ektron

What do you want your website to do ?

Ektron CMS400.NET User Manual

Version 7.5, Revision 9

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Version 7.5, Revision 9

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http://www.ektron.com/web-content-management-solutions.aspx?id=4020

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http://www.microsoft.com/virtualearth/product/terms.html

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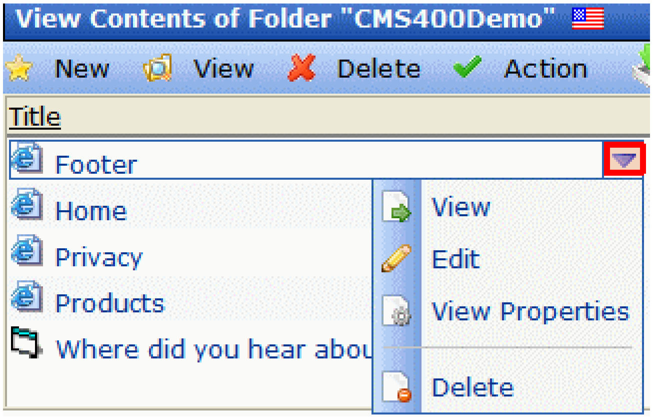
LA10031, Revision 2.0

What's New in the 7.5 Release

- The Document Management feature has been fundamentally improved. The way you create, edit, and perform all other functions with assets has been changed. For example, Internet Explorer users no longer need to deal with a client installation file.

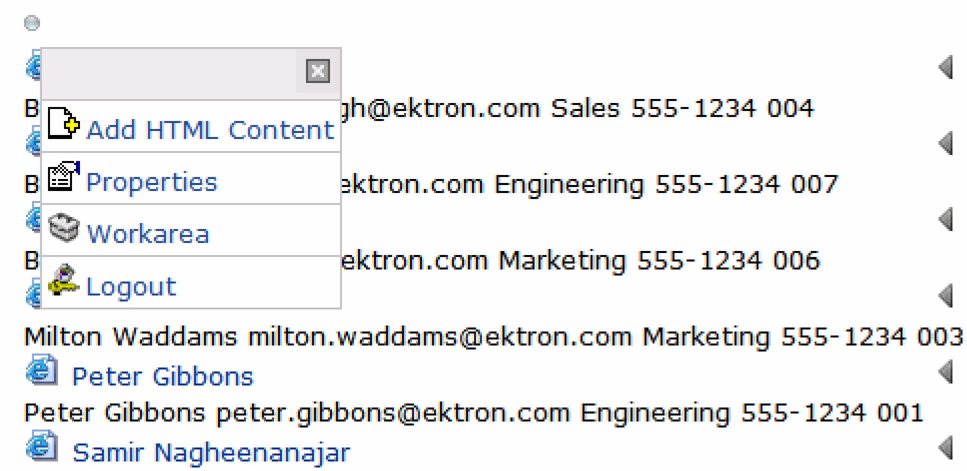
  Another new feature is the ability to drag and drop assets into a mapped network folder. Users of this method do not need to install **Ektron CMS400.NET** client software nor learn how to use it. For full details of the enhanced feature, see "Using the Document Management System" on page 222.

- After signing into the **Ektron CMS400.NET** Web Site or the Workarea and clicking the triangle (circled below), any content has a drop-down menu of actions that can be performed on it.

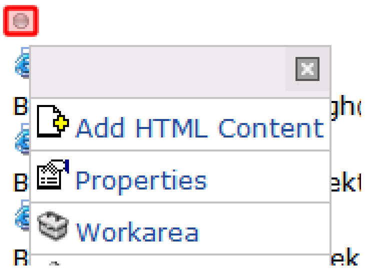


  The options change according to several criteria, such as the content type, status, and your permissions for its folder. *See Also:* "Content Dropdown Menu" on page 35

  - **New for 7.5.1** - After signing into an **Ektron CMS400.NET** Web site or the Workarea, many *server controls* have a menu of actions that can be performed.



To display the menu, click the small gray circle in the upper left corner.



- The Community Platform in Ektron CMS400.NET is a group of features that allow users to network socially on the site. Access to the community platform is available from the Web site or the Workarea. As a User, you can access the your Community information from the Workarea via the My Workspace folder tab. See ”My Workspace” on page 377.
- **New for 7.5.2** - The **eWebEdit400** editor, an alternative to eWebEditPro+XML, is available. Its main advantage is that users are not required to install an ActiveX control file on their computer. For more information, see ”Introduction to eWebEdit400” on page 488.

  Administrators who want to learn how validation is handled with this editor should read the **Ektron CMS400.NET** Administrator Manual section “Validating with **eWebEdit400**.”

- **New for 7.5.2** - The View Content Difference feature has been enhanced. It no longer requires you to install a file on your computer, and its display changed. For more information, see "Comparing Versions of Content" on page 98.
- **New for 7.5.2** - The options for working with checked out content have changed slightly. In 7.5.2, if you are not the user who checked out the content,
  - if you are a member of Administrators user group, you can either *force* a check-in or *request* one. If you request, **Ektron CMS400.NET** emails the user who checked out content, asking him to check it in.
  - if you are not a member of Administrators user group but have edit permission for the content's folder, you can *request* a check-in
  - if you are a not a member of Administrators user group and lack edit permission for the content's folder, you can only view the content
- For 7.5.2 - Entering start and end times for a calendar event is now optional. If the user does not select them, they are set to 12:00 a.m. and 11:55 p.m.
- New for 7.5.3 - The search finds metadata along with other content. Previously, you had to precede the search text with an at sign (@) followed by the name of the metadata field. *See Also:* "Searching for Metadata" on page 117
- New for 7.5.3 - The Document Management Toolbar has been removed. It was no longer needed since it has become easier to edit Microsoft Office documents within **Ektron CMS400.NET**. Alternatively, users can launch Office, edit a file, and save it to into **Ektron CMS400.NET** via a mapped network folder without signing into the Workarea. This feature is described in "Adding Documents to a Mapped Network Folder" on page 238.

  The Ektron Explorer has also been removed. It's no longer necessary, since users can drag and drop files into a mapped network folder without signing into the Workarea.

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
☐ jedit	☐ jmember
☐ tbrown	☐ member@example.com
☐ jsmith	☐ north
☐ vs	☐ supermember
	☐ 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.

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 a 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\CMS400`*`versionnumber`*`\Utilities`.

