Always</b> - send email whenever any content is published. It doesn't matter if the content is being published for the first time or being updated.</li> <li>• <b>Notify only on Initial Publication</b> - send email the first time content is published. After that, email is not sent.</li> <li>• <b>Notify Never</b> - email is never sent for content in this folder.</li> </ul>   |
| Web Alert Subject                        | Enter the subject line of the email.   |
| Web Alert email From Address             | Select the address of the person from whom the email will be sent.<br>See Also: <a href="#">"Creating "From" Addresses" on page 873</a>  |
| Web Alert Contents                       | Check any or all of the following components to determine the text of the email. See Also: <a href="#">"Combining Message Components to Create the Message" on page 874</a> <ul style="list-style-type: none"> <li>• OptOut Message - see <a href="#">"Creating Opt Out Message Text" on page 872</a></li> <li>• Use Default message - see <a href="#">"Creating Default Message Text" on page 871</a></li> <li>• Use Summary - include the content summary in the email</li> <li>• Use Content - see <a href="#">"Any CMS content item" on page 875</a></li> <li>• Unsubscribe message - See <a href="#">"Creating Unsubscribe Message Text" on page 873</a></li> </ul> <p>The components appears within the email in the order listed above.</p> |



| Field Group          | Description   |
|----------------------|---|
| Available Web Alerts | <p>All enabled subscriptions set up in the Subscriptions screen appear. Check those to be notified when content in this folder is added or updated.</p> <p>See Also: <a href="#">"Defining Subscriptions" on page 877</a></p> <hr/> <p>Note: If you uncheck all subscriptions, you disable the Web Alert feature for this folder and all of its content. This applies even if unique subscription information has been assigned to content items within the folder.</p> <hr/> |

## Assigning Web Alert Information to Content


You can customize Web Alert settings for any content item. If you do, you break the inheritance from its folder. This means that any subsequent changes to the folder settings do not affect the content's Web Alert settings. From then on, its settings are independent of the folder's settings.

See Also: ["Web Alert Feature" on page 855](#)

### EXCEPTION!

If *all subscriptions* are unchecked for a folder, the Web Alert feature is disabled for all content in the folder. This applies even if unique Web Alert information has been assigned to content.

To customize the Web Alert settings for any content item, follow these steps.

1. Navigate to the content item.
2. Click the Edit button (.
3. Click the **Web Alerts** tab.

### NOTE

The Web Alerts tab only appears if required messages, "from" email addresses, and at least one subscription are assigned to the content's folder.

4. The Web Alert settings for the content appear.



[Content](#)
[Summary](#)
[Metadata](#)
[Schedule](#)
[Comment](#)
[Web Alerts](#)

#### Web Alert Options:

- ☒ Notify Always
  - ☐ Suspend Next Notification (Override)
- ☐ Notify Only on Initial Publication
  - ☐ Send Next Notification (Override)
- ☐ Notify Never

#### Web Alert Subject:

#### Web Alert Email From Address:

bob.bolt@ektron.com ▼

#### Web Alert Contents:

- ☒ Opt Out Message
 

Opt out Message ▼
- ☐ Use Default Message
 

default ▼
- ☐ Use Summary
- ☐ Use Content Select
- ☒ Unsubscribe Message
 

unsubscribe msg ▼

#### Available Web Alerts:

##### Assigned Name


The following table describes the settings.



| Field Group                  | Description   |
|------------------------------|---|
| Web Alert Options            | <p>Check <i>when</i> Web Alert emails are sent as this content is published.</p> <ul style="list-style-type: none"> <li>• <b>Notify Always</b> - send email whenever content is published. It doesn't matter if the content is being published for the first time or being updated.</li> <li>• <b>Suspend Next Notification (override)</b> - Check this box if you want to suspend the next email to be sent for this content. You might use this feature if you notice a small error in the content and don't want to notify all subscribers that the page was updated.</li> </ul> <hr/> <p><b>Important!</b> - This setting only applies until the next time this content is published. When that happens, this box is automatically unchecked.</p> <hr/> <ul style="list-style-type: none"> <li>• <b>Notify only on Initial Publication</b> - send email the first time content is published. After that, email is not sent.</li> <li>• <b>Send Next Notification (override)</b> - Send an email to all subscribers the next time this content is published. Use this checkbox to send a one-time mailing to all subscribers about content that has already been published.</li> </ul> <hr/> <p><b>Important!</b> - This setting only applies until the next time this content is published. When that happens, this box is automatically unchecked.</p> <hr/> <ul style="list-style-type: none"> <li>• <b>Notify Never</b> - email is never sent when content in this folder is published.</li> </ul> |
| Web Alert Subject            | Same as for a content folder. See " <a href="#">Web Alert Subject</a> " on page 883   |
| Web Alert email From Address | Same as for a content folder. See " <a href="#">Web Alert email From Address</a> " on page 883  |
| Web Alert Contents           | Same as for a content folder. See " <a href="#">Web Alert Contents</a> " on page 883  |
| Available Web Alerts         | Only Web Alerts assigned to the folder appear. Check ones that you want to assign to this content item. For more information, see " <a href="#">Available Web Alerts</a> " on page 884.   |

### ***Inheriting Content-Level Web Alert Information from Its Folder***



If you customized Web Alert information for content items and later decide to standardize that information for all content in a folder, use the Restore Web Alert Inheritance toolbar button ().

This button copies folder-level Web Alert information to every content item in the folder, replacing whatever content-level information exists. In this way, all content in a folder will have the same Web Alert information.

## How Content that is Dragged and Dropped is Handled

Web Alert emails are not generated for files that are dragged and dropped into **Ektron CMS400.NET** and immediately published. To generate email for these files, you must manually publish them.

Like HTML content, these files must reside in a folder for which the Web Alert feature is enabled.

## How Users Sign up for Subscriptions

Once subscriptions are set up, you create a page on your Web site to let site visitors subscribe to areas of interest. An example of that page is below.

### NOTE

---

The email address collected on the screen is used for the membership **Username** field.

---



First Name:

Last Name:

Password:

Confirm Pwd:

E-Mail Address:

☐ Automobiles

☐ Motorcycles

\*Check areas of interest ☐ Trucks

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

To place this form on a Web page, your developer inserts a Membership Server Control. For more information, see the **Ektron CMS400.NET** Developer Manual chapter "Introduction to Ektron CMS400.NET Server Controls" > "Membership Server Control."

Any user who subscribes via the above screen becomes an **Ektron CMS400.NET** membership user, and is automatically added to the All Members user group. For more information, see ["Membership Users and Groups" on page 645](#).

What happens next depends on the **Enable Verify email** check box in the Application Setup screen (shown below).

☒ Enable Verify Email

(The CMS will verify all new membership users by sending them an email that asks them to confirm registration.)

- ["What Happens if Verification email is Not Used" on page 889](#)
- ["What Happens if Verification email is Used" on page 889](#)
- ["Setting up Other Web Pages for Site Visitor" on page 891](#)



- ["CMS User Subscription Sign Up" on page 891](#)

## What Happens if Verification email is Not Used

If the **Enable Verify email** checkbox is *not* checked, everyone who signs up automatically becomes a membership user.

## What Happens if Verification email is Used

Typically, when managing a self-subscribe list, you want new users to confirm their interest in being on the list. This prevents people from being subscribed by someone else without their permission.

If the **Enable Verify email** checkbox *is* checked, everyone who signs up is placed on the Users Not Verified list. (To see this list, go to **Workarea > Modules > Memberships > Users Not Verified**.)

These people then receive an email. You define the content of this email in **Workarea > Modules > Memberships > User Groups > Messages**. The email should direct the unverified user to a new Web page that asks him to confirm his interest in signing up for the subscription. (See ["The Verification Message" on page 889](#).) New users are activated when the subscriber confirms his interest.

To create such a page, your Web developer creates or updates a Web Form using the Membership Server Control. For this purpose, set the control's **DisplayMode** property to **AccountActivate**.

### NOTE

Users can also be manually activated or removed via the View Not Verified Users screen. For more information, see ["The View Not Verified Users Screen" on page 890](#).

## The Verification Message

By default, **Ektron CMS400.NET** supplies a generic message asking the user to confirm his password and directing him to the `acitvatemyaccount.aspx` page on your Web site. If you want to customize that message, follow these steps.

1. Go to **Workarea > Modules > Memberships > User Groups Messages**.
2. Click the Add button ().



3. Assign a title to the message, such as **Verification Message**.
4. Click to place a check mark in the **Default** box.
5. Enter the text of the confirmation message you want the subscriber to receive. Be sure to place a link to the confirmation page. After the URL of that page, you must add this text: @appQueryLink@. For example:

Welcome to example.Com. You have registered to be notified of updates to our site.

Before we can do this, you need to activate your account. To do so, please visit <http://www.example.com/workarea/activateuser.aspx@appQueryLink@>.

If you want the message to include the user's name and email address, use the following variables to retrieve that information:

- name - @appEmail@
- email address - @appActivateId@



For example:

Your user name is @appEmail@.

Your account id is @appActivateId@

## The View Not Verified Users Screen

All users who have signed up for a subscription but who have not yet verified that subscription appear on the View Not Verified Users Screen. This screen is available via **Modules > Memberships > Users not Verified**.

After viewing membership users on the screen, you can manually activate their account. To do so, selecting one or more users then click the Activate button (). Alternatively, you can delete members by selecting one or more and clicking the Delete button (.

### NOTE

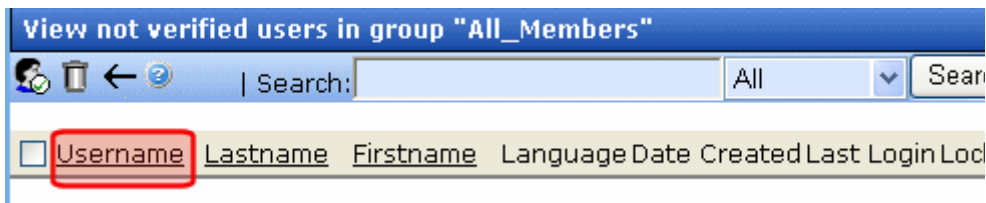
The `ek_PageSize` setting in the `web.config` file determines the maximum number of users that can appear on a page before it "breaks." When a page breaks, additional entries appear on another screen, and the following text appears near the bottom of the list:

Page 1 of 2

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

To select all members, click the check box in the header line, next to **Username** (circled below).





You can also change the way membership users are sorted, or use the **Search** button to find users that match your criteria (for example, users whose username includes *example.com*.) These features are explained in ["Sorting Membership Users" on page 650](#) and ["Searching for Membership Users" on page 650](#).

## Setting up Other Web Pages for Site Visitor

You can set up other Web pages that let the subscriber perform the following actions:

- Activate their account
- Reset their password
- Unsubscribe

To create these pages on your web site, place the membership server control on the page. Then use the control's **DisplayMode** property to determine the kind of screen you want to place. For example, to create a screen that lets the user reset his password, set the Membership server control's **DisplayMode** property to **ResetPassword**.

For more information, see the documentation for the Membership server control in the **Ektron CMS400.NET Developer's Manual**.

## CMS User Subscription Sign Up




CMS users can also subscribe to any subscription list. This would be particularly useful on an intranet where, for example, employees are notified when job-related information is updated.

Another example would be for your internet site. The manager of the Marketing Department could sign up to be notified whenever Marketing content is added or updated.



To do so, users go to **Settings > User Profile > Edit User** (see illustration).

**Edit User "Admin"**



Username:

Admin

First Name:

admin

Last Name:

admin

Password:

••••••••

Confirm Pwd:

••••••••

User Language:

App Default ▼

E-Mail Address:

admin@ektron.com

☐ Disable Receiving of System Notification Email

(System notification sending email is currently disabled)

Subscriptions

☒ Automobiles

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



---

# Ektron Windows Service

**Ektron CMS400.NET** provides a Windows Service to handle background processing functions. This section explains the service, including

- the CMS functions it performs
- how it propagates updates to the connection string and site path
- where it resides in IIS and the file system
- its activity log

## Functions Performed by the Ektron Windows Service

The Ektron Windows Service performs the following processes.

- ["XML Indexing" on page 204](#)
- "Quick Deploy" in the **Ektron CMS400.NET** Site Replication Manual
- ["Load Balancing Assets" on page 917](#)
- ["PDF Generation" on page 332](#)
- ["Bad Links Report" on page 168](#)
- Publication of content scheduled to go live at a future time, and removal of content scheduled to expire. See **Ektron CMS400.NET** User Manual section "Scheduling Content to Begin and End"
- When a new metadata definition is created, the Windows service applies it to all content in the CMS database. However, the metadata definition is only activated for the content when it is enabled for the content's folder. See *Also:* ["Metadata" on page 115](#)



In addition, the Ektron Windows Service propagates updates made to the database connection string or the site path in the web.config file. The service copies the new value to the data.config and sitedb.config files (respectively). These are located in `C:\Program Files\Ektron\EktronWindowsService`. Any CMS components that reference these values can retrieve the current information from these files.

**IMPORTANT!**

Do not edit the data.config and sitedb.config files. They are dynamically generated by **Ektron CMS400.NET**. If these files have incorrect values, edit the web.config file, which is used to generate them.

The following topics explain various aspects of using the Ektron Windows Service.

- "Enabling Load Balancing of Assets" on page 894
- "Changing the Update Time" on page 895
- "Preventing Configuration Information from Being Updated" on page 895
- "Changing the Name of the data.config File" on page 895
- "Changing the http Port" on page 896
- "Disabling PDF Generation" on page 896
- "Disabling XML Indexing" on page 896
- "Viewing in IIS" on page 897
- "Viewing in the File System" on page 899

## Enabling Load Balancing of Assets

By default, load balancing of assets is disabled within the Ektron Windows Services file:

```
C:\Program Files\Ektron\EktronWindowsService\Ektron.ASM.EktronServices.exe.config
```

To enable load balancing of assets, follow these steps.

**NOTE**

To learn about load balancing assets, see "Load Balancing Assets" on page 917.

1. Open that file using a word processor such as Notepad.
2. Find the `LoadBalanceRead` and `LoadBalanceWrite` tags
3. Set the `Enabled` attribute to `true`. See example below.



```
<add name="LoadBalanceRead"
type="Ektron.ASM.EktronServices.LoadBalancing.Read.LoadBalanceReadService,
Ektron.ASM.EktronServices" IntervalSeconds="59" Enabled="false" />
```

```
<add name="LoadBalanceWrite"
type="Ektron.ASM.EktronServices.LoadBalancing.Write.LoadBalanceWriteService,
Ektron.ASM.EktronServices" ServerCount="2" Enabled="false" />
```

4. For the "LoadBalanceWrite" tag, make sure the `ServerCount` attribute is set to the number of servers in your load balance cluster. This number must be the same for all servers in the cluster.

```
<add name="LoadBalanceWrite"
type="Ektron.ASM.EktronServices.LoadBalancing.Write.LoadBalanceWriteService,
Ektron.ASM.EktronServices" ServerCount="2" Enabled="false" />
```

## Changing the Update Time

The update of the `data.config` and `sitedb.config` files occurs once a day at a time prescribed in the `C:\Program Files\Ektron\EktronWindowsService\Ektron.ASM.EktronServices.exe.config` file's `updateTime` value. If desired, you can change this time.

## Preventing Configuration Information from Being Updated

You can prevent the information in the `data.config` and `sitedb.config` files from being changed by the automatic daily update. To do so, surround them with `<preserve>` tags.

## Changing the Name of the data.config File

If your server already has a file named `data.config`, and you want to change the name of the one in `C:\Program Files\Ektron\EktronWindowsService` to avoid confusion, follow these steps.

1. Open `Ektron.ASM.EktronServices.exe.config`.
2. Find this line: `<connectionStrings configSource="data.config"/>`.
3. Replace `data.config` with the new file name. For example:  
`<connectionStrings configSource="Ektron_data.config" />`
4. Save `Ektron.ASM.EktronServices.exe.config`.



## Changing the http Port

If your Web site is already using port 6060, follow these steps to change the port number used by the Ektron Windows Web Service.

1. Open Ektron.ASM.EktronServices.exe.config.
2. Find this line: `<add key="HttpServicePort" value="6060" />`.
3. Change the `value` to the port number you will use for the Ektron Windows Service.

## Disabling PDF Generation

By default, PDF generation is enabled. If you want to disable it within the Ektron Windows Services configuration file, follow these steps.

1. Open Ektron.ASM.EktronServices.exe.config.
2. Find these lines:

```
<add name="PdfFileRead"
type="Ektron.ASM.EktronServices.PdfFileManager.Read.PdfFileManagerReadService,
Ektron.ASM.EktronServices" IntervalSeconds="101" Enabled="true" />
```

```
<add name="PdfFileWrite"
type="Ektron.ASM.EktronServices.PdfFileManager.Write.PdfFileManagerWriteService,
Ektron.ASM.EktronServices" IntervalSeconds="149" Enabled="true" />
```

3. For both tags, set `enabled` to `false`.

## Disabling XML Indexing

If you want to disable XML indexing, follow these steps.

1. Open Ektron.ASM.EktronServices.exe.config.
2. Find these lines:

```
<add name="XmlIndexing" type="Ektron.ASM.EktronServices.XmlIndexing.IndexingService,
Ektron.ASM.EktronServices" Enabled="true" />
```

3. Change the value of `enabled` to `false`.



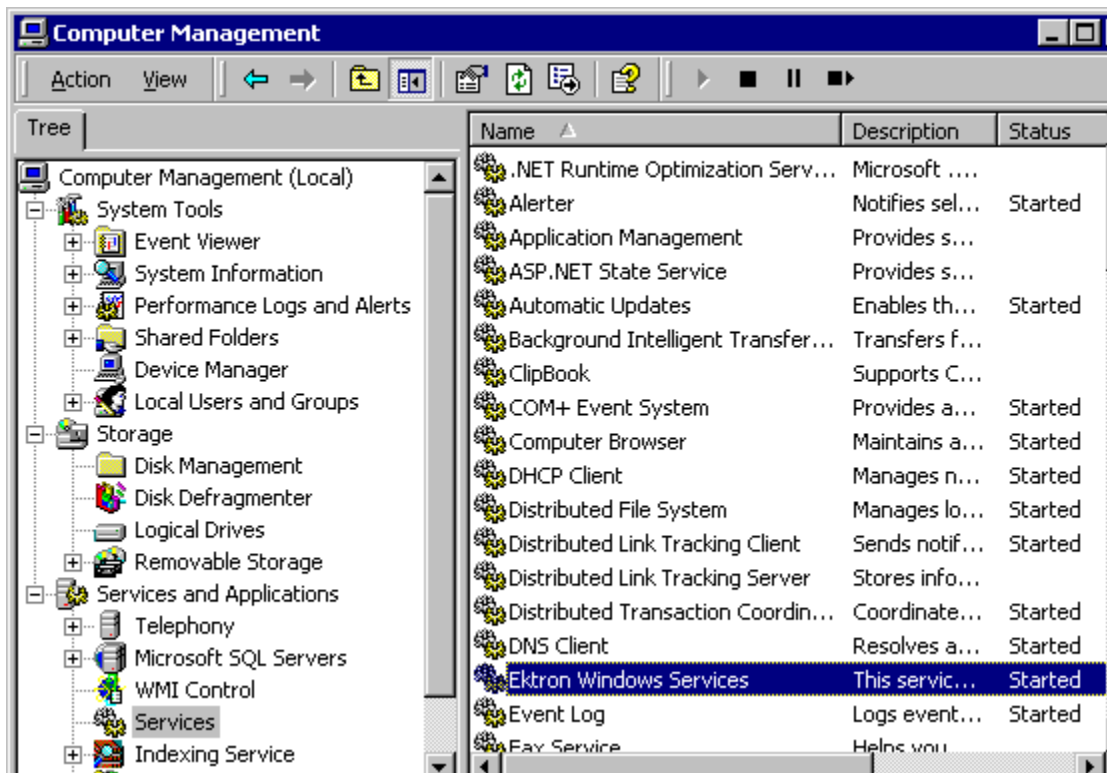
# Viewing the Ektron Windows Service

## Viewing in IIS

The Windows Service starts automatically when **Ektron CMS400.NET** is installed, and again whenever the server is restarted.

1. To see the status of the service, go to **Computer Management > Services and Applications > Services**.

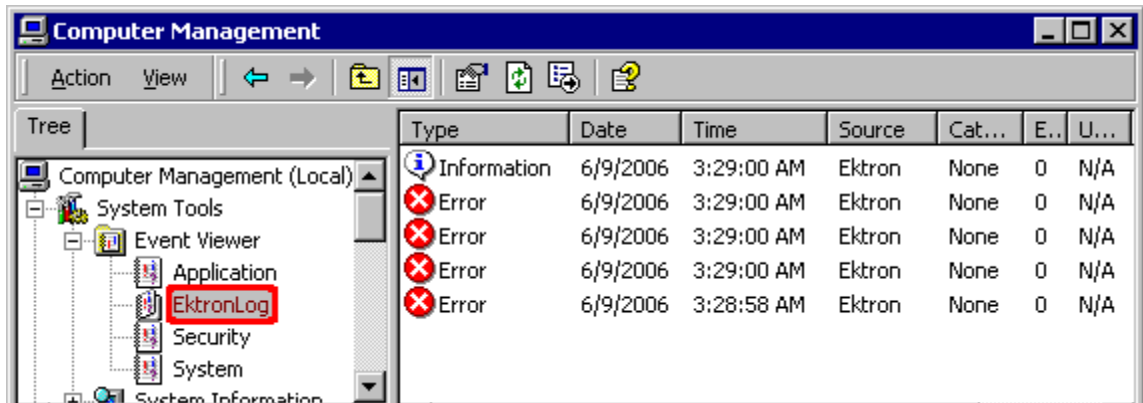
Look for **Ektron Windows Services**. You can see its status in the **Status** column.



## The Activity Log



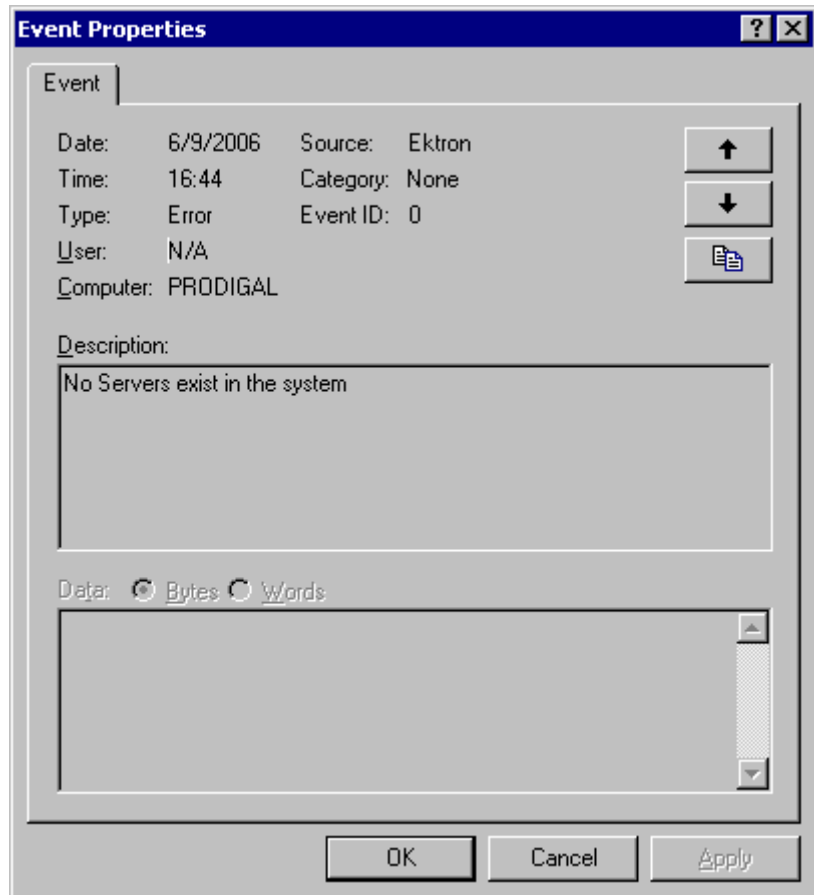
The service has an Activity Log, which tracks all related events. To see it, go to **Computer Management > System Tools > Event Viewer > Ektron Log**.



To view detail for any event, double click it.

A common source of errors is that the service cannot find **Ektron CMS400.NET** sites, because they have not been created yet, as shown in the sample below.

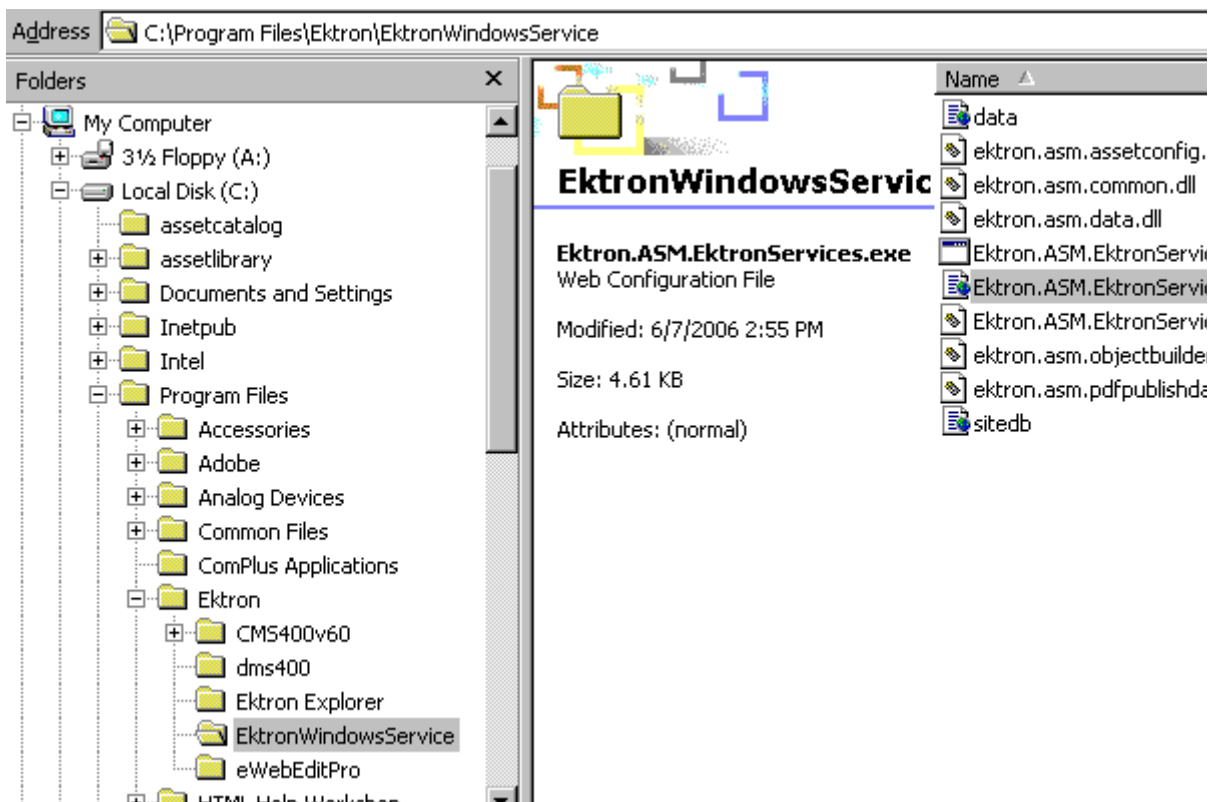




## Viewing in the File System

On your file system, the Ektron Windows Service is located in `C:\Program Files\Ektron\EktronWindowsService`. Within that folder, the `Ektron.ASM.EktronServices.exe.config` file runs the Ektron Windows service.







---

# Web Services

Web Services are reusable software components that can be consumed over the Web by means of standard Internet technologies. Mechanisms exist to publish and discover Web Services on the Web, allowing users to locate and integrate them into their applications.

A Web Service is comprised of one or more methods that expose functionality. A Web Service can be thought of as an Application Program(ming) Interface (API), the one big difference being, consumers can access the service using Simple Object Access Protocol (SOAP) over HTTP.

SOAP is an XML based lightweight protocol that defines the message format for Web Services, which allows heterogeneous systems to communicate with each other in a standard way. Seeing Web Services are based on ubiquitous technologies, they have been quickly accepted for the interchange of data.

For information about implementing Ektron CMS400.NET's Web services support for your Web site, refer to Web Services in the Ektron CMS400.NET Developer's Reference Manual.



---

# Load Balancing

Load Balancing has two important purposes:

- Provides redundancy for your Web site - if one server fails, a second can still handle the requests
- Balances requests - distributes requests across two or more servers

To enable load balancing, set up several servers that include the same files. Then, purchase load balancing equipment to evenly distribute requests for content among the servers. Whenever an image or file gets uploaded to your Web site, regardless of the Web server the user is working on, the asset is replicated on both servers.

The client browser is unaware that more than one server is involved. All URLs point to a single Web site. The load balance software resolves them.

Ektron provides different strategies for load balancing *library images and files* and *DMS assets*. See

- ["Load Balancing Library Images and Files" on page 902](#)
- ["Load Balancing Assets" on page 917](#)

## Load Balancing Library Images and Files

Ideally, your load balancing strategy involves automatic replication of files in each directory specified by Ektron CMS400.NET to all servers.

The easiest way to enable Load Balancing involves using Ektron's Site Replication Feature (see ["Using Site Replication for Load Balancing" on page 903](#)). If your site has not purchased that option, an alternative approach involves creating virtual directories and setting up load balance paths



(see "Configuring Load Balancing without Site Replication" on page 904).

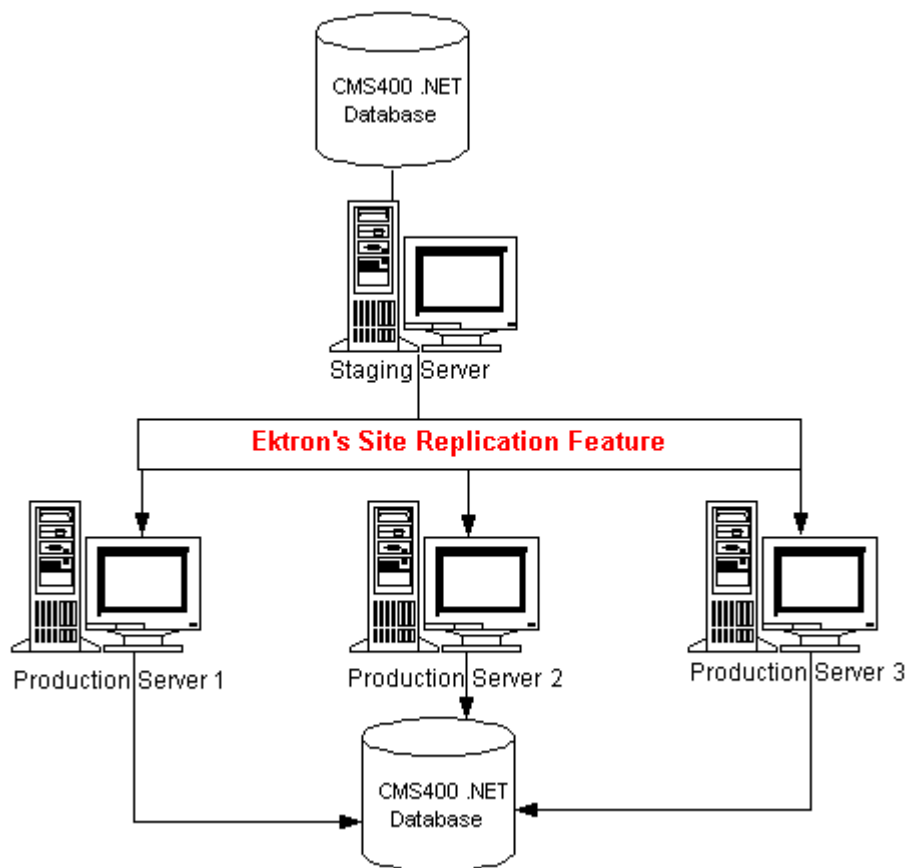
*See Also:*

- "Using Site Replication for Load Balancing" on page 903
- "Configuring Load Balancing without Site Replication" on page 904
- "Ektron CMS400.NET on Three Servers" on page 915

## Using Site Replication for Load Balancing

The easiest way to configure **Ektron CMS400.NET** for this setup is illustrated below. Have all content authoring, editing, and review occur on a staging server. Then, when new content is ready to go live, use the Site Replication feature to copy content from staging to production server.





For more information about Site Replication, see the **Ektron CMS400.NET** Site Replication Manual.

## Configuring Load Balancing without Site Replication

If your site has not purchased Site Replication software, enabling load balancing requires additional set-up outside of Ektron CMS400.NET. To set this up, you perform three tasks.

Instructions are provided for a configuration that involves both two and three Web servers.

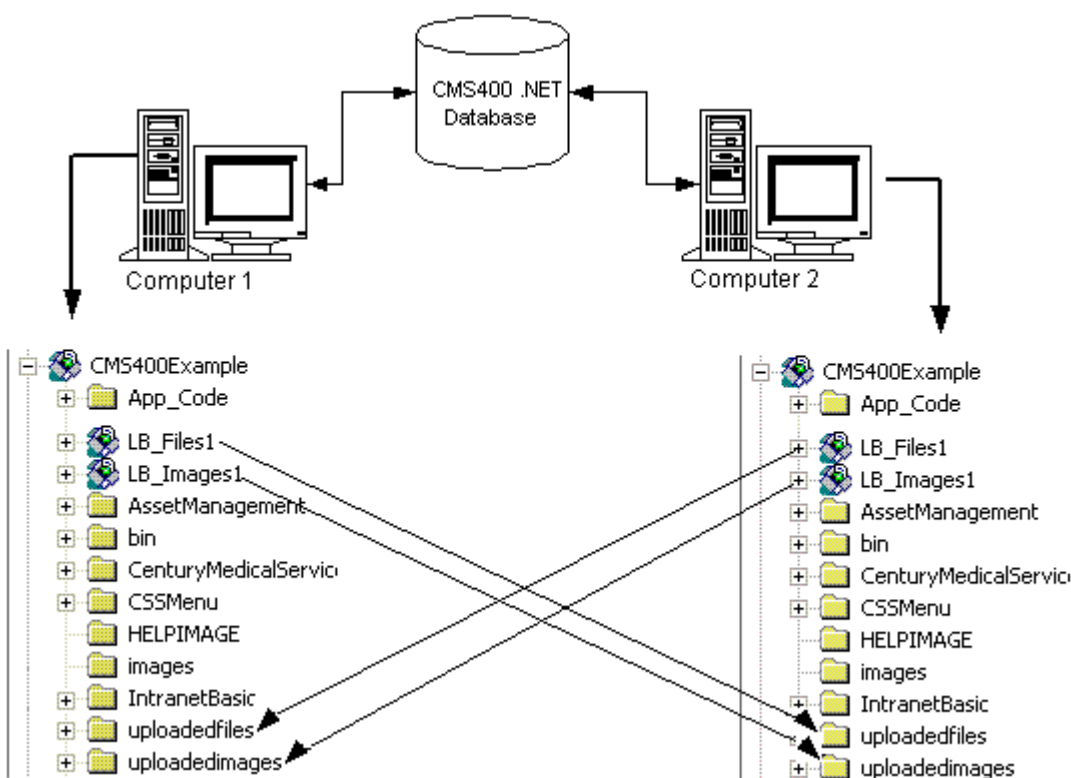


| Task  | Directions for 2 Web Servers                                     | Directions for 3 Web Servers                                 |
|---|--|--|
| 1. Set up Ektron CMS400.NET on multiple Web servers, sharing one database | "Set Up Two Ektron CMS400.NET Web Sites" on page 906             | "Setting Up Multiple Web Sites" on page 916                  |
| 2. Create virtual directories to uploadedimages and uploadedfiles folders | "Set Up Virtual Directories for Two Web Sites" on page 907       | "Setting Up Virtual Directories for Three Sites" on page 916 |
| 3. Set load balance paths in Ektron CMS400.NET                            | "Setting Up Load Balance Paths in Ektron CMS400.NET" on page 913 | "Setting Up Load Balancing for Three Servers" on page 916    |



## Set Up Two Ektron CMS400.NET Web Sites

The following diagram illustrates how to set up IIS consoles for load balancing two Ektron CMS400.NET Web servers.



Both servers point to the same database, and two virtual directories are set up in each Web server's IIS console. To set this up, follow these steps.

1. Install the .exe file for Ektron CMS400.NET on each Web server.

### NOTE

Read the [Ektron CMS400.NET Setup Manual](#) for information on performing an install.

2. Select one database as the master. Each Web site points to this database for content, users, and load balance paths.



3. By default, the `<connectionStrings>` element of the web.config file contains connection information to the sample database. Replace the sample values with your server, database name, and login information

## Set Up Virtual Directories for Two Web Sites

Through Internet Information Services (IIS) on both Web servers, create virtual directories for all image or file folders used with your load balancing model. For our example, create the following virtual directories on both Web servers.

| Virtual Directory | Points to   |
|-------------------|---|
| LB_Images1        | UploadedImages folder installed on the second Ektron CMS400.NET Web server. |
| LB_Files1         | UploadedFiles folder installed on the second Ektron CMS400.NET Web server.  |

These identical, virtual directories must exist in the IIS console for each Web server in your load balancing model.

### ***Why Must Virtual Directory Names Be Identical?***

Virtual directory names must be identical because load balance paths are stored in one database. IIS resolves the path to the virtual directory stored on the server being used.

For example, a load balance path is called `LB_Images1`. Ektron CMS400.NET talks to IIS and resolves the path for the virtual directory `LB_Images1`, which is `\\{Computer1}\\UploadedImages`.

If the Web site is accessed from another Web server, the load balance path `LB_Images1` points to the physical directory `\\{Computer2}\\UploadedImages`.

#### **IMPORTANT!**

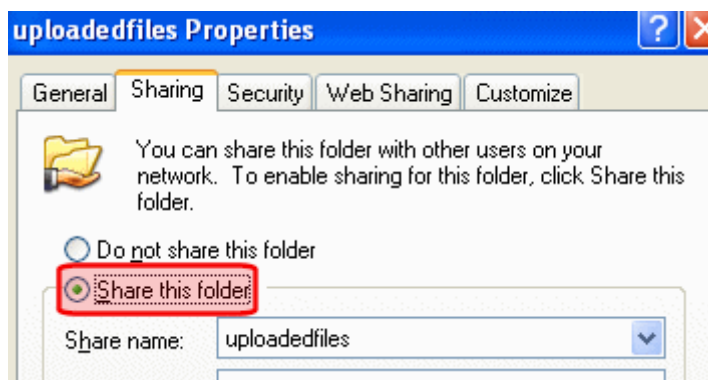
For load balancing to work correctly, the virtual directories on each Web server must be identical.

## Creating a Virtual Directory

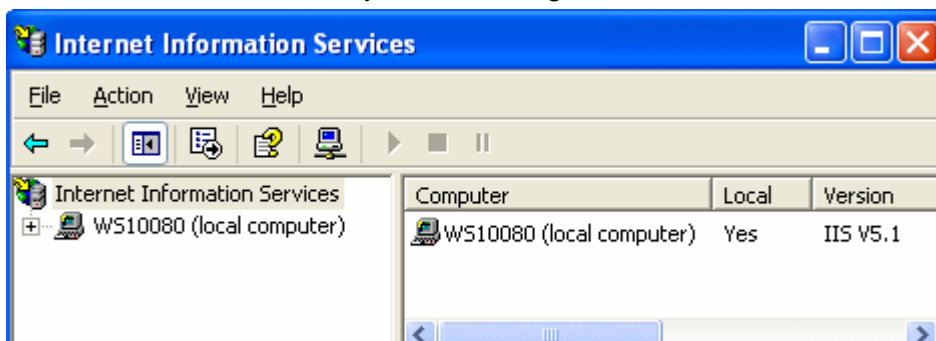


This section explains how to create a virtual directory in IIS. Follow this procedure for all servers being load balanced.

1. Open Windows Explorer and navigate to the your Web site's `uploadedimages` and `uploadedfiles` folders.
2. Select each folder, right click the mouse, and select **Properties**.
3. Click the **Sharing** tab, select **Share this folder**, and press **OK**.