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/CMS400Developer/Workarea/ServerControlWS.asmx" />
```

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

Table of Contents

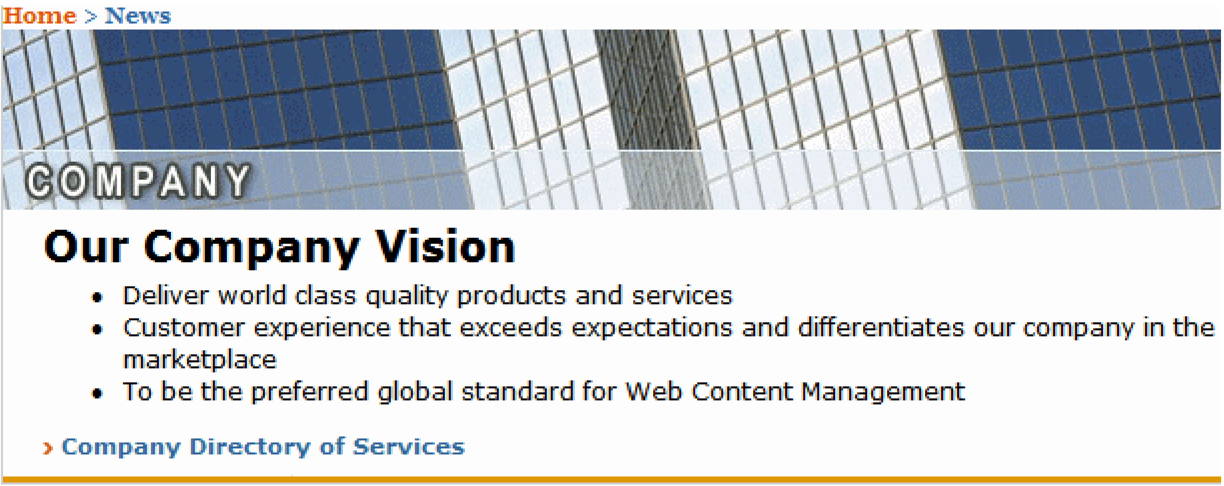
Introduction to Ektron CMS400.NET

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

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

What is a Content Block?

A Web site consists of several pages. Each page is made up of one or more *blocks* of content. For example, the home page from one of **Ektron CMS400.NET**'s sample sites is below.



You can work with content from the Web site or after logging into the **Ektron CMS400.NET** Workarea. *See Also:*

- ”Working with Content from your Web Site” on page 2
- ”The Workarea and Smart Desktop” on page 15

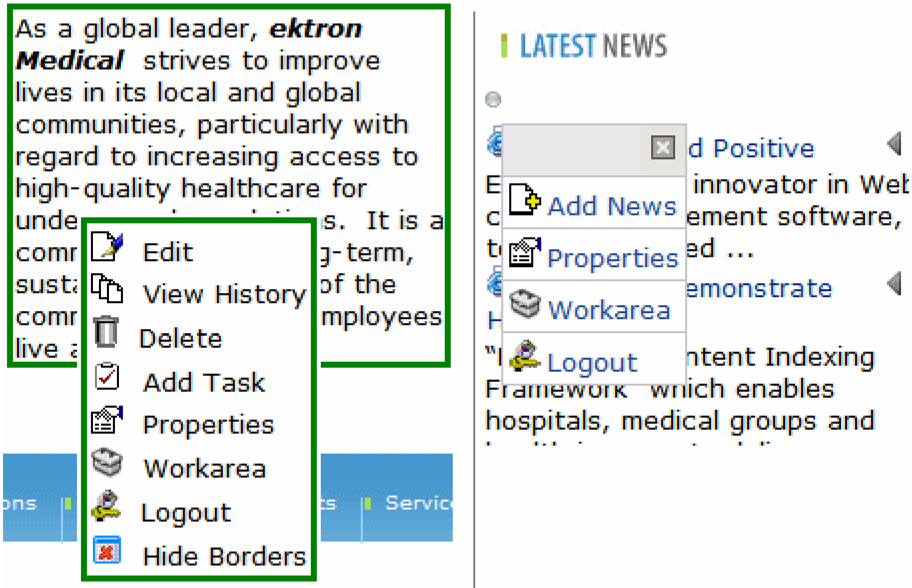
Working with Content from your Web Site

After signing in to **Ektron CMS400.NET**, you can do your work from two types of dropdown menus.

- Content menu - lets you work on content when it appears on a list. *See Also:* ”Content Dropdown Menu” on page 35
- Control menu - lets you work on any of the various **Ektron CMS400.NET** *controls* that appear on a Web page. A control can display content, a list of content items, etc. *See Also:* ”The Control Menu” on page 2

The Control Menu

After you sign in, notice that most areas of the Web page are surrounded by a border or display a gray circle in the top left corner. The border might only appear as you move the cursor over it.



Menu indicated by colored border

Menu indicated by gray circle in top left corner

You can perform **Ektron CMS400.NET** tasks from the control menus. The options can vary depending on what is on that area of the page and your permissions. For example, one area might have a content item and another a list of related content items. Your system administrator controls the design of each page.

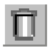
The advantage of this feature is that you can see how Web page will appear to site visitors. Continue editing until you are satisfied with the content.

See Also:

- ”Control Menu Options” on page 3
- ”Hiding and Showing the Content Border” on page 5
- ”Appendix A: Content Statuses” on page 798 explains the meaning of the border’s color

Control Menu Options

The following table describes the menu options that may appear.

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.	
	Approve	Approve or decline a request to publish or delete content	"Approving/Declining Content" on page 87
	Assign Task	Assign a task to a user	"Managing Tasks" on page 286
	Delete	Open View Content page. From it, you can delete the content.	"Viewing Content" on page 40
	Edit	Check out content for editing	"Editing HTML Content" on page 52
	Hide Border	Hide the colored border around content when a user is logged in Important! When you hide the border, the Add and Edit buttons for menus are also hidden.	"Hiding and Showing the Content Border" on page 5
	Logout	Log out of **Ektron CMS400.NET** view of Web site	"Logging Out of the Sample Site" on page 14
	New Poll	Create new poll or survey	"Creating Polls and Surveys" on page 214
	Preview	Preview content before it is published	"Site Preview" on page 13
	Properties	Open content's View Content page	"Viewing Content" on page 40

Button	Name	Description	More Information
	Show Border	Show a colored border around content when you are logged in Important! When you hide the border, the Add and Edit buttons for menus are also hidden.	"Hiding and Showing the Content Border" on page 5
	View Content Difference	Display differences between a previous and the currently published version of content	"Comparing Versions of Content" on page 98
	View History	Open View History screen, where you can view previous versions of content	"Viewing and Restoring Previous Content" on page 108
	Workarea	Open Workarea. From here, you can perform all **Ektron CMS400.NET** tasks.	"The Workarea and Smart Desktop" on page 15

Hiding and Showing the Content Border

IMPORTANT! When changing the border to hidden, the **Add** and **Edit** buttons for menus are also hidden. This displays the page as it appears when you are not logged in. For information on menus, see "Working with Menus" on page 444.

You can hide the border that may surround content when you are logged into Ektron CMS400.NET. This lets you view the page as it appears when not logged in.

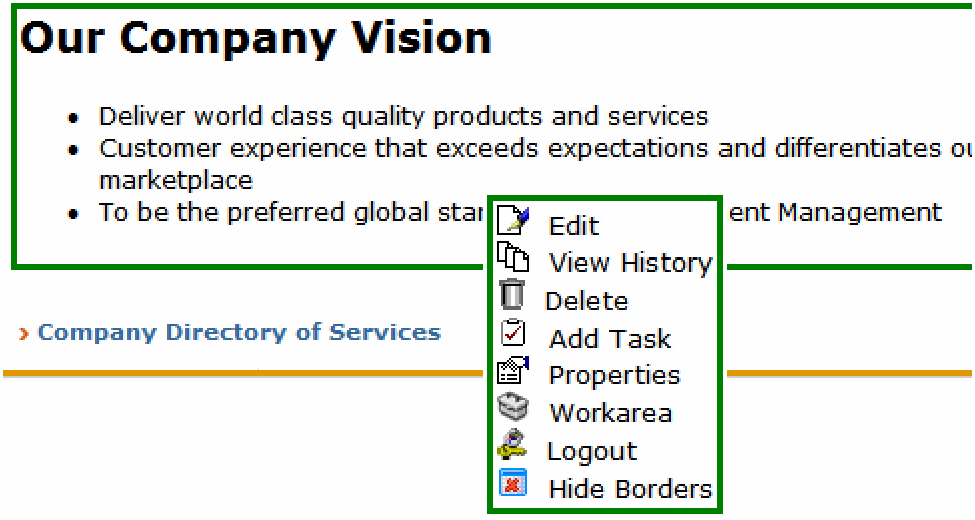
When the border is hidden and you hover over a content area, there is no indication that it is CMS400 content. However, you can still right click to access the menu.

TECHNICAL NOTE Information about whether a border is hidden is stored in a cookie on a user's system. This preserves the information between sessions.

Hiding the Border

To hide the content border, right click a content block while logged in. Next, select **Hide Borders**. The page refreshes, and no border appears.

This image shows the content with a border and menu.



This image shows the same content without the border.

Showing the Border

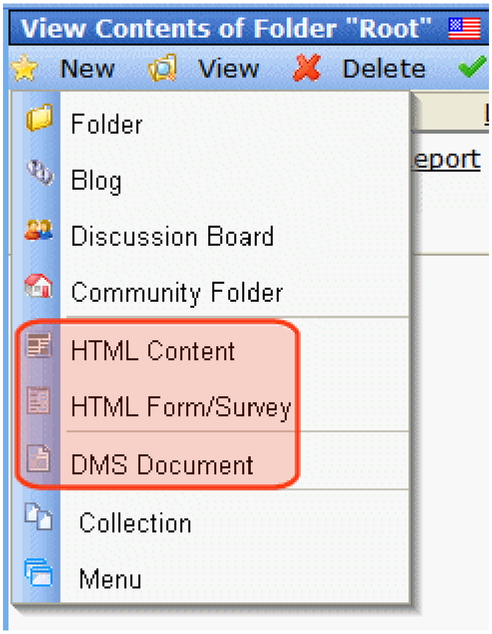
To show the border, right click a content block while logged into Ektron CMS400.NET. Next, select **Show Borders**. The page refreshes, and the border appears.

Types of Content

Every piece of content in **Ektron CMS400.NET** is one of the following types. The table below summarizes all types.

Type	Description	For more information, see
HTML content	Content designed to be published on the World Wide Web	For information on using **Ektron CMS400.NET**'s editor, see "Introduction to eWebEditPro+XML" on page 626.
XML Smart Forms	Online forms, polls, or surveys designed to collect information from site visitors and save it in an XML format	**Ektron CMS400.NET** Administrator Manual Section "Managing Content Folders" > "Smart Forms"
HTML form/survey	Online forms, polls, or surveys designed to collect information from site visitors and save it in an HTML format	"Working with HTML Forms" on page 156
DMS Documents, which consist of Office documents, managed files, and multimedia files	See details below	
Office documents	Files normally created and edited using Microsoft Office	"Working with Microsoft Office Documents" on page 227
Managed files	Files created outside of **Ektron CMS400.NET**, such as PDFs and .jpeg files. You cannot create or edit these files within **Ektron CMS400.NET** - you can only store them.	"Working with Managed Files" on page 253
Multimedia	Files that run in a media player, such as sound and movie files	**Ektron CMS400.NET** Administrator Manual section "Managing Assets"> "Managing Multimedia Assets"'

When creating new content, you must assign a type.



As you can see, the **New** menu lists all types of content you can work with.

Workflow in Ektron CMS400.NET

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

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

Editing Content

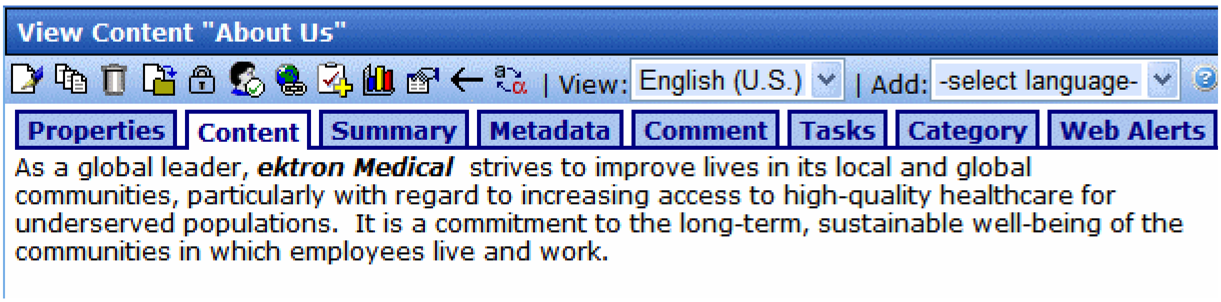
Finding Content

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

- Navigate through your Web site to the content you want to edit
- Find the content through the *Workarea*, which resembles Windows Explorer and helps you find content by navigating through a folder tree. *See Also:* "The Workarea and Smart Desktop" on page 15
- Use the Search button ( ), which appears on many screens. When clicked, a screen prompts you to enter keywords and then finds content containing the keywords.

The Editing Process

After you find content, click the Edit button ( ) or menu option to open it in an editor. Below is an example of content within the editor.



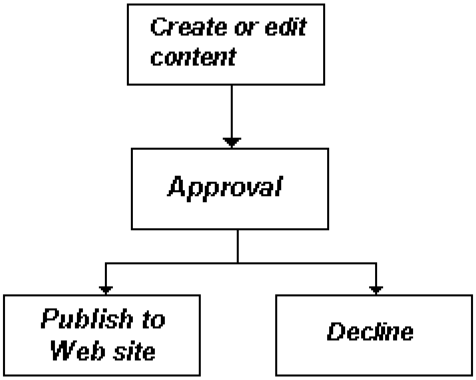
The editor resembles popular word processing software. You can enter text, then select it and click a button to change its display properties. For example, you can make text bold, change the color, or copy and paste it. You can also insert images, tables, links to other Web pages, and check spelling. *See Also:* "Introduction to Ektron CMS400.NET Editors" on page 486

The Lifecycle of Content

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

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

The following graphic illustrates the content approval cycle.



To help track content's position in this workflow, **Ektron CMS400.NET** assigns a status to each content item. The status determines what you can do with it, and indicates what must occur in order for it to get published to the Web site. For more information, see "Appendix A: Content Statuses" on page 798.

Logging In and Out

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

- "Prerequisites" on page 11
- "Logging into the Sample Web Site" on page 11
- "Site Preview" on page 13
- "Logging Out of the Sample Site" on page 14

Prerequisites

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

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

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

Logging into the Sample Web Site

To access the Ektron CMS400.NET sample site, follow these steps.

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

3. The Login dialog box appears.

4. Enter your username and password.

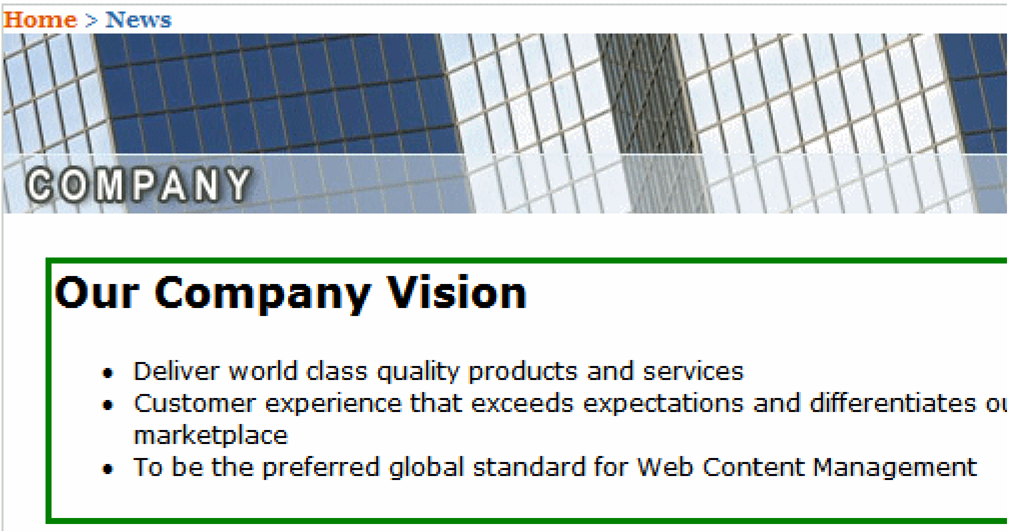
If you are using one of Ektron’s sample sites, you can use any of three standard users that demonstrate Ektron’s flexible user-permissions model. The table below lists the username and password needed to log in as each user type, as well as the permissions assigned to each user.

User Type	Username	Password	Permissions
Administrator	admin	admin	All
Standard user	jedit	jedit	Basic (for example, add/edit content, manage library files, etc.)
Membership user	jmember	jmember	Read-only permission to private content

5. Click the **Login** button.

6. The Web page appears.

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



Site Preview

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

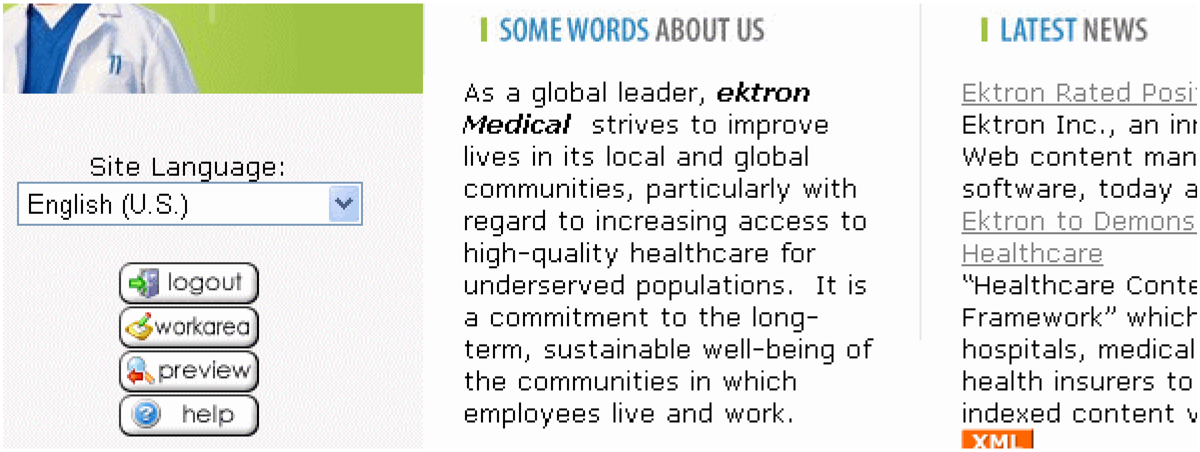
Button Appearance	Status	Description
	Preview Mode	Content appears as last *edited*. The advantage of this mode is that you can see a Web page as it will appear when published to your site. Continue editing until you are satisfied with its appearance. In Preview mode, click the **Preview** button to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

Toggling Site Preview

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

1. Navigate to a page that includes the login/logout button.
2. Click the **Preview** button.

3. The Web site is now in preview mode.

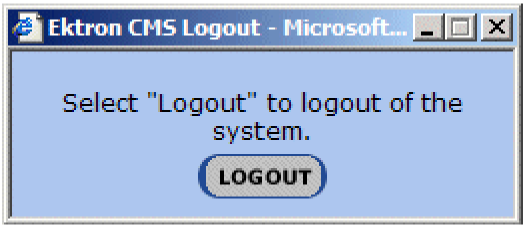


4. To turn preview mode off, click the () button on the login screen.

Logging Out of the Sample Site

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

1. Click the **Logout** button () in the content’s floating toolbar, or click the **Logout** button () on the Web page.
2. The Logout confirmation box appears.



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

The Workarea and Smart Desktop

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

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

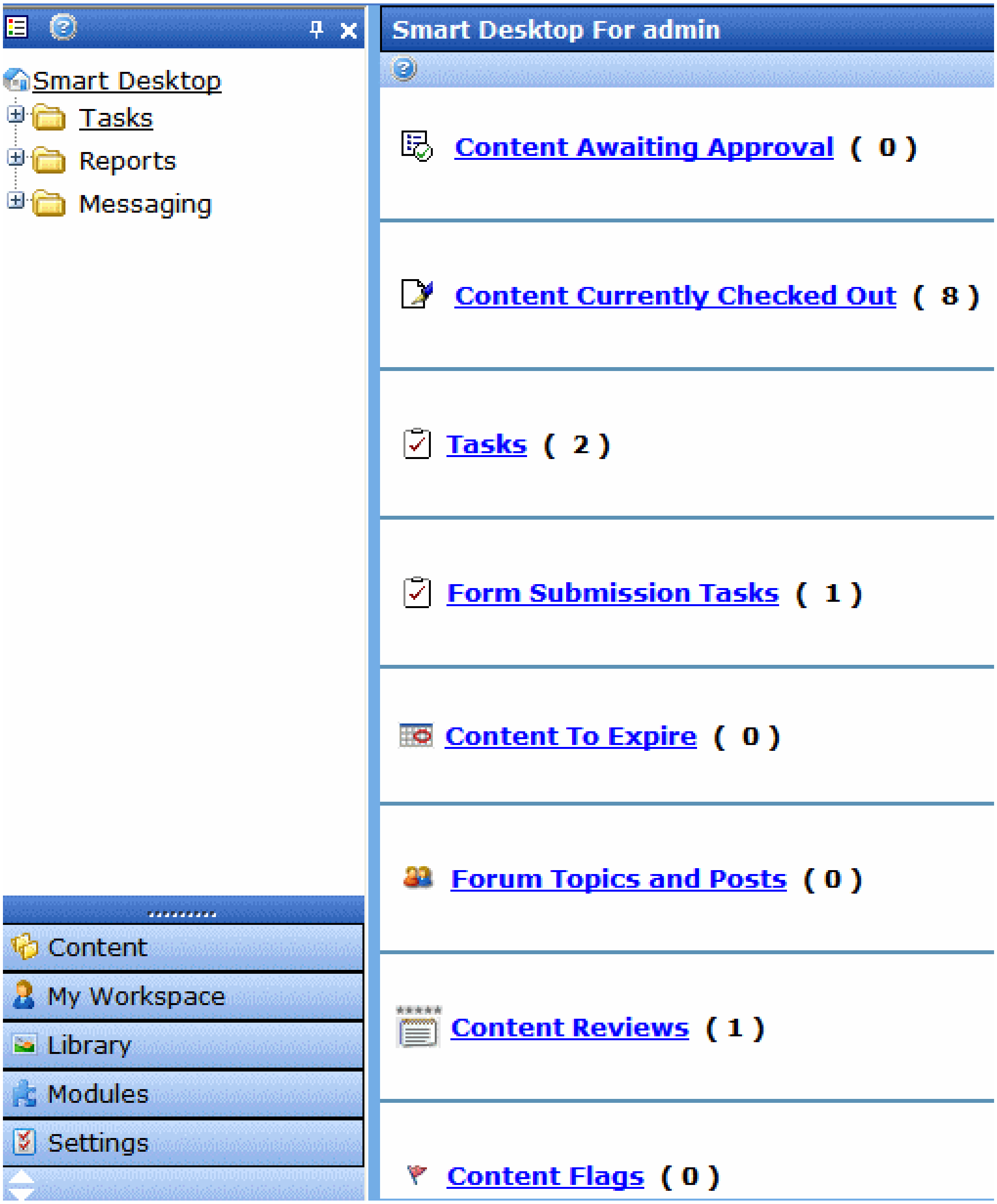
This chapter describes using the Workarea and Smart Desktop through the following subtopics.

- "Accessing the Workarea" on page 15
- "Understanding the Smart Desktop" on page 17
- "Navigating Within the Smart Desktop" on page 20
- "Sending Instant Email" on page 25

Accessing the Workarea

To access your Workarea, follow these steps.

1. Click the Workarea button at the bottom of the screen (workarea) or the Workarea button ( ) in the content's floating toolbar.
2. The Workarea appears.
3. The following illustrates one of several screens that may appear in the Workarea. Your system administrator determines which screen appears for you.



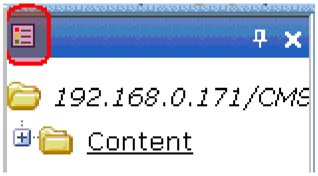
Closing the Workarea

To close the Workarea, click in the upper right corner of the window. When you close the Workarea, you return to the Ektron

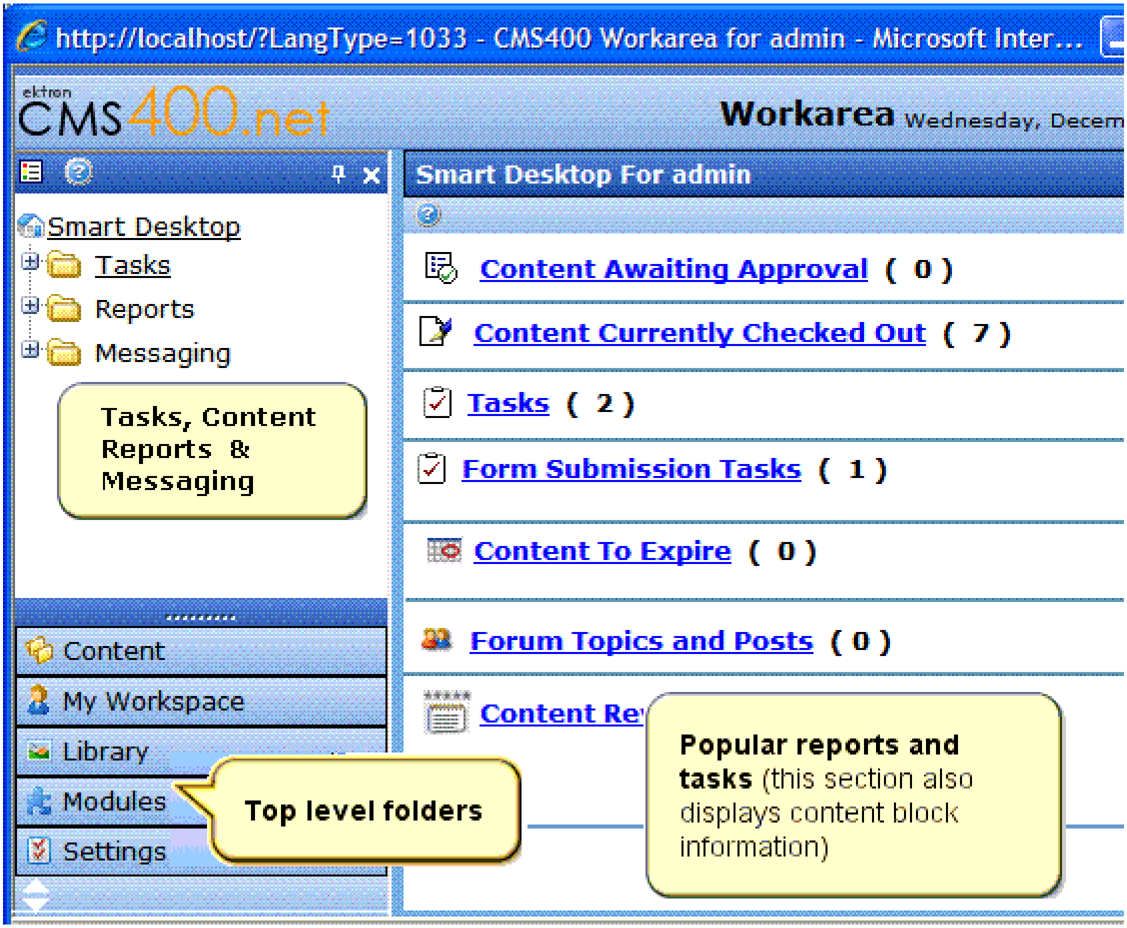
CMS400.NET view of your Web site. You do not exit Ektron CMS400.NET.

Understanding the Smart Desktop

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



The Smart Desktop consists of three sections, illustrated below.



- The right frame displays
  - **Content awaiting approval** - content you need to approve before it proceeds to the next approver or is published if you are the final approver.*See Also:* The **Ektron CMS400.NET** Administrator Manual > “Content Reports” > “Approvals Reports”
  - **Content currently checked out** - all content in a checked-out status. This content cannot be edited by other users until the user who checked it out or the system administrator checks it in.*See Also:* The **Ektron CMS400.NET** Administrator Manual > “Content Reports” > “Checked Out Report”

- A list of **tasks** assigned to you *See Also:* "Managing Tasks" on page 286
- Any form submission tasks assigned to you *See Also:* "Assigning a Task to a Form" on page 195
- The **Content to Expire Report** -*See Also:* The **Ektron CMS400.NET** Administrator Manual > "Content Reports" > "Content to Expire Report"
- **Forum Post** - A list of Forum Posts that are awaiting approval. Posts need approval when Forums are using the Moderate Comments feature. *See Also:* The **Ektron CMS400.NET** Administrator Manual > "Discussion Boards" > "Implementing Discussion Boards" > "Working with Posts" > "Approving a Post"
- **Content Review** - A list of Content Reviews awaiting approval. Content Reviews need approval when the ContentReview server control's Moderate property is set to True. *See Also:* The **Ektron CMS400.NET** Administrator Manual > "Managing HTML Content" > "Content Rating" > "Viewing the Content Rating Report" > "Moderating Reviews" > "Moderating Reviews From the Smart Desktop"
- **Content Flags** - Content flagged by a site visitor for review. *See Also:* **Ektron CMS400.NET** Administrator Manual section "Community Management" > "Flagging"

NOTE The number to the right of each category lists the quantity of content items in that category for you. When you click an item, up to five content items in a category appear. To perform tasks on that content, and to view additional content in that category, click the category.

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

- The top left frame displays the folder tree for the Smart Desktop folder, which has three subfolders
  - Tasks (See "Managing Tasks" on page 286)
  - Content Reports (see "Content Reports" in the **Ektron CMS400.NET** Administrator Manual)
  - Community Messaging (see "Messaging" on page 390)

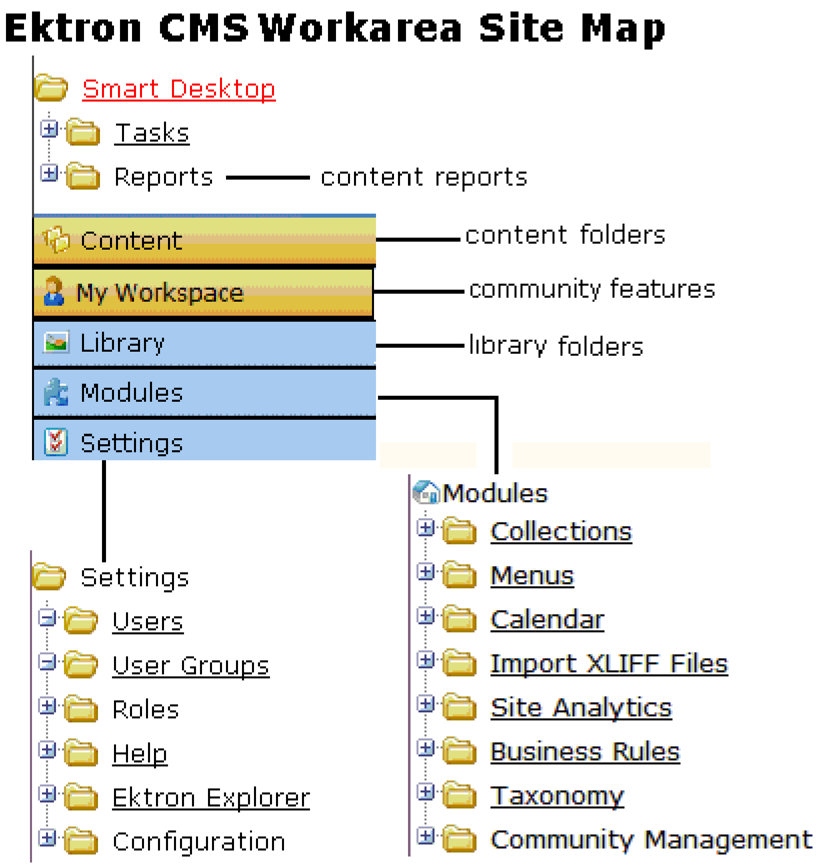
- The bottom left frame displays the top-level folders in **Ektron CMS400.NET**. Your display may be different depending on whether you are an administrator.
  - Content folder (see "Working with Folders and Content" on page 28)
  - Forms folder (see "Working with HTML Forms" on page 156)
  - "Library Folder" on page 131
  - Modules (see "Membership Users and Groups" and "Business Rules" sections of the **Ektron CMS400.NET** Administrator Manual)
  - Settings folder, which includes "Updating Your User Profile" on page 477 and "Accessing Online Help" on page 483

Navigating Within the Smart Desktop

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

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

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

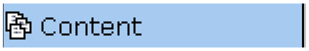
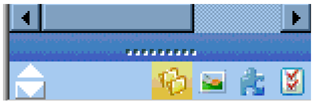


From the Smart Desktop, you can also:

- ”Modify the Display of Top Level Folders” on page 21
- ”Hide the Left Panel of the Workarea” on page 23

Modify the Display of Top Level Folders

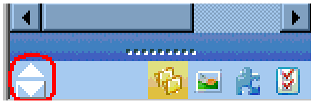
The display of top level folders can appear in two formats.

Format	Illustration
A full button with an icon and text	
An icon on the bottom of the left frame	

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

Switching Between Full Buttons and Icons

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

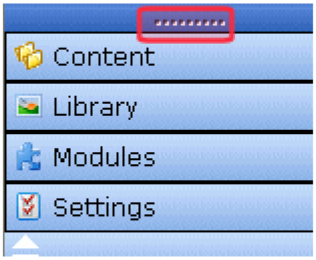


To switch back to full buttons, double click the up arrow circled above.

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

As an alternative method of switching the display, you can

1. Place the cursor on the bar above the display of top-level folders. (The bar has several dots in the middle.)



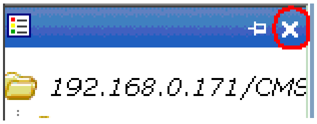
2. When the cursor turns to a double headed arrow, drag it to the bottom bar.

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

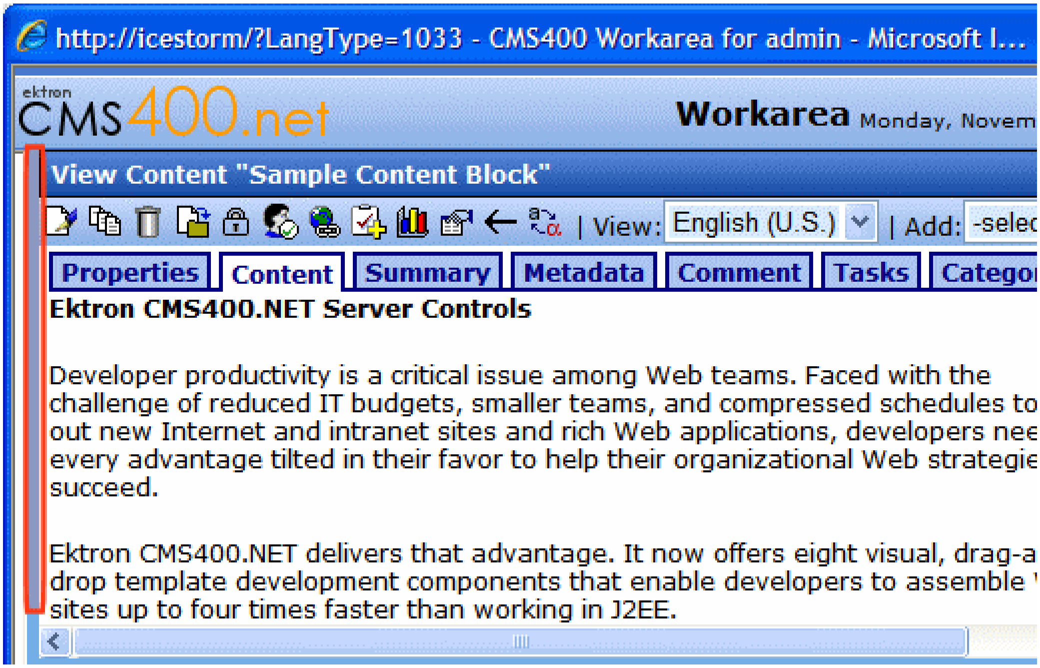
Hide the Left Panel of the Workarea

You can hide the left frame of the Workarea to provide more space for working in the right frame. Below is an example of the Workarea with a minimized left frame. Note that you cannot see the folder display in the left frame.

To minimize the left frame, click the white X near the top of the left frame.



The left frame remains minimized until you move the cursor to the left of the bar circled below.

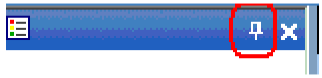


Using Autohide

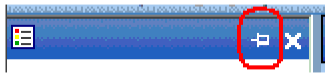
The Workarea screen also provides an *autohide* feature, which quickly switches between full right frame view and combination right-left frame view.

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

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



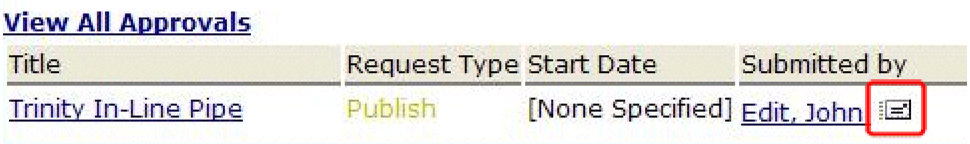
When you do, the push pin turns 90 degrees to indicate autohide is on.



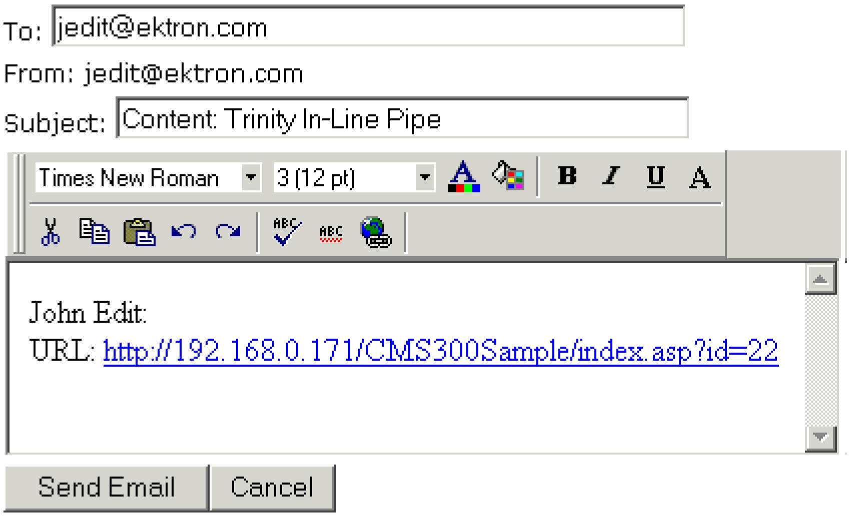
To turn off autohide, move the cursor to the left frame and click the push pin icon. When you do, the push pin returns to its original position.

Sending Instant Email

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



When you click a user/group name or email icon, the email screen appears, as shown below. Once you complete the screen and click **Send**, an email is sent to designated users.



Conditions for Instant eMail

- You must have a valid email address set up in the user profile. If not, email icons do not appear in **Ektron CMS400.NET**. *See Also:* "Updating Your User Profile" on page 477
- Your system administrator must enable the feature.

Where Instant email is Available

Instant email is available from several screens that display users and user groups. Typically, you click a user name or the email icon to launch an email. Screens in the following **Ektron CMS400.NET** features support instant email.

- Smart Desktop
- Tasks
- Approvals
- Reports
- User and user group setup