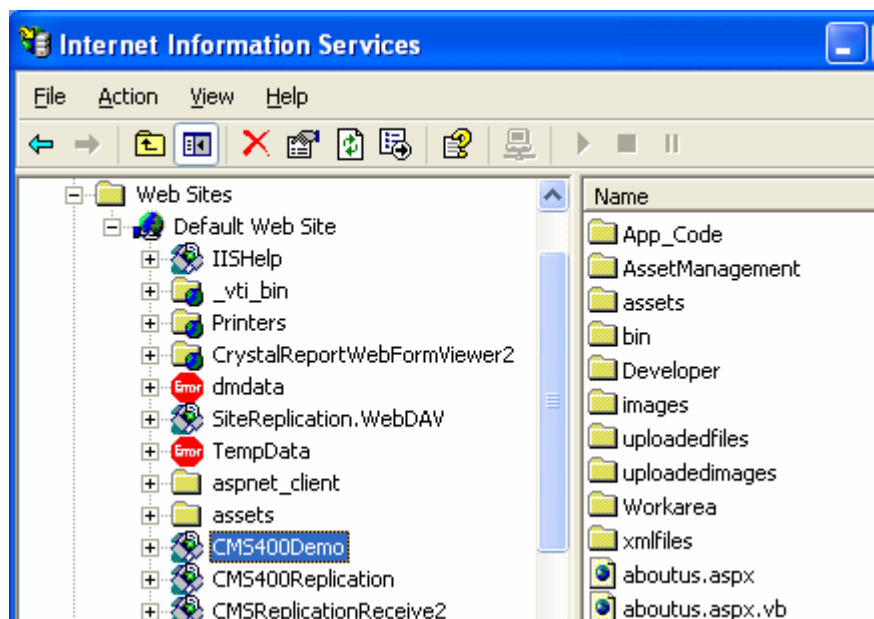


4. Access your IIS management console.

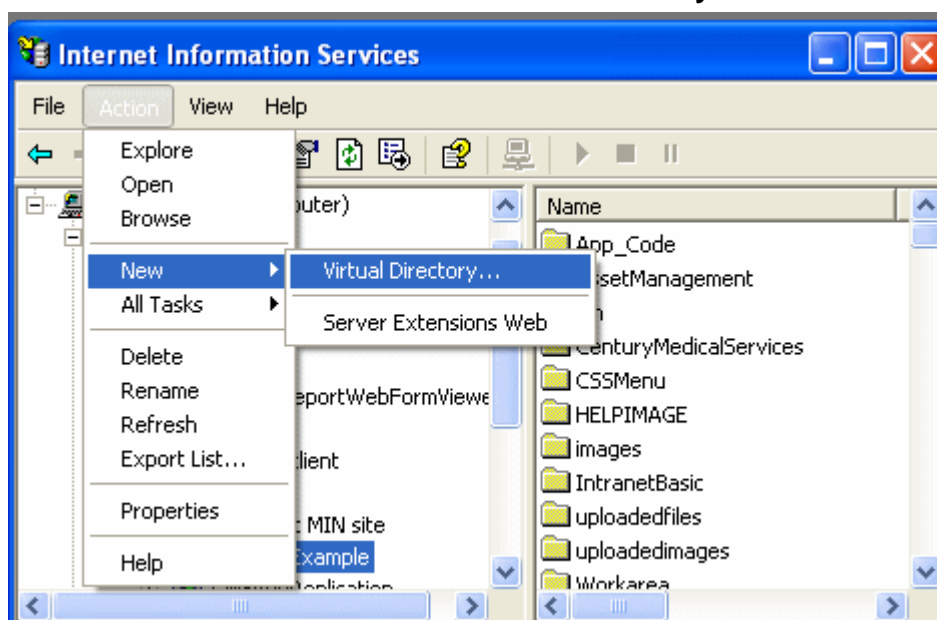


5. In the folder tree on the left side of the console, navigate to the Ektron CMS400.NET Site root folder. In this example, it is **CMS400Min**.





6. In the toolbar at the top of the screen, follow the path **Action > New > Virtual Directory...**





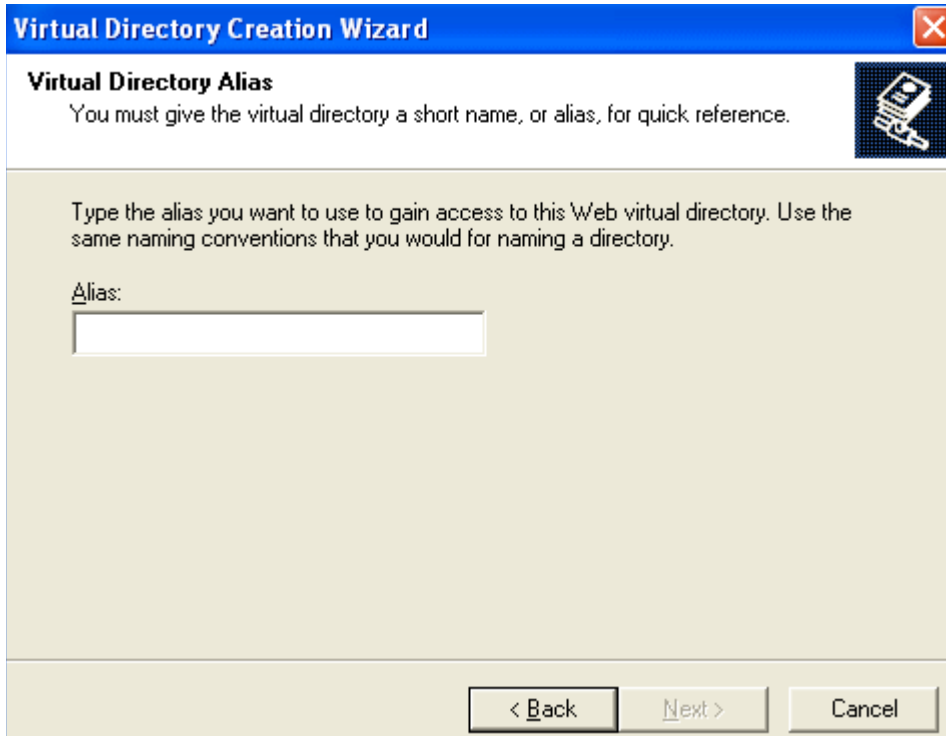
7. The Virtual Directory Creation Wizard is displayed.



8. Click **Next** to proceed.



9. The Virtual Directory Alias screen is displayed.



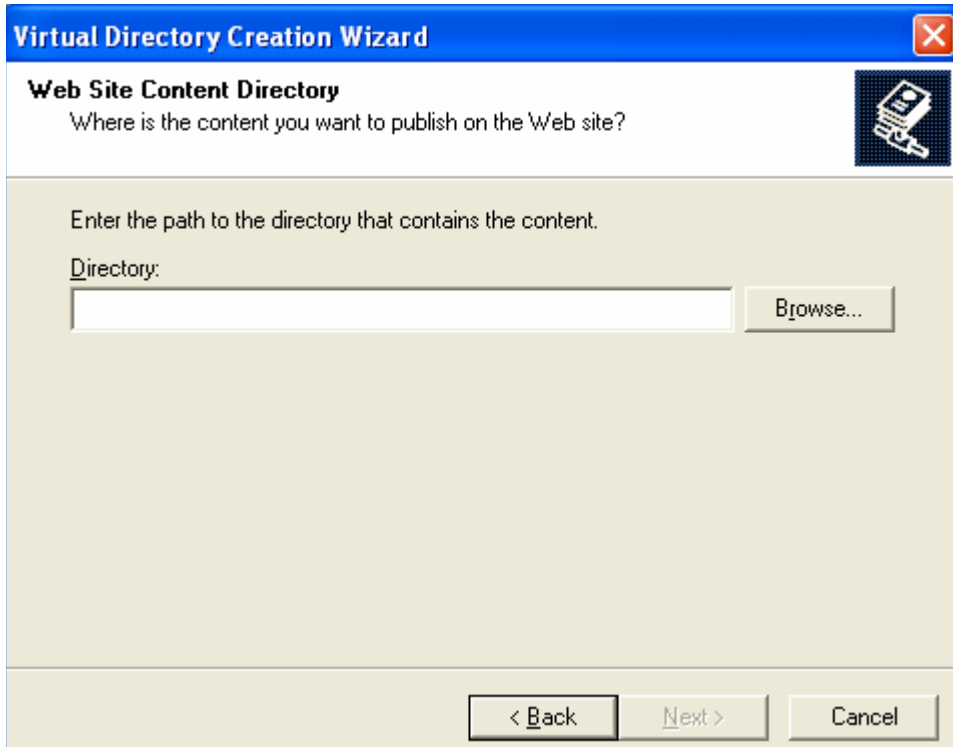
The screenshot shows a Windows-style dialog box titled "Virtual Directory Creation Wizard". The main heading is "Virtual Directory Alias". Below the heading, a message states: "You must give the virtual directory a short name, or alias, for quick reference." To the right of this text is a small icon of a floppy disk. The main area of the dialog contains the instruction: "Type the alias you want to use to gain access to this Web virtual directory. Use the same naming conventions that you would for naming a directory." Below this instruction is a label "Alias:" followed by a text input field. At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

10. Enter an alias for the virtual directory. For example, **LB\_Images1**. You will use this name to reference the virtual directory in Ektron CMS400.NET.

11. Click **Next**.



12. The Web Site Content Directory screen is displayed.



The screenshot shows a Windows-style dialog box titled "Virtual Directory Creation Wizard". The main heading is "Web Site Content Directory". Below the heading is the question "Where is the content you want to publish on the Web site?". To the right of the text is a small icon of a floppy disk. Below this, there is a text prompt "Enter the path to the directory that contains the content." followed by a label "Directory:" and an empty text input field. To the right of the input field is a "Browse..." button. At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

13. Enter the path to the directory to be used for the virtual directory.

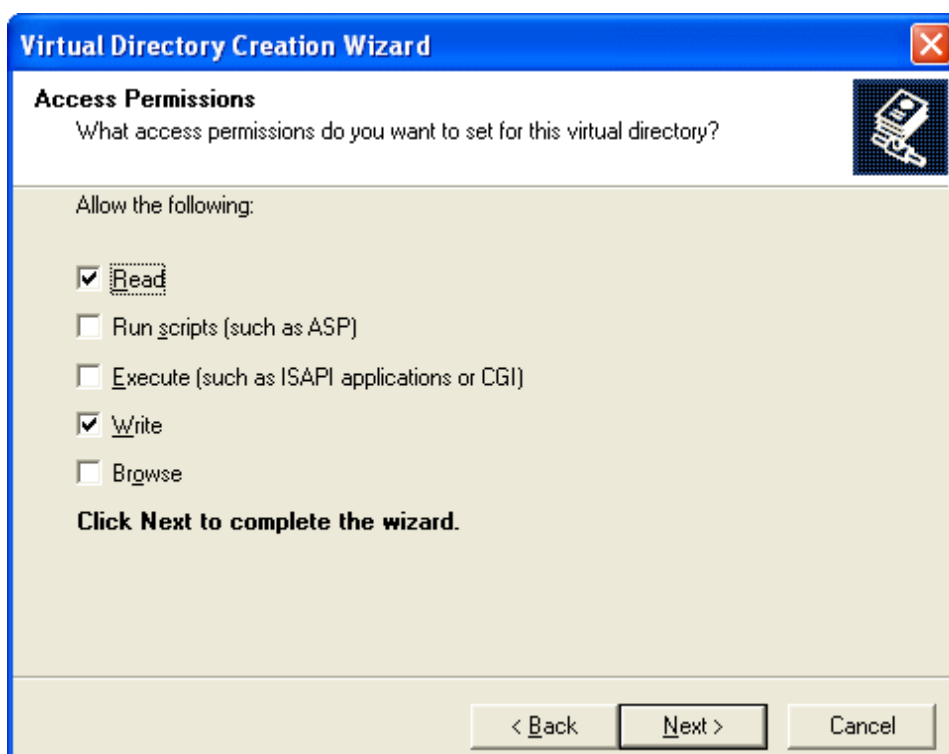
**NOTE** The path must follow the UNC syntax, that is \\{ComputerName}\\{FilePath}. For example, \\ws10080\\uploadedfiles.

14. Click **Next** to continue.

15. Enter a user and his password that will be used to access the virtual folders. To see a list of possible users, click the **Browse** then **Advanced** buttons.

16. Check off permissions you want to allow for the virtual folder.





**NOTE** [At a minimum, the IIS user needs Read and Write permissions.](#)

17. Click **Next** to complete the wizard.
18. A confirmation indicates that you have created a virtual directory. Click the **Finish** button.
19. The IIS console is displayed with the virtual directory added to the specified location.
20. Repeat the above steps for each virtual directory you need to create on each Web server running Ektron CMS400.NET.

**NOTE** [Remember, the names of the virtual directories on each server \*must\* be identical!](#)

## Setting Up Load Balance Paths in Ektron CMS400.NET

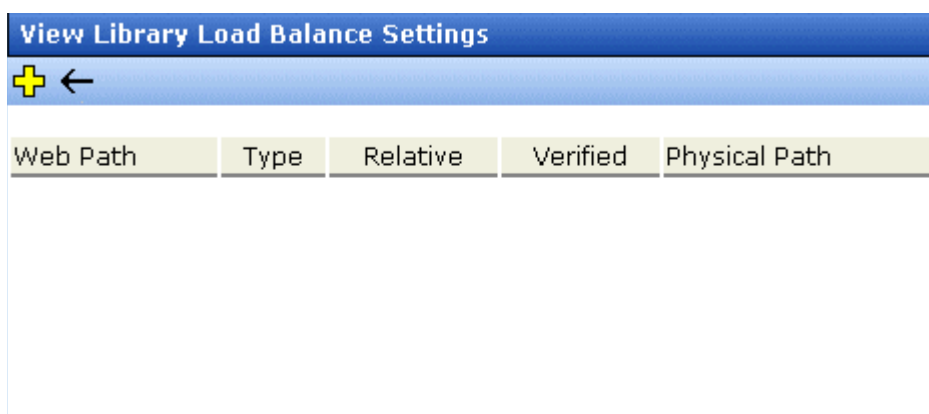
In this section, you set up load balance paths in Ektron CMS400.NET that point to the `LB_Images1` and `LB_Files1` virtual directories created earlier.



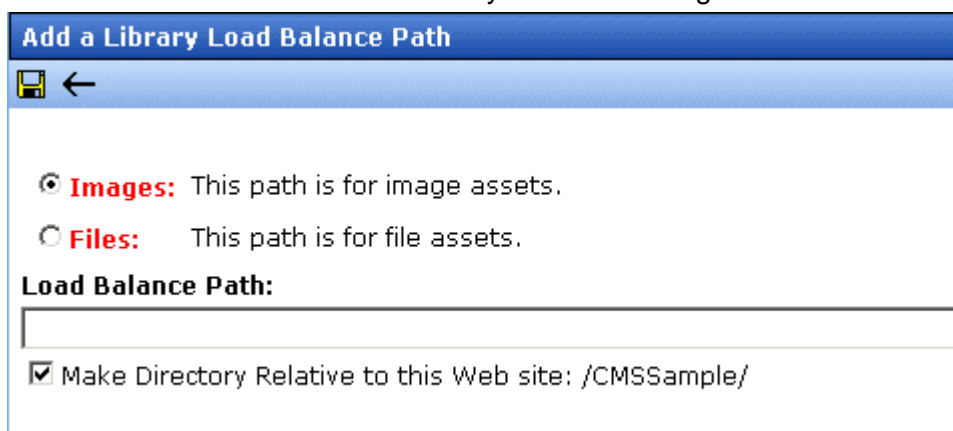
**NOTE** For additional information about working with load balance paths in Ektron CMS400.NET, refer to "Load Balancing" on page 176.

To add a load balance path in Ektron CMS400.NET, follow these steps.

1. Log in as an administrator to the Web site you set up in "Set Up Two Ektron CMS400.NET Web Sites" on page 906.
2. Go to **Library > View Properties > Load Balance** (.




3. Click the Add button (.
4. The Add a Library Load Balancing Path screen is displayed.








5. Use the following table to help you complete the screen.

| Field             | Description   |
|-------------------|---|
| Images/Files      | Specify if the load balance path folder is for images or files.   |
| Load Balance Path | Enter the path to the virtual directories on your server. (These were set up in <a href="#">"Creating a Virtual Directory" on page 907.</a> )                   |
| Make Relative     | If the folder (or virtual folder) resides under your Ektron CMS400.NET site root, check the box to make the path relative to that. Otherwise, remove the check. |

6. Click the Save button (  ) to add the load balance folder to the Ektron CMS400.NET library.

The View Library Load Balance Settings screen appears with the changes. Notice the green check, which indicates that IIS on the local Web server resolved the virtual directory and located its physical folder.

7. To further verify the load balance path is working successfully, go to the View Library Load Balance Setting screen in the Workarea for the other Ektron CMS400.NET Web server.

| View Library Load Balance Settings   |        |          |          |                             |
|--|--------|----------|----------|-----------------------------|
|    |        |          |          |                             |
| Web Path   | Type   | Relative | Verified | Physical Path               |
| <u>/cms400sample/uploadedimages/</u>   | images | x        | ✓        | c:\inetpub\wwwroot\cms400sa |

Notice that the two Web path names are identical, but the physical paths are different. This proves that IIS resolves each differently.

## Ektron CMS400.NET on Three Servers

This section examines a Web site driven by Ektron CMS400.NET and three Web servers through the following topics.

- ["Setting Up Multiple Web Sites" on page 916](#)
- ["Setting Up Virtual Directories for Three Sites" on page 916](#)



- ["Setting Up Load Balancing for Three Servers" on page 916](#)

## Setting Up Multiple Web Sites

To run an identical Ektron CMS400.NET Web site on three machines, you must use the same database for each site. To do so, follow instructions in ["Set Up Two Ektron CMS400.NET Web Sites" on page 906](#).

## Setting Up Virtual Directories for Three Sites

Through Internet Information Services (IIS) on all three Web servers, create virtual directories for each image or file folder to be used with your load balancing model. For our example, we create virtual directories on all Ektron CMS400.NET Web servers.

| Virtual Directory | Description  |
|-------------------|--|
| LB_Images1        | Virtual directory that points to the UploadedImages folder installed on the second Ektron CMS400.NET Web server. |
| LB_Files1         | Virtual directory that points to the UploadedFiles folder installed on the second Ektron CMS400.NET Web server.  |
| LB_Images2        | Virtual directory that points to the UploadedImages folder installed on the third Ektron CMS400.NET Web server.  |
| LB_Files2         | Virtual directory that points to the UploadedFiles folder installed on the third Ektron CMS400.NET Web server.   |

These virtual directories must exist in the IIS console for each Web server machine in your load balancing model.

### ***Creating a Virtual Directory***

See ["Creating a Virtual Directory" on page 907](#)

## Setting Up Load Balancing for Three Servers

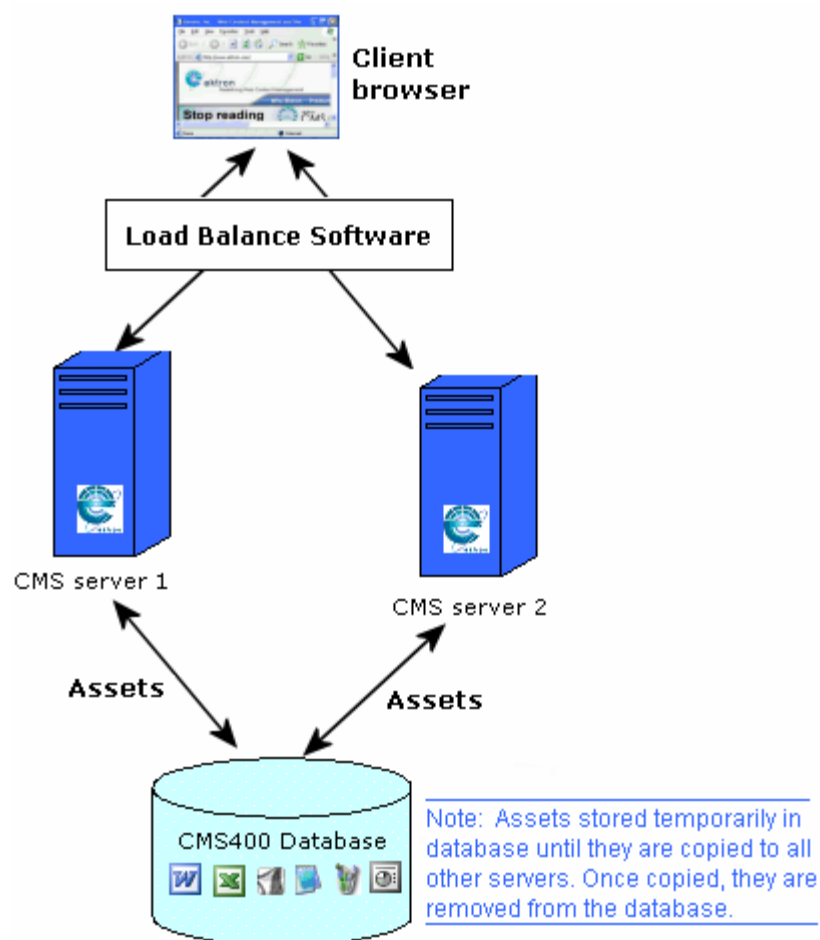
After setting up virtual directories on all Web servers, you're ready to create load balance paths in Ektron CMS400.NET.

See ["Setting Up Load Balance Paths in Ektron CMS400.NET" on page 913](#)



## Load Balancing Assets

**Ektron CMS400.NET** lets you balance requests to view or work with assets among two or more servers. To achieve this, each server has its own copy of every asset.



To accomplish this, **Ektron CMS400.NET** initially stores every new asset in the database. An Ektron service constantly checks to see if all database assets also exist on each server's file system. To learn about this service, see ["Ektron Windows Service" on page 893](#).

If an asset does not exist on any server in the cluster, it is copied from the database to the server's file system. Once there, the



asset is available for requests to work with it. After an asset is copied to all servers, **Ektron CMS400.NET** removes it from the database.

There is no limit to the number of servers or databases that can be load balanced.

See Also: ["Setting up Load Balancing" on page 918](#)

## Setting up Load Balancing

To set up load balancing for assets, you need to follow the steps described below.

1. *Update the AssetManagement.config File.* Within each site's root folder, open the AssetManagement.config file. To enable load balancing, set the value of the `LoadBalanced` element to **1**.
2. Enable load balancing for assets in the Ektron Web services file. See ["Enabling Load Balancing of Assets" on page 894](#)

After updating these files for each server in the load balance cluster, sign on to Ektron CMS400.NET. This action sets up the load balance software in the database.



# email Features

## Configuring SMTP Server

For information about configuring Microsoft's SMTP service for your Ektron CMS400.NET Web server, please refer to Configuring Email Notifications, in the Ektron CMS400.NET Setup Manual.

## Automatic eMail Notification

Ektron CMS400.NET has an automated email system that sends emails to the proper users when an action has been, or needs to be, performed. Emails are generated when any of the following actions takes place.

| email sent to | When content is                     |
|---------------|-------------------------------------|
| Next approver | Submitted to be published           |
| Next approver | Submitted to be deleted             |
| Author        | Published to Web site               |
| Author        | Declined to be published or deleted |

In order for users to be notified of these actions, the following criteria must be met:

- Valid system email address
- Enabled email notification
- User email address
- User email notification enabled

These values are set in the Edit User screen. See Also: ["Managing Users" on page 635](#)



The Tasks feature also has automatic email notification. For more information, see "Email Notification" on page 391.

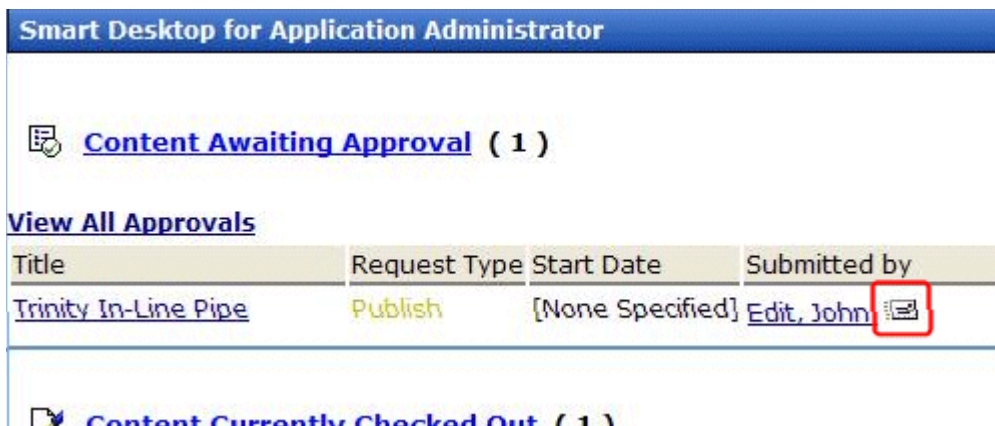
## Content of Automatic email

The automatic emails are stored in and received from the database. Each email consists of one string for the subject and one for the body. **Ektron CMS400.NET** does not currently support HTML emails, but the messages are fully customizable. To learn about customizing them, see Customizing **Ektron CMS400.NET** emails in the **Ektron CMS400.NET** Setup Manual.

## Instant eMail

In addition to automatic email, **Ektron CMS400.NET** lets you send email instantly to a user or user group from many screens. Your ability to send instant mail is indicated by either

- a small mail icon next to a user or group name, as indicated in red below
- a small mail icon on the toolbar (see second image below)

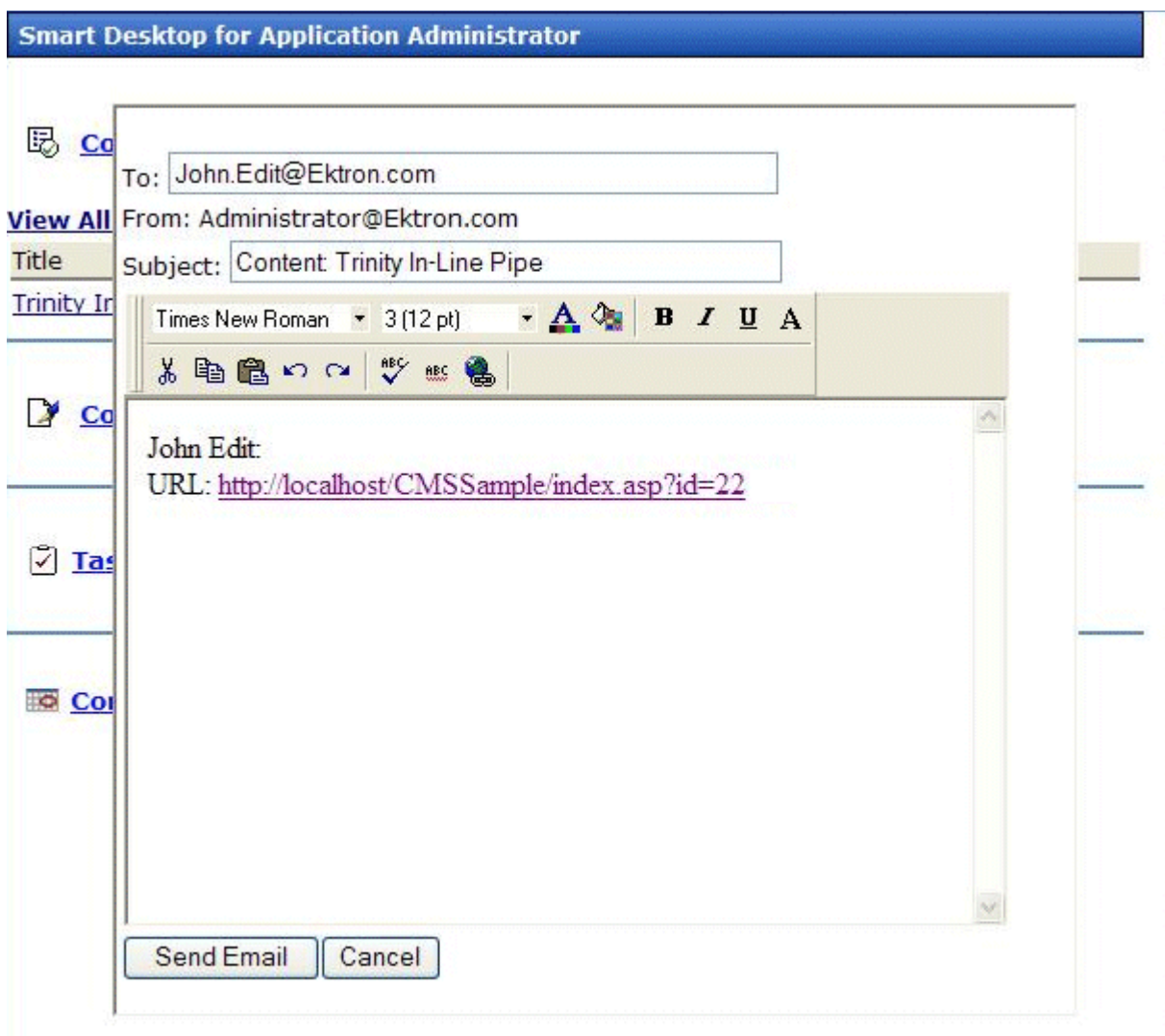






When you click such a user/group name or email icon, the email screen appears, as shown below. Once you complete the screen and click **Send**, an email is sent to designated users.





## Conditions for Instant eMail

- The user who is using **Ektron CMS400.NET** must have a valid from email address set up in the user profile. If not, email icons do not appear in **Ektron CMS400.NET**.
- The email software must be configured for your server. See ["Configuring SMTP Server" on page 919](#)

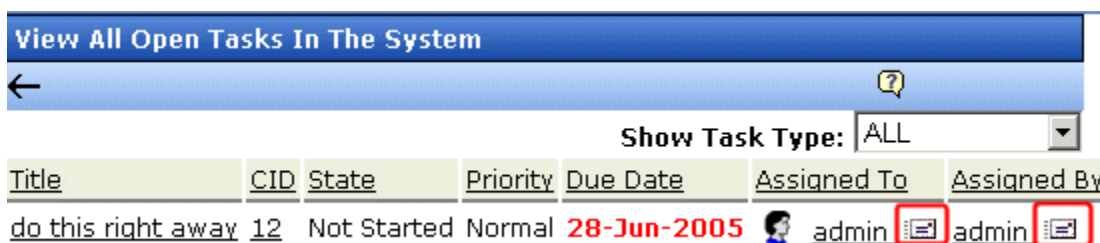


## Where Instant email is Available

Instant email is available from several screens that display users and user groups. Typically, you click a user name or the email icon to launch an email. Screens in the following **Ektron CMS400.NET** features support instant email.

- Smart Desktop
- Tasks
- Approvals
- Reports
- User and user group setup

Wherever instant email is available, an email icon appears (circled in the illustration below).



## Modifying Instant eMail


When the email screen appears, the following information is copied from **Ektron CMS400.NET** into the email.

| Field | Source of Default Information   | Editable?   |
|-------|---|---|
| To    | <p>User you selected to receive the email. If the user does not have valid email address, an error message appears. If you then insert a valid email address, the email is sent.</p> <p>If you specify a group to receive the message, as long as one group member has a valid email address, all group members with valid addresses receive the email.</p> | <p>Yes.</p> <p>If desired, you can add recipients by typing them into this field.</p> |



| Field   | Source of Default Information  | Editable? |
|---------|--|-----------|
| From    | User who signed on to <b>Ektron CMS400.NET</b> .   | No        |
| Subject | <p>If the email message is linked to content, its title appears.</p> <p>The screen section below provides an example of content (<b>Trinity In-Line Pipe</b>) that is linked to a message.</p> | Yes       |

[View All Approvals](#)

| Title                                | Request Type | Start Date       | Submitted by   |
|--------------------------------------|--------------|------------------|--|
| <a href="#">Trinity In-Line Pipe</a> | Publish      | [None Specified] | <a href="#">Edit, John</a>  |

|                 |   |     |
|-----------------|---|-----|
| Body of message | If the email message is linked to content, a link to the content appears. | Yes |
|-----------------|---|-----|

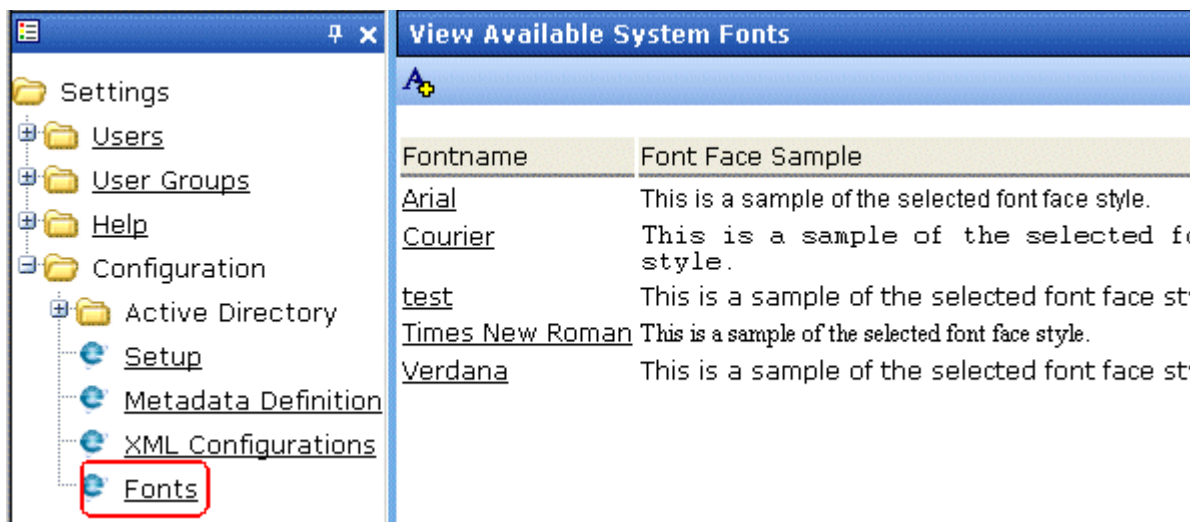


# Font Manager

As an administrator, you can add, edit, and delete fonts to and from the Ektron CMS400.NET application. By adding fonts, you are allowing the content contributors to use them when creating content. Administrators can also edit the name of a font, and delete a font from the system.

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

Below is the Font Manager screen.



**NOTE** Only members of the Administrator User Group can view, add, or edit fonts.

## Adding Fonts

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

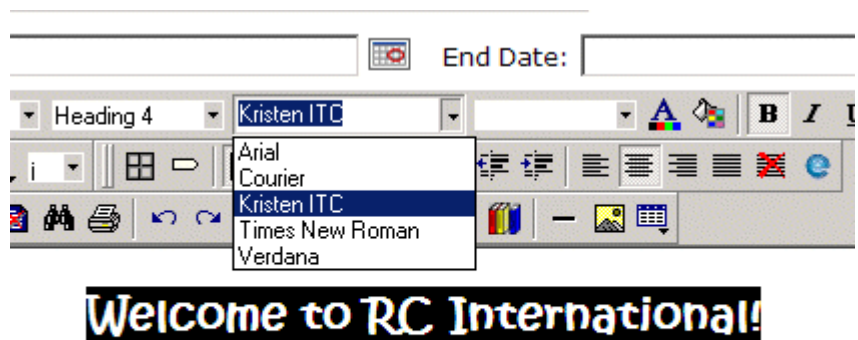
1. From the left frame of the Workarea, click **Settings > Configuration > Fonts**.



2. Click the Add Font button (A+).
3. The add font screen is displayed.



4. Enter the font name or family into the text field provided.
  5. Click the Save button (floppy disk icon).
- The new font is available to use when adding or editing content.



al is dedicated to the RC racing enthusiasts! We eat, work, play  
e short years RC International has become one of the leading m  
d this website. Our dedication to the sport and the enthusis

## Viewing Fonts

When viewing fonts, you can also edit or delete them.

To view a font:

1. Access the font manager in your Workarea as described in ["Adding Fonts" on page 925](#).



- Click the font you want to view.


| Fontname               | Font Face Sa     |
|------------------------|------------------|
| <u>Arial</u>           | This is a samp   |
| <u>Courier</u>         | This is a        |
| <u>Kristen ITC</u>     | This is a samp   |
| <u>Times New Roman</u> | This is a sample |
| <u>Verdana</u>         | This is a sam    |

- The view font screen is displayed.

## Edit Fonts

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


To edit a font name, follow these steps.

- Access the view font screen, as described in ["Viewing Fonts" on page 926](#).
- Click the Edit button (.
- The Edit Font screen is displayed.

Edit Font "Arial"





Font Name or Family:

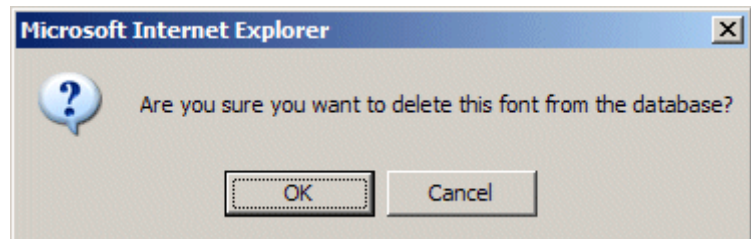
- Edit the font name or family in the text field specified.
- When finished, click the Update button (.



## Delete Fonts

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

1. Access the view font screen, as described in ["Viewing Fonts" on page 926](#).
2. Click the Delete button (.
3. A message is displayed.



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

**NOTE**

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



---

# Integrating with Other Systems

## Microsoft SharePoint Portal Server Integration

Before you begin using the Ektron CMS400.NET Web Parts, it is recommended that you read the following section of the documentation. It provides information about installing and configuring the Ektron CMS400.NET Web Parts, as well as overview information about Microsoft SharePoint Portal Server 2003.

Once completed, you can move on to ["Ektron CMS400.NET Web Parts" on page 943](#) for information about how to use the Ektron CMS400.NET Web Parts.

### Overview

Ektron CMS400.NET can easily be integrated with Microsoft's SharePoint Portal Server. Ektron CMS400.NET's custom display functions, as well as other functions, have been configured to be used as Web Parts within the SharePoint Portal Server. By combining the simplicity of Ektron CMS400.NET and the power of Microsoft SharePoint Portal Server, users can easily access, share, and manage Ektron CMS400.NET Web site content from a single application.

This section explains how Ektron CMS400.NET easily, and seamlessly, integrates with Microsoft SharePoint Portal Server through the following topics.

- ["Prerequisites" on page 930](#)
- ["Configuring Your SharePoint Portal Server" on page 930](#)
- ["Microsoft SharePoint Portal Server Overview" on page 939](#)
- ["Ektron CMS400.NET Web Parts" on page 943](#)



## Prerequisites

### Ektron CMS400.NET Server

A server running Ektron CMS400.NET must have a directory under the web site root folder called `\Workarea\Portals\SharePoint2003`, which contains the necessary SharePoint Portal Server .aspx display pages.

These pages installed when you install the SharePoint integration file. See ["Performing the Installation" on page 931](#).

This directory is referenced by SharePoint Portal Server's Web.config file.

---

**NOTE** [These files enable Ektron CMS400.NET's Web Parts to work.](#)

---

### SharePoint Portal Server

For Ektron CMS400.NET to successfully integrate with Microsoft SharePoint Portal Server, a Web server must first be set up and configured with the following applications:

- Windows 2003 Server Operating System
- Microsoft SharePoint Portal Server 2003

---

**IMPORTANT!** [SharePoint requires its own IIS site -- it cannot use the IIS site set up for Ektron CMS400.NET. This is because SharePoint alters some of the settings in the IIS site to which it is installed.](#)

---

## Configuring Your SharePoint Portal Server

Ektron CMS400.NET includes a separate installation program to install necessary files onto your SharePoint Portal server, as well as update necessary files.