Wherever instant email is available, one of the email icons appears.

Modifying Instant eMail

When the email screen appears, the following information is copied from **Ektron CMS400.NET** into the email.

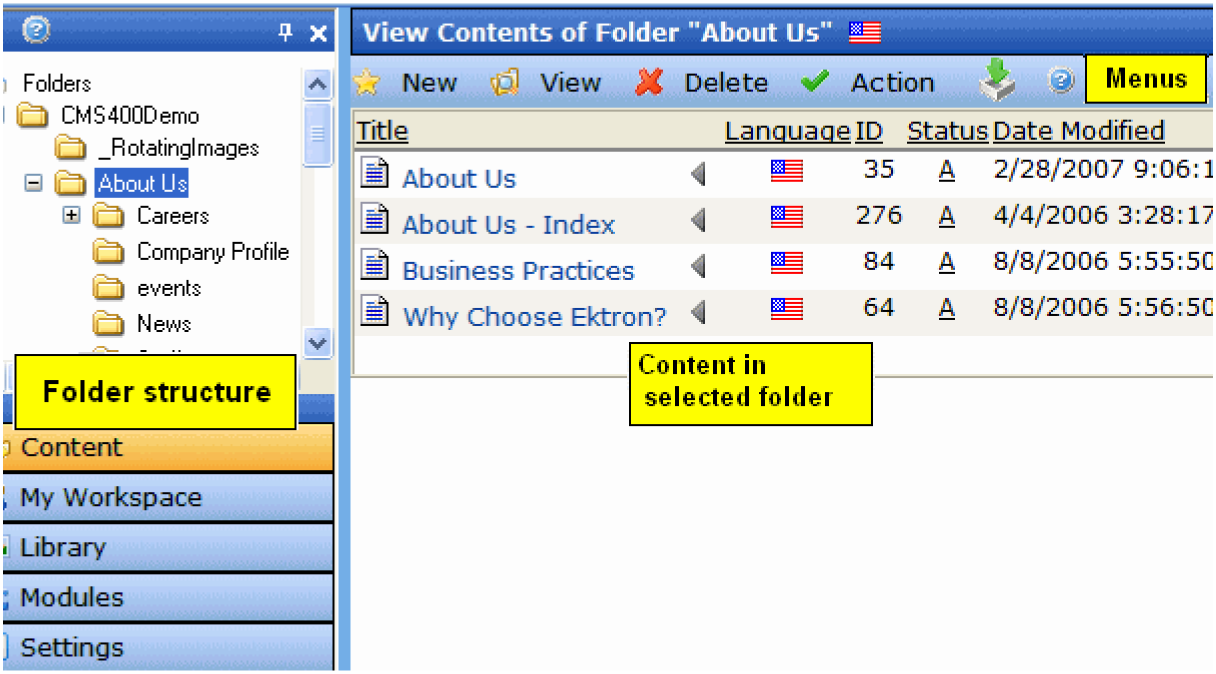
Field	Source of Default Information	Editable?
To	User you selected to receive the email. If the user does not have valid email address, an error message appears on the screen (see below). If you then insert a valid email address, the email is sent.  If you specify a group to receive the message, as long as one group member has a valid email address, all group members with valid addresses receive the email.	Yes. If desired, you can add recipients by typing them into this field.
From	You	No
Subject	If the email message is linked to content, its title appears.	Yes
Body of message	If the email message is linked to content, a link to the content appears.	Yes

Working with Folders and Content

Every content item resides in the Content folder or one of its subfolders. So, to work with existing content or create a new content, you must first navigate to its folder.

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

- The top left frame shows the folder structure. You can click any folder to display its content in the right frame, while its subfolders appear below it.
- The right frame shows content in the currently selected folder. Above is a set of menus that let you perform tasks on the content.
- The lower left frame shows **Ektron CMS400.NET**'s top level folders



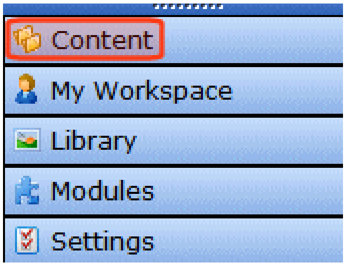
In this chapter, you learn about adding, editing, publishing, and deleting content through the following subtopics. (Permissions and Approvals are explained in the **Ektron CMS400.NET** Administrator manual .)

- ”Viewing a Folder” on page 30
- ”Workarea Toolbar Buttons” on page 60
- ”Deleting a Folder” on page 40
- ”Viewing Content” on page 40
- ”Expanding the Content Area” on page 46
- ”Adding HTML Content” on page 48
- ”Editing HTML Content” on page 52
- ”Deleting Content” on page 57
- ”Workarea Toolbar Buttons” on page 60

Viewing a Folder

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

1. Access the Workarea, as described in "Site Preview" on page 13.
2. Click **Content** from the left lower side of the Workarea.



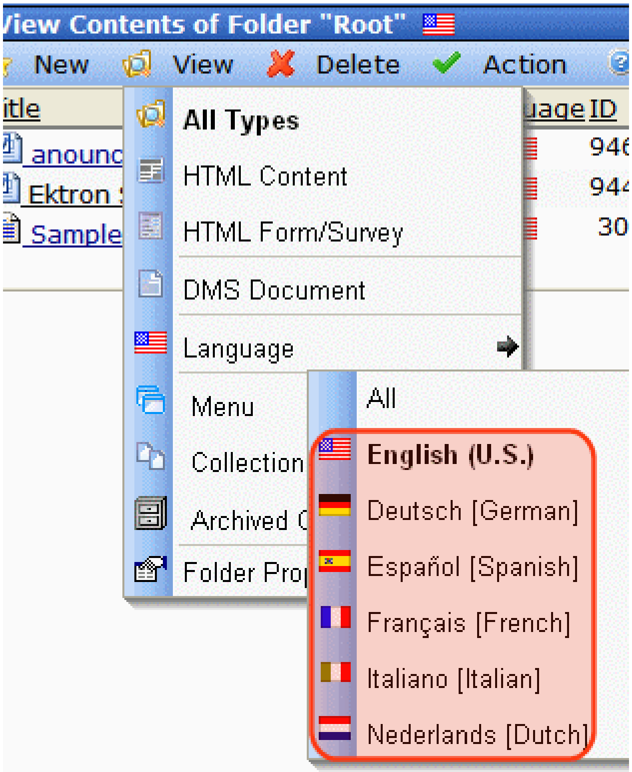
3. All content in the root folder and the selected language appear in the right frame. Subfolders appear in the upper left frame.

NOTE The View menu option lets you filter content by type. For example, you can set it to view only HTML content. Therefore, you may only see content of a selected type in the folder. *See Also:* "View Menu" on page 33

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

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

5. If your system supports more than one language, you can select content for a particular language or all languages using the **View > Language** menu option (illustrated below).



Each folder lists the following information about its content.

Field	Description
Title	The name of the content.
Language	The language of the content.
ID	The number assigned to the content by Ektron CMS400.NET. It is used to retrieve the content from a database.
Status	The status of the content. *See Also:* "Appendix A: Content Statuses" on page 798
Date Modified	The most recent date the content was added, edited, or published.

Field	Description
Last Editor	The last user who accessed the content.

The following menus and button appear across the top of the View Contents of Folder screen.

NOTE Depending on your permissions, you may not see all menu options.

- ”New Menu” on page 32
- ”View Menu” on page 33
- ”Delete Menu” on page 34
- ”Action Menu” on page 35
- Add Asset button ( ) See ”Adding Documents Using Drag and Drop” on page 235
- ”Content Dropdown Menu” on page 35

New Menu

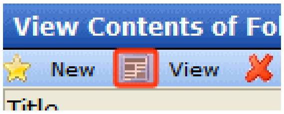
Menu Option	Lets you create or upload this new item into folder	For more information, see
Folder	Folder	”Workarea Toolbar Buttons” on page 60
Blog	Blog	”Blogs” on page 312
Discussion Board	Discussion Board	**Ektron CMS400.NET** Administrator Manual Section “Discussion Boards” ”Discussion Boards” on page 471

Menu Option	Lets you create or upload this new item into folder	For more information, see
Community Folder	Folder whose content can be updated by membership as well as regular users	**Ektron CMS400.NET** Administrator Manual Section “Managing Content Folders” > “Community Folders”
HTML Content	HTML content	”Adding HTML Content” on page 48
HTML Form/Survey	HTML Form, Poll, or Survey	”Working with HTML Forms” on page 156
Smart Form	Smart Form	**Ektron CMS400.NET** Administrator Manual Section “Managing Content Folders” > “Smart Forms”
DMS Document	• Office Document • Managed file, any supported type • Multimedia file, any supported type	• ”Working with Microsoft Office Documents” on page 227 • ”Working with Managed Files” on page 253
Multiple DMS Documents	Several Office documents, managed files, multimedia files	”Adding Documents Using the Multiple DMS Documents Option” on page 233
Collection	Collection	”Working with Collections” on page 424
Menu	Menu	”Working with Menus” on page 444

View Menu

The View Menu provides the following functions.

Menu Option	Function	For more information, see
All types	Displays *all* content types of selected language.	

Menu Option	Function	For more information, see
• HTML content • HTML Form/Survey • DMS Document, which includes Office Documents, Managed Files, Multimedia, Open Office	Limits folder display to *selected content type*. For example, choose **View > DMS Document** and see only managed assets in the folder -- other content types are suppressed. This is especially helpful if the folder has a lot of items, and you are looking for only one type of content. Note that the icon for the selected type appears to the left of **View**, as illustrated below. 	
Language	Limits display of content within folder to one language. Also, sets language of new items you create or upload into the folder.	
Menus	Lets user view and work with menus assigned to this folder	”Working with Menus” on page 444
Collections	Lets user view and work with Collections assigned to this folder	”Working with Collections” on page 424
Archived Content	Lets user view and work with content that passed its scheduled End Date and whose archive option is either **Archive and remove from site** or **Archive and remain on Site**.	”Setting Archive Options” on page 69
Folder Properties	Only system administrators see this option. It lets you assign folder properties, such as which users can edit a folder’s content.	The **Ektron CMS400.NET** Administrator Manual section “Managing Content“ > “Managing Content Folders” > “Folder Properties”

Delete Menu

This menu lets you perform the following functions.

Menu option	Lets you	For more information, see
Delete this folder	Delete current folder and all of its content Note: You cannot delete the Root folder.	”Deleting a Folder” on page 40
Delete content	Delete one or more content items in folder	”Deleting Content” on page 57

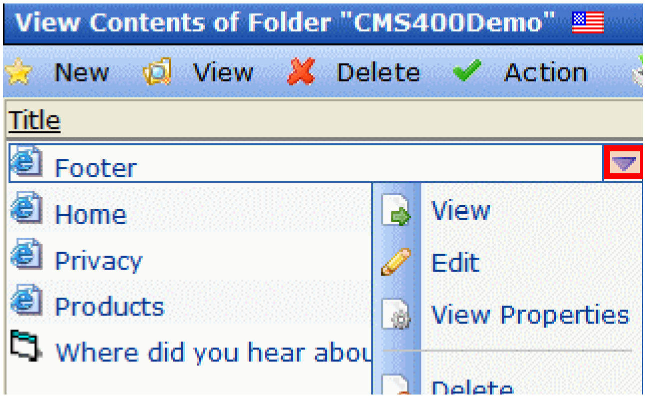
Action Menu

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	**Ektron CMS400.NET** Administrator Manual section “Multi-Language Support” > “Using the Language Export Feature”
Search	Search content in the Workarea	”Searching the Workarea” on page 114

Content Dropdown Menu

The View Contents of Folder screen features a context-sensitive, dropdown menu of options you can perform for a content item.

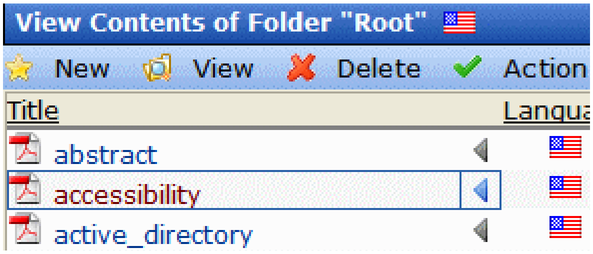


The options depend on several factors, such as

- your folder permissions
- your position in the approval chain (if any)
- the content's status
- whether the item is a Microsoft Office document

To see the dropdown menu options for any content item, follow these steps.

1. After signing in, navigate to a Web page or the folder that contains the content.
2. Hover the cursor over the content item. It is surrounded by a blue rectangle, and a triangle appears to the right of the title.



3. Hover the cursor over the triangle ( ) and click.

4. A menu of options available for that content item appears. For example, if you have permission to edit it, **Edit** appears on the dropdown menu.

Dropdown Menu Options

Option	Allows you to...	For more information, see
Approve	Approve content that has been submitted for publishing	”Approving/Declining Content” on page 87
Check in	Change status of selected content to checked in. Might use if you checked out and saved a document then it became lost or corrupted. This option changes original document’s status to checked in. However, it does not replace the version of the file in **Ektron CMS400.NET**. To replace content that was checked out and edited, drag and drop it into **Ektron CMS400.NET**. *See Also:* ”Checking Out, Saving, and Replacing an Office Document” on page 247 Note: Previous **Ektron CMS400.NET** releases included a Work Offline option, whose **Check In** function *replaced* the version of the file in **Ektron CMS400.NET**. In contrast, this release’s Check In function only changes the content’s status.	”Checked-In Content” on page 800
Check out and Save As	Change a content item’s status to checked out and save it to your local computer. When you finish editing the item, drag and drop it into **Ektron CMS400.NET**.	”Checking Out, Saving, and Replacing an Office Document” on page 247

<table>
<tr><th>Option</th><th>Allows you to...</th><th>For more information, see</th></tr>
<tr><td>Decline</td><td>Decline an approval request submitted to you. This option reject the changes and keeps the current version live on Web site. You are prompted to enter a reason for the decline.
After you decline
• The author who made the change is notified by email
• The content is removed from the Approval Chain
If the author updated content then submitted it for approval, the updated content remains in the file. If you do not want it to remain, choose the Edit option.
You may be asked to decline both a content change and a request to delete content.</td><td>”Approving/Declining Content” on page 87</td></tr>
<tr><td>Delete</td><td>Submit content for deletion.</td><td>• ”Deleting a Single Content Item” on page 57
• ”Deleting an Office Document” on page 246
• ”Deleting a Managed File” on page 257</td></tr>
<tr><td>Edit</td><td>• HTML, HTML form, or XML Smart Form content - edit content within an Ektron CMS400.NET editor
• Asset - First, use Check out and Save As or Save As to save asset to your computer and edit it. Then, use Edit to replace version in Ektron CMS400.NET.</td><td>• ”Editing HTML Content” on page 52
• ”Editing a Form” on page 210
• ”Editing a Managed File” on page 256</td></tr>
<tr><td>Edit in Microsoft Office</td><td>Edit Office document within Ektron CMS400.NET, which launches Office</td><td>”Editing an Office Document” on page 244</td></tr>
<tr><td>Edit Properties</td><td>Edit item’s Ektron CMS400.NET information, such as Summary, Metadata, Schedule, and Taxonomy.
After you complete the edit screen, you proceed to the View Content screen. From here, you can perform additional content activities, such as move/copy, delete, and view history.</td><td>”After you select the content, you have the following options.” on page 43</td></tr>
</table>

Option	Allows you to...	For more information, see
Force Check In	Only appears if user is a member of the Administrator group and content is checked out. Allows an admin to check in content even though he is not the one who checked it out.	
Publish	Accept changes to content and publish it to the site.	
Request Check In	Allows either admin user or non-admin user with edit permission for the content's folder to email the user who checked out content. The email asks the check-out user to check it in.	
Save As	Save Office document or asset to your computer.	"Saving an Office Document" on page 249
Submit	Submit current version of content for publishing. When you do this, the next person in the Approval Chain is notified that your content is ready for review.	"Asset Workflow" on page 258
View	View item's **Ektron CMS400.NET** information, such as Summary, Metadata, Schedule, and Taxonomy. After viewing, you can also edit that information if you have permission. Next, you proceed to the View Content screen. From here, you can perform additional content activities, such as move/copy, delete, and view its history.	"After you select the content, you have the following options." on page 43
View in Microsoft Office	View Office document within Office application. Cannot change.	
View Properties	View Office document's **Ektron CMS400.NET** information, such as Summary, Metadata, Schedule, and Taxonomy. After viewing, you can also edit that information if you have permission. After you complete the edit screen, you proceed to the View Content screen. From here, you can perform additional content activities, such as move/copy, delete, and view its history.	"After you select the content, you have the following options." on page 43

Adding a Subfolder

Since the procedure for adding new folders is usually only granted to administrators, it is documented in the **Ektron CMS400.NET** Administrator manual section “Managing Content Folders” > “Adding Subfolders.”

Deleting a Folder

Since the procedure for adding new folders is usually only granted to administrators, it is documented in the **Ektron CMS400.NET** Administrator manual section “Managing Content Folders” > “Deleting Subfolders.”

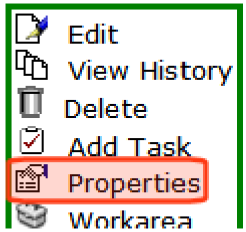
Viewing Content

You can view all content in your Ektron CMS400.NET Web site. Viewing content allows you to see the content, metadata, summaries, and other information.

Viewing Content from a Web Page

To view content from a Web page, follow these steps.

1. Sign in.
2. Browse to the content you want to view.
3. Right click the mouse.
4. Click **Properties**.



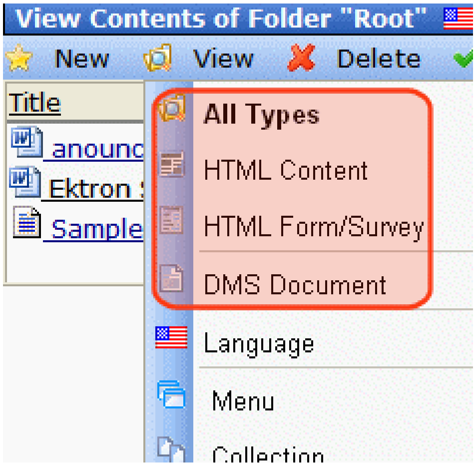
5. Continue reading from ”The View Content screen appears.” on page 43.

Viewing Content from the Workarea

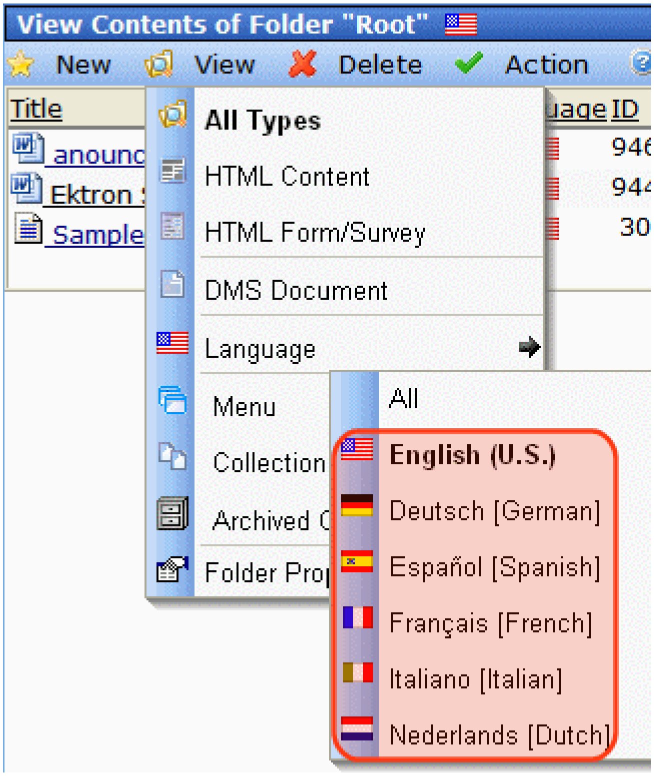
1. Navigate to the folder that contains the content, as explained in ”Viewing a Folder” on page 30.
2. The icon to the left of **View** indicates the type of content being displayed. Icons are described below.

Icon	Content Type
	All types
	HTML
	HTML form or survey
	DMS document

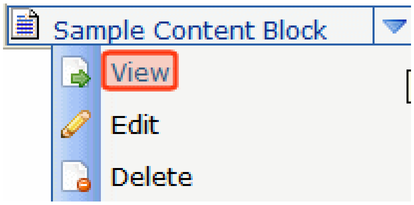
To change the type of content being displayed, click **View** then select a type.



3. If your system supports more than one language, you can view only content in any language via the **View > Language** menu option (illustrated below).

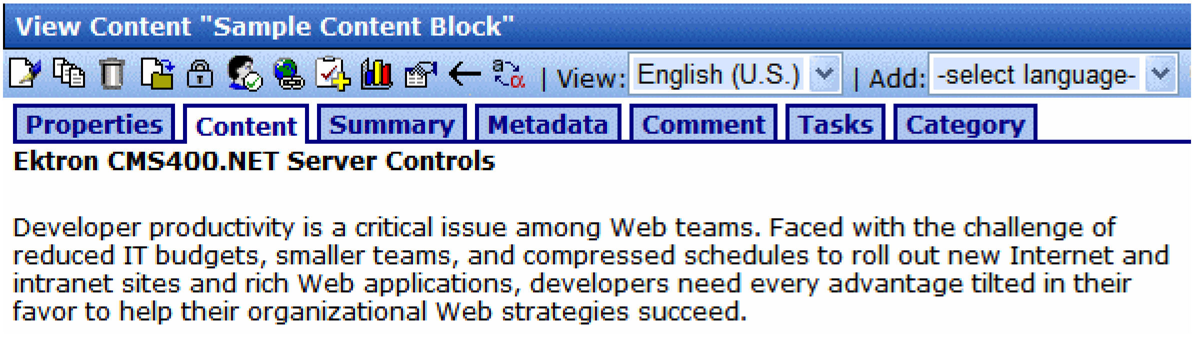


4. Hover the cursor over the content, click the triangle (◀), and select **View** from the dropdown menu.



Alternatively, click the content's title.

5. The View Content screen appears.

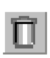


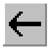
NOTE You can also click the content title to access the View screen.

After you select the content, you have the following options.

Your options depend on your permissions and the status of the content.

Button or Tab	Name	Description	For more information, see
Properties tab	Content Properties	View the content's properties	”Properties” on page 45
Content tab	View Content	Displays content	
Summary tab	Edit Summary	Edit content's summary	”Adding a Content Summary” on page 73

Button or Tab	Name	Description	For more information, see
Metadata tab	Edit Metadata	Edit content's metadata	"Adding or Editing Metadata" on page 77
Comment tab	View Comment	View comments on changes made when editing content. This comment also appears on the View Content and Content History screens. Use it to help distinguish one version from another.	
Tasks tab	Add/edit tasks	Add or edit tasks for this content	"Managing Tasks" on page 286
Web Alerts tab	Add/edit Web Alerts	Add or edit Web Alerts for this content	**Ektron CMS400.NET** Administrator manual chapter "Web Alert Feature"
Templates tab	Add/edit Templates	The template currently assigned to the content.	The **Ektron CMS400.NET** Administrator Manual section "Managing HTML Content" > "Creating/Updating Templates"
Category tab	Add/edit Taxonomy Category	Any taxonomy categories currently assigned to the content.	The **Ektron CMS400.NET** Administrator Manual section "Taxonomy"
	Edit Content	Open content for editing	"Editing HTML Content" on page 52
	View History	View older versions of content; restore older version	"Viewing and Restoring Previous Content" on page 108
	View Staged	Displays staged content	"Staged Content" on page 806
	View Difference	Compares current and earlier versions of content	"Comparing Versions of Content" on page 98
	Delete	Delete content	"Deleting Content" on page 57
	Check for content linked to this content	Identify all content with Quicklinks to this content	"Checking for Broken Quicklinks" on page 59

Button or Tab	Name	Description	For more information, see
	Add Task	Attach a task to content	”Task Module Toolbar” on page 311
	Return	Go back to previous menu	
View (language)	View	If you can view content in more than one language, select a language from the drop down list.	
Add **-select language-**	**Add** **-select language-**	Lets you copy current content into a new item and translate it to selected language.	”Translating Content to Another Language” on page 55

Properties

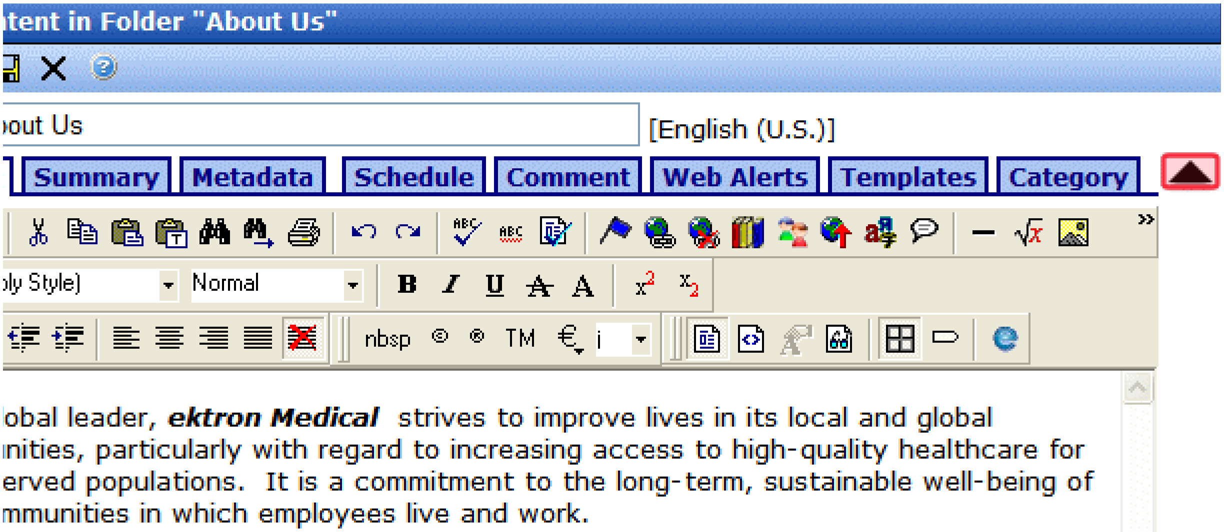
The content properties screen contains information about the content.

Field	Description
Content Title	The title assigned to the content
Content ID	The ID number assigned to the content. The ID number is used to retrieve content from a database.
Content language	The content’s language
Status	The current status of the content *See Also:* ”Appendix A: Content Statuses” on page 798
Last User to Edit	The last user to edit this content
Last Edit Date	When the content was last edited
Start Date	When the content will go live on the Web site
End Date	When the content will be removed from the Web site

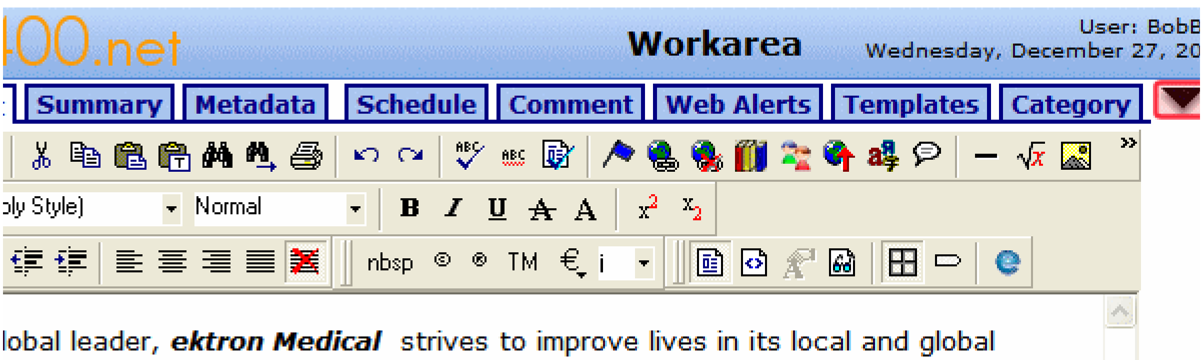
Field	Description
Action on End Date	What happens to the content when its end date and time are reached. *See Also:* ”Setting Archive Options” on page 69
Date Created	When the content was created
Approval Method	Whether all approvers must sign off on content before it is published; managed by your system administrator.
Approvals	The users in the approval chain for this content. *See Also:* ”Approving/ Declining Content” on page 87