The installation program performs many actions, including:

- installing Ektron CMS400.NET Web parts
- registering Web Parts in your SharePoint Web.config file



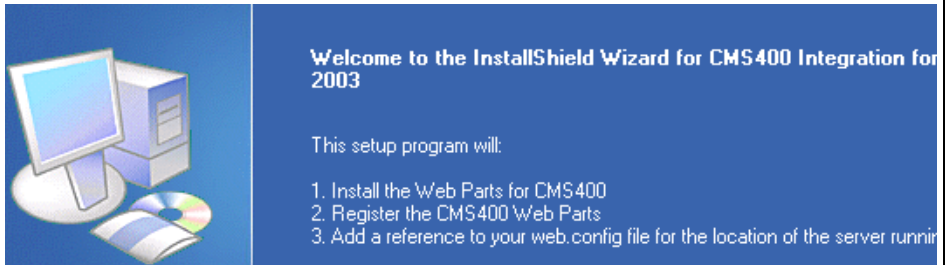
- updating the **Ektron CMS400.NET** Web.config file with a reference to your Ektron CMS400.NET Web site

## Performing the Installation

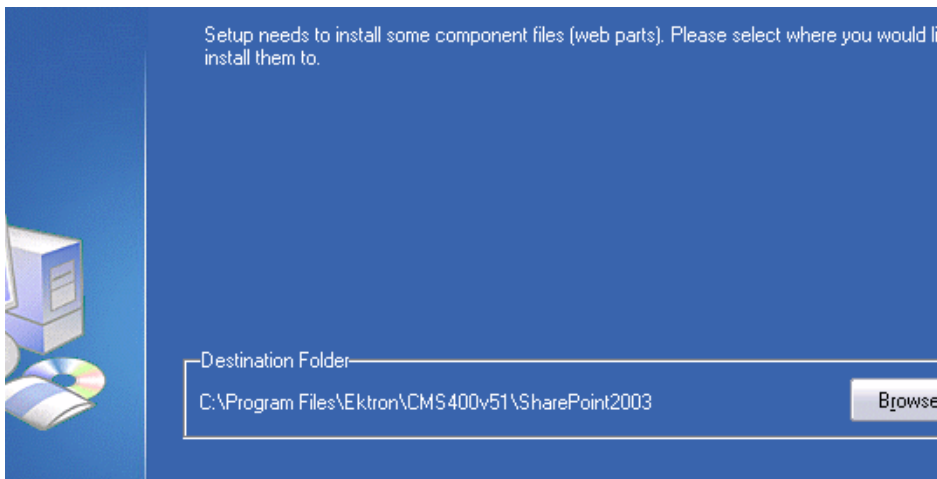
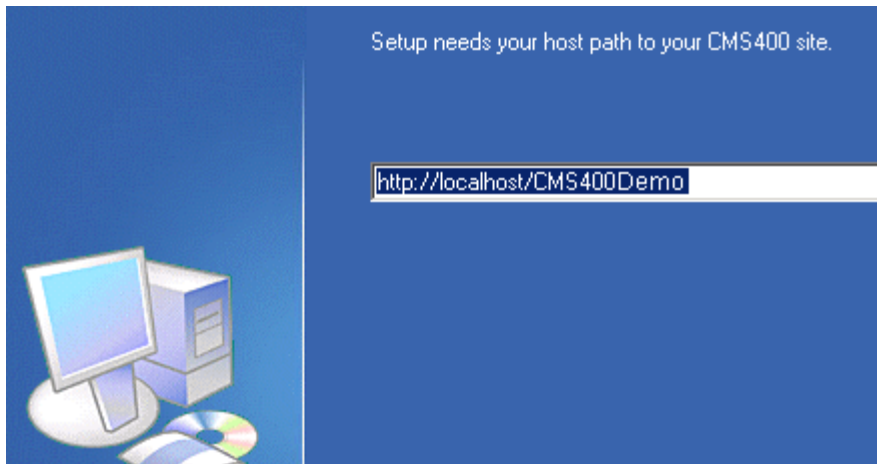
To configure your SharePoint Portal server using the Ektron CMS400.NET SharePoint integration .exe, follow these steps.

1. Move the installation file, `C:\Program Files\Ektron\CMS400versionnumber\Utilities\SharePointForCMS400.exe`, to your SharePoint Portal Server.
2. Double-click the installation file.
3. The installation begins.


The following table guides you through the rest of the installation.

| Action  | Setup Screen  |
|---|---|
| <p>4. Click <b>Next</b> to proceed.</p> <p>The CMS Cab Files screen is displayed.</p> |  |



| Action  | Setup Screen  |
|---|---|
| <p>5. Specify the location on your SharePoint server where you want to install the Ektron CMS400.NET Web Part CAB files.</p> <p>Click <b>Browse</b> to specify a directory other than the default.</p> <p>6. Click <b>Next</b> to proceed.</p> <p>The SharePoint Portal Site Location screen is displayed.</p>            |   |
| <p>7. Enter the fully qualified path of your Ektron CMS400.NET Web site's root directory. For example, <code>http://www.example.com/CMS400Min.</code></p> <p>Click <b>Next</b> to proceed.</p> <p>The installation performs the Web Part registrations. When complete, the Installation Complete screen is displayed.</p> |  |



| Action  | Setup Screen   |
|---|--|
| 8. Click <b>Finish</b> to exit the installation program.<br>The necessary Ektron CMS400.NET integration files and settings are installed and configured on your SharePoint Portal Server. |  |

## Testing the Installation

Once the installation is complete, perform a test to make sure everything is working. To do this, access SharePoint Portal in a browser and view your **Virtual Server Gallery**.



A list of Web Parts that were added to the Virtual Server Gallery, including the Ektron CMS400.NET Web Parts, appear at the bottom of the page.



If the installation was not successful, see ["Installation Troubleshooting" on page 934](#).

## What's Next?

Having configured the SharePoint Portal Server, you are ready to add Ektron CMS400.NET Web Parts into your portal pages. See ["Microsoft SharePoint Portal Server Overview" on page 939](#) for information about working with Ektron CMS400.NET Web Parts.

## Installation Troubleshooting

During installation, you may receive messages that information you entered is not correct. If you continue the installation with

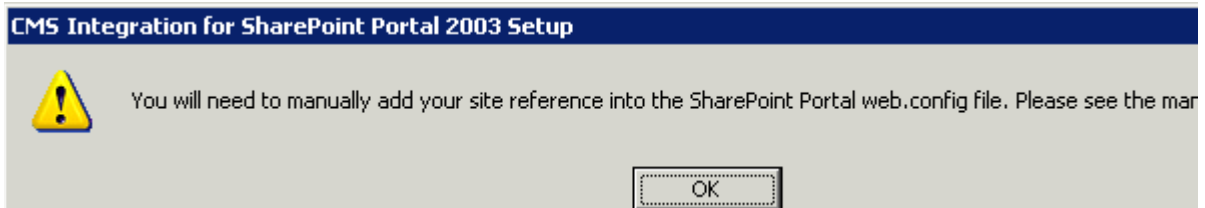


incorrect data, it might be necessary to register the Ektron CMS400.NET Web Parts or update your Web.config file manually.

The following section explains solutions to problems that can occur if incorrect information was submitted during installation.

### ***Incorrect SharePoint Portal Location***

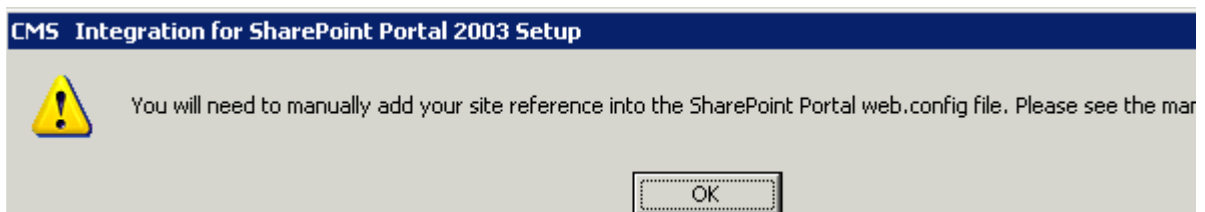
If an incorrect SharePoint Portal Server path location is given, the following message is displayed.



When the installation is complete, update your Web.config file manually (or perform the installation program again using the correct path). See ["Updating Web.config Manually" on page 936](#) for more information.

### ***Incorrect Ektron CMS400.NET Host Path***

If an incorrect Ektron CMS400.NET Host Path is given during installation, the following message appears.



When the installation is complete, update your Web.config manually (or perform the installation program again using the correct path).

See ["Updating Web.config Manually" on page 936](#) for more information.



## Updating Web.config Manually

Your SharePoint Portal Server's Web.config file must contain the following Ektron CMS400.NET information for integration to work:

- Ektron CMS400.NET Web Parts as safe controls
- Ektron CMS400.NET site location

During installation, if you receive a message that you must update your Web.config file manually, the following section explains the actions that you must perform.

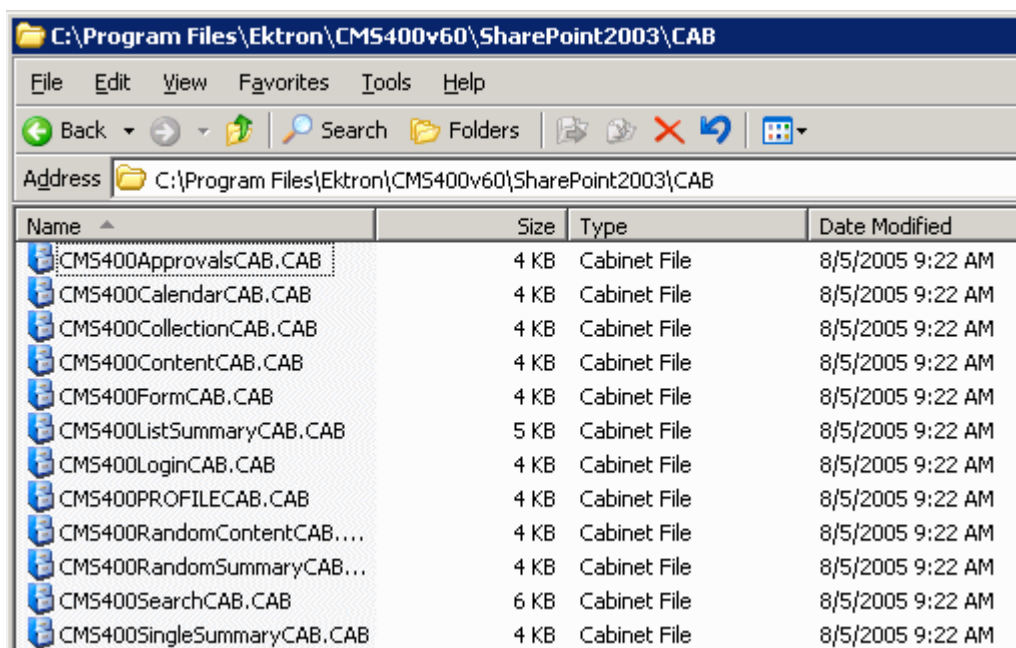
### ***Registering Ektron CMS400.NET Web Parts as Safe Controls***

In order for SharePoint to use Ektron CMS400.NET Web Parts, they must be registered by SharePoint as safe controls. To do that manually, follow these steps.

1. Complete the Ektron CMS400.NET SharePoint Portal Integration Installation program. This installs the files that need to be registered. See Also: ["Configuring Your SharePoint Portal Server" on page 930](#)
2. Access the directory to which you installed CMS cab files during installation.



**NOTE** The default location is C:\Program Files\Ektron\CMS400\SharePoint2003\CAB



- Double-Click **RegisterWebParts.bat** to execute the batch file that registers Ektron CMS400.NET Web Parts.

**NOTE** If you receive errors when running the .bat file, edit the file and make sure the correct location to **stsadm.exe** is referenced.

- When complete, the following lines are added to your Web.config file:

```
<SafeControl Assembly="System.Web, Version=1.0.5000.0, Culture=neutral,
PublicKeyToken=b03f5f7f11d50a3a" Namespace="System.Web.UI.WebControls" TypeName="*"
Safe="True" />
  <SafeControl Assembly="System.Web, Version=1.0.5000.0, Culture=neutral,
PublicKeyToken=b03f5f7f11d50a3a" Namespace="System.Web.UI.HtmlControls" TypeName="*"
Safe="True" />
  <SafeControl Assembly="Microsoft.SharePoint, Version=11.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce11e9429c" Namespace="Microsoft.SharePoint" TypeName="*" Safe="True" />
  <SafeControl Assembly="Microsoft.SharePoint, Version=11.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce11e9429c" Namespace="Microsoft.SharePoint.WebPartPages" TypeName="*"
Safe="True" />
  <SafeControl Assembly="Microsoft.SharePoint, Version=11.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce11e9429c" Namespace="Microsoft.SharePoint.WebControls" TypeName="*"
Safe="True" />
  <SafeControl Assembly="Microsoft.SharePoint, Version=11.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce11e9429c" Namespace="Microsoft.SharePoint.ApplicationPages"
TypeName="*" Safe="True" />
  <SafeControl Assembly="Microsoft.SharePoint, Version=11.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce11e9429c" Namespace="Microsoft.SharePoint.SoapServer" TypeName="*"
Safe="True" />
```



```
<SafeControl Assembly="Microsoft.SharePoint, Version=11.0.0.0, Culture=neutral,
PublicKeyToken=71e9bcell1le9429c" Namespace="Microsoft.SharePoint.Meetings" TypeName="*"
Safe="True" />
<SafeControl Assembly="CMS400Approvals" Namespace="CMS400Approvals" TypeName="*"
Safe="True" />
<SafeControl Assembly="CMS400Content" Namespace="CMS400Content" TypeName="*" Safe="True"
/>
<SafeControl Assembly="CMS400Login" Namespace="CMS400Login" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS400RandomSummary" Namespace="CMS400RandomSummary" TypeName="*"
Safe="True" />
<SafeControl Assembly="CMS400Calendar" Namespace="CMS400Calendar" TypeName="*"
Safe="True" />
<SafeControl Assembly="CMS400Form" Namespace="CMS400Form" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS400Profile" Namespace="CMS400Profile" TypeName="*" Safe="True"
/>
<SafeControl Assembly="CMS400Search" Namespace="CMS400Search" TypeName="*" Safe="True" /
>
<SafeControl Assembly="CMS400Collection" Namespace="CMS400Collection" TypeName="*"
Safe="True" />
<SafeControl Assembly="CMS400ListSummary" Namespace="CMS400ListSummary" TypeName="*"
Safe="True" />
<SafeControl Assembly="CMS400RandomContent" Namespace="CMS400RandomContent" TypeName="*"
Safe="True" />
<SafeControl Assembly="CMS400SingleSummary" Namespace="CMS400SingleSummary" TypeName="*"
Safe="True" />
```

The Ektron CMS400.NET Web Parts are successfully registered, and your Web.config is updated with the Web Parts registered as safe controls.

### ***Specifying Your Ektron CMS400.NET Site Path Manually***

The Web.config file must contain a reference to your Ektron CMS400.NET Web site. During installation, if an incorrect path or no path was given, you need to update your Web.config file with the correct Ektron CMS400.NET's site path. To do this, follow these steps.

1. Open your SharePoint Portal Server's Web.config for editing with a text editing program such as NotePad.
2. Enter the following information within the `<configuration>` tags.

```
<appSettings>

<add key="CMS400sitelocation" value="[CMS400SitePath]" />

</appSettings>
```

Where `[CMS400SitePath]` is a fully qualified path to the directory in your Ektron CMS400.NET Web server that contains the Ektron CMS400.NET display files for SharePoint.



For example, <http://www.example.com/CMS400Min/cms400scripts/portals/sharepoint2003/>

3. Save and close your Web.config file

## Microsoft SharePoint Portal Server Overview

SharePoint Portal Server 2003 enables enterprises to develop an intelligent portal that seamlessly connects users, teams, and knowledge so that people can take advantage of relevant information across business processes to help them work more efficiently.

SharePoint Portal Server 2003 provides an enterprise business solution that integrates information from various systems into one solution through single sign-on and enterprise application integration capabilities, with flexible deployment options and management tools.

The portal facilitates end-to-end collaboration by enabling aggregation, organization, and search capabilities for people, teams, and information. Users can find relevant information quickly through customization and personalization of portal content and layout, as well as by audience targeting. Organizations can target information, programs, and updates to audiences based on their organizational role, team membership, interest, security group, or any other membership criteria that can be defined.

### SharePoint Portal Web Page Layout

All Web pages in SharePoint have the same layout characteristics. Each Web page is comprised of the following:

- Web Part page
- Web Part zone
- Web Part



The following graphic shows the relationship of these components on a Web page in SharePoint.



## What is a Web Part?

Components of a SharePoint Portal page are called Web Parts.

Microsoft defines a Web Part as:

A modular unit of information that consists of a title bar, a frame, and content. Web Parts are the basic building blocks of a Web Part Page. A Web Part is the combination of a Web Part Description file (.dwp) and a Web Part assembly file (.dll). All Web Parts are based on Web Custom Controls.

Ektron has created a Web Part for each Ektron CMS400.NET display function, as well as Web Parts for other useful Ektron CMS400.NET information.

## Three Types of Web Parts



There are three types of Web Parts.

| Type         | Description  | Available to   |
|--------------|--|--|
| Shared       | A Web Part added to a Web Part Page by a user who is creating or making changes to the Web Part Page in shared view  | All users of a Web Part Page with appropriate permissions                              |
| Personalized | A shared Web Part with one or more property values modified by a user who has made changes to the Web Part in personal view  | The user who made the changes. Other users continue to see the shared Web Part.        |
| Private      | A Web Part that a user has <ul style="list-style-type: none"><li>added to a Web Part Page from a Web Part gallery</li></ul> or <ul style="list-style-type: none"><li>imported from a computer while creating or making changes to the Web Part Page in personal view</li></ul> | The user who added or imported the Web Part. Other users cannot see private Web Parts. |

When properly configured, Ektron CMS400.NET Web Parts are shared Web Parts that can be personalized by different users (assuming they have the necessary permissions).

The type of Web Part you are working with can be important because:

- You may have permission to modify only some types of Web Parts on certain Web Part Pages, but not on other Web Part Pages
- You may be able to connect to certain types of Web Parts on a Web Part Page, but not to other types of Web Parts on the same Web Part Page

## Web Part Zones

The areas, or zones, are the locations on a SharePoint Web Parts page where Web Parts can be inserted. Web Part zones can contain one or more Web Parts.

Microsoft defines a Web Part zone as:



A container with a set of properties that can be configured to control the organization and format of Web Parts on a Web Part Page. Web Part zones can also be used to provide protection against changes to Web Parts.

Although their sizes are customizable, all Web Part pages contain right and left Web zones.

## SharePoint Server Permissions

Regardless of other permissions, a SharePoint Portal Server user must have at least **Member** permissions to be able to insert and customize Ektron CMS400.NET Web Parts. These permissions are configured on the SharePoint server by the *SharePoint Portal Server* administrator, not the Ektron CMS400.NET administrator.

Refer to your SharePoint documentation for information about giving SharePoint users Member permissions.

## Personal vs. Shared View

When adding Web Parts to a SharePoint Portal page, you may either insert them into a shared or personal Web page. The following table contrasts the views.

| Web Page View | Description   |
|---------------|---|
| Shared        | A view of a list, document library, or Web Part Page that every user with appropriate permissions for a site can see. The shared view of a Web Part Page uses shared property values. Changes made to a shared view apply to the list, library, or page as it appears to all users.   |
| Personal      | A view of a list, SharePoint document library, or Web Part Page that is available only to a particular user. The personal view of a Web Part Page uses a combination of shared property values and personalized property values. Changes made to a personal view apply only to the list, library, or page in that view and are therefore visible to that user only. |

Keep this information in mind when inserting Web Parts.

## *Toggleing Between Shared and Personal View*



When logged in and in Edit Page mode, you can toggle between shared view and personal view by following these steps.

1. Click **Modify Shared Page** or **Modify My Page** (depending on your current settings).
2. A menu appears.
3. Click **Shared View** or **Personal View** to display the respective view.
4. The page refreshes, and the change is reflected.
5. Repeat this process to return to the previous view.

## Ektron CMS400.NET Web Parts

When configured properly, all Ektron CMS400.NET Web Parts are available to be inserted by browsing to the SharePoint Portal **Virtual Server Gallery**.

*See Also:*

- ["Inserting Ektron CMS400.NET Web Parts" on page 943](#)
- ["Modifying Web Parts" on page 946](#)
- ["Managing Ektron CMS400.NET Web Parts" on page 947](#)

### Inserting Ektron CMS400.NET Web Parts

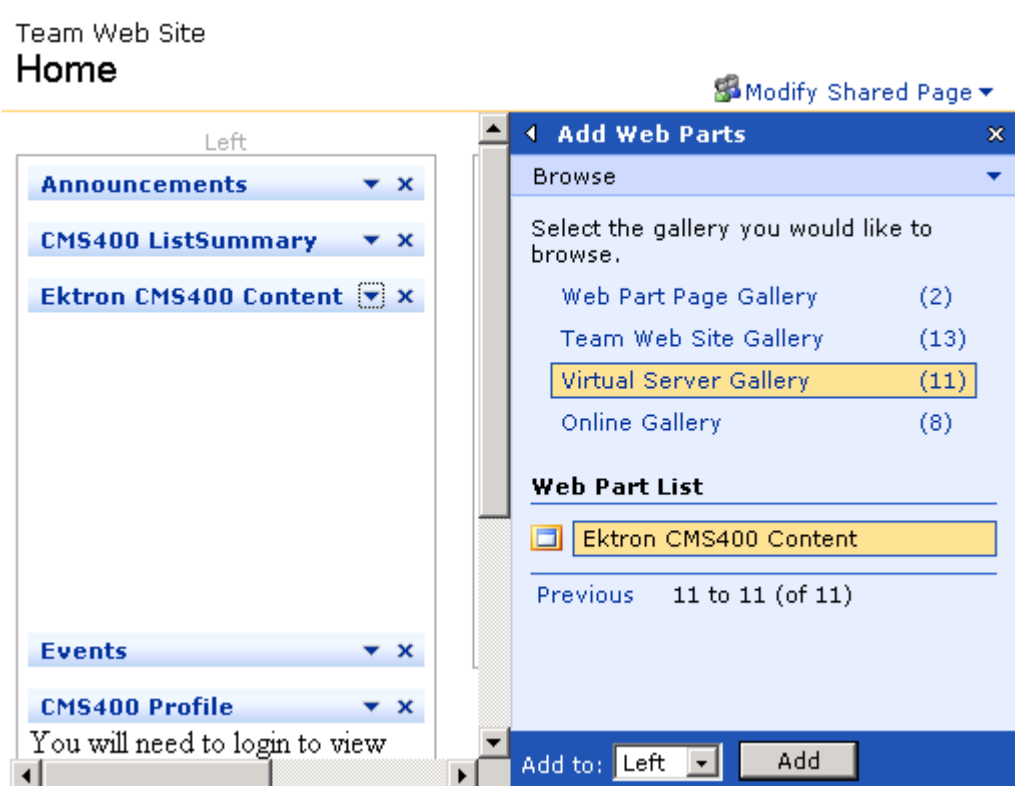
This section explains the basics of inserting Ektron CMS400.NET Web Parts.

1. Log in to SharePoint Portal Server.
2. Create or navigate to the Web Part zone into which you want to insert an Ektron CMS400.NET Web Part.
3. Click **Modify Shared Page**, **Add Web Parts**, then **Browse**.
4. The Web Part zones are displayed, and the Add Web Parts menu appears on the right side of the screen.
5. Click **Virtual Server Gallery**.
6. All Web Parts added to the Virtual Server Gallery, including the Ektron CMS400.NET Web Parts, appear at the bottom of the page.




**NOTE** For information about Ektron CMS400.NET Web Parts, see "Managing Ektron CMS400.NET Web Parts" on page 947.

7. Insert an Ektron CMS400.NET Web Part one of two ways:

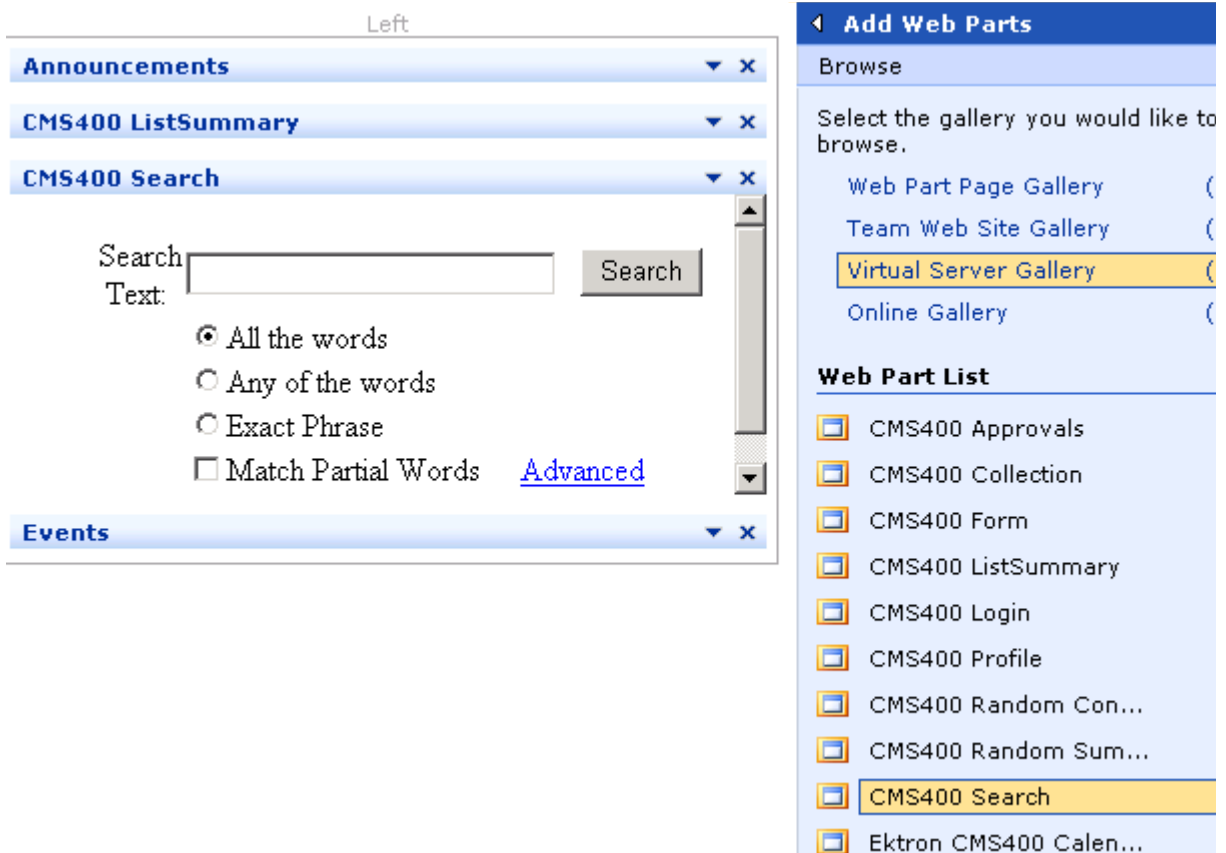
| Method   | Screen  |
|--|---|
| Drag and drop the Web Part to the desired zone |  <p>The screenshot shows the 'Add Web Parts' dialog box in a SharePoint environment. The main window displays the 'Team Web Site Home' page with a 'Left' zone. The 'Add Web Parts' dialog is open, showing a list of galleries. The 'Virtual Server Gallery' is selected, and the 'Web Part List' shows 'Ektron CMS400 Content' as the selected web part. The 'Add to' dropdown is set to 'Left' and the 'Add' button is visible.</p> |



| Method  | Screen   |
|---|--|
| <ol style="list-style-type: none"><li>1. Click a Web Part.</li><li>2. Choose the location at the bottom of the page.</li><li>3. Click <b>Add</b>.</li></ol> |  |



The selected Web Part is added to the selected zone.



4. Continue to insert all desired Web Parts onto your shared or personal Web page.

## Modifying Web Parts

All Web Parts have three properties that you can modify.

| Property   | Lets you   |
|------------|--|
| Appearance | Adjust appearance settings such as height, width, and title. |
| Layout     | Adjust location, order, and other layout information.        |
| Advanced   | Set advanced options.  |



**NOTE** Refer to your Microsoft SharePoint documentation for information about configuring these properties.

Some Ektron CMS400.NET Web Parts have additional configuration settings.

### Modifying a Web Part

To modify a Web Part that has been inserted into a Web Part zone, follow these steps.

1. Log into your SharePoint Portal Server.
2. Navigate to a Web Part zone that contains an Ektron CMS400.NET Web Part that you want to modify.
3. Click the Down Arrow ( ▼ ) at the top right corner of the Web Part you want to modify.
4. The Web Part Menu is displayed.
5. Click **Modify Shared Web Part**.
6. The Web Part is surrounded by a yellow dashed border, and the modify Web Part menu appears on the right side of the screen.
7. Modify the Web Part.

**NOTE** Information about modifying Ektron CMS400.NET Web Parts can be found in "Managing Ektron CMS400.NET Web Parts" on page 947.

8. Click **Apply** for the changes to take effect without closing the menu. Or, click **OK** to save and close the menu.

### Managing Ektron CMS400.NET Web Parts

Ektron created Web Parts for all display functions in Ektron CMS400.NET, as well as two others. The following table lists each Web Part and its functionality.

| Web Part  | Displays   | More Information                 |
|-----------|--|----------------------------------|
| Approvals | A list of content awaiting approval by the logged in Ektron CMS400.NET user. | "Approvals Web Part" on page 948 |
| Calendar  | A calendar created for the Ektron CMS400.NET Web site.                       | "Calendar Web Part" on page 950  |



| Web Part       | Displays   | More Information                                    |
|----------------|--|---|
| Collection     | A collection, as well as its display function, for a collection created in the Ektron CMS400.NET Web site.   | <a href="#">"Collection Web Part" on page 952</a>   |
| Content        | Content created for the Ektron CMS400.NET Web site.  | <a href="#">"Content Web Part" on page 954</a>      |
| Form           | A form content item created for the Ektron CMS400.NET Web site.  | <a href="#">"Form Content Web Part" on page 956</a> |
| ListSummary    | A summary list for a specified content folder in the Ektron CMS400.NET Web site.   | <a href="#">"Summary List Web Part" on page 959</a> |
| Login          | A login button which allows users to log in, and be authorized, by the Ektron CMS400.NET Web site.   | <a href="#">"Login Web Part" on page 963</a>        |
| Profile        | Configurable profile settings for the logged in Ektron CMS400.NET user.  | <a href="#">"Profile Web Part" on page 964</a>      |
| Random Content | Randomly displays the content of a content block that belongs in a specified collection. <ul style="list-style-type: none"> <li>• "id" represents the ID number of the collection to which the content block belongs</li> <li>• "XSLTId" is the ID number of the display XSLT that will be applied to content blocks in the collections</li> </ul> |   |
| Random Summary | Randomly displays the summary of a content block that belongs in a specified collection. The "id" property represents the ID number of the collection to which the content blocks belong.  |   |
| Search         | Ektron CMS400.NET Web site search box and search results.  | <a href="#">"Search Web Part" on page 966</a>       |

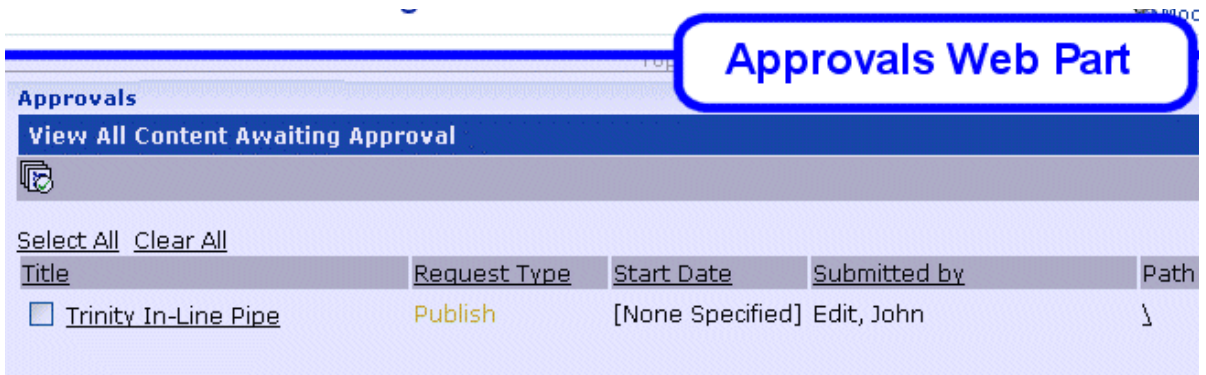
## Approvals Web Part

When logged into Ektron CMS400.NET via Microsoft SharePoint Portal Server, the approvals Web page displays a list of content awaiting your approval.

**NOTE** [See "Login Web Part" on page 963 for additional information.](#)



Here is an example of the approvals Web Part displayed in SharePoint Server.



The approvals Web Part is identical to the approvals report page within the Ektron CMS400.NET Workarea.

### ***Approvals Web Part Settings***

The Approvals Web Part includes no additional settings.

### ***Approving Content via SharePoint***

After viewing approvals, you can approve any content as you would in the Ektron CMS400.NET Web site.



## Calendar Web Part

The calendar Web Part displays an event calendar created within the Ektron CMS400.NET Web site. Here is an example of a calendar Web Part displayed in the SharePoint Portal Server.



In addition to displaying the event calendar, if you are logged into the Ektron CMS400.NET Web site via SharePoint Portal Server, you can add and manage calendar events (assuming you have permissions to do so).

### NOTE

See "Login Web Part" on page 963 for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

## Calendar Web Part Settings

The calendar Web Part can be configured to display any event calendar from your Ektron CMS400.NET Web site. To configure the calendar Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the calendar Web Part, as described in "Modifying Web Parts" on page 946.



2. Minimize the **Appearance Settings**, and expand the **CMS400.NET Calendar settings**.
3. The Calendar Web Part Settings page is displayed.
4. Change the value in the **CalendarID** field to the ID number of the event calendar you want to be displayed.
5. Click **Apply** for the changes to take effect without closing the menu.
6. The screen is refreshed with the updated calendar displayed.
7. Make additional changes to the Calendar Web Part. Or, click **OK** to close the Modify Web Part area.

Clicking **OK** returns you to the Edit Page view.

### ***Managing Calendars and Calendar Events***

When you are logged into the Ektron CMS400.NET Web site via SharePoint Server, you can manage your calendars and calendar events. Actions that you can perform from the SharePoint server include

- Adding new event calendars
- Editing and deleting existing event calendars
- Adding new calendar events
- Editing, viewing, and deleting existing calendar events

as well as other actions.



## Collection Web Part

The collection Web Part displays a collection that has been created in your Ektron CMS400.NET Web site. Here is an example of a collection Web Part displayed in the SharePoint Portal Server.



In addition to displaying the collection in the portal, if you are logged into the Ektron CMS400.NET Web site via SharePoint, you can perform all actions related to collections.

### NOTE

See ["Login Web Part" on page 963](#) for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

## Collection Web Part Settings

After a collection Web Part is added to the portal, you may configure it to display any collection on your Web site, as well as specify the display function you want to apply to it. To configure the collection Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the collection Web Part as described in ["Modifying Web Parts" on page 946](#).
2. Minimize the **Appearance Settings**, and expand the **CMS400.NET Content settings**.
3. The Collection Web Part Settings information is displayed.



4. Make the necessary changes to the available fields using the following table as a reference.

| Field                       | Description  |
|-----------------------------|--|
| CollectionID                | The ID of the collection you want to display in the portal.  |
| Collection Display Function | <div>The name of the display function you want to apply to the collection.</div> <div><a href="#">Contact your Ektron CMS400.NET Web site developer for a list of available display functions.</a></div> |

5. Click the **Apply** button for the changes to take effect.
6. The screen is refreshed with the updated collection displayed.
7. Make additional changes to the collection Web Part, or click the **OK** button to close the Modify Web Part area.

Clicking **OK** returns you to the Edit Page view.

### ***Managing Ektron CMS400.NET Content***

When logged into the Ektron CMS400.NET Web site via SharePoint, you may perform any action on the collection, assuming you have the proper permissions. Some collection-related actions you may perform include

- Adding new content to the collection
- Re-ordering items in the collection
- Removing items from the collection
- Editing collection information

To manage the Ektron CMS400.NET Web site collection within SharePoint, follow these steps.

1. Log In to the Ektron CMS400.NET Web site via the Login Web Part (see "[Login Web Part](#)" on page 963 for more information).

#### **NOTE**

[If the collection Web Part is in a different zone than the login Web Part, it may be necessary to refresh the zone in which the content Web Part is located.](#)



2. The collection displayed by the collection Web Part is surrounded by a colored border.

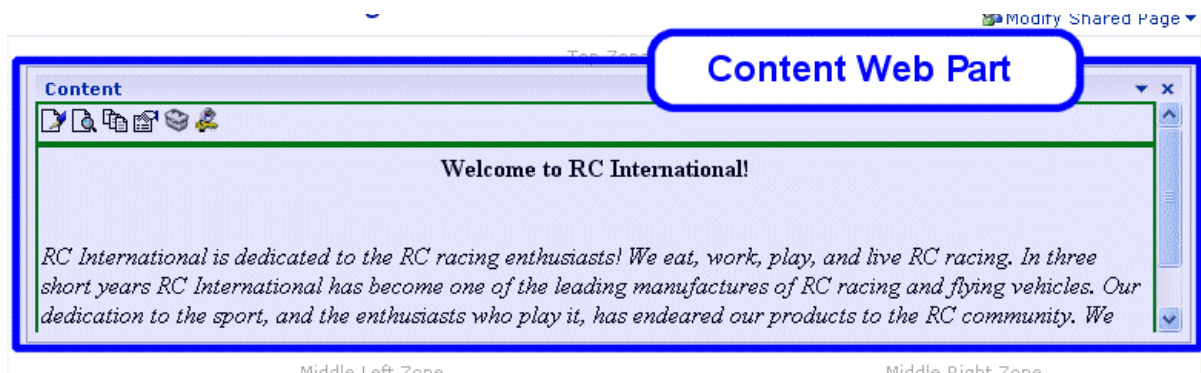


3. Perform actions by using the floating toolbar, or by clicking on the Workarea button to access the Ektron CMS400.NET Workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS400.NET collections.

## Content Web Part

The content Web Part is used to display any content created in the Ektron CMS400.NET Web site. Here is an example of one displayed in the SharePoint Portal Server.



If you are logged into the Ektron CMS400.NET Web site via SharePoint server, you may also manage the content (see



"Managing Ektron CMS400.NET Content" on page 955 for more information).

**NOTE** See "Login Web Part" on page 963 for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

---

## **Content Web Part Settings**

The content Web Part can be configured to display any content from your Ektron CMS400.NET Web site. To do so, follow these steps.

1. Access the Modify Shared Web Part area for the content Web Part, as described in "[Modifying Web Parts](#)" on page 946.
2. Minimize the **Appearance Settings** and expand the **CMS400.NET Content settings**.
3. The Content Web Part Settings page is displayed.
4. Change the value in the **ContentID** field to the ID number of the content you want to be displayed.
5. Click the **Apply** button for the changes to take effect.
6. The screen is refreshed with the updated content displayed.
7. Make additional changes to the Content Web Part, or click **OK** to close the Modify Web Part area.

Clicking **OK** returns you to the Edit Page view.

## **Managing Ektron CMS400.NET Content**

As stated earlier, when logged into the Ektron CMS400.NET Web site via SharePoint, you may manage content displayed by the content Web Part (assuming you have permissions to do so within the Ektron CMS400.NET Web site).

Content-related actions you may perform include:

- Editing existing content, summaries, and metadata
- Creating new content
- Deleting content
- Viewing historical versions of content and restoring them
- Managing collections



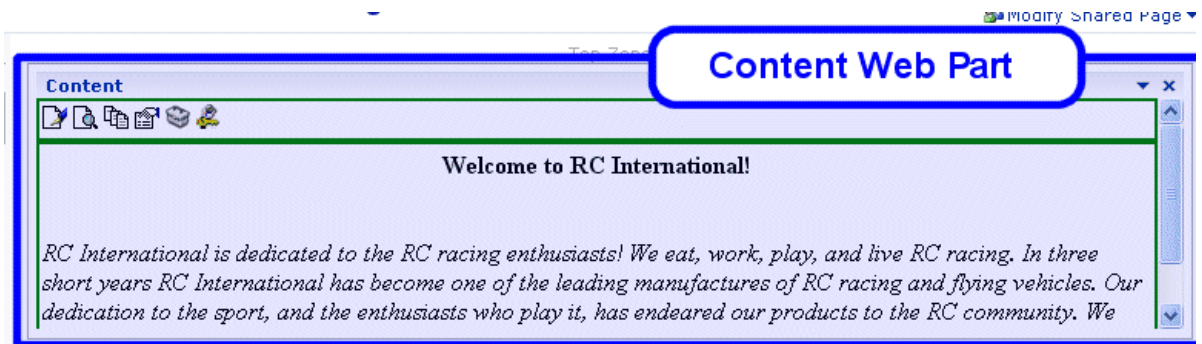
To manage the Ektron CMS400.NET Web site content within SharePoint, follow these steps.

1. Log in to the Ektron CMS400.NET Web site via the Login Web Part (see "Login Web Part" on page 963 for more information).

**NOTE**

If the content Web Part is in a different zone than the login Web Part, it may be necessary to refresh the zone the content Web Part is in.