Smart Form Configuration	The Smart Form applied to the content. This is typically managed by your system administrator. *See Also:* **Ektron CMS400.NET** Administrator Manual Section “Managing Content Folders” > “Smart Forms”
Template	The template currently assigned to the content. This is typically managed by your system administrator. *See Also:* The **Ektron CMS400.NET** Administrator Manual section “Managing HTML Content” > “Creating/ Updating Templates”
Path	The folder path to the content’s folder. A slash (\) represents the Content folder.
Rating	**Ektron CMS400.NET** provides a Content Rating feature that lets site visitors rate any content item on a scale of 1 to 10. If this feature is enabled for the content item, the average numerical rating appears. *See Also:* **Ektron CMS400.NET** Administrator Manual section “Managing Content” > “Content Rating”
Content Searchable	**True** appears if the content can be found when someone searches your Web site. However, even if content is *not* searchable, the Workarea Advanced search still finds it. *See Also:* ”The Advanced Search Tab” on page 119

Expanding the Content Area

You can vertically expand the content area of the screen. This gives you more space to work on content. To expand the content portion of the Workarea, click the up arrow (▲), highlighted below.



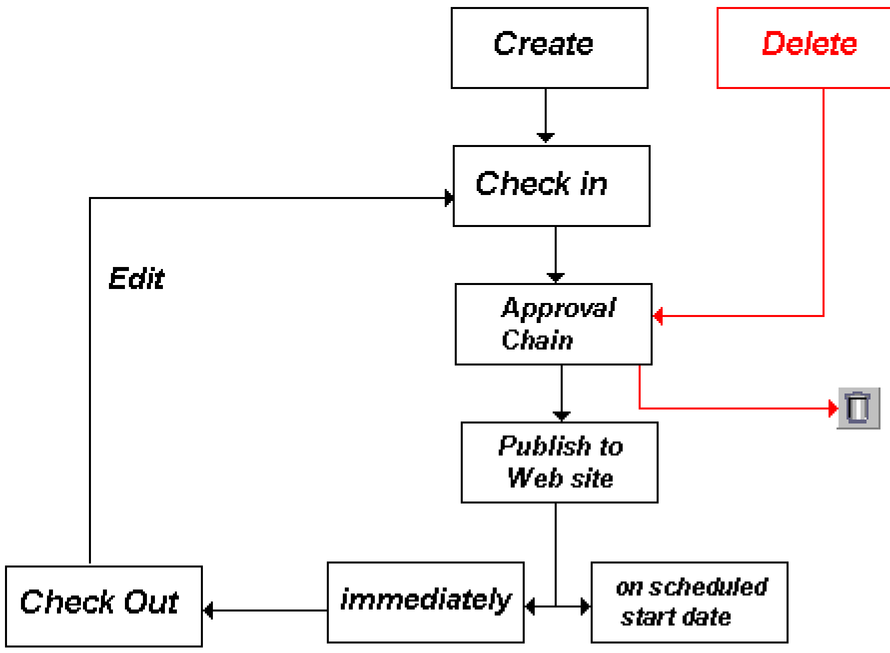
Once the content area is expanded, the top row of buttons and title are not visible.



Click the down arrow ( ) to return the content area to normal size. The top row of buttons and title return.

Adding HTML Content

You can only add content to a folder if you have permission to do so. The following flowchart illustrates a typical sequence of events when working with content.



After you create content, you or your system administrator typically make it available on the site. For example, you can add a hyperlink to it from another page, or place it in a collection or menu. Your administrator can add it to a list summary or content list.

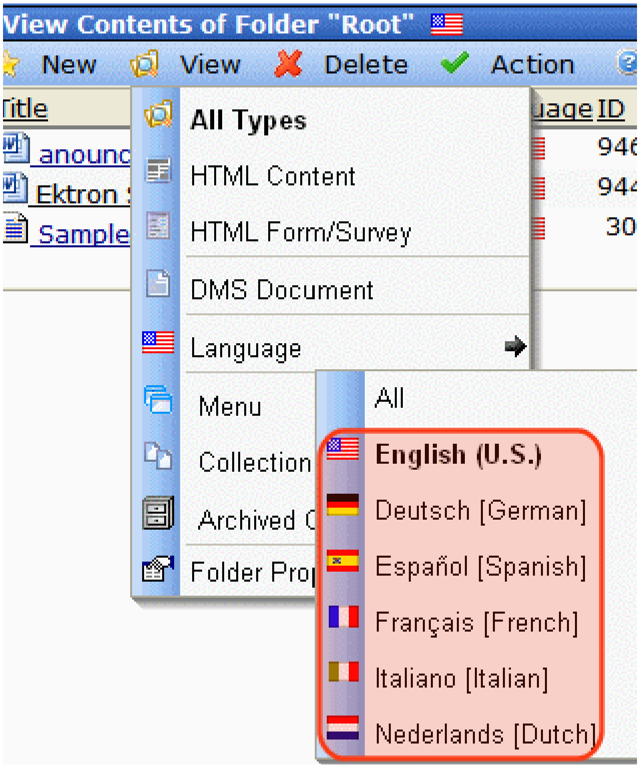
NOTE Only users with **Add** permission for a folder can add content to it. *See Also:* Ektron CMS400.NET Administrator Manual chapter "Setting Permissions"

NOTE This section only explains how to create HTML content. The procedure for creating/uploading other types content are listed in the table below.

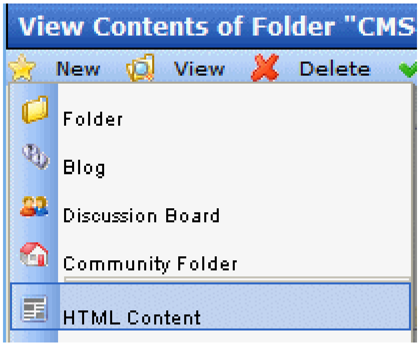
To add HTML content, follow these steps.

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

2. Click **View > Language** and select a language from the list.



3. Click **New > HTML Content**.



4. The Edit Content window opens.
5. Create content in the editor using the following table.

Responding to the Fields on the Add Content Screen

Field	**Description**
Title	Enter a title for the content.
Add to Quicklinks Table	Note: This checkbox only appears if you are a member of the Administrators User Group. Check if you want to create a Quicklink to this content. If you do, users can insert links to this content from within other **Ektron CMS400.NET** content items *See Also:* "A quicklink is a special kind of hyperlink that jumps to another content item on your Web site. (A regular hyperlink jumps to a Web page on the internet.)" on page 132
Content Searchable	Note: This checkbox only appears if you are a member of the Administrators User Group. Check this box if the content should be found when someone searches your Web site. However, even if content is *not* searchdisplay' • the Workarea Advanced search still finds it. *See Also:* "The Advanced Search Tab" on page 119 • it can appear among Suggested Results. *See Also:* **Ektron CMS400.NET** Administrator Manual section "Searching Your Web Site" > "Suggested Results"

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

Buttons on the Add Content Screen

Button	**Name**	**Description**
	Submit	Submit the content into the approval chain. This action also returns the new or updated content to the database and exits the editor. *See Also:* "Approving/Declining Content" on page 87

Button	Name	Description
	Publish	Publish the content to the Web site. Note: Only the last approver in the approval chain sees this button. If no approval chain is assigned to the content's folder, every authorized user sees this button. *See Also:* "Approving/Declining Content" on page 87 This action also returns the changed content to the database and exits the editor.
	Check In	Save and check-in the document. This action returns the changed content to the database and exits the editor. It does *not* submit the content into the approval chain. Rather, it allows you and other users to continue changing it.
	Save	Save the content without leaving the editor. It is a good idea to save your work frequently.
	Cancel	Close the editor without saving changes.

Tabs on the Edit Content Screen

Tab	Description
Content	Insert content. For more information about using **Ektron CMS400.NET**'s editors, see "Introduction to Ektron CMS400.NET Editors" on page 486.
Summary	Enter or edit the content summary. *See Also:* "Adding a Content Summary" on page 73
Metadata	Enter or edit the content metadata. Note: All required metadata must be added before content can be checked in or submitted into the approval chain. *See Also:* "Adding or Editing Metadata" on page 77

Tab	Description
Comment	Briefly describe the content, or comment on changes made when editing content. The history comment appears on the View Content and Content History screens.
Schedule	Use this tab to set a future publication date/time. In order to be published, this content must be approved *and* reach its publication date/time. *See Also:* ”Scheduling Content to Begin and End” on page 65 If appropriate, enter a date when the content will no longer be viewable on the Web site. *See Also:* ”Setting an End Date on Content” on page 68
Web Alerts	See the **Ektron CMS400.NET** Administrator Manual chapter “Web Alert Feature”
Templates	This content’s folder must have a default template. It can also have additional templates assigned. When content is created, the default template is automatically assigned to it. If you want to change the template assigned to this content, click this tab and choose a template from the dropdown list. *See Also:* **Ektron CMS400.NET** Administrator Manual section “Managing HTML Content” > “Creating/Updating Templates”
Category	Assign taxonomy categories to this content. *See Also:* **Ektron CMS400.NET** Administrator Manual chapter “Taxonomy.”

Editing HTML Content

Ektron CMS400.NET HTML content can be in any of several statuses, as described in ”Appendix A: Content Statuses” on page 798. You can only edit content for which you have permission and in one of the following statuses:

- published
- checked in
- checked out by you
- submitted for your approval

NOTE If you check content out, you or a member of the Administrators group must check it in before other users can edit it.

NOTE The ability to edit content is a privilege granted by the system administrator. If you do not see an **Edit** option on the dropdown menu, you do not have permission to do so.

See Also:

- ”Editing a Form” on page 210
- ”Translating Content to Another Language” on page 55
- ”Editing an Office Document” on page 244
- ”Editing a Managed File” on page 256

Steps in Editing HTML Content

There are two ways to edit content:

- from a web page after you log in
- from the **Ektron CMS400.NET** Workarea

Each is now explained.

Accessing the Edit Content Screen from a Web Page

To access the Edit Content screen from a Web page, follow these steps.

1. Browse to the content you want to edit.
2. Click **Edit** from the menu options.
3. The Edit Content in Folder screen appears. From here, you can
   - edit content
   - create or edit a summary
   - specify metadata for the content
   - enter or update a comment
   - enter or update start and end dates
   - review and update **Web Alert** information (To learn more, see the **Ektron CMS400.NET** Administrator manual chapter “Web Alert Feature”)

- if manual aliasing is enabled, an **Alias** tab appears (To learn more, see the **Ektron CMS400.NET** Administrator Manual section “URL Aliasing” > “Manual Aliasing”)
- assign or change available **templates** (To learn more, see the **Ektron CMS400.NET** Administrator Manual section “Managing HTML Content” > “Creating/Updating Templates”)
- assign **taxonomy** categories (To learn more, see the **Ektron CMS400.NET** Administrator Manual section “Taxonomy”)
- save changes
- check in content
- submit content for approval
- publish content to the Web site
- access the library

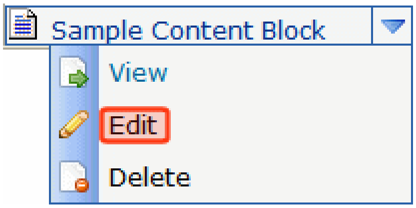
4. Edit the content. *See Also:* ”Table of Toolbar Buttons and Drop-Down Lists” on page 633

   Or, you can choose a toolbar option or tab from the top of the Edit Content window. These options are described in ”Buttons on the Add Content Screen” on page 50 and ”Tabs on the Edit Content Screen” on page 51.

Accessing the Edit Content Screen from the Workarea

To access the Edit Content screen from the Workarea, follow these steps.

1. Access the View Content screen for the folder that contains the content you want to edit, as described in ”Viewing Content” on page 40.
2. Select **View > Language** then the language whose content you want to view.
3. Hover the cursor over the triangle ( ) and click.
4. Select **Edit** from the menu.



5. The editor opens with the content block inserted.

6. From the Edit Content window, you can

    - edit content
    - create or edit a summary
    - specify metadata for the content
    - enter or update a comment
    - enter or update start and end dates
    - review and update Web Alert information (To learn more, see the **Ektron CMS400.NET** Administrator manual chapter “Web Alert Feature”)
    - review and update templates (To learn more, see the **Ektron CMS400.NET** Administrator Manual section “Managing HTML Content” > “Creating/Updating Templates”)
    - review and update categories (To learn more, see the **Ektron CMS400.NET** Administrator manual chapter “Taxonomy”)
    - save changes
    - check in content
    - submit content for approval
    - publish content to the Web site
    - access the library

7. Make the necessary edits to the content.

    Or, you can choose a toolbar option or tab from the top of the Edit Content window. These options are described in ”Buttons on the Add Content Screen” on page 50 and ”Tabs on the Edit Content Screen” on page 51.

Translating Content to Another Language

NOTE The following procedure only works with HTML or XML content. You cannot translate other file types as described below.

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

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

NOTE Ektron CMS400.NET also has a Language Export feature copies content into XLIFF files for submission to a translation agency. For more information, see the Ektron CMS400.NET Administrator Manual section “Multi-Language Support” > “Using the Language Export Feature.”

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

1. Go to the View Content screen for the content you want to translate. *See Also:* ”Viewing Content” on page 40
2. Use the **Add:** dropdown list in the upper right corner to select the language into which you want to translate the content.

3. The Edit Content screen appears with original language content.
4. Translate into the new language then delete the original content.

   If desired, you can click the Translate button (). If you do, a new screen prompts you to identify the original language, new language, and a glossary. Then, the content is translated. If you like the translation, click **Paste Content**, and the translated content replaces the original.

   Once the translated content is inserted into the editor, you can edit it as needed.
5. When you save the content, it is saved as the edition of that content in the selected language. It has the same content ID number as the original content but a different language identifier.

Deleting Content

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

NOTE It is good practice to check for broken quicklinks before deleting content. See ”Checking for Broken Quicklinks” on page 59.

The Delete command lets you permanently delete obsolete content from your Web site.

There are two ways to delete content.

- A folder-level Delete option (

) removes several content items from the current folder. This option only deletes Approved content. For more information, see ”Deleting Several Content Items in a Folder” on page 59.
- Depending on the content’s status and your permissions, you may be able to delete one item at a time. The options for doing so are
  - a **Delete** option when viewing content from a Web page
  - a **Delete** menu option that appears after selecting content on the View Contents of Folder screen

  For more information, see ”Deleting a Single Content Item” on page 57.

Like publishing, deleted content must proceed through the approval chain before it is removed. If you are the last approver in the approval chain, the content is deleted immediately. *See Also:* ”Approving/Declining Content” on page 87

Deleting a Single Content Item

To delete one content item, follow these steps.

Deleting One Content Item from a Web Page

To delete content from a Web page, follow these steps.

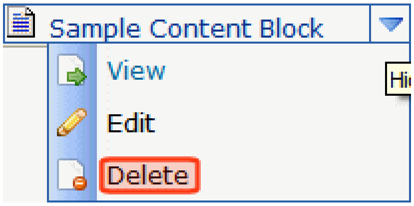
1. Sign in.

2. Browse to the content you want to delete.
3. Click the **Delete** menu option.
4. The View Content screen for the selected content appears. (See ”Viewing Content” on page 40.)
5. Click the Delete button ( ).
6. The following message appears.

7. Click **OK** to delete the content.

Deleting One Content Item from the Workarea

1. Access the View Contents of Folder screen for the content you want to delete, as described in ”Viewing Content” on page 40.
2. Hover the cursor over the triangle ( ).
3. Select **Delete** from the dropdown menu.



NOTE If you do not see **Delete**, either you lack permission to delete the content, or its status makes it ineligible for deleting.

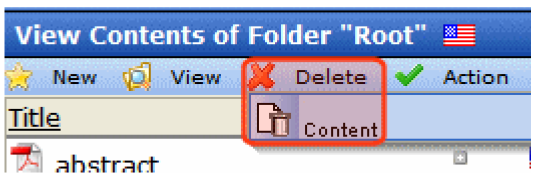
4. The following message appears.

5. Click **OK** to delete the content.

Deleting Several Content Items in a Folder

On the View Contents of Folder screen, you can delete several Approved content items at once. To do so, follow these steps.

1. Navigate to the folder that contains the Approved content you want to delete.
2. Hover the cursor over the Delete menu (Delete).
3. Select **Content** from the dropdown menu.



4. Check boxes next to Approved content items you want to delete.

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

5. Click the Delete Content button ( ).
6. A confirmation message appears.
7. Click **OK** to continue.

Checking for Broken Quicklinks

The Link Search button ( ) locates all content that includes a Quicklink to the displayed content. This feature is useful before deleting content, because it informs you of every content item that will include a “dead” link if you delete a content item. You should then edit that content and remove or change the obsolete Quicklinks.

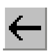
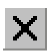
To use the link checker, follow these steps.

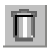
1. Access the View Content page for the content whose links you want to check, as described in ”Viewing Content” on page 40.
2. Click the Link Search button ().
3. A page lists each content item that links to the current content.
4. Click the title to access the View Content page for the selected content.
5. Remove or change the Quicklink.

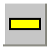
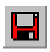
Workarea Toolbar Buttons

Many Workarea screens feature a toolbar that contains buttons for performing actions. This section explains the buttons’ functions.

Button	Name	Description
	Add	Adds items in several places.
	Add Calendar Event	Accesses the add calendar event screen in the Workarea.
	Add Content	In a content folder, opens the editor and allows you to create new content. *See Also:* ”Adding HTML Content” on page 48
	Add Content Folder	In a content folder, allows you to create a subfolder to further organize your content. *See Also:* ”Workarea Toolbar Buttons” on page 60

Button	Name	Description
	Add Library Item	In the library folder, allows you to upload an image or file, or add a hyperlink or Quicklink to use in content. *See Also:* "Library Folder" on page 131
	Add Task	Assign task to a user. *See Also:* "Managing Tasks" on page 286
	Approvals	View approval chain for folder or content. *See Also:* "Approving/Declining Content" on page 87
	Approve	Approve content that awaits your approval.
	Approve All	In the approvals folder, approves all content awaiting your approval with one click.
	Archived Content	If current content is being displayed, switch to display archived content. If archived content is being displayed, switch to display current content. *See Also:* "Setting Archive Options" on page 69
	Back	Return to previous screen.
	Calendar	Lets you choose when content will go live. *See Also:* "Working with Calendars" on page 261
	Cancel	Cancels action you are performing without saving the information.
	Check-in	Saves and checks in content you are working on. *See Also:* "Approved Content" on page 799
	Collection	Accesses the collection area for content; lets you create, edit, and delete collections. *See Also:* "Working with Collections" on page 424

Button	Name	Description
	Decline	Declines an approval request submitted to you. Clicking this button rejects changes and keeps the current version of content live on Web site. You are prompted to enter a reason for the decline. After you decline • The author who made the change is notified by email • The content is removed from the Approval Chain If the author edited content then submitted it for approval, the updated content remains in the file. If you do not want it to remain, choose the **Edit** option. You may be asked to decline both a content change and a request to delete content.
	Delete	Deletes selected item. *See Also:* ”Deleting Content” on page 57
	Delete Content	Deletes multiple content items at once. *See Also:* ”Deleting Content” on page 57
	Delete Folder	Deletes current content folder.
	Do Not Apply XSLT	Removes XSLT applied to XML content viewed in the content history area. *See Also:* ”Removing Applied XSLT” on page 112
	Edit	Edits content or specific criteria in the Workarea.