2. The content displayed by the content Web Part is surrounded by a colored border.



3. Perform actions by using the floating toolbar, or by clicking the Workarea button to access your Ektron CMS400.NET Workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS400.NET content.

## Form Content Web Part

A form content Web Part is used to display Ektron CMS400.NET form content.



Here is an example of form content displayed in SharePoint as a Web Part.

SharepointMain  
Edit: Ektron Integration

This topic

Form Content Block Web Part

Form

First Name:

Last Name:

Email:

Ektron Product: CMS300

Comments:

Middle Left Zone Middle Right Zone

If you are logged into the Ektron CMS400.NET Web site via SharePoint server, you may also manage the form content (see ["Managing Ektron CMS400.NET Form Content" on page 958](#) for more information).

**NOTE**

See ["Login Web Part" on page 963](#) for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

**Form Content Web Part Settings**

The form content Web Part can be configured to display any form content from your Ektron CMS400.NET Web site. To configure one, follow these steps.

1. Access the Modify Shared Web Part area for the form content Web Part, as described in ["Modifying Web Parts" on page 946](#).
2. Minimize the **Appearance Settings**, and expand the **CMS400.NET Form Content settings**
3. The Form Content Web Part Settings information is displayed.
4. In the **Form Block ID** field, enter the ID number of the form content you want to display.
5. Click the **Apply** button for the changes to take effect.



The screen is refreshed with the updated content displayed.

6. Make additional changes to the Form Content Web Part, or click the **OK** button to close the Modify Web Part area.

Clicking **OK** returns you to the Edit Page view.

### ***Managing Ektron CMS400.NET Form Content***

When logged into the Ektron CMS400.NET Web site via SharePoint, you may manage form content displayed by the form content Web Part (assuming you have permissions to do so within Ektron CMS400.NET).

Some form content related actions that you may perform include

- Editing form content
- Modifying form processing information
- Creating new form content

To manage the Ektron CMS400.NET Web site form content within SharePoint, follow these steps.

1. Log in to the Ektron CMS400.NET Web site via the Login Web Part (see "[Login Web Part](#)" on page 963 for more information).

#### **NOTE**

If the form content Web Part is in a different zone than the login Web Part, it may be necessary to refresh the zone that includes the form Web Part.



- 
2. The form content displayed by the form content Web Part is surrounded by a colored border.

The screenshot shows a SharePoint web page with a form titled "Edit: Ektron Integration". The form is enclosed in a blue border. A callout box with a blue border and white background points to the form, containing the text "Form Content Block Web Part". The form itself has a light blue background and contains the following fields:

- First Name:** A text input field.
- Last Name:** A text input field.
- Email:** A text input field.
- Ektron Product:** A dropdown menu with "CMS" selected.
- Comments:** A large text area.

At the top of the form, there is a toolbar with icons for saving, deleting, and other actions. The form is positioned in the "Middle Left Zone" of the page layout.

- 
- 
3. Perform actions by using the floating toolbar, or by clicking on the Workarea button to access your Ektron CMS400.NET Workarea.

## Summary List Web Part

The summary list, or list summary, Web Part displays a list of summaries for some, or all, content in a specified Ektron CMS400.NET content folder.



Here is an example of a summary list Web Part being displayed in the SharePoint Portal Server.



If you are logged into the Ektron CMS400.NET Web site via SharePoint Server, you can also manage the summary list (see ["Managing the Summary List" on page 962](#) for more information).

**NOTE** See ["Login Web Part" on page 963](#) for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

### **List Summary Web Part Settings**

The list summary Web Part can be configured to fully customize the summary list. Several options are configurable including:

- Starting folder
- Style information
- Maximum amount to display

To configure the list summary Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the content Web Part, as described in ["Modifying Web Parts" on page 946](#).



2. Minimize the **Appearance Settings**, and expand the **CMS400.NET ListSummary settings**.
3. The List Summary Web Part Settings screen is displayed.
4. Make the necessary changes to the List Summary settings using the following table as a guide.

| Field             | Description   | Default |
|-------------------|---|---------|
| Starting Folder   | Ektron CMS400.NET content folder from which the summary list begins to retrieve summary information.<br>Examples: \Products\RC Cars or \ (root content folder)  | \       |
| Recursive         | Specifies whether the summary list includes information from the starting folder's subfolders. <ul style="list-style-type: none"> <li>• <b>No</b> - summary list is not recursive</li> <li>• <b>Yes</b> - summary list is recursive</li> </ul>  | No      |
| Show Summary      | Used to specify if the summaries for the content in summary list are displayed. <ul style="list-style-type: none"> <li>• <b>No</b> - summaries are not displayed</li> <li>• <b>Yes</b> - summaries are displayed</li> </ul>   | No      |
| Style Information | Insert an inline style that is applied to the hyperlinks generated by the summary list.<br>Example: <code>backgroundcolor:#cccccc; border:solid blue 1pt;</code>  |         |
| Order By          | Choose how you want to order the summary list by. <ul style="list-style-type: none"> <li>• <b>Title</b> - title of the content</li> <li>• <b>DateModified</b> - date the content was last modified</li> <li>• <b>DateCreated</b> - date the content was created</li> <li>• <b>AuthorFname</b> - first name of the last editor</li> <li>• <b>AuthorLname</b> - last name of the last editor</li> </ul> | Title   |
| Order By Asc/Desc | Choose how to sort the summary list. <ul style="list-style-type: none"> <li>• <b>Asc</b> - ascending order (A &gt; Z)</li> <li>• <b>Desc</b> - descending order (Z &gt; A)</li> </ul>   | Asc     |



| Field          | Description   | Default       |
|----------------|---|---------------|
| Show Info      | <p>Additional information to display in the summary list.</p> <ul style="list-style-type: none"> <li>• <b>None</b> - no additional information</li> <li>• <b>DateModified</b> - date and time content was last modified</li> <li>• <b>DateCreated</b> - date and time content was created</li> <li>• <b>AuthorFname</b> - first name of the last editor</li> <li>• <b>AuthorLname</b> - last name of the last editor</li> </ul> | None          |
| Maximum Number | <p>Specify the maximum number of results you want to display.</p> <p><u>Note: Enter zero (0) to display unlimited, or all, results.</u></p>   | 0 (unlimited) |

5. Click the **Apply** button for the changes to take effect.
  6. The screen is refreshed with the updated summary list is displayed.
  7. Make additional changes to the List Summary Web Part, or click the **OK** button to close the Modify Web Part area.
- Clicking **OK** returns you to the Edit Page view.

### ***Managing the Summary List***

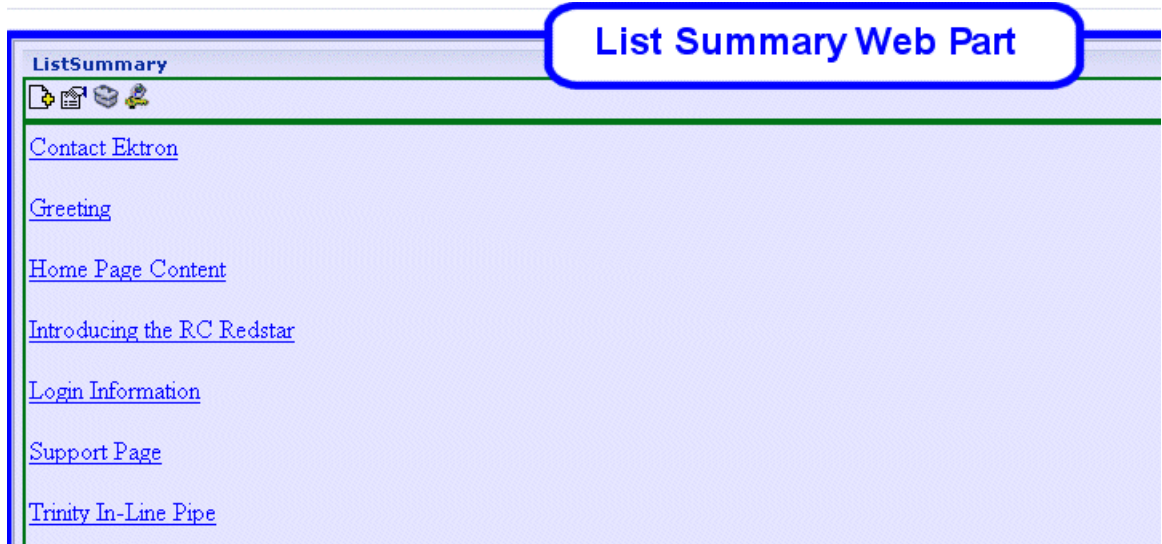
When logged into the Ektron CMS400.NET Web site via SharePoint, you may manage the summary list displayed by the list summary Web Part. To do so, follow these steps.

1. Log in to the Ektron CMS400.NET Web site via the Login Web Part (see "[Login Web Part](#)" on page 963 for more information).

**NOTE** If the summary list Web Part is in a different zone than the login Web Part, it may be necessary to refresh the summary list Web Part's zone.



2. The summary list displayed by the summary list Web Part is surrounded by a colored border.

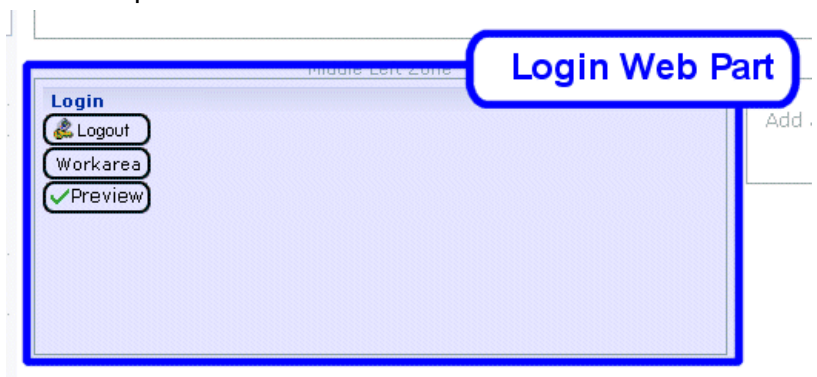


3. Perform actions by using the floating toolbar, or by clicking the Workarea button to access the Ektron CMS400.NET Workarea.

## Login Web Part

The Login Web Part displays a login button that lets users log in to the Ektron CMS400.NET Web site via SharePoint, and be authorized to work with Ektron CMS400.NET related content.

Here is an example of the login Web Part displayed in the SharePoint portal server.



In this example, the **Logout**, **Workarea**, and **Preview** buttons are displayed because we are currently logged in. If we were not logged in, only **Login** would appear.



## **Login Web Part Settings**

The login Web Part includes no configurable settings.

## **Logging Into a Ektron CMS400.NET Web Site Via SharePoint Server**

You can log in to your Ektron CMS400.NET Web site via SharePoint Portal Server and be authorized to manage content, as well as perform any other action. To log in to your Ektron CMS400.NET Web site via SharePoint Portal Server, follow these steps.

1. Navigate to the SharePoint Zone that contains the Ektron CMS400.NET Login Web Part.
2. Click the **Login** button.
3. The Ektron CMS400.NET Login box appears.
4. Enter a valid Ektron CMS400.NET username and password.
5. Click the **Login** button.
6. The username and password are sent to the Ektron CMS400.NET server. Upon successful authorization, you are logged in to Ektron CMS400.NET.

**NOTE** [Logging in via SharePoint does not refresh the entire screen. Instead, only the zone that includes the login Web Part appears to be logged into. Refresh each zone, or the entire screen, for the changes to take effect.](#)

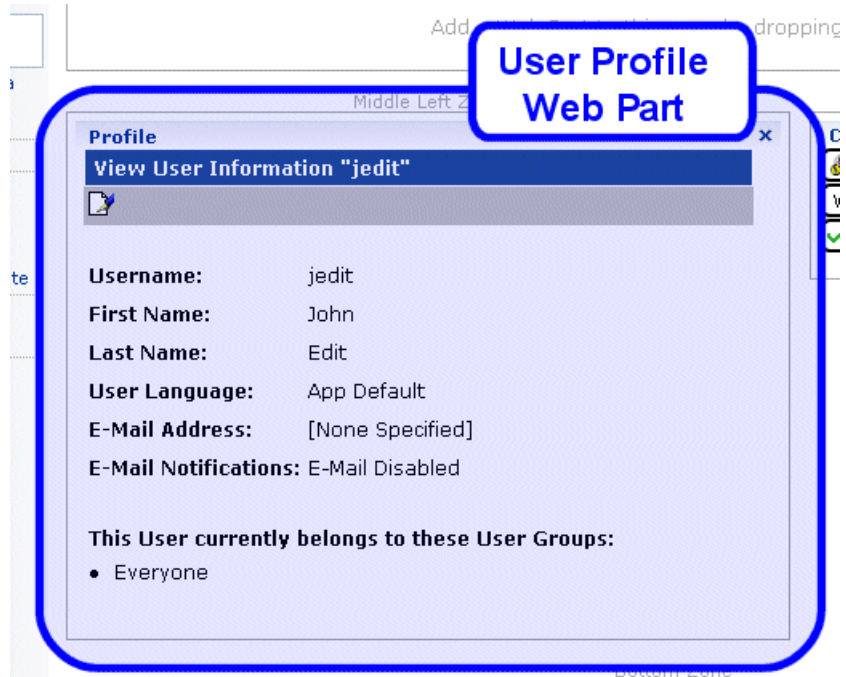
## **Profile Web Part**

Every user of an Ektron CMS400.NET Web site has access to their user profile, which allows them to view and modify information about themselves. When logged into Ektron CMS400.NET via SharePoint, each user can access his profile information.

**NOTE** [See "Login Web Part" on page 963 for additional information about logging in.](#)



Here is the profile Web Part displayed in the SharePoint portal server, logged in as the user **John Edit**.



Although you cannot modify the profile Web Part, you can update your Ektron CMS400.NET user profile information (see ["Editing Profile Information" on page 965](#) for additional information).

### **Profile Web Part Settings**

The profile Web Part includes no configurable settings.

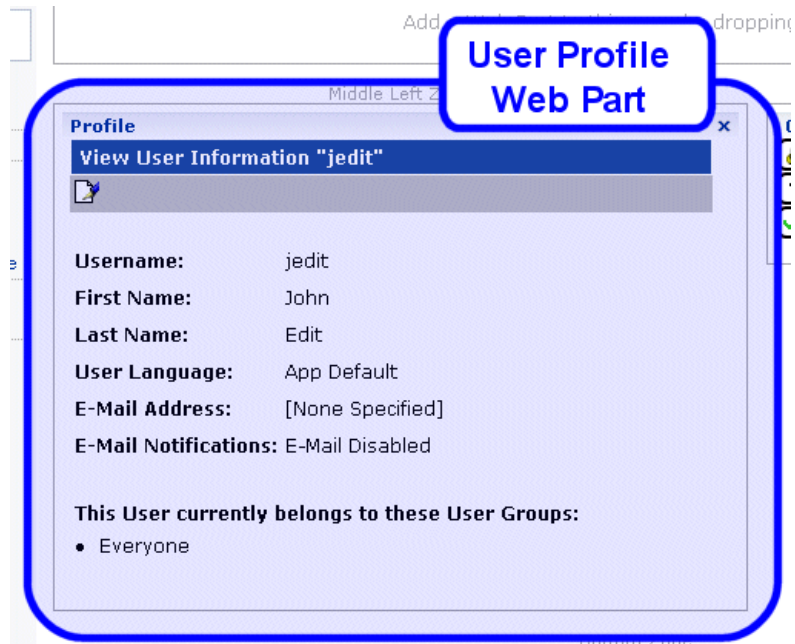
### **Editing Profile Information**



All Ektron CMS400.NET users can update their profile information directly from SharePoint. To update Ektron CMS400.NET profile information, follow these steps.

**NOTE** Before updating profile information, you must be logged in to your Ektron CMS400.NET Web site via SharePoint. See ["Logging Into a Ektron CMS400.NET Web Site Via SharePoint Server" on page 964](#) for more information.



1. Access the SharePoint portal page that contains the Ektron CMS400.NET profile Web Part.



2. Click the Edit button (  ).
3. The Edit User Information screen is displayed.
4. Change your user information.
5. Click the Update button (  ) to save the changes.
6. The Web Part is refreshed, and the view user information screen is displayed with the updated information.

## Search Web Part

The search Web Part lets you insert a search text box and search button that search your Ektron CMS400.NET Web site from SharePoint.



Here is an example of a search Web Part inserted into a SharePoint portal server screen.



When visitors to the SharePoint portal page access this search Web Part, they can perform a search on your Ektron CMS400.NET Web site.

### ***Search Web Part Settings***

You can configure the search Web Part to fully customize how the search is displayed in the portal, as well as the search's functionality. Several options are configurable, including:

- Starting folder
- Recursive search
- Maximum amount of results to display

To configure the search Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the content Web Part, as described in "[Modifying Web Parts](#)" on page 946.
2. Minimize the **Appearance Settings** and expand the **CMS400.NET Search settings**.
3. The Search Web Part Settings screen is displayed.



4. Make the necessary changes to the search settings using the following table as a guide.

| Field                   | Description  | Default             |
|-------------------------|--|---------------------|
| Starting Folder         | Ektron CMS400.NET content folder where the search begins to retrieve results from.<br>Example: \Products\RC Cars or \ (root content folder)  | \                   |
| Recursive               | Specifies whether the search looks through the starting folder and its subfolders <i>or</i> the starting folder only <ul style="list-style-type: none"> <li>• <b>No</b> - search only the starting folder</li> <li>• <b>Yes</b> - search starting folder and its subfolders</li> </ul> | No                  |
| Target Page             | The Web page that displays the search results.   | search-display.aspx |
| Text Box Size           | The size of the search text box when displayed.  | 25                  |
| Maximum Characters      | The maximum number of characters the search text box accepts.  | 200                 |
| Button Text             | The text displayed on the search button.   | Search              |
| Font Face               | The font style of the search box options.  | Verdana             |
| Font Color              | The font color of the search box options.  | #808080             |
| Font Size               | The font size of the search box options.   | 2                   |
| Horizontal              | The orientation of the search text box and options. <ul style="list-style-type: none"> <li>• <b>No</b> - search options align vertically</li> <li>• <b>Yes</b> - search options align horizontally</li> </ul>  | No                  |
| Return: Maximum Results | Determines the maximum number of search results displayed.<br><u>Note: Enter zero (0) to display unlimited, or all, results.</u>   | 0                   |
| Return: Style Info      | An inline style applied to search result hyperlinks.<br>For example: background-color:#cccccc; border:solid blue 1pt;  |                     |
| Return: Show Date       | Specify whether the search results will display the date and time they were last edited.   | No                  |



5. Click the **Apply** button.
6. The screen is refreshed, and the updated search Web Part is displayed.
7. Make additional changes to the search Web Part, or click the **OK** button to close the Modify Web Part area.  
Clicking **OK** returns you to the Edit Page view.

### **Performing a Search**

When the search Web Part is inserted into your SharePoint Portal page, you can perform a search. To do so, follow these steps:

1. Access the SharePoint portal page that contains the Ektron CMS400.NET search Web Part.



2. Enter search criteria in the search text box.
3. Click **Search**.
4. The search is performed, and all content in your Ektron CMS400.NET Web site that matches the criteria appears.



---

# Syndicating Web Content as RSS

RSS stands for Really Simple Syndication, a common method of syndicating Web content as an XML document. There are several versions of RSS. Ektron has implemented version 2.0.

In Ektron CMS400.NET, you use RSS to prepare a collection list or a list summary for reading by an *aggregator*. An aggregator consumes an RSS feed and displays it to the user. (An aggregator is similar in function to a portal.) There are several popular aggregators, including:

- AmphetaDesk (<http://www.disobey.com/amphetadesk/>)
- NewzCrawler (<http://www.newzcrawler.com/>).

For information about how to syndicate Ektron CMS400.NET as RSS, refer to Syndicating Web Content as RSS, in the Ektron CMS400.NET Developer's Reference Manual.



# Additional Information

## Supporting Documents

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

- Ektron CMS400.NET Developer's Reference Manual
- Ektron CMS400.NET User Manual
- Ektron CMS400.NET Quick Start Manual
- Ektron CMS400.NET Setup Manual

## Support

If you are experiencing trouble with any aspect of Ektron CMS400.NET, please contact the Ektron Support Team via our Web Site: <http://dev.ektron.com/support.aspx>

## Sales

For questions and answers about purchasing Ektron CMS400.NET from Ektron, contact the sales department at [sales@ektron.com](mailto:sales@ektron.com).