	Insert Library Item	Inserts selected library item into content. *See Also:* ”Library Folder” on page 131
	Link Check	Identifies content with a hyperlink to the current content. You would typically use this feature to remove the links before deleting content. If you do not remove the links, they are inoperative after the content is deleted.
	Overwrite	Replaces an image or file with a newer version. *See Also:* ”Overwriting Images” on page 152
	Preview	Previews item that was or will be added.

Button	Name	Description
	Publish	Save and publish the content.
	Remove	Removes items from folders and lists in the Workarea.
	Reorder	Changes the sequence of links in a collection. *See Also:* "Working with Collections" on page 424
	Restore	Restores previously published content. *See Also:* "Viewing and Restoring Previous Content" on page 108
	Save	Saves content that was modified.
	Search	Searches content and library folder screens. *See Also:* "Searching the Library" on page 136
	Show Calendar	Displays the calendar in the Workarea. *See Also:* "Working with Calendars" on page 261
	Submit	Saves and submits content to next approver in the approval chain.
	Update	Changes are saved and content is updated.
	View Date	View all calendar events for a selected day.
	View Difference	Opens the View Content Difference feature. *See Also:* "Comparing Versions of Content" on page 98
	View History	View history of selected content. *See Also:* "Viewing and Restoring Previous Content" on page 108
	View Published	Displays currently published version of content.

Button	Name	Description
	View Staged	Displays staged content. *See Also:* "Staged Content" on page 806
 Select language		Selects the language of the content being displayed.

Scheduling Content to Begin and End

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

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

How Does It Work?

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

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

The Ektron Windows Service manages these changes to your site. *See Also:* **Ektron CMS400.NET** Administrator Manual section “Managing your CMS400 System” > “Ektron Windows Service.”

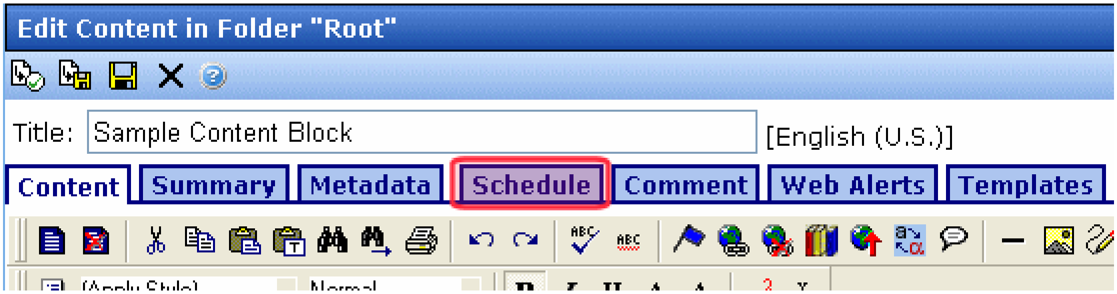
This topic is explained through the following subtopics:

- ”Setting a Start Date” on page 66
- ”Setting an End Date on Content” on page 68
- ”Setting Archive Options” on page 69

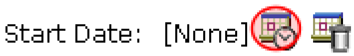
Setting a Start Date

To set a start date, follow these steps.

1. Access the editor by adding new content or editing existing content.
2. If adding new content, enter a title and the content.
3. Click the **Schedule** tab.



4. Click the calendar button next to the **Start Date** field.



5. A calendar pops up.
6. Select the date and time when this version of the content will become visible on the Web site.

7. Click the **Done** button.
8. The date and time appear in the **Start Date** field.

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

What Happens After I Set a Start Date?

After you save the content, it appears on the Content Pending Start Date report, which helps you keep track of content with a future start date. *See Also:* **Ektron CMS400.NET** Administrator Manual > "Content Reports" > "Content Pending Start Date Report"

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

- The content is new
- The content already exists, and you are publishing a new version

Each scenario is now explained.

Setting the Go-Live Date on New Content

When you set a go-live date on new content, it becomes viewable on the specified date and time as long as it completes the approval chain. If a site visitor accesses the page that contains the content before then, he sees only the template.

If a logged-in CMS user browses your Web site, he sees a grey border around the content until the date specified. If he clicks within the grey border, he can use the Preview option to see the new content.

Setting the Go-live Date on Existing Content

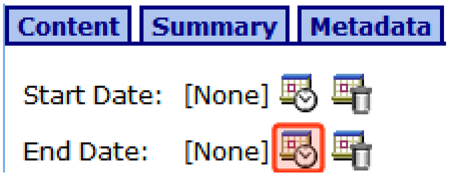
When you set a go-live date for changes to existing content, and it completes the approval chain, a logged-in CMS user sees a grey border around the content until the date specified.

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

Setting an End Date on Content

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

1. Edit content. See ”Editing HTML Content” on page 52.
2. Click the **Schedule** tab.
3. Click the calendar icon next to the **End Date** field.



4. A calendar pops up.
5. Select the date and time you want the content to be removed from the Web site.

6. Click the **Done** button.
7. The date and time appear in the **End Date** field

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

What Happens After I Set an End Date?

You have three choices for what to do with content when it reaches its end date. These are explained in "Setting Archive Options" on page 69.

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

Appearance on Content Reports

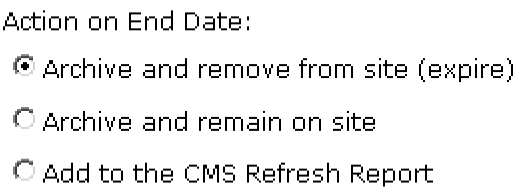
After content reaches its end date, it appears on the Expired Content report, which helps you track expired content.*See Also:* **Ektron CMS400.NET** Administrator Manual > "Content Reports" > "Expired Content Report"

The report lists all content whose end date will occur within a number of days that you specify.

Setting Archive Options

Use content's archive options to determine what happens upon reaching its end date/time. To be eligible for any option, the content must reach its end date/time, progress through its approval chain, and be published. Until those events occur, the content remains visible both within its content folder and on the site.

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



Each option is explained below.

Archive Options

Option	**Can site visitors view content upon expiration?**	**Can users view and edit content within Ektron CMS400.NET upon expiration?**
Archive and remove from site (expire)	No	Yes, within its folder by clicking the **View > Archive Content** option. Archived content can be found via the Workarea Advanced search (if the **Archived** check box is checked).

Option	Can site visitors view content upon expiration?	Can users view and edit content within Ektron CMS400.NET upon expiration?
Archive and remain on Site	• Content appears in a List Summary if the ListSummary control's `contentype` property is set to **Archive_Content**. • If content is an HTML form, the response page option appears. For example, if the form displays a message after the user completes it, that message appears. *See Also:* "A new screen lets you determine what happens after the site visitor completes the form. The choices are:" on page 160 • Content is found by the search (Workarea and site) • Content is visible within its taxonomy display • Content is visible if site visitor enters exact path, such as `http://localhost/CMS400Developer/dynamic.aspx?id=1014&__taxonomyid=14`	Yes, within its folder by clicking the **View > Archive Content** option. Also, can be found via Basic Search and Advanced search (if the **Archived** check box is checked).
Add to CMS Refresh Report	Yes	Yes, in the active area of its folder and on the Refresh Report. *See Also:* **Ektron CMS400.NET** Administrator Manual section "Content Reports" > "Refresh Reminder Report"

Restoring Content from Archived to Active State

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

1. Navigate to its folder.
2. Click **View > Archived Content**. (See "Setting Archive Options" on page 69).

3. Hover the cursor over the content, click the triangle ( ), and select **Edit** from the dropdown menu.
4. The Edit Content in Folder screen appears.
5. Click the **Schedule** tab.
6. Remove the **End Date** or change it to a future date.
7. Submit the content for publishing. When the content is published, it will no longer be archived.

Adding a Content Summary

A summary provides a short description of content to supplement the title when a list of content items appear on a Web page. You create a summary when creating or editing content. Then, your Web site developer can create Web pages that display just the title and summary to attract readers to the full story.

A good example is a news Web site, which lists titles and summaries of top stories (illustrated below)

TOP STORIES
Ektron Named a Rising Star (08-15-2003)
August 15, 2003, Amherst, New Hampshire, USA — Ektron, Inc., an innovator in Web content management and authoring, has been named a Rising Star as part of the prestigious New England Technology Fast 50 Program.

Ektron Launches International Distribution Program *(08-08-2003)*
August 8, 2003, Amherst, New Hampshire, USA — Ektron, Inc., an innovator in dynamic Web content authoring and management with over 350,000 users, today announced the launch of its international distribution program.

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

See Also:

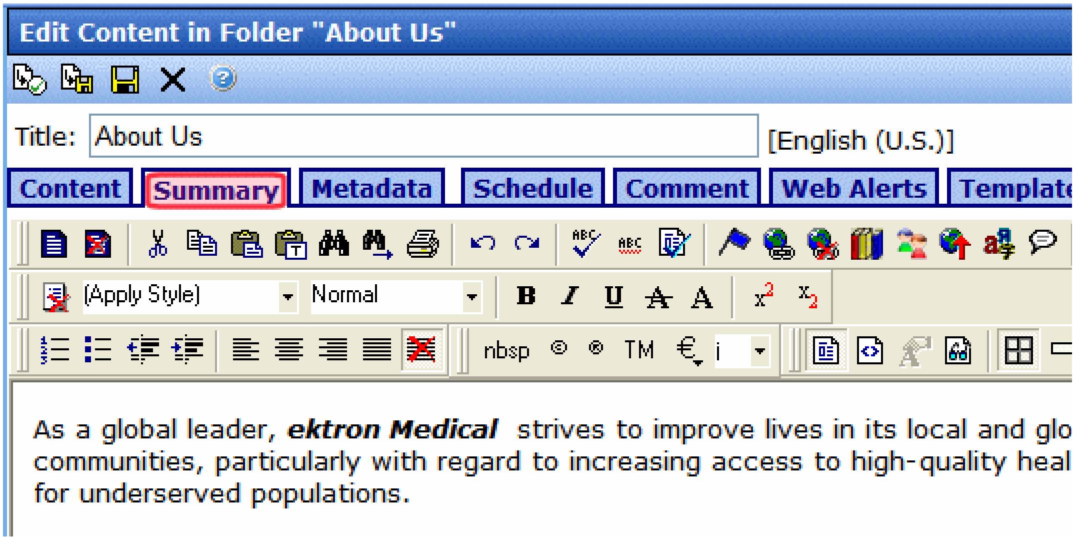
Automatic Creation of a Summary

Ektron CMS400.NET automatically generates a summary for new content if none exists. To do this, it checks the summary when new content is published. If the summary is blank, **Ektron CMS400.NET** copies the first 40 words of the content to the summary.

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

Creating a Summary for New Content

1. Navigate to the folder in which you want to create the content.
2. Click **New** then pick the content type from the dropdown menu.
3. The Add Content screen appears.
4. Insert a **Title** and content. *See Also:* ”Adding HTML Content” on page 48
5. Click the **Summary** tab.



6. Enter summary information for the content. The summary can include images, files, and hyperlinks. Its length can be restricted by your system administrator in the configuration setup file.
7. When done, click the appropriate button.

Creating a Summary for Existing Content

1. Navigate to the folder that contains the content.
2. Hover the cursor over the content, click the triangle ( ), and select **Edit** or **Edit Properties** from the dropdown menu.
3. The View Content screen appears.
4. Click the **Summary** tab to enter or edit summary information for the content. The summary can include images, files, and hyperlinks. Its length can be restricted by your system administrator in the configuration setup screen.
5. When done, click the appropriate button.
6. The View Content page reappears.

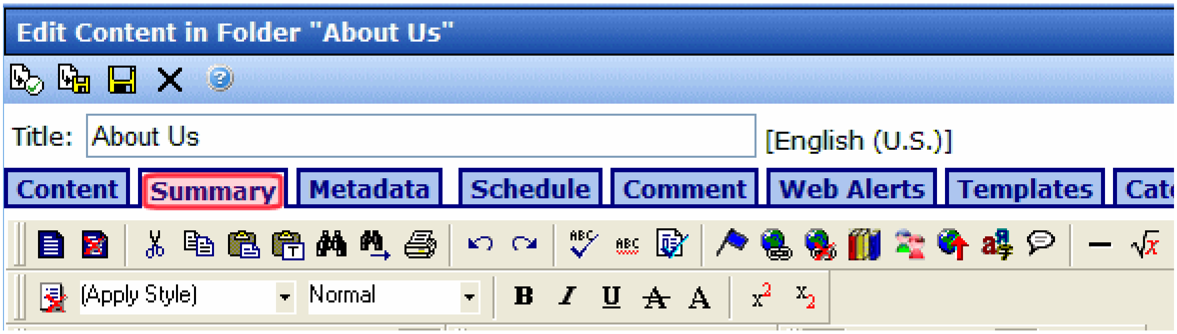
NOTE When you enter or edit existing content's summary, its status changes to checked out. After you create the summary, click the Check-In button to check the content in. From that point, you need to submit or publish it.

Editing a Summary

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

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

1. Access the View Content page for the content whose summary you want to edit, as described in "Viewing Content" on page 40.
2. Click the **Summary** tab.



3. The Edit Summary window opens.
4. Click the Edit button. The summary opens within the editor.
5. Make the necessary changes.
6. When done, click the appropriate button.
7. The View Content page reappears.

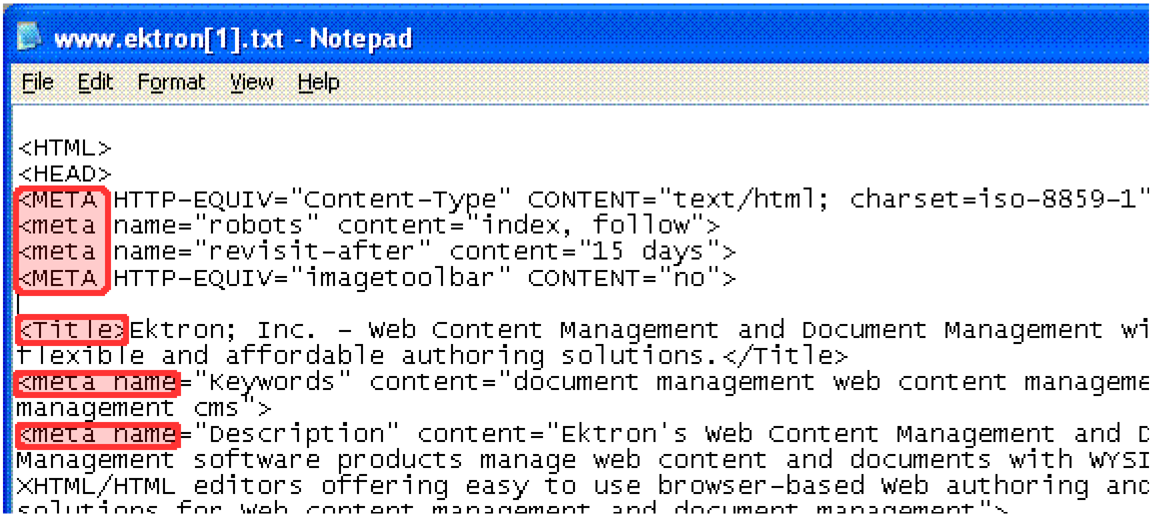
NOTE When you edit an existing content summary, it goes into a checked out state. After creating the summary, check the content back in. From that point, you must submit it or publish it.

Adding or Editing Metadata

You can add several kinds of metadata to **Ektron CMS400.NET** content.

- Metadata that can be found by your Web site search. It helps site visitors find content on your Web site. This kind of metadata can also be found using the Workarea's Search screen. For more information, see "Entering Custom Metadata" on page 78.

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



For more information, see "Entering Title and Keywords" on page 85.

- Metadata that identifies related **Ektron CMS400.NET** information (for example, another content item, a collection, or a ListSummary). Then, your Web site can display the related content whenever the source content item appears.

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 use that helmet.

- Image data - this standard metadata field is available to every content item. It identifies an image that can be retrieved by Ektron Markup Language's (EKML) `[$Image]` and `[$ImageThumbnail]` variables. (EKML is described in the **Ektron CMS400.NET** Developer's Guide.)

  An example of using Image data is a list summary that includes a photo of every item on the list. For example, your site promotes a soccer team. The list summary shows every player on the team. To the left of each player's name is a thumbnail of his image.

Metadata is more fully explained through the following topics.

- "Entering Custom Metadata" on page 78
- "Entering Title and Keywords" on page 85

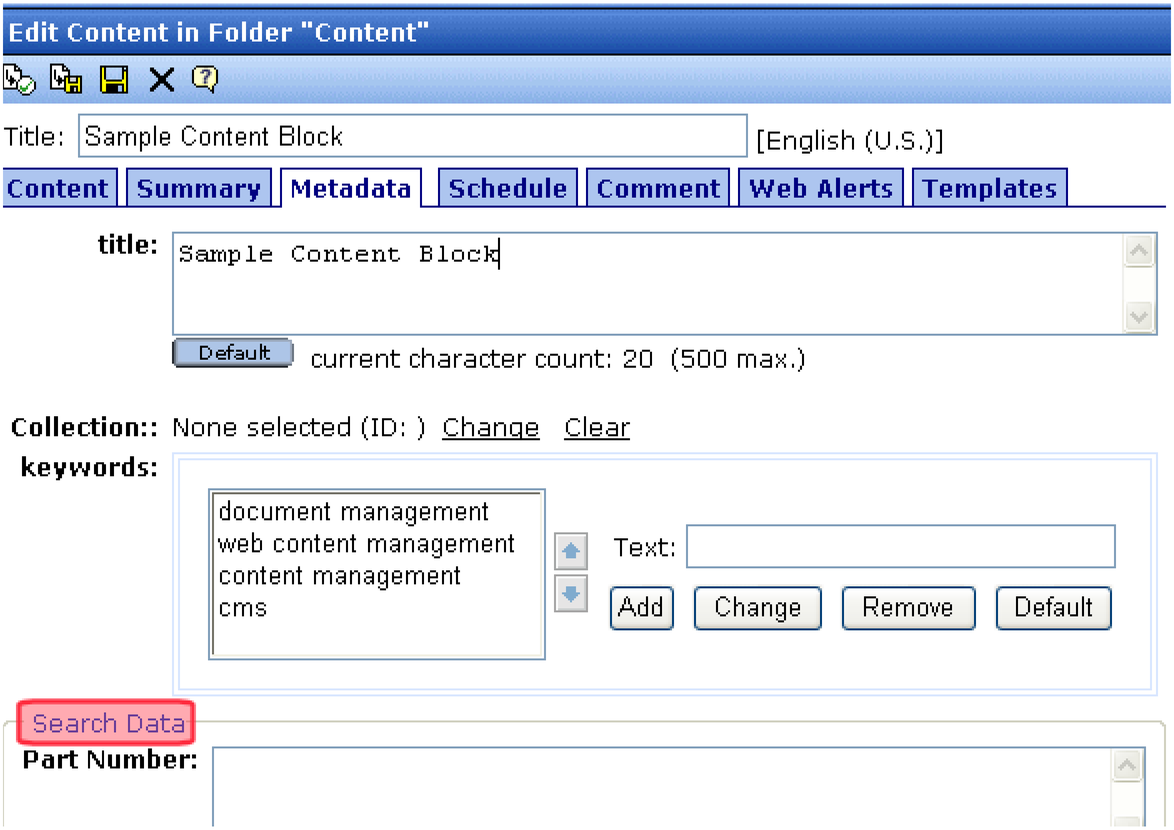
Entering Custom Metadata

Your system administrator defines the metadata that can be added to content. The metadata being collected can be customized for each folder. When you create or update content, you can define metadata using fields that the administrator specified.

NOTE In order to add metadata to content, an administrator must have created definitions for it in the language of the content.

For example, each document stored in the Document Management functionality has a unique part number. Your system administrator adds a custom search field called **Part Number**, and specifies that only numbers can be inserted into the field.

When you add a document to **Ektron CMS400.NET**, you access the content's metadata and insert the correct part number for the document (illustrated below).



Then, anyone visiting your Web site can find that document by its part number using your Web site's search screen.

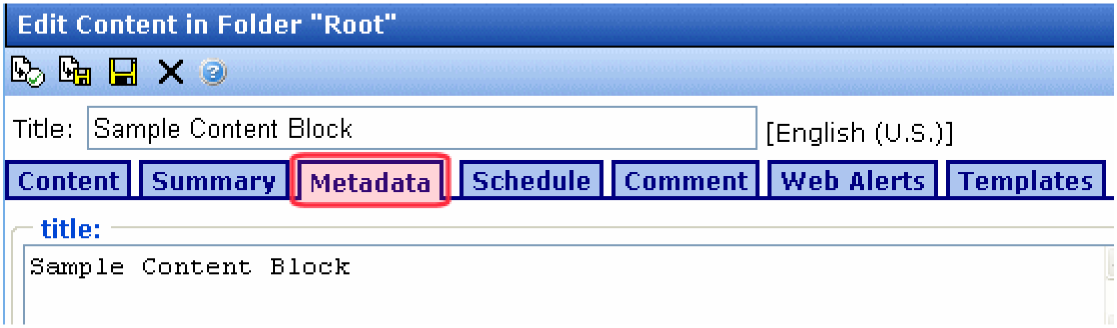
NOTE When your system administrator sets up metadata, he determines whether or not is it "publicly viewable."
If it is, the search field appears on the search screen that site visitors use along with the search screen in the Ektron CMS400.NET Workarea. If the data is not publicly viewable, it only appears on the Workarea search screen.

Entering or Editing Metadata

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

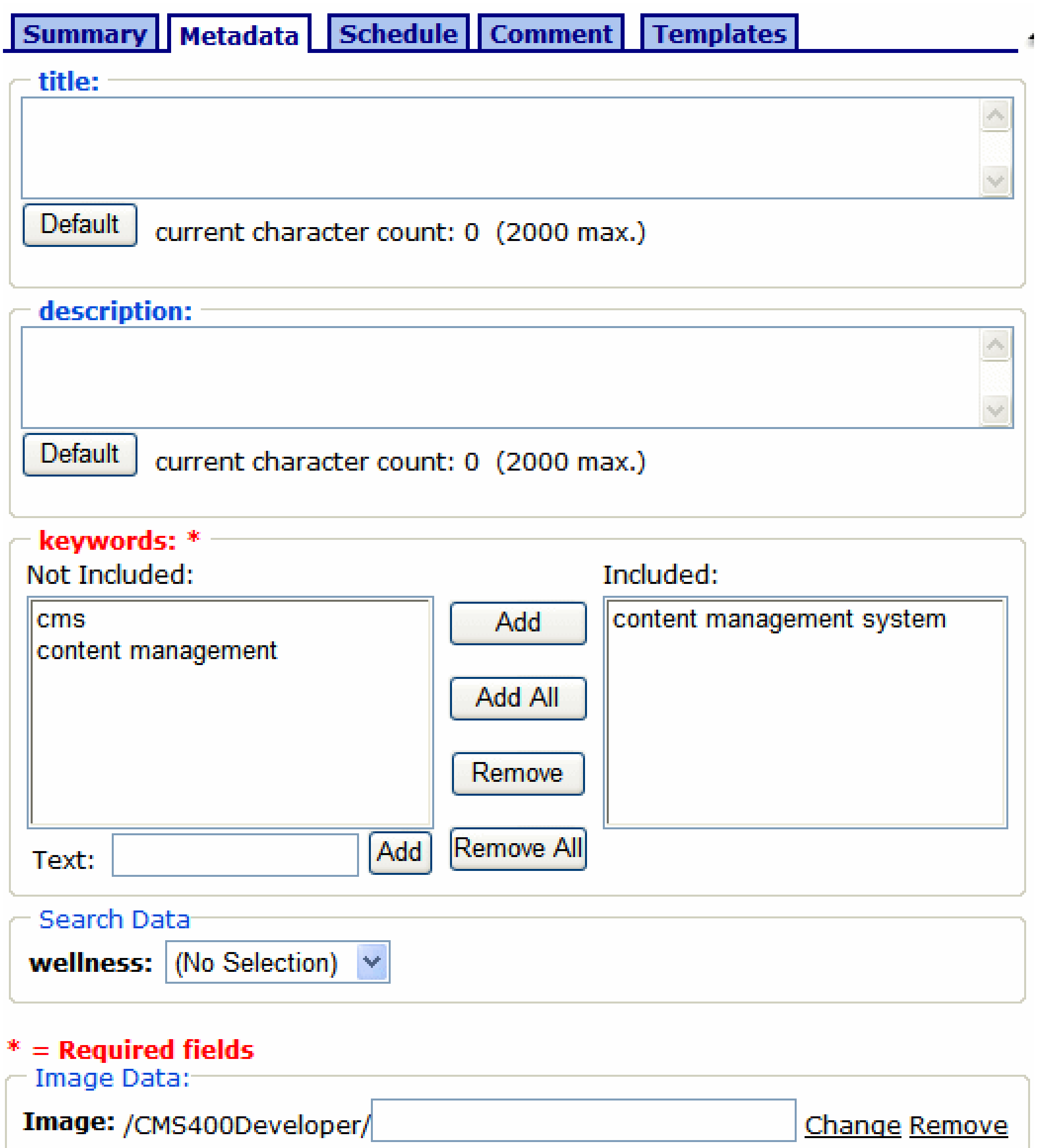
WARNING! You may only edit metadata of content that is published, checked in, or checked out by you.

1. Access the Edit Content screen for the content whose metadata you want to enter or edit, as described in "Editing HTML Content" on page 52.
2. Click the **Metadata** tab.



3. The Edit Metadata screen opens with the current metadata displayed. In order to add metadata to content, an administrator *must* have created definitions for it in the language of the content.

NOTE Your system administrator determines the appearance of the Metadata screen.



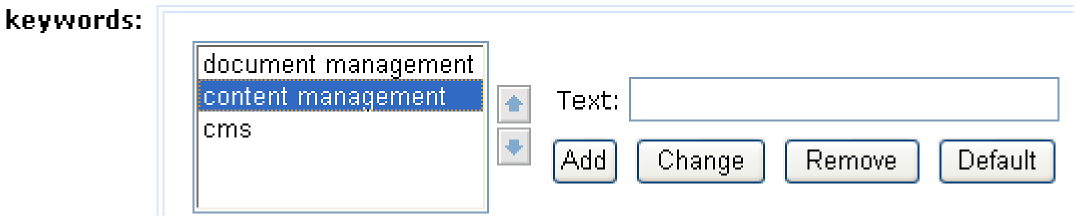
4. Edit the metadata. Note that

- Required field labels are red and marked with an asterisk (*). You must place at least one response in such fields before you can save the metadata.
- Your system administrator may prevent you from editing a field. In this case, the field has a gray background, and you cannot place the cursor there.

- Fields may appear in two columns. In this case, the system administrator provides a list of terms that you can apply to the content. You can select terms from the list or enter free text.

  One column is labeled **Not Included** and the other **Included**. Move terms between lists by clicking the **Add** and **Remove** buttons.

- You may see a list of terms in one box, and a field labeled **Text** to its right.



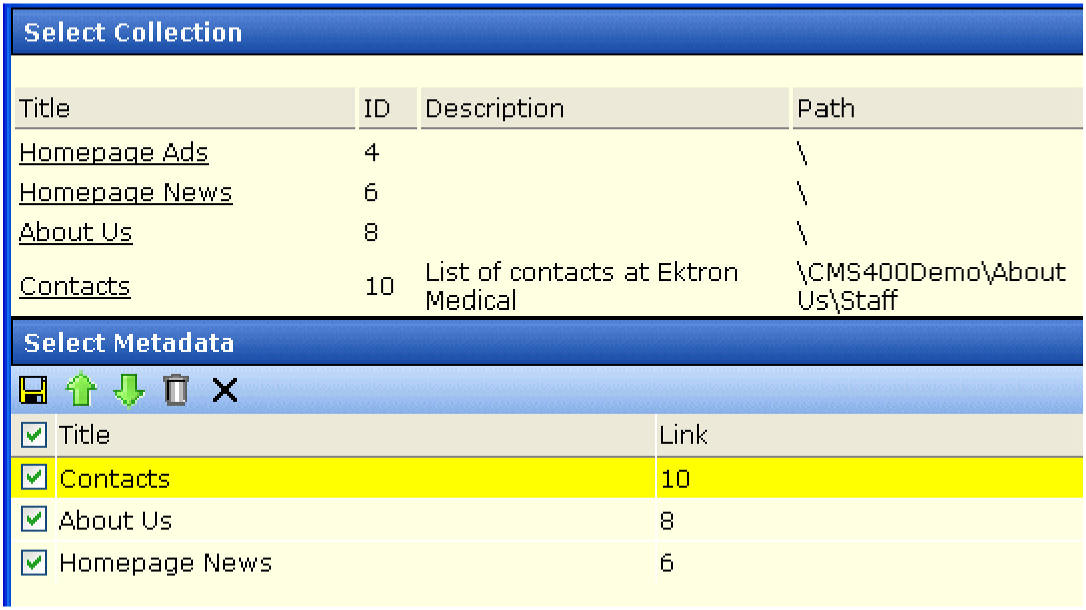
  With such a list, you can

  - add a new term by typing it into the **Text** field and clicking **Add**
  - remove any term by selecting it and clicking **Remove**
  - modify any term by selecting it. It appears within the **Text** field, where you can change it. Then, press the **Change** button.
  - restore the terms to their default settings by pressing the **Default** button
  - change the sequence of terms by selecting one then pressing the up and down arrows ( )

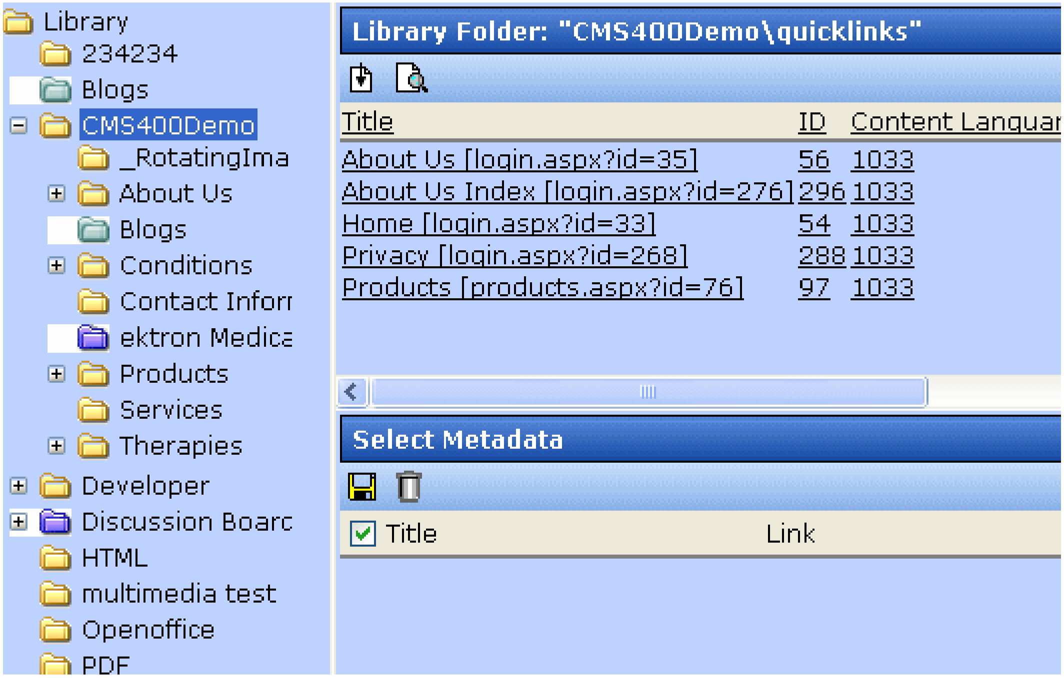
- If *related content* metadata is available for the content, its name appears followed by **None Selected (ID)** **<u>Change</u>** **<u>Clear</u>**.

  Click **Change** to display a window of choices. For example, if the related content type is a collection, all collections appear in the popup. Select the appropriate data for this content.

  Selected items appear in the bottom of the screen. You can reorder them by selecting an item then clicking the up and down arrows. To remove items from the bottom of the screen, select them and click the delete ( ) button.



If the related content type is either content item or library image, hyperlink, or file, the following window appears when you click **Change**.



Use this screen to identify the related content. To do this,

- Select a folder from the left frame
- Double click the related-content item from the top right frame
- The item appears in the lower right frame
- When all items are in the lower right frame, click the Save button ( ) directly below **Select Metadata**

- If default metadata is defined for a specific data type, you can click the **Default** button at the bottom of each field to restore it.
- Below each field is a **Characters Left** field, which counts the number of metadata characters. You cannot exceed the maximum (500 characters).

5. Click the Save button ( ).
6. The View Content screen reappears.

The content is now in a checked out state to you. For the changes to take effect on the Web site, check in the content and submit it to the approval chain.

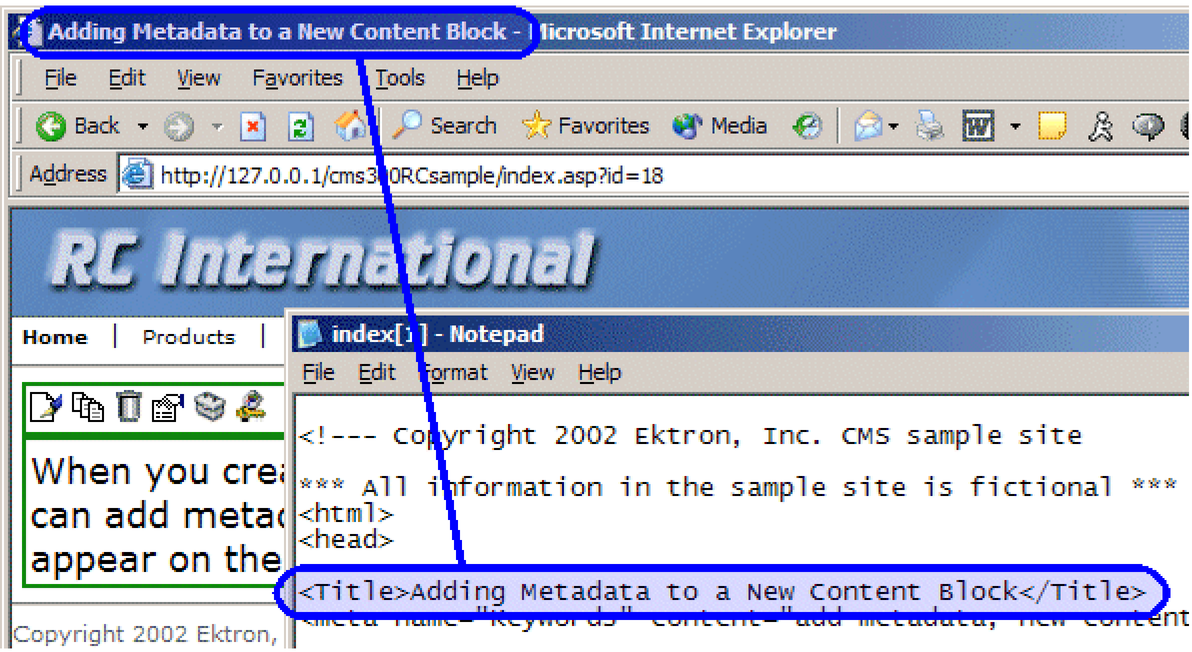
See Also: "Approving/Declining Content" on page 87

Entering Title and Keywords

After you create or update content, it is typically published. Programs that search the Web look at a page's title and keywords to determine if they should return your Web page. To improve search results, **Ektron CMS400.NET** provides two fields within Metadata by default.

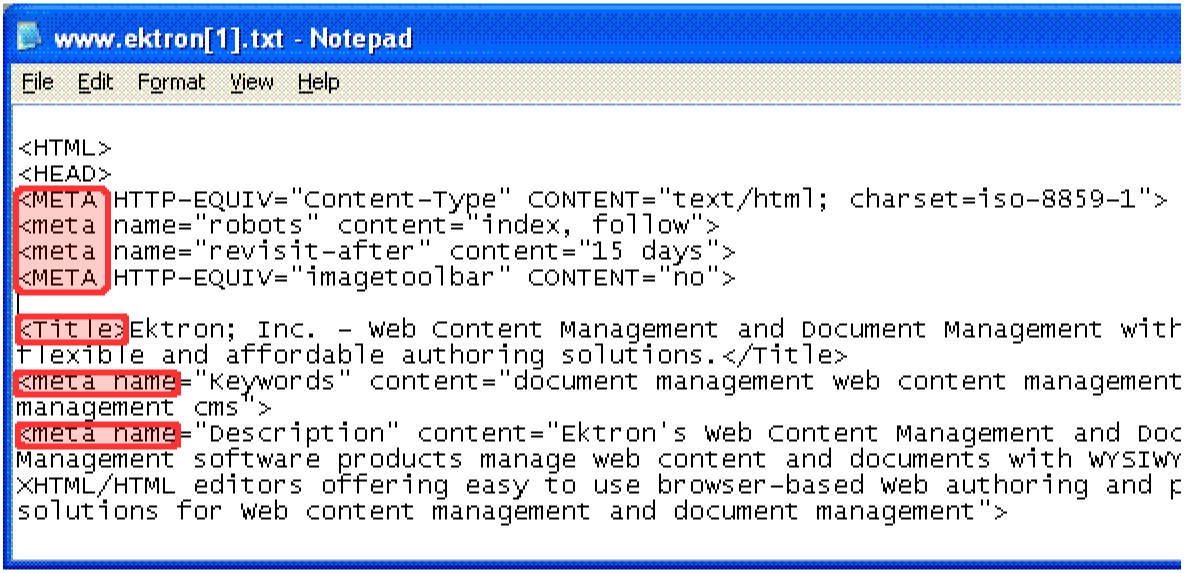
NOTE Your system administrator may enable or disable these fields for each folder.

- **Title** - appears on the search results screen to further define your Web page



- **Keywords** - are searched by leading search programs, along with the page's title

After content is published, you can view the page source to see its metadata. Below is an example.



On this Web page, notice the keywords are included in the meta tag, and the title is in HTML tags. These appear according to how the administrator sets up the metadata definitions.

Approving/Declining Content

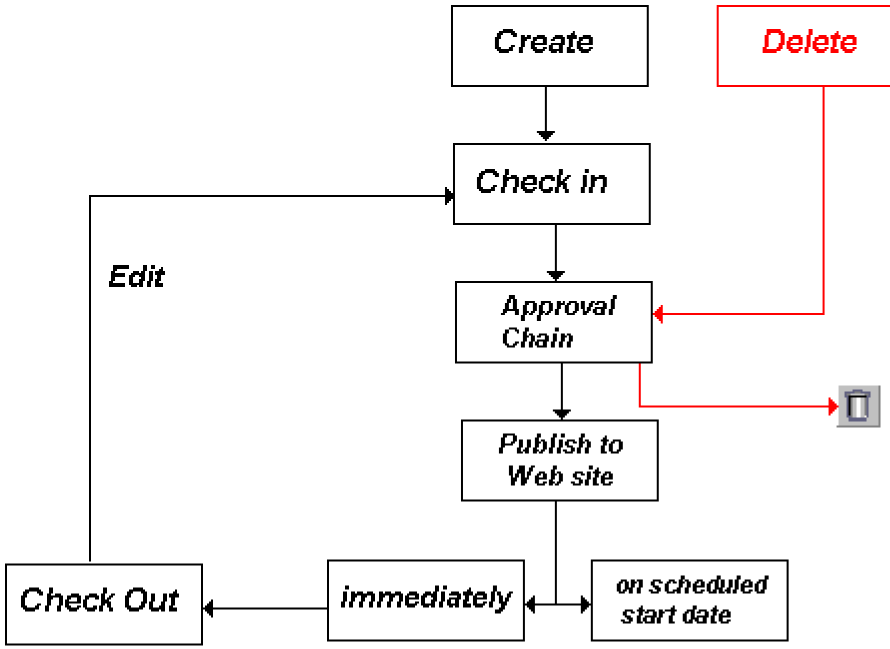
Your site administrator establishes an *approval chain* for each folder, or even specific content items. The approval chain is a list of people or groups who must approve new or edited content before it is published to the Web site. If a user group is part of an approval chain, any member of the group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

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

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

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

The chart below illustrates the approval process.



You can approve or decline all content submitted to you from the approval folder.

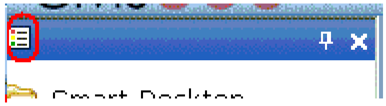
Ektron CMS400.NET can automatically send email notification, informing users that content workflow events have either taken place or are requested of them. For example, a content contributor receives an email that his content has been published to the Web site. The list of automatic emails and directions for customizing their content are described in the Setup manual section “Customizing **Ektron CMS400.NET** email.”

The following topics guide you through the approval or decline of this content.

- ”Approve/Decline One Content Item” on page 89
- ”Approve/Decline Several Content Items” on page 90
- ”Example of an Approval Chain” on page 91

Approve/Decline One Content Item

1. Click the Smart Desktop button (circled in red below).

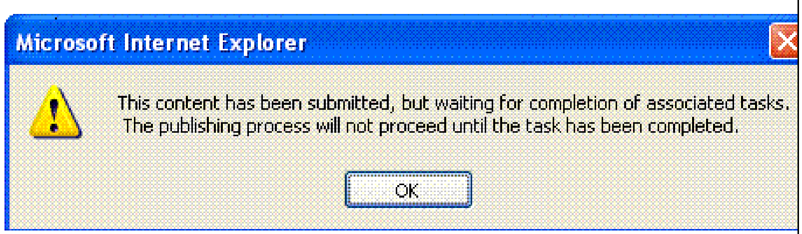


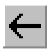
2. Click **Reports**.
3. Click **Approvals**.
4. Click the content you want to approve or decline.

   To select all displayed content, click **Select All** at the top of the screen.

5. The content appears. You can view the content, summary, metadata, etc.

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

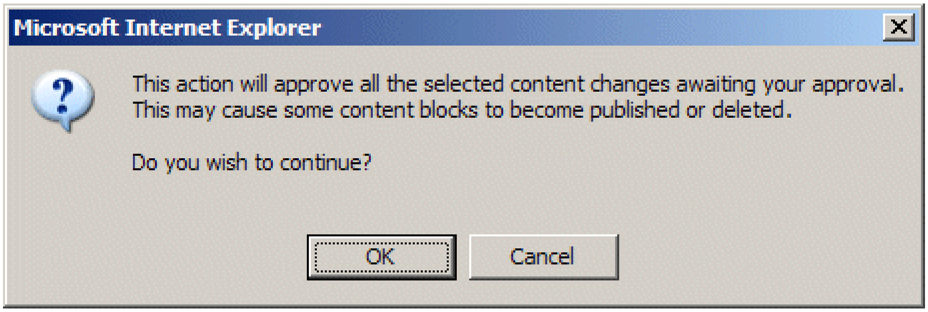
Button	Name	Result of Clicking
	Publish	Accept changes to the content and publish it to the site. Note: If there is another approver in the content's approval chain, this is replaced by a **SUBMIT** button. If you click Publish but the content item has an incomplete task assigned to another user, the content cannot be published. Instead, the following error message appears.  The user to whom the task is assigned must complete it before you can publish the content.

Button	Name	Result of Clicking
	Decline	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. The content inserted by the last editor remains in the file. If you do not want it to remain, choose the **Edit** option.
	Edit	Check out content and change it if desired.
 	View Published/ Staged	Toggle between published and submitted versions of content. This can help you compare versions. *See Also:* ”Staged Content” on page 806
	View Diff	View differences between the version awaiting approval and the published content. *See Also:* ”Comparing Versions of Content” on page 98
	Back	Return to previous screen.

Approve/Decline Several Content Items

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

1. Select the submitted content you want to approve, as described in ”Approve/Decline One Content Item” on page 89.
2. Click the Approve All button ().
3. The following message appears.



4. To continue, click **OK**.
5. The approved content is either submitted to the next publisher, published immediately to the Web site, or deleted, depending on the approval chain set for the content.

Example of an Approval Chain

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

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

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

Each user has different permissions that correspond to their roles.

The example uses the following topics to explain a typical approval chain.

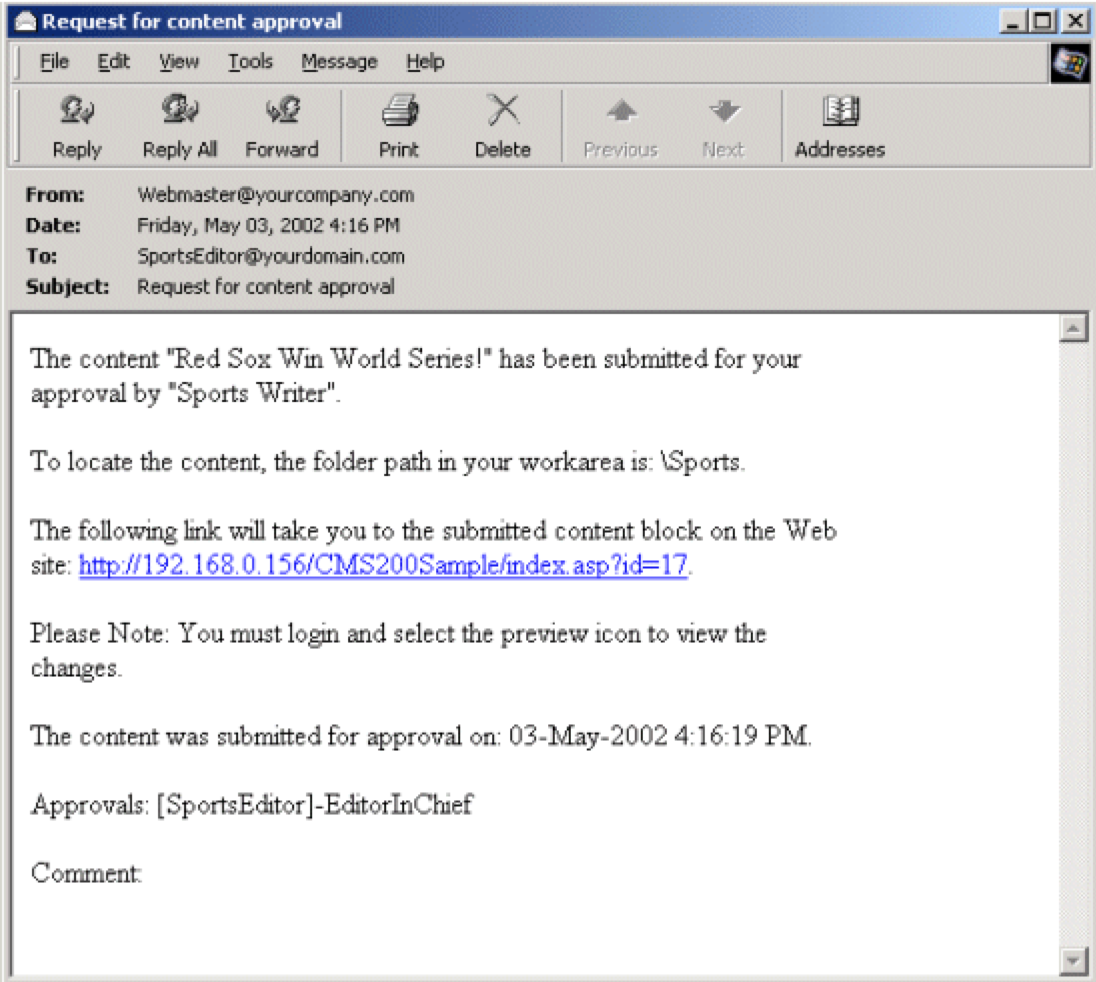
- ”Creating Content” on page 91
- ”First Approver” on page 93
- ”Second Approver” on page 94

Creating Content

The first step is to create content. To create new content, follow these steps.

1. Log in to Ektron CMS400.NET as a SportsWriter.
2. Create content, as described in ”Adding HTML Content” on page 48.
3. Click the Submit button ().

4. The content is placed into the approval chain. The next user in the chain receives an email saying the content is ready for approval.



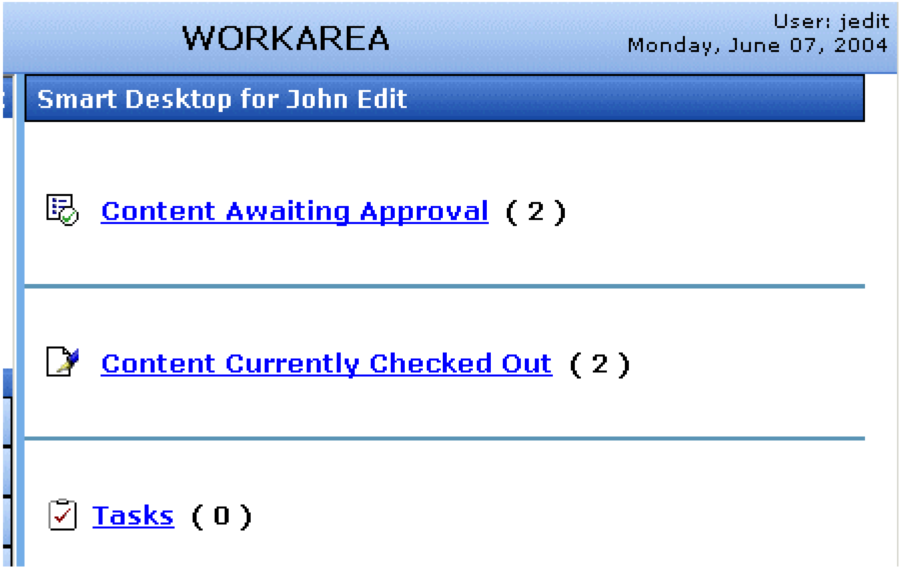
NOTE Emails are only sent if your Administrator enables them.

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

First Approver

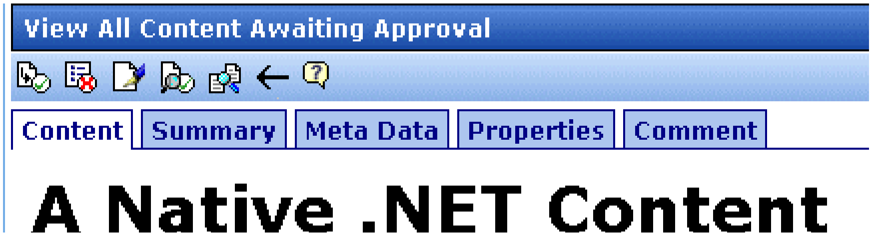
After Sports Writer submits the content, the first user in the approval chain, Sports Editor, receives an email stating content needs his approval. He can change and approve the content or decline it.

Sports Editor logs into Ektron CMS400.NET, navigates to his desktop, where he sees a link **Content Awaiting Approval**.



He clicks the link and sees all content awaiting his approval.

The approvals folder window displays information such as title, who submitted it, go live date, etc. The Sports editor clicks the submitted content.



The View Content Awaiting Approvals window appears listing all information necessary to decide whether to approve or decline the content.

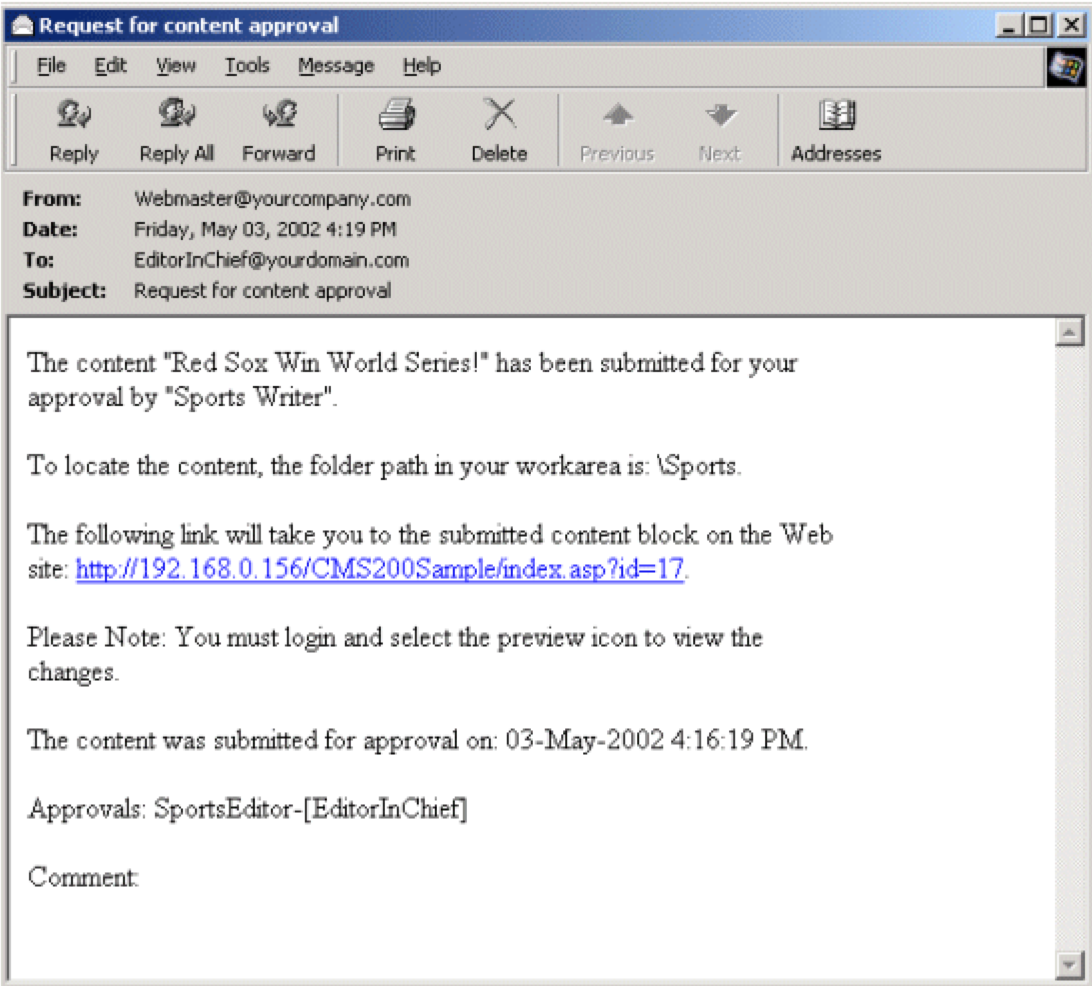
At the approval window, the Sports Editor has these options.

Button	Result
Approve	Send content to next approver in approval chain.
Decline	1. Send email to creator, notifying him/her that content was declined. 2. Remove content from approval chain.
Edit	Invokes the editor. From here, the approver can change the content.

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

Second Approver

After the content is approved, the next approver in the approval chain receives an email saying that the content is ready for approval.



EditorInChief logs in to Ektron CMS400.NET and accesses his Workarea. The Workarea has an Approval folder with the content awaiting his approval. EditorInChief navigates through the Approval folder until he finds the content **Red Sox win World Series**.

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

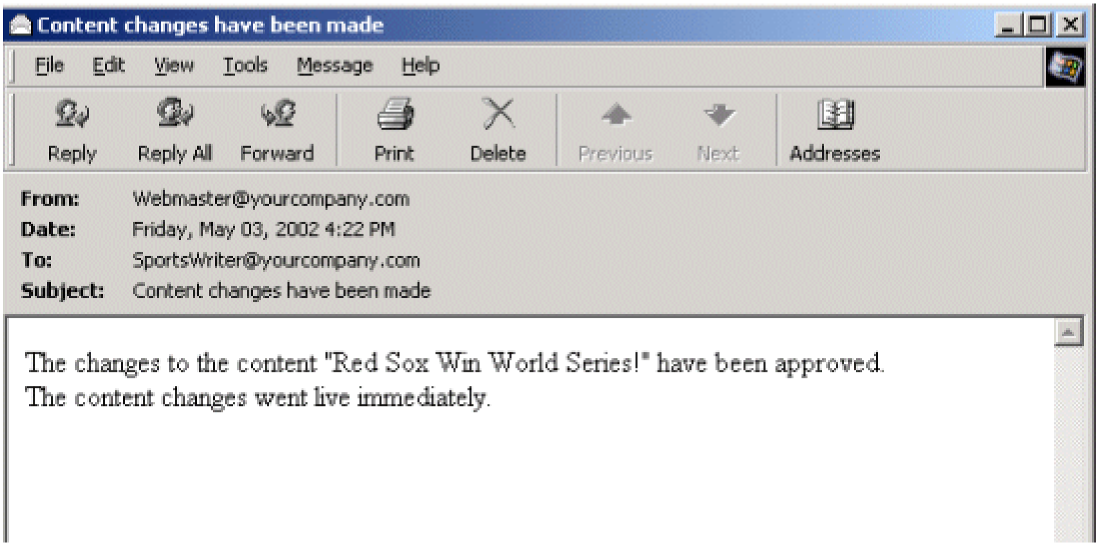
This window is similar to the previous approver’s but includes a Publish button at the top of the screen. The EditorInChief has a publish button (instead of a submit button) because he is the last approver in the approval chain. When he approves the content, it is published to the Web site.

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

Button	Description
Publish	Publish the content.
Decline	1. Sends an email to the creator, notifying him/her that content was declined. 2. Removes content from the approval chain.
Edit	Invokes the editor. The approver changes the content.

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

The user who created the content receives an email notifying him that it was published.


Content changes have been made
File Edit View Tools Message Help
Reply Reply All Forward Print Delete Previous Next Addresses
From: Webmaster@yourcompany.com
Date: Friday, May 03, 2002 4:22 PM
To: SportsWriter@yourcompany.com
Subject: Content changes have been made
The changes to the content "Red Sox Win World Series!" have been approved.
The content changes went live immediately.

Comparing Versions of Content

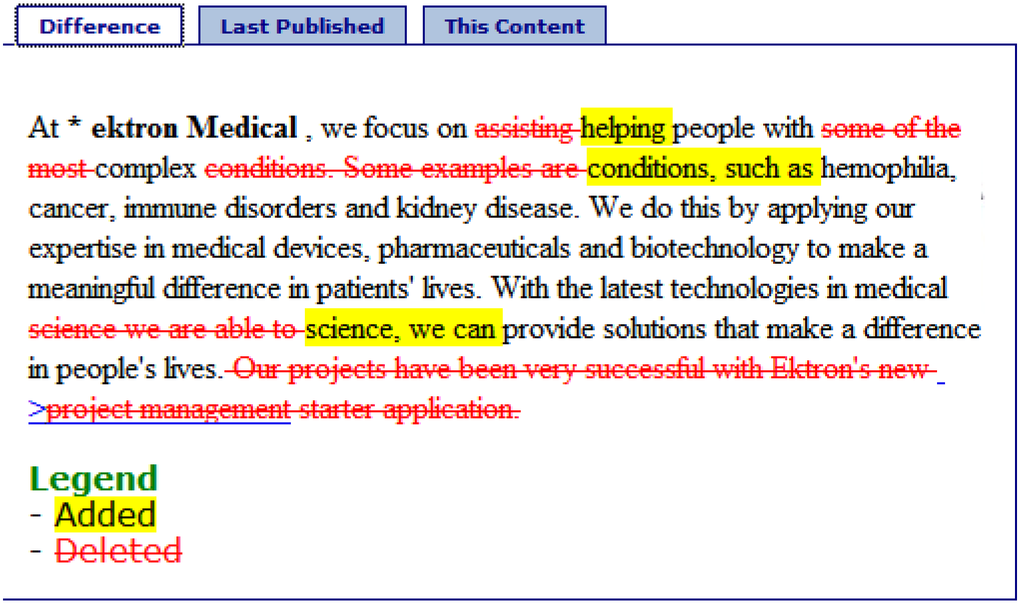
There are two versions of this procedure. You may need to consult your system administrator to determine the correct procedure for you.

If the Ektron CMS400.NET server is	And your client is	See
32 bit	32 bit	"The View Content Difference Screen" on page 98
64 bit	32 bit	"The View Content Difference Feature" on page 100 Note: This procedure was the only one prior to 7.5.2. It downloads an ActiveX control to your computer.
64 bit	64 bit	The View Content Difference feature is not available

The View Content Difference Screen

NOTE Use this procedure if both your computer and the Ektron CMS400.NET server are 32 bit.

The View Content Difference screen highlights changes to selected content. Below is an example of the View Content Difference screen, showing the default tab, **Difference**.



Each tab is explained below.

Tab	Shows this content
Difference	Both versions: • content that only appears in the version on the **This Content** tab is highlighted in yellow • content that only appears in the currently published version is red • unchanged content is black
Last Published	Currently-published.
This Content	The version you are comparing the currently-published content against.

IMPORTANT! If there is no difference between the versions, you see **Content is Identical**.

The View Content Difference feature is explained through the following topics.

- "When Can I Compare Content?" on page 100
- "Accessing the View Content Difference Feature" on page 100

When Can I Compare Content?

The View Content Difference feature is available when

- you are viewing a version of content
- a staged version of that content is available (*See Also:* "Staged Content" on page 806)

Learn About Accessing the View Content Difference Feature

Accessing the View Content Difference Feature

To Access the View Content Difference feature, follow these steps.

1. Navigate to the content whose versions you want to compare.
2. Click View Properties.
3. Click the History button ( ). The View Content History screen appears. *See Also:* "Comparing Historical Versions" on page 112
4. Click a version that you want to compare with the most recently published version.
5. Click the View Content Difference toolbar button ( ).

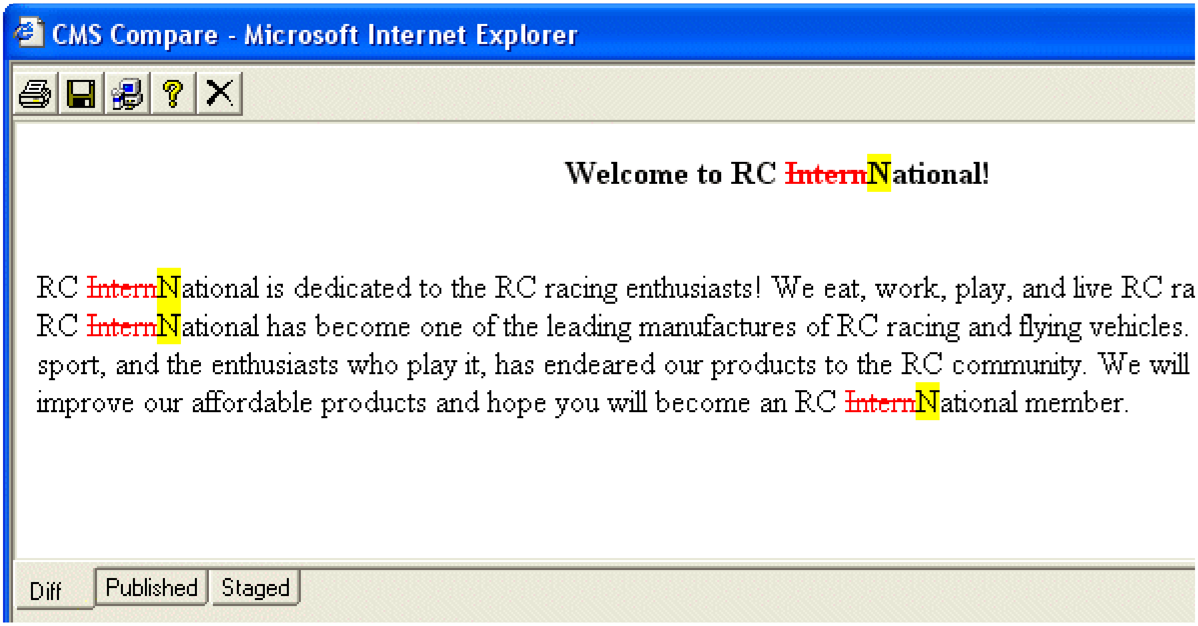
The View Content Difference Feature

NOTE Use this procedure if your computer is 32 bit, and the Ektron CMS400.NET server is 64 bit.

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

- redlining deleted content

- highlighting in yellow added content



Within the View Content Difference feature, you can perform several tasks, as well as view different versions of the content separately, or compared.

The View Content Difference feature is explained through the following topics:

- ”When Can I Compare Content?” on page 100
- ”The Compare Content Window” on page 102
- ”First Use of the View Content Difference Feature” on page 107

When Can I Compare Content?

The View Content Difference feature is only available when

- you are viewing an historical version of content
- a staged version of the content is available (*See Also:* ”Staged Content” on page 691)

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

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

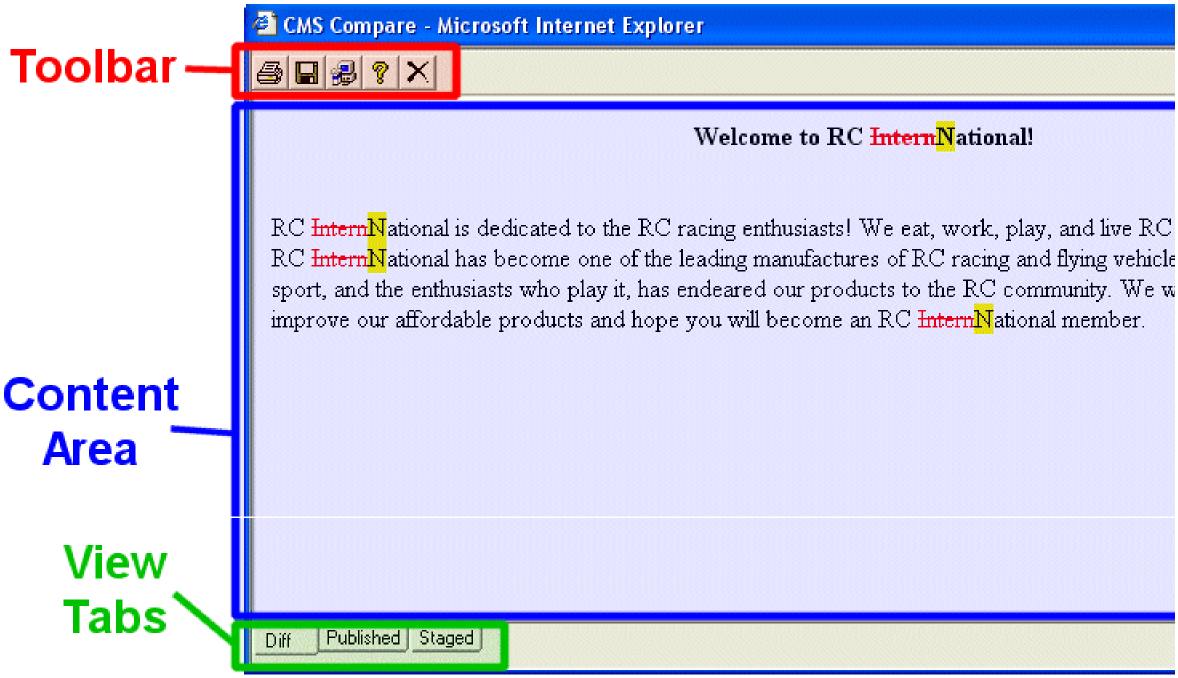
If content can be compared with another version, the View Difference button () appears in the content history area or the Web page view.

The Compare Content Window

NOTE The first time the View Content Difference feature is opened, a simple installation program runs. *See Also:* "First Use of the View Content Difference Feature" on page 107.

The Compare Content window consists of the following:

- "Toolbar" on page 103
- "Content Area" on page 106
- "View Tabs" on page 106



Each area is explained below.

Toolbar

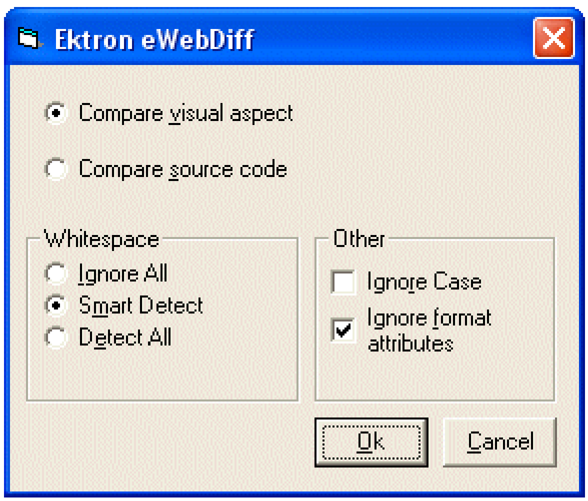
The content comparison toolbar has five buttons, explained below.

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

Button	Name	Description
	Setup	Opens setup dialog box to configure the settings. Typically, only an administrator would use this. For more information, see "Setup" on page 104.
	Help	Displays additional information about the compare feature.
	Exit	Closes the window.

Setup

Click the **Setup** button () to open the setup dialog box. Typically, a system administrator would edit these settings.



You can change the setup options to better suit your needs. The following table explains each option.

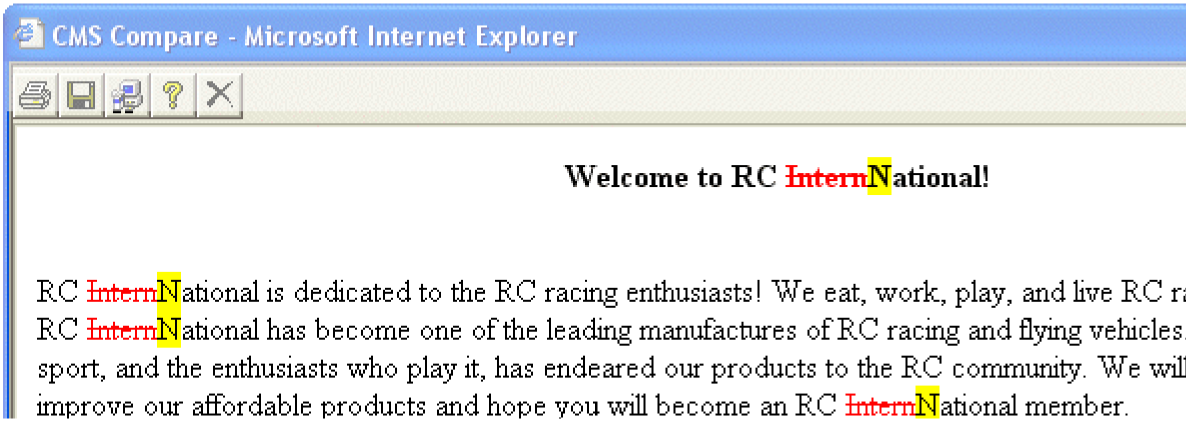
Option	Description
Compare Options	

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

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

Content Area

The content area displays the content comparison.



The following table describes the change indicators.

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

View Tabs

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

View	Description
Diff	Compares published version of content to staged version

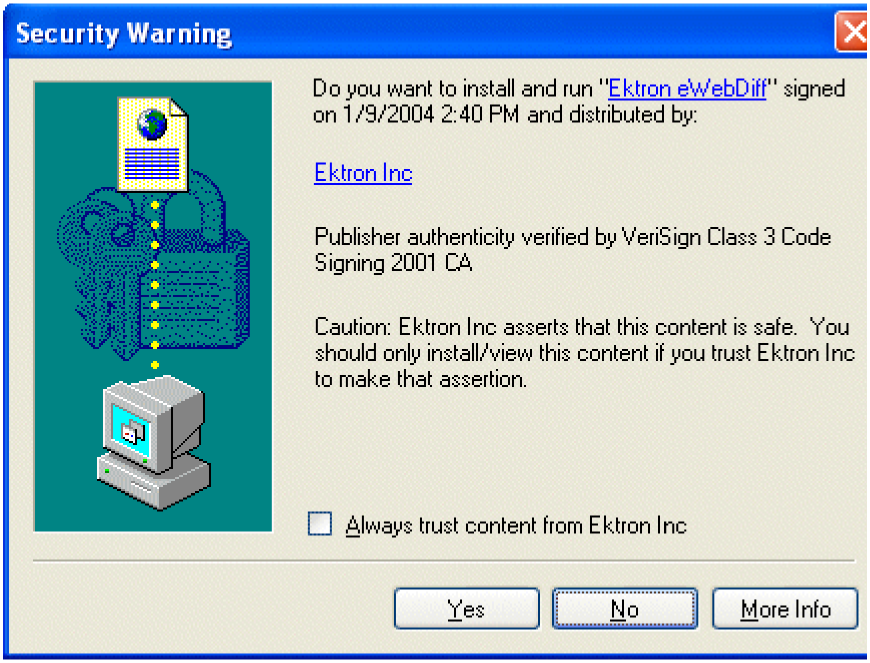
View	Description
Published	Displays currently published version
Staged	Displays the staged version of content. *See Also:* "Staged Content" on page 691

To switch between views, click the corresponding View tab.

First Use of the View Content Difference Feature

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

Click **Yes** when the following screen appears.



When the installation program completes, close and reopen the View Content Difference feature.

Viewing and Restoring Previous Content

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

After viewing a previous versions of content, you can replace the current version with any previous version.

NOTE This section explains how to view and possibly restore older versions of content. To see a change-by-change comparison of two content items, use the View Content Difference feature, explained in "Comparing Versions of Content" on page 98.

NOTE The Purge History feature deletes historical versions of content according to user-defined criteria. Therefore, some previous versions may be unavailable. *See Also:* Ektron CMS400.NET Administrator manual > "Managing Content Folders" > "Folder Properties" >"Purge History"

The View and Restore features are explained through the following subtopics.

Accessing Content History

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

- The Workarea's View Content page

- A Web page

Once you access the history, the functionality is identical.

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

Accessing the Content History from the Workarea

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

1. Navigate to the View Content page for the content whose history you want to view.
2. Click the item whose history you want to view.
3. The View Content Screen appears.
4. Click the View History button ( ).

Accessing the Content History from a Web Page

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

1. Sign in.
2. Browse to the content whose history you want to view.
3. Click the View History menu option (View History).
4. The Content History window opens.

The Content History Window

View Content History

Version	Last Edit Date (=published date):	Content Title:	Last User To Edit:
2.0	4/10/2007	Welcome to Devcenter Community	Administrator Applic
1.1	4/10/2007	Welcome to Devcenter Community	Administrator Applic
1.0	3/22/2007	Welcome to Devcenter Community	Administrator Applic
0.1	3/22/2007	Welcome to Devcenter Community	Administrator Applic

The View Content History window lists every version of the content available in **Ektron CMS400.NET**. The window displays the following information for each version.

- version number *See Also:* "The Content Version Number" on page 110
- a green circle indicates a version that was published. Versions without a green circle indicate content that was checked-in but not published.
- date and time when a version was checked in or published
- title of content
- last user who edited content
- comments entered by user to describe nature of changes made

To view any version, click its title. When you do, the Content History window appears for that content.

The Content Version Number

Ektron CMS400.NET assigns a unique number to each saved version of a content block. The number is increased by one tenth if the content is checked in but not published. If the content is published, the next whole number is assigned.

For example, if the current version is 1.0 and you check in that content, the new version is 1.1. If the next editor publishes it, the new version is 2.0.

If the content is purged, the numbering scheme restarts with the remaining content.

The Detail History Window

After viewing the View Content History window, you can click any version to see the detail for it. The detailed History window has two sides:

- The left side redisplays the information in the content history window. *See Also:* "The Content History Window" on page 109

- The right side displays the selected version of the content.

After viewing a version of content, you can perform these actions on it.

Action	Button	Description	More Information
Restore		Restore historical version of content	"Restoring a Previous Version" on page 111
View Difference		Compare historical version to current version	"Comparing Historical Versions" on page 112
View History Report		View summary list of all versions	"The Content History Window" on page 109
Remove XSLT *XML Content Only*		Remove XSLT applied to XML content	"Removing Applied XSLT" on page 112

Actions are explained below.

Restoring a Previous Version

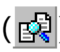
NOTE The ability to restore content is a privilege granted by the system administrator. If you do not see a Restore button ( ) on the View Content History screen, you do not have permission to do so.

1. Open the content folder that contains the content.
2. Click the content item.
3. Click the History toolbar button ( ).
4. Select an historical version of the content that you want to restore.
5. Click the Restore button ( ).
6. The content history window closes, and you return to the View Content page or the Web page, with the content in a checked in status.
7. If desired, check out the content to make additional changes.
8. Select the workflow to perform on the content.
9. When the historical version is placed in the approval chain and approved, it is published to the Web site.

Comparing Historical Versions

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

NOTE You can only View Differences if there are two or more published versions of the content.

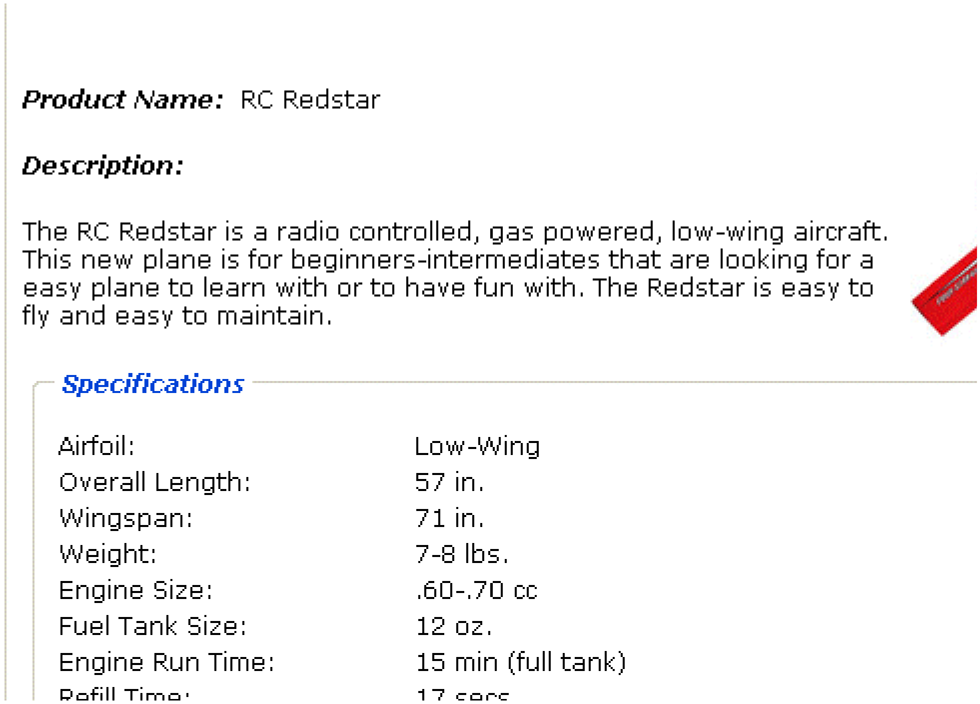
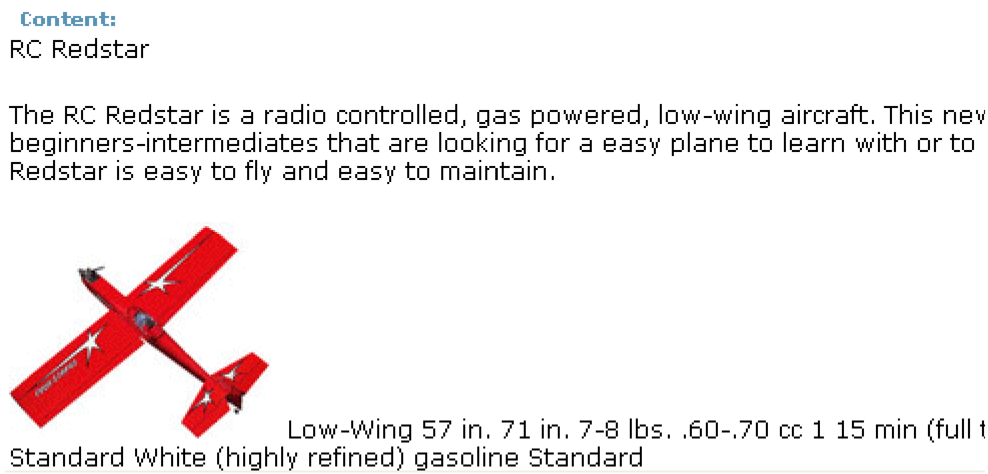
1. Open the content folder that contains the content.
2. Click the content item.
3. Click the History toolbar button ().
4. Select an historical version of the content.
5. Click the View Differences button ().

The historical and the current versions are compared. To learn more about the comparison, see "Comparing Versions of Content" on page 98.

Removing Applied XSLT