## Information

For general information about Ektron and its products, send an email to [info@ektron.com](mailto:info@ektron.com).



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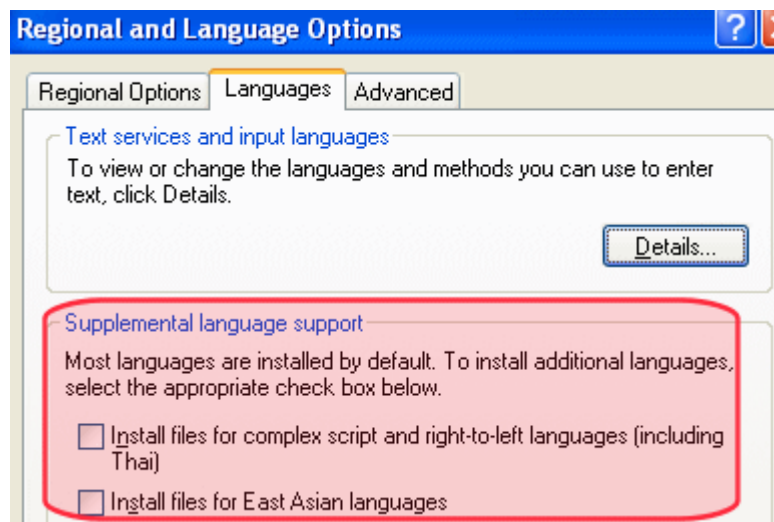
# Appendix A: Unicode Support

**Ektron CMS400.NET** supports Unicode characters in

- the editor
  - source view, from the editor
- dialog boxes

## **IMPORTANT!**

To see Unicode characters, each client's Windows installation must include Asian and bidirectional languages. To install them, go to **Control Panel > Regional and Language Options > Languages**. Check both boxes under **Supplemental language support** (see illustration below).



---

## Unicode Support in the Ektron CMS400.NET Editor

**Ektron CMS400.NET** is practically 100% compliant with the Unicode standard. It is only lacking in the following areas.



- **Dialog box title bars** - If the client does not support Unicode characters, the title bar displays English.
- **The toolbar** - If the client does not support Unicode characters, drop-down lists on the toolbar display question marks (?).

---

**NOTE**

A client fully supports Unicode characters if the Unicode language is the same as the Windows default language.

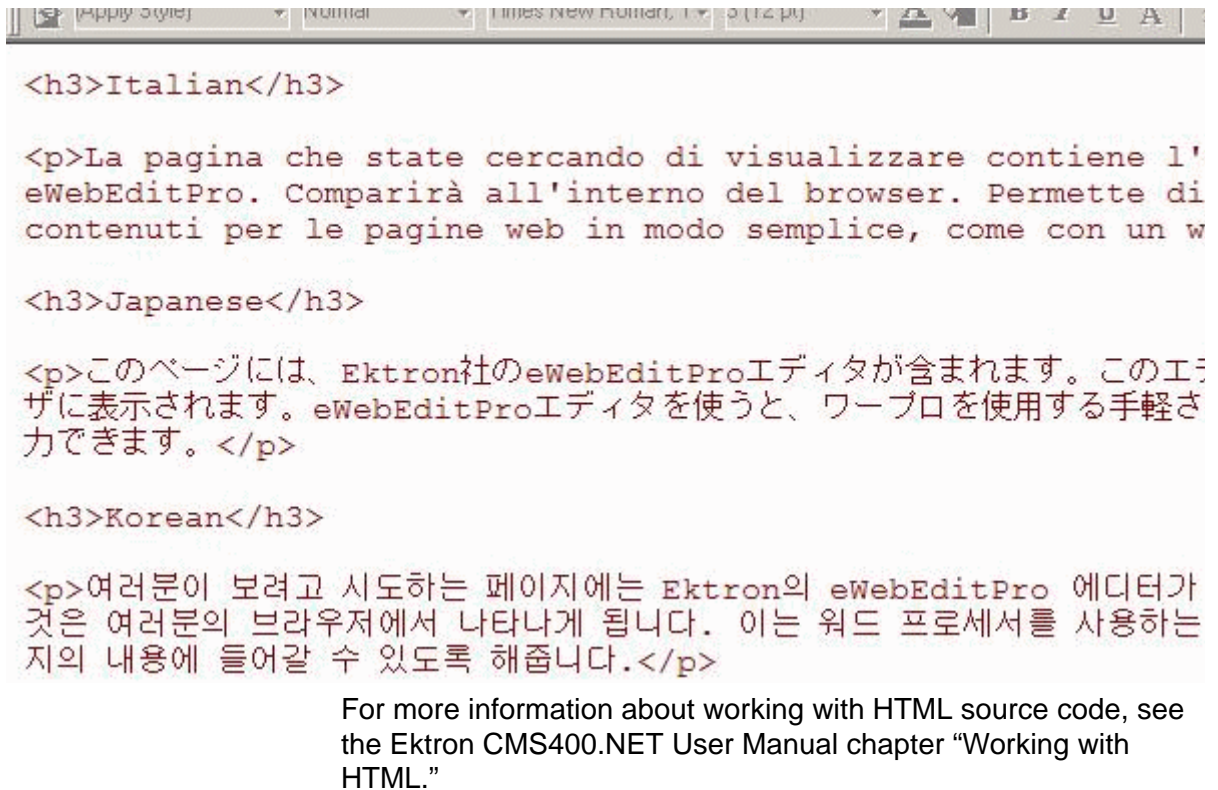
---

- **Toolbar dropdown lists on Korean systems** - Korean characters in a drop-down list may appear as question marks (?) unless one of the following conditions is true:
  - The Arial Unicode MS font is installed. Since this is installed with MS Office, most clients have it.  
or
  - The default system language is Korean.

## Unicode Support in Source View

**Ektron CMS400.NET** also supports Unicode characters in while viewing HTML source code, as illustrated below.



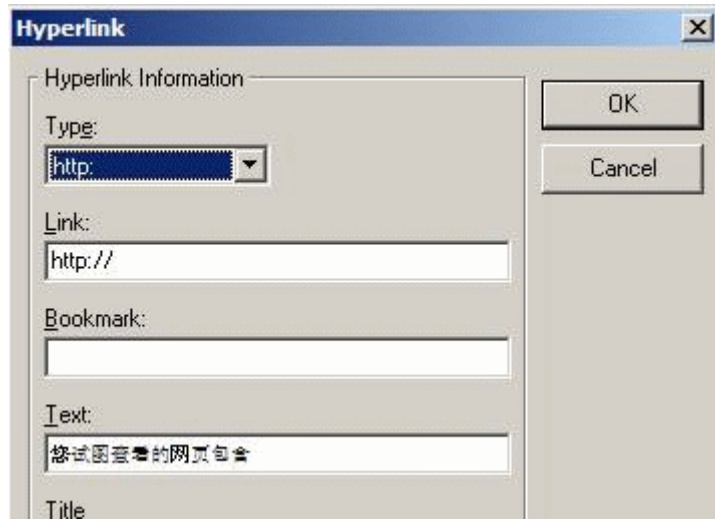


## Unicode Support in Dialog Boxes

**Ektron CMS400.NET** supports Unicode in text boxes within dialogs even if the Operating System (OS) language does not match the Unicode language. For example, a content contributor author wants to edit in Korean and Japanese without switching the OS language.

Here is an example of such a dialog.







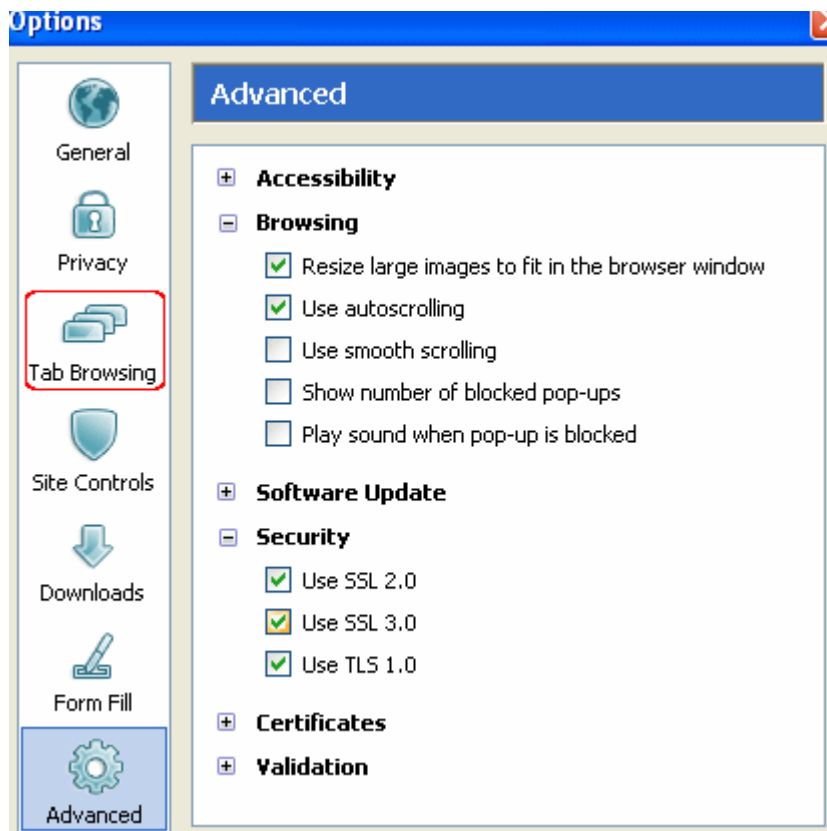
# Appendix B: Browser Issues

This section explains how to use **Ektron CMS400.NET** with different browsers.

## Netscape 8

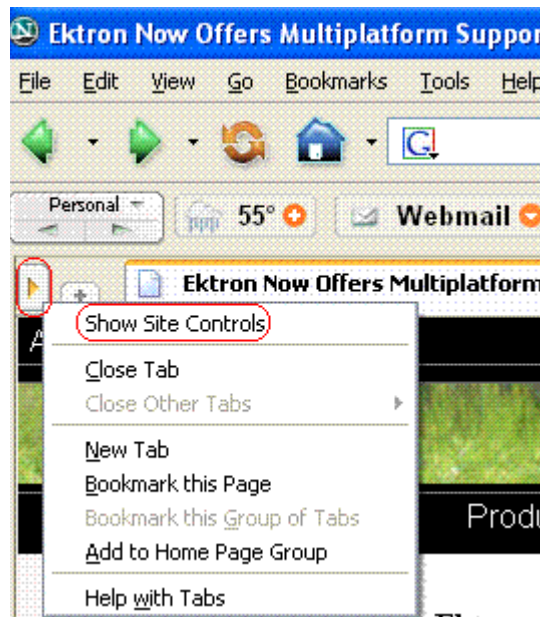
To make sure the Netscape 8 browser works properly with **Ektron CMS400.NET**, follow these steps.

1. From the verb strip at the top of the Netscape 8 screen, click **Tools > Options**.
2. Select the **Tab Browsing** screen.



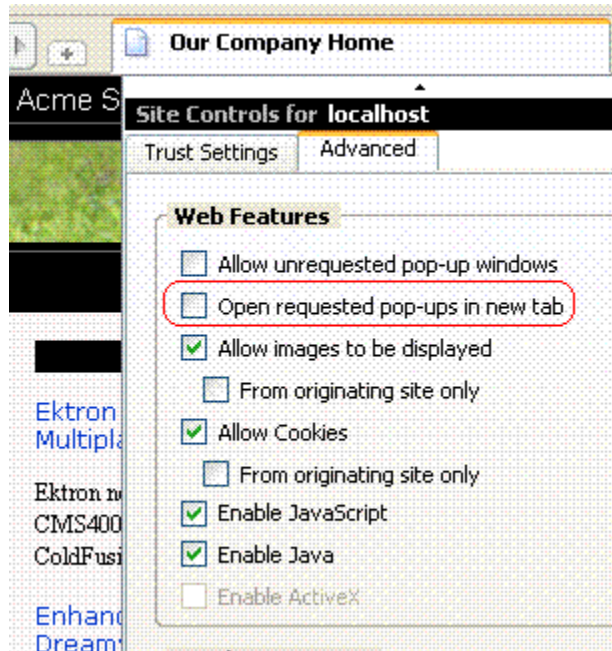


3. After **Open links from other applications in**, check a **new window**.
4. Makes sure the following options are unchecked.
  - **Open non-requested pop-ups in a new tab**
  - **Open a new tab instead of a new window**
5. Click **OK** to save the options.
6. Return to **Ektron CMS400.NET** running in the Netscape 8 browser.
7. Right click the triangle icon to the left of the tab (circled in red below).



8. Click **Show Site Controls**.
9. The Site Controls screen appears.
10. Click the **Advanced** tab.





11. Make sure **Open requested pop-ups in new tab** is unchecked.



# Appendix C: List of Supported Languages

**NOTE** Within Ektron CMS400.NET screens, languages are by indicated by a flag. If you want to change the images, they are contained in the `Workarea/images/application/flags/` directory. The file name format is `flagNNNN.gif`, where `NNNN` is the language's locale id value. For example, `flag0409.gif` is for English (US).

**NOTE** Each language also has an alphabetic code (for example, **en-US**) and a hexadecimal value (for example, **040a**). To obtain these values, sign on to Ektron CMS400.NET workarea and go to **Settings > Configuration > Language Settings** screen.

| Language         | Locale id value |
|------------------|-----------------|
| Afrikaans        | 1078            |
| Albanian         | 1052            |
| Alsatian         | 1156            |
| Amharic          | 1118            |
| Arabic (Algeria) | 5121            |
| Arabic (Bahrain) | 15361           |
| Arabic (Egypt)   | 3073            |
| Arabic (Iraq)    | 2049            |
| Arabic (Jordan)  | 11265           |
| Arabic (Kuwait)  | 13313           |
| Arabic (Lebanon) | 12289           |
| Arabic (Libya)   | 4097            |
| Arabic (Morocco) | 6145            |



|                             |       |
|-----------------------------|-------|
| Arabic (Oman)               | 8193  |
| Arabic (Qatar)              | 16385 |
| Arabic (Saudi Arabia)       | 1025  |
| Arabic (Syria)              | 10241 |
| Arabic (Tunisia)            | 7169  |
| Arabic (U.A.E.)             | 14337 |
| Arabic (Yemen)              | 9217  |
| Azeri (Cyrillic)            | 2092  |
| Azeri (Latin)               | 1068  |
| Bashkir                     | 1133  |
| Basque                      | 1069  |
| Belarussian                 | 1059  |
| Bengali                     | 1093  |
| Bosnian (Cyrillic)          | 8218  |
| Bosnian (Latin)             | 5146  |
| Breton                      | 1150  |
| Bulgarian                   | 1026  |
| Burmese                     | 1109  |
| Catalan                     | 1027  |
| Chinese (Hong Kong SAR PRC) | 3076  |
| Chinese (Macau SAR)         | 5124  |
| Chinese (PRC)               | 2052  |
| Chinese (Singapore)         | 4100  |



|                          |       |
|--------------------------|-------|
| Chinese (Taiwan)         | 1028  |
| Corsican                 | 1155  |
| Croatian (Latin)         | 4122  |
| Croatian                 | 1050  |
| Czech                    | 1029  |
| Danish                   | 1030  |
| Dari                     | 1164  |
| Divehi                   | 1125  |
| Dutch (Belgium)          | 2067  |
| Dutch (Netherlands)      | 1043  |
| English (Australian)     | 3081  |
| English (Belize)         | 10249 |
| English (Canadian)       | 4105  |
| English (Caribbean)      | 9225  |
| English (India)          | 16393 |
| English (Ireland)        | 6153  |
| English (Jamaica)        | 8201  |
| English (New Zealand)    | 5129  |
| English (Philippines)    | 13321 |
| English (South Africa)   | 7177  |
| English (Trinidad)       | 11273 |
| English (United Kingdom) | 2057  |
| English (US)             | 1033  |



|                        |       |
|------------------------|-------|
| English (Zimbabwe)     | 12297 |
| Estonian               | 1061  |
| Faeroese               | 1080  |
| Farsi                  | 1065  |
| Filipino               | 1124  |
| Finnish                | 1035  |
| French (Belgian)       | 2060  |
| French (Canadian)      | 3084  |
| French (Luxembourg)    | 5132  |
| French (Monaco)        | 6156  |
| French (Standard)      | 1036  |
| French (Switzerland)   | 4108  |
| Frisian                | 1122  |
| Gaelic (Ireland)       | 2108  |
| Georgian               | 1079  |
| Galician (Spain)       | 1110  |
| German (Austria)       | 3079  |
| German (Liechtenstein) | 5127  |
| German (Luxembourg)    | 4103  |
| German (Standard)      | 1031  |
| German (Switzerland)   | 2055  |
| Greek                  | 1032  |
| Greenlandic            | 1135  |



|                       |      |
|-----------------------|------|
| Gujarati (India)      | 1095 |
| Hausa                 | 1128 |
| Hebrew                | 1037 |
| Hindi (India)         | 1081 |
| Hungarian             | 1038 |
| Icelandic             | 1039 |
| Indonesian            | 1057 |
| Inuktitut (Latin)     | 2141 |
| Inuktitut (Syllabics) | 1117 |
| Irish                 | 2108 |
| Italian (Standard)    | 1040 |
| Italian (Switzerland) | 2064 |
| Japanese              | 1041 |
| Kannada (India)       | 1099 |
| Kashmiri (India)      | 2144 |
| Kazakh                | 1087 |
| Khmer                 | 1107 |
| K'iche                | 1158 |
| Kinyarwanda           | 1159 |
| Konkani               | 1111 |
| Korean                | 1042 |
| Korean (Johab)        | 2066 |
| Kyrgyz                | 1088 |



|                            |       |
|----------------------------|-------|
| Lao                        | 1108  |
| Latvian                    | 1062  |
| Lithuanian                 | 1063  |
| Lithuanian (Classic)       | 2087  |
| Macedonian                 | 1071  |
| Malay (Brunei Darussalam)  | 2110  |
| Malay (Malaysian)          | 1086  |
| Manipuri                   | 1112  |
| Marathi                    | 1102  |
| Norwegian (Bokmal)         | 1044  |
| Norwegian (Nynorsk)        | 2068  |
| Polish                     | 1045  |
| Portuguese (Brazil)        | 1046  |
| Portuguese (Standard)      | 2070  |
| Punjabi (Gurmukhi - India) | 1094  |
| Romanian                   | 1048  |
| Russian                    | 1049  |
| Serbian (Cyrillic)         | 3098  |
| Serbian (Latin)            | 2074  |
| Sindhi                     | 1113  |
| Slovak                     | 1051  |
| Slovenian                  | 1060  |
| Spanish (Argentina)        | 11274 |



|                              |       |
|------------------------------|-------|
| Spanish (Bolivia)            | 16394 |
| Spanish (Chile)              | 13322 |
| Spanish (Columbia)           | 9218  |
| Spanish (Costa Rica)         | 5130  |
| Spanish (Dominican Republic) | 7178  |
| Spanish (Ecuador)            | 12298 |
| Spanish (El Salvador)        | 17418 |
| Spanish (Guatemala)          | 4106  |
| Spanish (Honduras)           | 18442 |
| Spanish (Mexican)            | 2058  |
| Spanish (Modern Sort)        | 3082  |
| Spanish (Nicaragua)          | 19466 |
| Spanish (Panama)             | 6154  |
| Spanish (Peru)               | 10250 |
| Spanish (Puerto Rico)        | 20490 |
| Spanish (Traditional Sort)   | 1034  |
| Spanish (Uruguay)            | 14346 |
| Spanish (Venezuela)          | 8202  |
| Sutu                         | 1072  |
| Swahili (Kenya)              | 1089  |
| Swedish                      | 1053  |
| Swedish (Finland)            | 2077  |
| Tamil (India)                | 1097  |



|                        |      |
|------------------------|------|
| Tatar (Tatarstan)      | 1092 |
| Telugu (India)         | 1098 |
| Thai                   | 1054 |
| Turkish                | 1055 |
| Ukrainian              | 1058 |
| Urdu (India)           | 2080 |
| Urdu (Pakistan)        | 1056 |
| Uzbek (Cyrillic)       | 2115 |
| Uzbek (Latin)          | 1091 |
| Vietnamese             | 1066 |
| Welsh (United Kingdom) | 1106 |



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