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

The following table compares the views.

With XSLT	
Without XSLT	

Searching the Workarea

You can search any folder to quickly locate content within **Ektron CMS400.NET**. The following sections explains how to use the content search through the following subtopics.

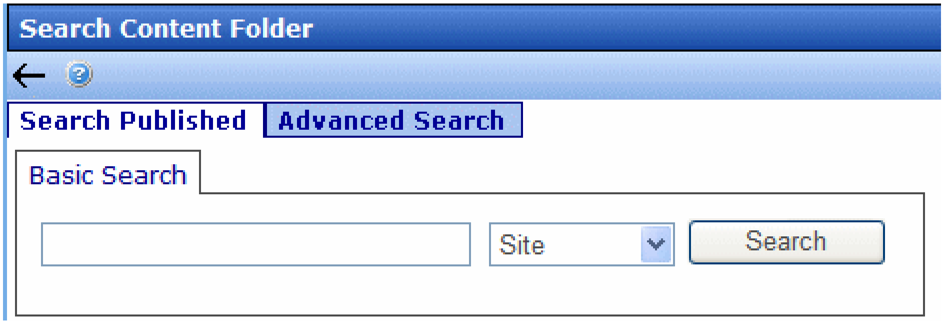
Accessing the Search Content Folder Screen

To access the Search Content Folder screen, follow these steps.

1. Navigate to the folder from which you want to begin the search.

NOTE To search your entire site, start with the top-level (Root) folder. If you want to limit the search to a folder (and its subfolders), select it then choose search criteria.

2. Click **Action > Search**.
3. The Search Content Folder screen appears.



The Workarea search has two tabs:

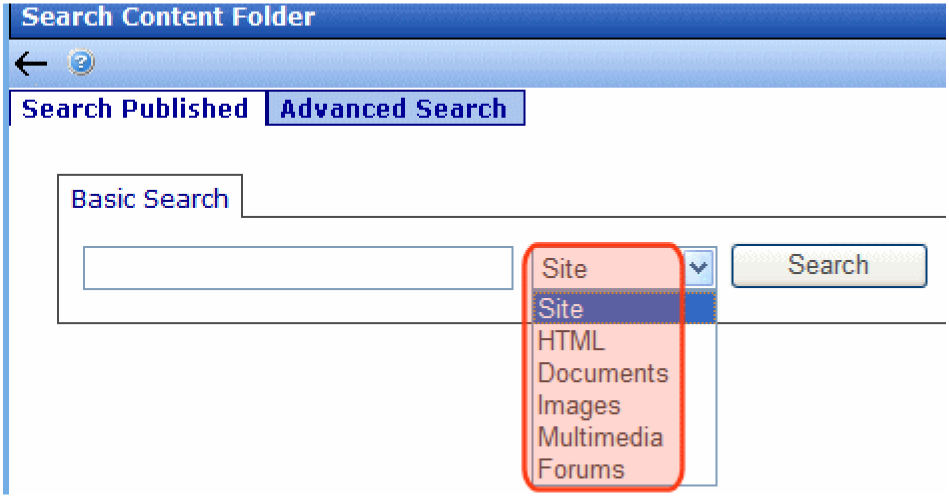
- the left tab, **Search Published**, is like the Site Search. See "The Search Published Tab" on page 115.
- the right tab, **Advanced Search**, lets you search by internal properties, such as title, status, and comments. See "The Advanced Search Tab" on page 119.

The Search Published Tab

The Search Published tab within the Workarea finds content that satisfies these criteria.

- status is published
- active (archived content is ignored; however, the Advanced Search finds archived content. See "The Advanced Search Tab" on page 119)
- you have read-only or greater permission for the content's folder
- content is public. However, private content is available to those with permission to view it, such as membership users after logging in. (*See Also:* "Private Content & Memberships" section of the "Managing Users & User Groups" chapter of the **Ektron CMS400.NET** Administrator Manual)
- matches selected language, if site is multi-lingual. *See Also:* **Ektron CMS400.NET** Administrator Manual section "Working with Multi-Language Content"
- the content's **Content Searchable** check box is checked
- is *not* a non-image file added to the library. Images are searchable, while other files added to the library are not. So, to make files searchable, add them as assets, not library files.
- content resides in the folder you selected before launching the search or one of its subfolders. To search the entire Web site, begin the search at the root folder.
- satisfies text and/or query entered in the search box (no value returns nothing). The text inserted in the search field can appear in the content, summary, or metadata. *See Also:* **Ektron CMS400.NET** Administrator Manual section "Searching Your Web Site" > "Query Language."

- satisfies content type criterion, if chosen (see below). These are described in "Search Screen Options" on page 116.



Search Screen Options

Search Screen Option	Finds submitted text in these content types
Site	Content from all options listed below.
HTML	• HTML • Smart Form (XML) Note: Finds field values but not field labels. This has not changed since prior releases. • HTML Form • Blog entries (not comments)

<table>
<tr><th>Search Screen Option</th><th>Finds submitted text in these content types</th></tr>
<tr><td>Documents</td><td>• MS Office document (includes Powerpoint, Excel)

Note: The search finds text within Visio documents if the Visio IFilter has been installed on the server. See “Installing the Visio IFilter” in the Ektron CMS400.NET Administrator Manual.

• PDF file
• .txt file</td></tr>
<tr><td>Images added as assets or through the library</td><td>.gif, .jpeg, etc.</td></tr>
<tr><td>Multi Media</td><td>Flash, .mp3, etc.</td></tr>
<tr><td>Forums</td><td>Forum posts and topics</td></tr>
</table>

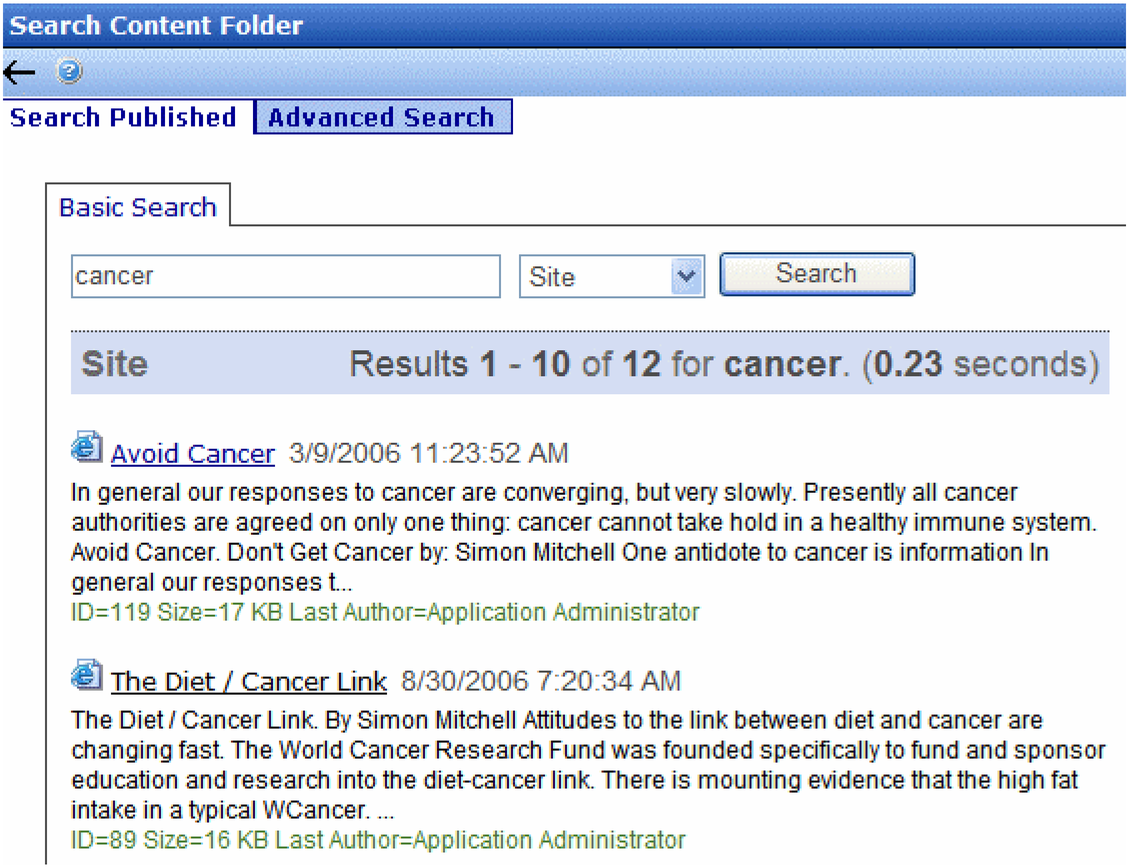
NOTE The search cannot find calendar events.

Searching for Metadata

- Searchable type metadata values are returned like regular content.
- It can take up to 30 minutes for newly-added metadata to be available to the search.
- 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 `true` or `false`.

Display of Published Search Results

Below is an example of the Search Published results screen.



As you can see, content on the search results screen begins with the title and last edited date/time. Following them is either an abstract or the summary of the content. This is determined by your web developer in the Web Search server control.

Following the abstract is additional information, such as content ID number, size, last author, etc.

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

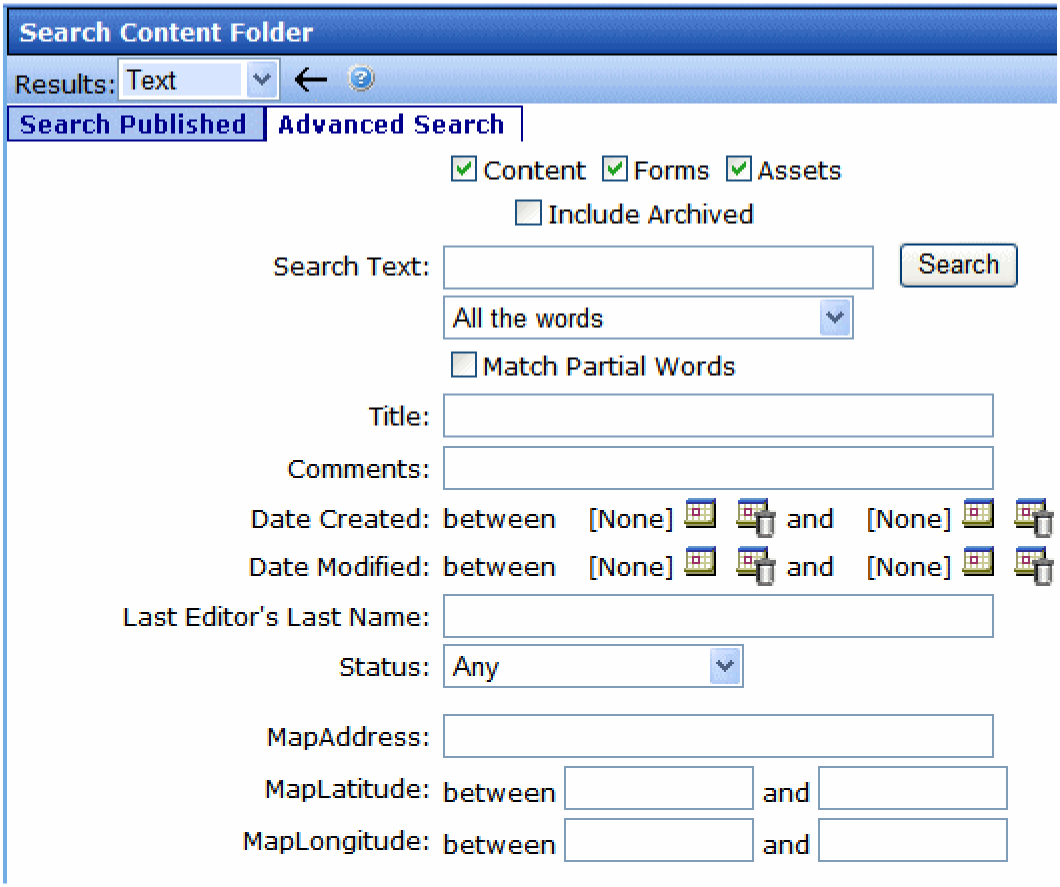
- proximity of search term to beginning of file
- proximity of search term to other occurrences of the term
- whether the term is in the title

The Advanced Search Tab

The Advanced Search within the Workarea finds content that satisfies these criteria.

IMPORTANT! The Advanced search finds content whether or not it is marked **Searchable**.

- user must have read-only or greater permission for content's folder
- matches selected language, if site is multi-lingual
- satisfies criteria entered on the screen (see below)



The Advanced Search Tab helps you find **Ektron CMS400.NET** content by specifying the following criteria. All fields are optional. However, the search only finds content that satisfies *all* criteria.

- the kind of content you want to search (for example, HTML content, forms, assets)
- a search word or words. Unlike the **Search Published** tab, you cannot use a query.
- how the search words must match the content in order for a document to be found
- whether the title is searched
- whether the comments are searched

- a range of created or modified dates
- the editor who updated the content most recently
- the content's status
- any searchable *metadata* assigned to the folder

See Also:

- "Using the Advanced Search" on page 121
- "Specifying the Kind of Content to Search" on page 122
- "Specifying a Search Word or Phrase" on page 122
- "The Noise File" on page 123
- "Specifying Match Criteria" on page 123
- "Additional Search Criteria" on page 125
- "Custom Fields" on page 126

Each feature is explained below.

NOTE To help track search activity, the Search Phrase Report provides a count of all words and phrases searched within a date range. In **Ektron CMS400.NET**, this report is available from the **Smart Desktop > Reports**. For documentation of this report, see **Ektron CMS400.NET** Administrator Manual > "Content Reports" "Search Phrase Report."

Using the Advanced Search

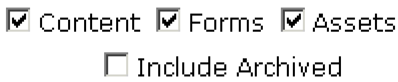
When performing a search, enter one or more words into the text box, select search preferences, then click the **Search** button.

You can use an asterisk as a *wildcard* character, in other words, to stand for any character. For example, the phrase **CMS*00** returns topics that include the following text: CMS400, CMS300, CMS200 and CMS100.

Your system administrator can add custom search fields that only appear if a user is logged in. For more information, seethe "Metadata" section of the **Ektron CMS400.NET** Administrator Manual .

Specifying the Kind of Content to Search

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



NOTE **Assets** only appears if your organization has implemented Ektron's Document Management feature.

Check this box	To search
Content	HTML content, blogs entries, and XML Smart Form field values
Forms	HTML forms
Assets	Content that is neither HTML nor XML, such as Office documents and managed files. *See Also:* "Using the Document Management System" on page 222
Include Archived	Content, forms and assets that have been archived. *See Also:* "Setting Archive Options" on page 69

Specifying a Search Word or Phrase

In the **Search Text** field, enter one or more words that you want to find within content, forms, and assets. The search returns content that includes these words.

Entering text here is optional. That is, you can use fields on the lower portion of the screen to find content without entering words contained in the content. For example, you can find every piece of HTML content that was modified by a certain user within the last 30 days.

If you check off HTML and Form content, you can enter no search criteria and get a list of all HTML and Form content on your site.

However, if you enter search text, the search only finds items that include the search text *and* satisfy other criteria on the screen.

The Noise File

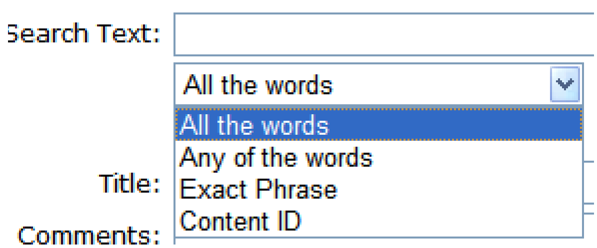
Ektron CMS400.NET has a *noise* file that screens from the search every single letter of the alphabet as well as common words. Examples of common words are **about**, **after**, **all**, and **also**. Avoid entering such words into the **Search Text** field, because the search ignores them.

For information on managing the noise files, see the **Ektron CMS400.NET** Administrator Manual section “Searching Your Web Site” > “Query Language” > “Rules for Formulating Queries.”

Specifying Match Criteria

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

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



Your choices are described below.

Choice	A search returns content that has	For more information, see
All the words	all words in the search field	”All the Words” on page 124
Any of the words	any word in the search field	”Any of the Words” on page 124

Choice	A search returns content that has	For more information, see
Exact Phrase	all words in the order specified in the search field	”Exact Phrase” on page 124
Content ID	has the submitted ID number	”Content ID” on page 125

Match Criteria Examples

The examples below assume you entered these words into the **Search Text** field.

- partners
- content
- Monday
- employee
- green

All the Words

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

Any of the Words

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

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

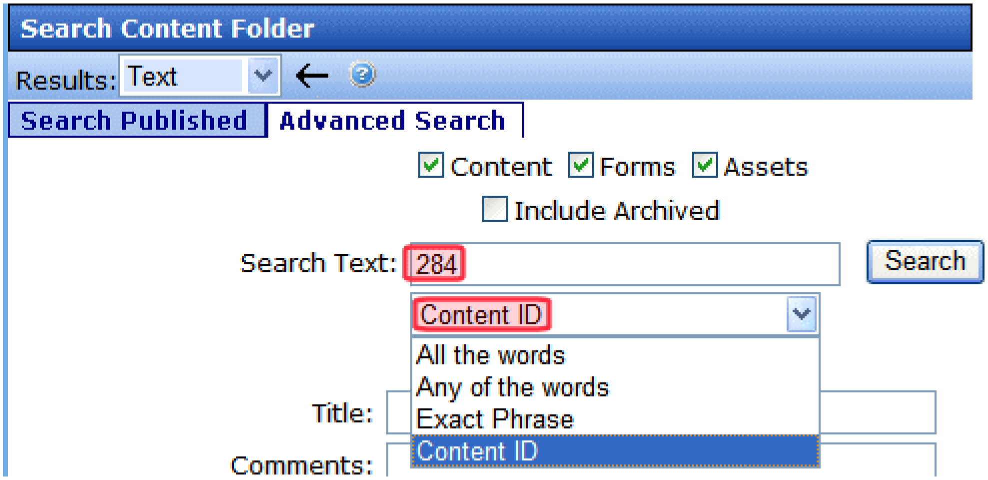
Exact Phrase

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

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

Content ID

You can find content by its ID number. To do so, select **Content ID** from the drop down box below the **Search Text** field. Then, enter the ID number in the **Search Text** field and click **Search**.



Additional Search Criteria

The next section of the Advanced Search Tab lets you choose one or more customized search criteria. Note that if you enter more than one criterion, only content satisfying *all* criteria appears on the search results screen.

Fields that Apply to Content, Forms and Assets

Search criterion	**Description**
Title	The title of the content. You can enter a partial word. For example, entering **Part** yields the following results. • Multi-Hospital Nurse Executive Participation • Ektron Partners and Customers You can enter more than one word or phrase as long as they are in the correct sequence.
Comments	The content's comments, which can be inserted via the **Comment** tab.
Date Created	The file's creation date. You can enter a single date or a range of dates. The search returns all content with that creation date that satisfy the other criteria.
Date Modified	The last date when the file was modified. You can enter a single date or a range of dates. The search returns all items with that edit date that satisfy the other criteria.
Last Editor's Last Name	The last name (surname) of the user who most recently changed the content. This is taken from the **Last Name** field on the User Information screen. The search returns all items last edited by that user that satisfy the other criteria.
Status	The content status. *See Also:* "Appendix A: Content Statuses" on page 798 Note: Although you can search for content by any status, the search results display only the most recently published version. If a version has never been approved, nothing appears.

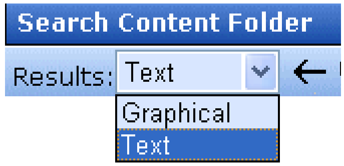
Custom Fields

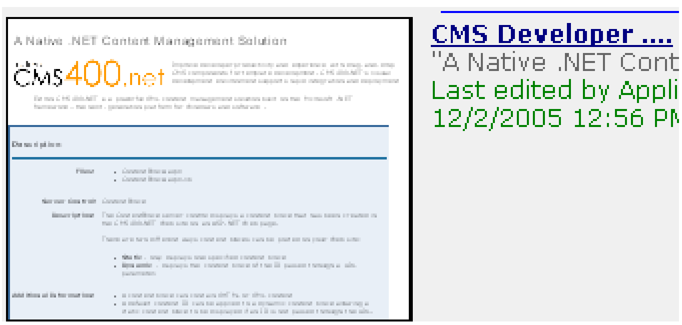
Custom fields are defined by your system administrator and applied to content by its author or editor. They are custom-defined, so would be different for every site.

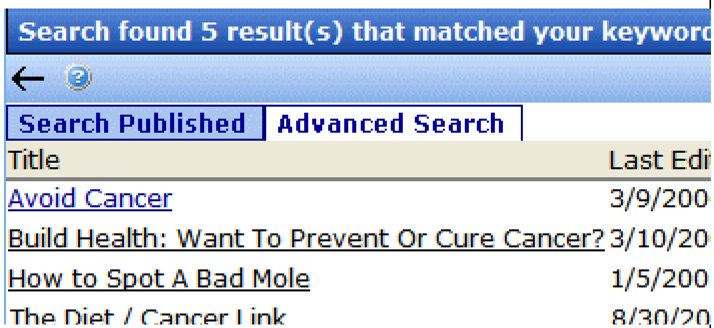
The custom search fields appear below the **Status** field.

Result Display Options

At the top of the Advanced Search Tab, a pull-down list lets you choose the how to display the search results.



View option	Description	Example
Graphical	If the item is content or a form, display a thumbnail of it. If the item is an asset, display a generic icon that indicates asset type. In both cases, to the right are the item's • title • summary • last edited user, date and time You can click the title to display the item inside the View Contents screen. From there, you can perform all available functions on the item. Note: Graphical search results require the Internet Explorer browser, version 6 or greater.	**Sample HTML content**  **Sample Microsoft Word document** 

View option	Description	Example
Text	Display item's title in the left column. To the right, display the • last edit date/time • folder name • size (assets only) • DMS rank (assets only) • language • status	

Information on the Advanced Search Results Screen

The following column headers describe the information displayed for all content items that satisfy the search criteria.

Column Header	Description
Content Title	The title of the content item
Last Edit Date	The most recent date on which content was edited. If it was never edited, its creation date.
Folder name	The folder that contains the content
Size	The size of the content item in kilobytes
DMS Rank	An indication of how well a content item page matches the search criteria, using a range of 0 to 1000. The higher the rank, the more relevant content is to the search criteria.

Column Header	Description
Language	The locale id value of the content's language. For a reference list of these values, see the **Ektron CMS400.NET** Administrator manual section "Appendix C: List of Supported Languages""Appendix C: List of Supported Languages" on page 1015
Status	A one-character abbreviation of the content item's status. *See Also:* "Appendix A: Content Statuses" on page 798

NOTE If you install **Ektron CMS400.NET** then later select a different database to search, you must run `C:\Program Files\Ektron\releasenumber\utilities\software\searchconfig\SearchConfig.exe` against the new database. This program gets all required data from the new database.

Content Workflow Reports

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

Library Folder

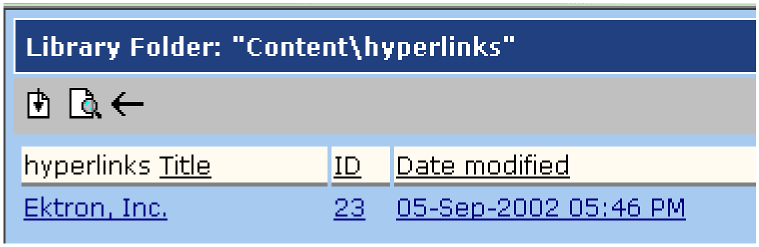
The library folder stores images, files, quicklinks, and hyperlinks that can be inserted into editor content. Before you can insert them into content, you must copy them from your computer to a larger, file server computer that everyone editing your site can access.

This chapter explains how to copy such files and insert them into Web content through the following topics.

Terms Used in this Chapter

- An *image* is any graphic file, which can include illustrations and photos. Common image file extensions are .gif., .jpg, .tiff, etc.
- A *file* is type of computer file that can be launched from a browser, such as Internet Explorer. Examples include a Microsoft Word document and a .PDF file.
- A *hyperlink* is a commonly used or hard to remember Web address (also known as a URL). After you add hyperlinks to the library, users can easily apply them to editor content.

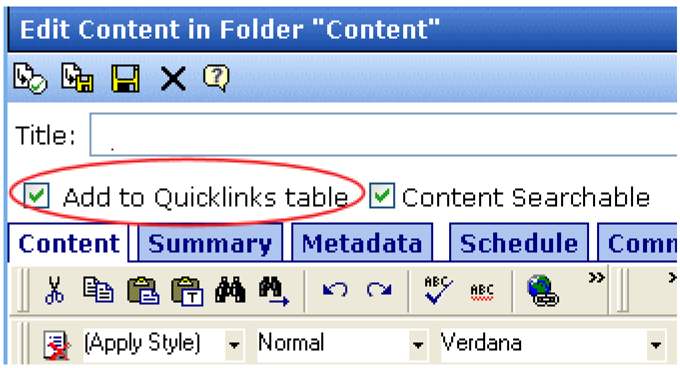
  So for example, if the editor content is “Contact Ektron,” the user can select the text, click the library button, select **hyperlinks** to find the Ektron hyperlink, and apply that hyperlink to the text.



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

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

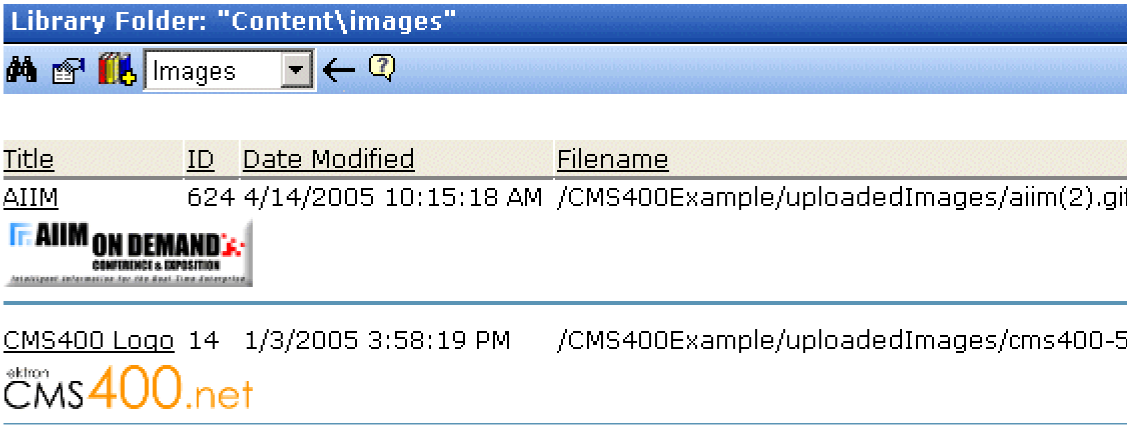
  Whenever content is created, if the **Add to Quicklinks table** box is checked, a quicklink is created for it.



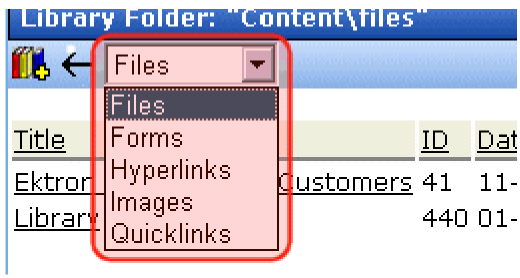
- A *form* is a quicklink to HTML form content. Whenever content is created, a form link is automatically created for it.

Accessing The Library

1. Click the Workarea button (workarea) or icon ( ).
2. Click the **Library** folder in the lower left corner of the Workarea.
3. The **Library** folder appears.



4. The sub-folders appear in the left frame. Files in the root folder (library) appear in the right frame.



You can use the dropdown list (circled above) to change the type of library files that appear.

To work with any library file, click it. When you do, the View Library screen appears, providing additional information about the item. From here, you can

- edit its title, file name, or description
- overwrite it
- find content linked to it
- delete it

For more information, see "Viewing Files" on page 143.

The following table explains the toolbar buttons on the library screen.

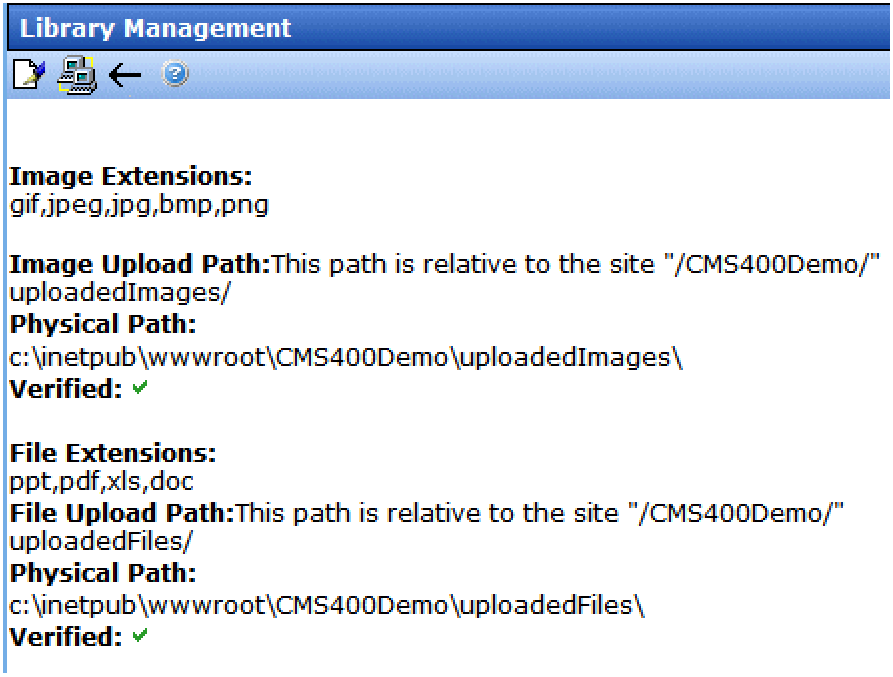
NOTE Your system administrator determines which library folders you can access, and which functions you can perform on library items within the folders.

Button	Description	For more information, see
	Search library	”Searching the Library” on page 136
	View the library’s properties screen	”Library Folder Properties” on page 134
	Add an image, file, quicklink, or hyperlink to the library	”Copying Files to the Library” on page 141
	Select the type of Library file to work with	

Library Folder Properties

To view the library folder’s properties, follow these steps.

1. Click the Properties button ().
2. The Library Management screen appears.



3. The screen displays the following settings.

Field	Description
Image Extensions	File extensions of images that can be copied to the library folder. For example, .gif and .jpg.
Image Upload path/ Physical Path	The folder to which library images are moved when you insert them into **Ektron CMS400.NET**.
File Extensions	Extensions of files that can be copied to this library folder. For example, .doc and .pdf.
FIle Upload path/ Physical Path	The folder to which library files are moved when you insert them into **Ektron CMS400.NET**.

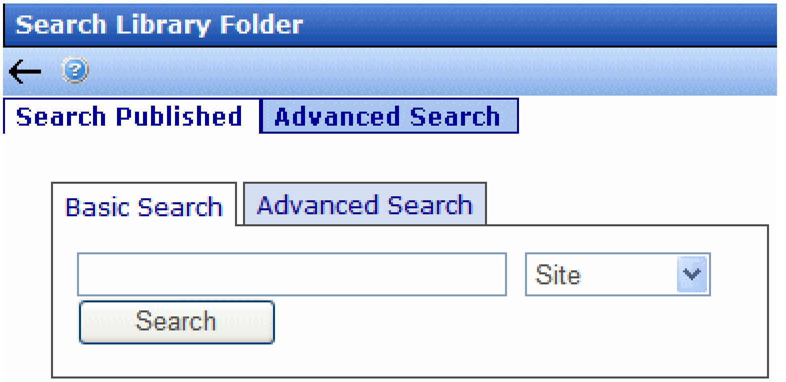
Your system administrator controls these settings.

Searching the Library

You can search the library to find items when you only know some information about them. For example, you know that an image's name includes **Ektron** but don't know its filename or folder.

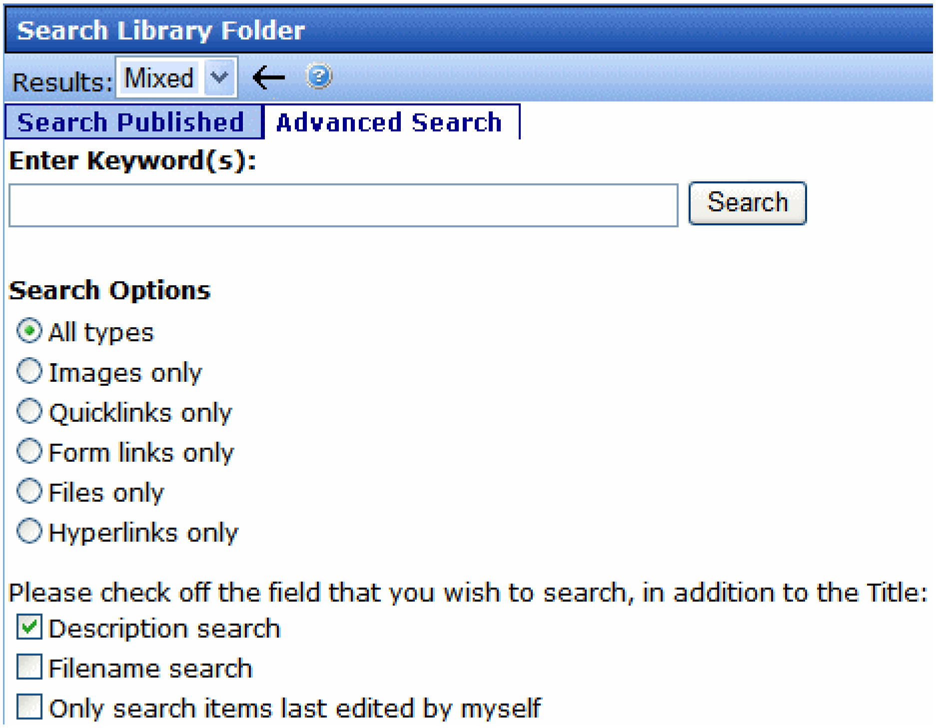
To search the library, first select the folder in which you want to begin the search. The search only considers files in that folder and its child folders. To search the entire library, begin by selecting the Library (root) folder.

Next, click the Search button ( ) from the library toolbar. When you do, a search screen appears with two tabs (shown below).



The left tab, **Search Published**, works the same as the regular search tab of that name. See "The Search Published Tab" on page 115.

The right tab, **Advanced Search**, provides several fields that let you narrow your search.



The fields are described below.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Enter Keyword(s)</td><td>Specify one or more keywords that the search will use. The search looks for keywords in the file’s title. (The title is assigned by the user when the file is added to the library.) If a file’s title matches the keywords, the file appears on the search results screen.
The search also uses keywords to search through the file’s
• internal name (for example, airplane.gif) if the Filename Search checkbox is checked
• description if the Description search checkbox is checked
A keyword can be a complete or partial word. But, you can only enter a partial term for one word. For example, you can enter Adv and have the search return the content titled “Adverse Drug Reactions.” But if you enter Adv Drug, the search returns nothing.
You can enter several complete search terms but they must be in the correct sequence. For example, to find the topic titled “Adverse Drug Reactions,” you can enter Adverse Reactions but cannot enter Reactions Adverse.
To find all files in a selected library folder, enter nothing in this field. Or, to find all files in a selected library folder of a type (for example, images), select the type and enter nothing in this field.</td></tr>
<tr><td>All Types</td><td>The search considers all library asset types.</td></tr>
<tr><td>Images only</td><td>The search only considers images.</td></tr>
<tr><td>Quicklinks Only</td><td>The search only considers quicklinks.</td></tr>
<tr><td>Forms Only</td><td>The search only considers forms.</td></tr>
<tr><td>Files Only</td><td>The search only considers files.</td></tr>
<tr><td>Hyperlinks Only</td><td>The search only considers hyperlinks.</td></tr>
<tr><td>Description Search</td><td>If you check this box, the search considers the library item’s description when returning search results. Otherwise, the search ignores the description.
For example, if you enter Ektron into the keyword field, the search returns all library files that include that string.</td></tr>
</table>

Field	Description
Filename Search	If you check this box, the search considers the file name when returning search results. Otherwise, the file name is not considered by the search. For example, if you enter **ppt** into the keyword field, the search returns all files that include that string (such as all Powerpoint presentations).
Only search items last edited by myself	The search only considers library assets that were last modified by you.
One or more of the search criteria set by your system administrator in the Metadata Definitions screen.	

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

The search displays library items that meet the search criteria on the search results screen. You can click any item to view its properties (such as Library ID number, Last Edit Date and Description).

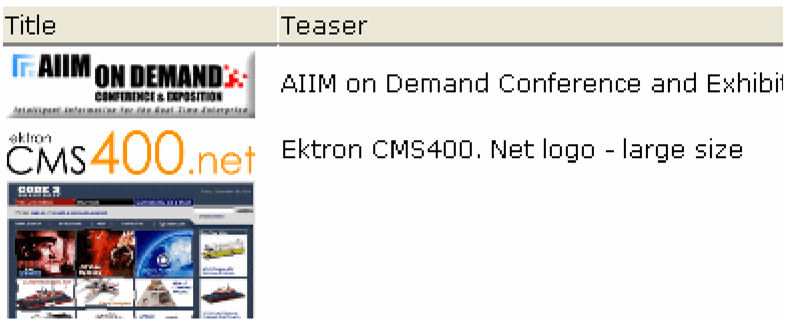
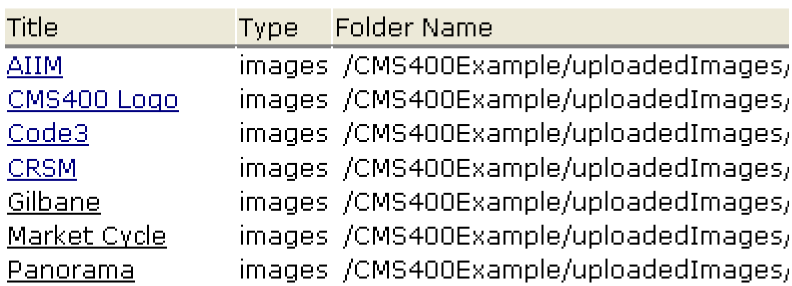
Displaying Search Results

Search results appear in this order.

- images
- files
- hyperlinks
- quicklinks
- form links

Result Display Options

At the top of the library search screen, a pull-down list lets you choose the how to display the results.

<table>
<tr><th>View option</th><th>Description</th><th>Example</th></tr>
<tr><td>Mixed</td><td>If the item is an image, display the image in the left column. If not, display its title.
To the right, display the item's Description.
Note: Mixed search results require the Internet Explorer browser, version 6 or greater.</td><td>
</td></tr>
<tr><td>Text</td><td>Display item's title in the left column. To the right, display the file type and folder name.</td><td>
</td></tr>
</table>

Files

This section explains how to work with library files through the following subtopics:

- ”Copying Files to the Library” on page 141
- ”Viewing Files” on page 143
- ”Editing a File” on page 145
- ”Overwriting Files” on page 145
- ”Library Link Searching” on page 147
- ”Adding a Library File to Content” on page 148

For a definition of the term “files,” see ”Terms Used in this Chapter” on page 131.

Copying Files to the Library

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

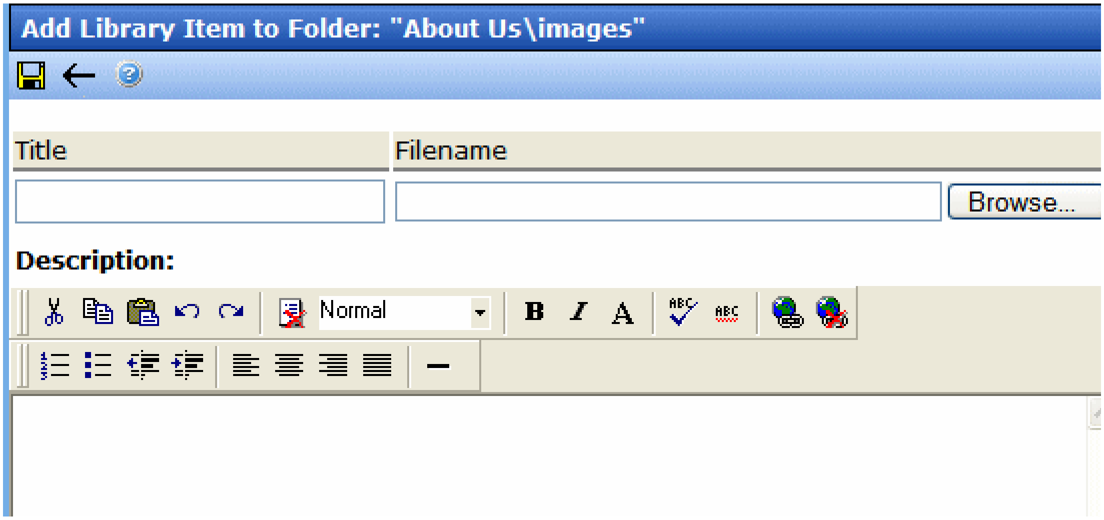
WARNING! Ektron recommends using the Document Management system to add files. Unlike library files, DMS files can be part of an approval chain, maintain a history, are searchable, and can have a summary, schedule, metadata, taxonomy categories, etc.

TECHNICAL NOTE Microsoft lets users upload files of any name. However, Internet Explorer security blocks files whose name contains an ampersand (&), colon (:), or percentage sign (%). *Source: http://support.microsoft.com/kb/826437/en-us*
To allow these characters, add the following registry key to your Web server then reset IIS.
Reg Key: `DWORD HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\ASP.NET VerificationCompatibility = 1`.

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

NOTE When you copy a file to a folder, only users with permissions to that folder can insert the file into content.

2. A list of files in that folder appears.
3. Click the Add Library button ().
4. The Add File screen appears.



5. Enter the necessary information according to the following table.

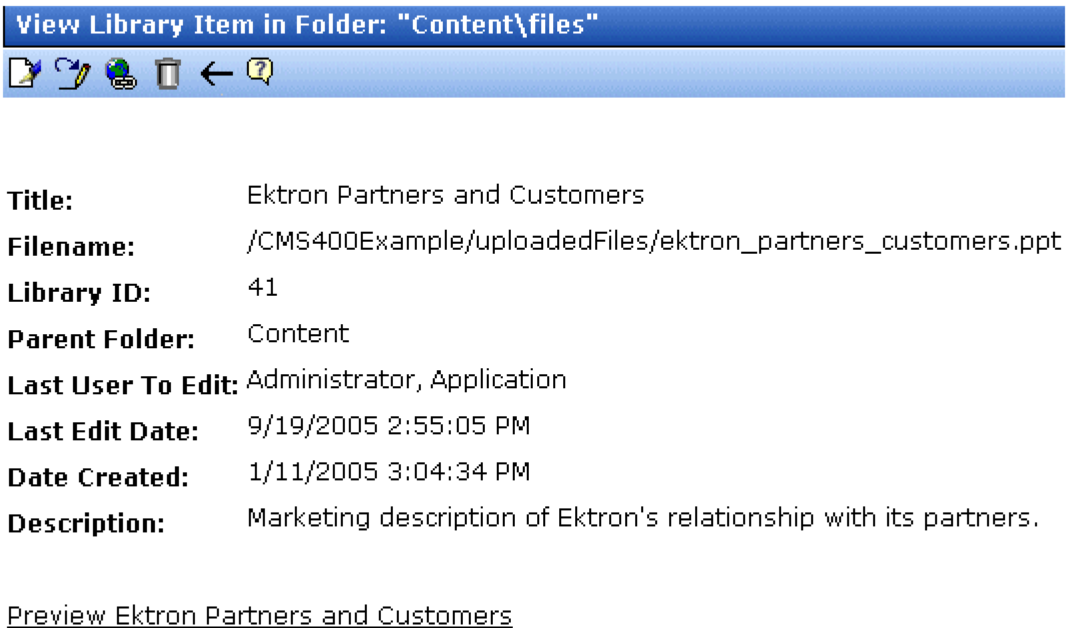
Field	Description
Title	Enter a title for the file to be copied.
Filename	Enter the path to the file to be copied. You can use the **Browse** button to find it.
Description	You can enter a full text description to help other users identify this file. The **Description** appears on the View File screen. It also accompanies the file on the Search Results screen if the user selects **Mixed** when viewing results. *See Also:* "Displaying Search Results" on page 139

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

Viewing Files

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

1. Navigate to the library folder to which the file was copied.
2. Click the file you want to preview.
3. The View File screen appears.



The table below describes each field on the screen.

Field	Description
Title	Title assigned by user who copied or edited it.
Filename	Filename and location on the server.
Library ID	ID number assigned by Ektron CMS400.NET when file was originally copied.

Field	Description
Parent Folder	File's parent folder. Users need permissions to this folder to insert the file into content.
Last User to Edit	Last user who changed file.
Last Edit Date	When file was last edited.
Date Created	When file was originally copied to library.
Description	Optional, full-text description of file.

If the file can be displayed in your browser, a preview of it appears at the bottom of the screen. If it cannot display in the browser, a link to preview it in its host application appears instead.

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

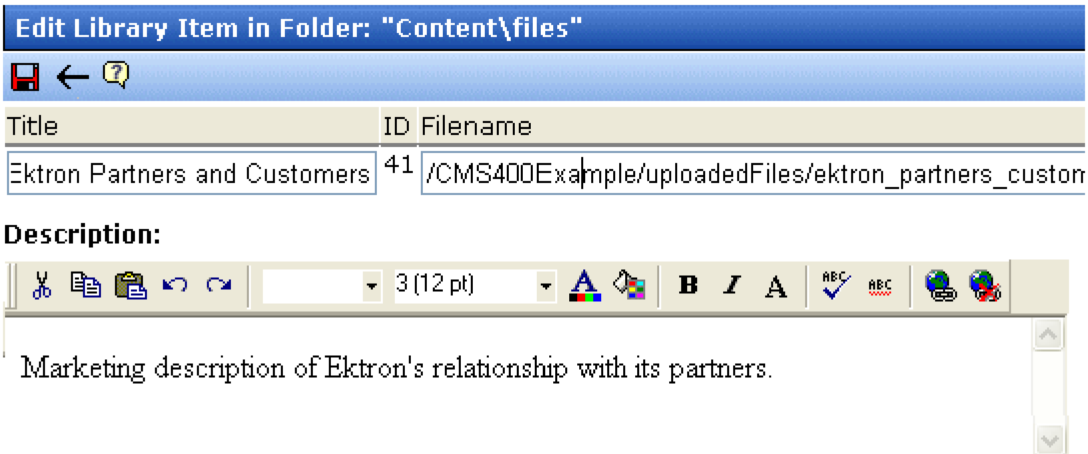
The following table describes the buttons on the View Library Item screen.

Button	Description	For more information, see
	Edit the items title and description	"Editing a File" on page 145
	Overwrite the library item	"Overwriting Files" on page 145
	Find content linked to the library item	"Library Link Searching" on page 147
	Delete library item	"Deleting Library Items" on page 148
	Return to previous screen	

Editing a File

You can edit the title, filename and description of any file that was copied to the library. To do so, follow these steps.

1. Access the View File screen, as described in ”Viewing Files” on page 143.
2. Click the Edit button ( ).
3. The Edit File screen appears.



4. Change the title, file name, and/or description of the file.
5. Click the Update button ( ).

Overwriting Files

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

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

NOTE You can only overwrite images and files. The new image or file must have the same file extension as the file being replaced.

Before You Overwrite an Image

When overwriting an image, the new image uses the same size dimensions and file extension as the older image. Be sure that the two images have the same file extension and size or make the adjustments at each occurrence of the image.

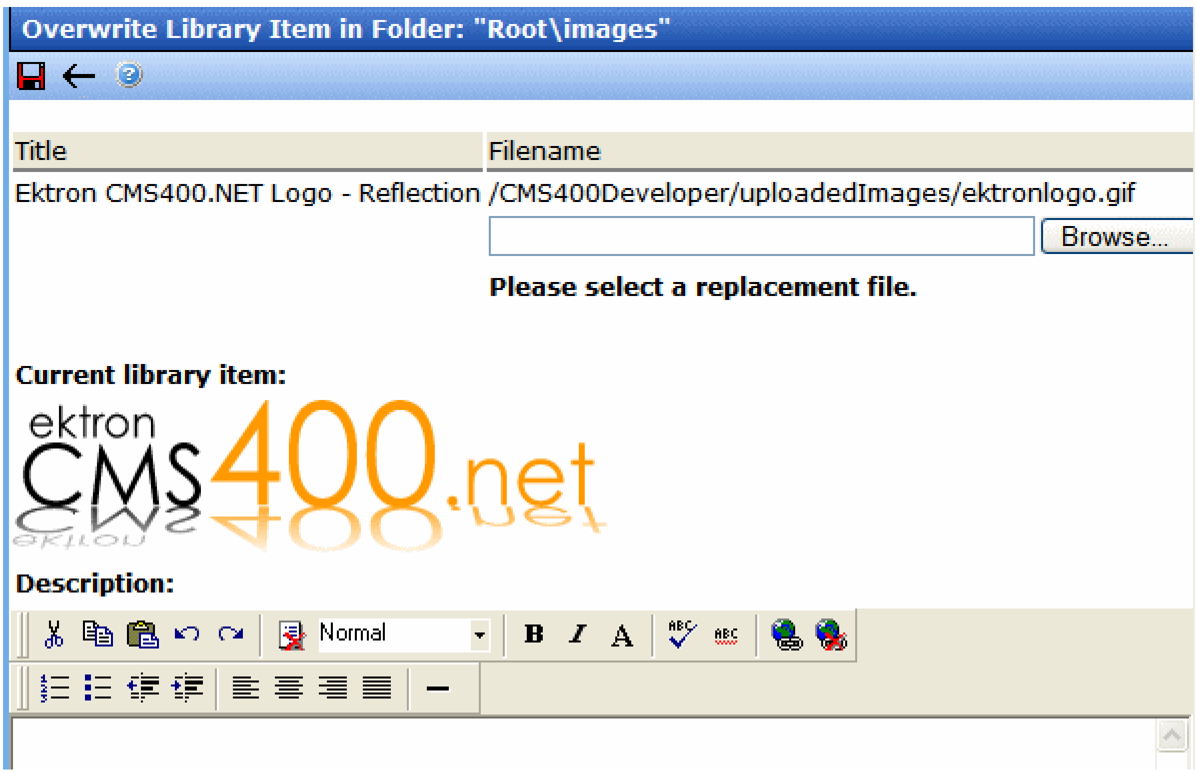
Before You Overwrite a File

Remember, all links that point to the overwritten file now point to the new file.

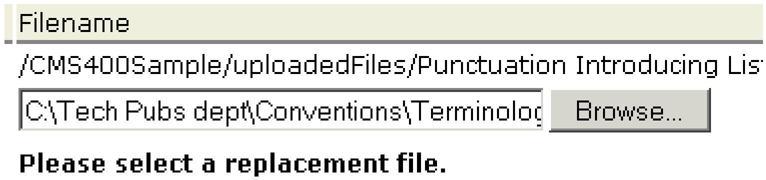
Overwriting Library Assets

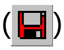
To overwrite a library file, follow these steps.

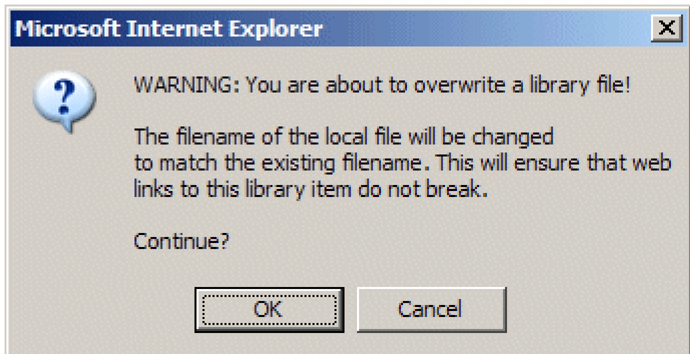
1. Navigate to the View File screen for the file you want to overwrite, as described in ”Viewing Files” on page 143.
2. Click the Overwrite button ().
3. The Overwrite File screen appears.



4. Click the **Browse** button.
5. A window lets you navigate to the new file.
6. Click the file, then click the **Open** button.
7. You return to the Overwrite File screen with the path to the new file in the **Filename** field.



8. If desired, enter a **Description** for the new file.
9. To overwrite the current version of the file with this version, click the Update button ().
10. The following message appears.



11. To overwrite the file, click **OK**.

Library Link Searching

Link searching indicates all content that includes a library link. It is useful when you want to delete a library item. With the click of a button, you see all content that you need to update to reflect the change you are making.

Performing a Library Item Link Search

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

1. Access the View Library Item for any type of library item, as described in "Viewing Files" on page 143.

2. Click the Link Search button ( ).
3. A list of all content that references the library item is displayed.

You should edit that content before deleting the item.

Deleting Library Items

You can delete obsolete items from the library. By deleting an item, you prevent users from adding it to their content. A deleted hyperlink, quicklink or form quicklink remains on your Web server, so any existing links to them are not broken.

On the other hand, if an item is a file or image, the delete window displays an additional prompt, **Remove from the server,** that lets you remove the item from the server. This feature is available to help reduce disk space taken up by these files. Before removing an image or file from your server, you should review all content with links to it and remove or update the link. To delete an item from the library, follow these steps.

1. Access the View Library Item for any type of library item, as described in ”Viewing Files” on page 143.
2. Click the Delete button ( ).
3. The Delete Library Item screen is displayed.
4. If appropriate, check the box next to **Remove from the server** (see above).
5. Click the Delete button ( ).

Adding a Library File to Content

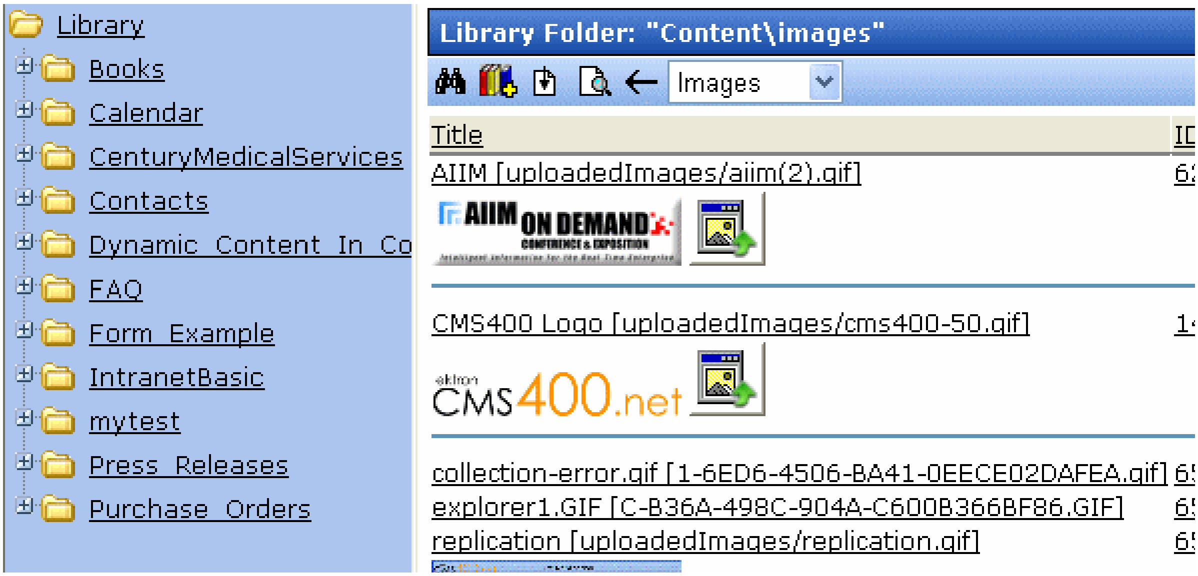
After a file is copied to the library, users can add it to content. (See ”Adding a Library File to Content” on page 149)

You can also insert an item into the library while adding it to content. (See ”Adding a File to the Library and Inserting it into Content” on page 150)

If you insert an image file, it appears within the content. If you add any other type of file, the file name appears as a hyperlink within the content. When a site visitor viewing that page clicks the hyperlink, the inserted file is launched.

Adding a Library File to Content

1. Invoke the editor by adding or editing content in Ektron CMS400.NET.
2. Place the cursor within the content where you want the library file to appear.
3. Click the library button ( ).
4. The library opens.
5. Navigate to the folder that contains the file you want to insert.

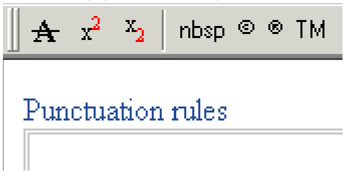


6. From the file types dropdown list, select the kind of file you want to insert.
7. All library files of that type in the selected folder appear on the screen.
8. Click the file you want to insert.

NOTE You can preview the file by clicking the preview button ( ).

9. Click the insert button ( ) to insert the file.

10. A hyperlink to the file appears in your content.



You can click the link to open the file.

Adding a File to the Library and Inserting it into Content

Use this procedure to insert an image into content that has not yet been copied to the library. This procedure inserts the item into the library then into the content.

1. Invoke the editor by adding or editing content in Ektron CMS400.NET.
2. Click the library button ( ).
3. The library opens.
4. Navigate to the folder that will contain the file after you insert it.
5. From the File types dropdown, select the type of file you want to insert.
6. Click the Add Library button ( ).
7. A new screen appears. Browse to the file you want to insert.

   Or you can click the search button ( ) to search for a file to insert.
8. Enter a **Description** for the file.
9. If metadata is required for the library item, you must complete it. Metadata fields may appear in the lower section of the screen.
10. Click the Add Library button ( ).
11. The file is inserted into the selected library folder and the content.

Hyperlinks

For a definition of the term *hyperlinks*, see "Terms Used in this Chapter" on page 131.

Adding Hyperlinks

You must copy hyperlinks to the library before content creators can insert them into content. To copy a hyperlink to the library, follow the procedure described in ”Copying Files to the Library” on page 141. The only difference is that you insert a hyperlink instead of a file.

Viewing Hyperlinks

To view a hyperlink, follow the procedure described in ”Viewing Files” on page 143. The only difference is that you view a hyperlink instead of a file.

Editing Hyperlinks

To edit a hyperlink, follow the procedure described in ”Editing a File” on page 145. The only difference is that you edit a hyperlink title instead of a file title. You can also edit the URL.

Adding Hyperlinks to Your Content

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

To add a hyperlink to content, follow the procedure described in ”Adding a Library File to Content” on page 148. The only difference is that you add a hyperlink instead of a file.

Images

For a definition of the term *images*, see ”Terms Used in this Chapter” on page 131.

Uploading Images

You must copy images to the library before content creators can insert them into content. To copy an image to the library, follow the procedure described in ”Copying Files to the Library” on page 141. The only difference is that you add an image instead of a file.

Viewing Images

To view an image, follow the procedure described in ”Viewing Files” on page 143. The only difference is that you view an image instead of a file.

Editing Image Titles

To edit an image’s title, follow the procedure described in ”Editing a File” on page 145. The only difference is that you edit an image’s title instead of a file title.

Overwriting Images

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

NOTE Overwriting images is a permission that your system administrator may or may not assign to you.

To overwrite an image, follow the procedure described in ”Overwriting Files” on page 145. The only difference is that you overwrite an image instead of a file.

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

Adding Images to Your Content

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

To add an image to content, follow the procedure described in ”Adding a Library File to Content” on page 148. The only difference is that you add an image instead of a file.

The image is placed into the picture properties dialog box, where you can change it before inserting it. For information about the picture properties dialog box, see ”Using the First Picture Properties Dialog Box” on page 673.

Quicklinks and Forms

For a definition of the terms *quicklinks* and *forms*, see ”Terms Used in this Chapter” on page 131.

Adding a Quicklink or Form to Content

After new content is created, if the **Add to Quicklinks table** checkbox was checked for it, users can insert a quicklink to it into any other content. To do so, follow the procedure described in ”Adding a Library File to Content” on page 148. The only difference is that you add a quicklink or form instead of a file.

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

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

Viewing Quicklinks or Forms

To view a quicklink or form, follow the procedure described in ”Viewing Files” on page 143. The only difference is that you view a quicklink or form instead of a file.

The table below describes each field on the quicklinks display.

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

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

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

Updating Default Template for Multiple Quicklinks

WARNING! This procedure is only necessary if Link Management is set to `false` in your web. config file. If if Link Management is set to `true`, Ektron CMS400.NET automatically updates the template within the quicklink when content is moved. See your system administrator for help with the web.config file.

NOTE This action can only be performed on quicklinks.

When content is moved in Ektron CMS400.NET, its quicklink does not get changed. After it is moved, you need to update the default template called in the content's quicklink.

To update the default template for one or more quicklinks, follow these steps.

1. In the library, access the quicklinks folder containing quicklinks you want to update.
2. Click the Update Quicklinks button ().
3. The Update URL Link Template Quicklinks screen is displayed.
4. Check the quicklinks you want to update.

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

5. In the **To:** text field, enter the name of the template you want to apply to the selected quicklinks.

6. Click the Update Quicklinks button () to update the changes.

   A confirmation message is displayed.

7. Click **OK** to continue.

The selected quicklinks are updated to use the specified template.

Working with HTML Forms

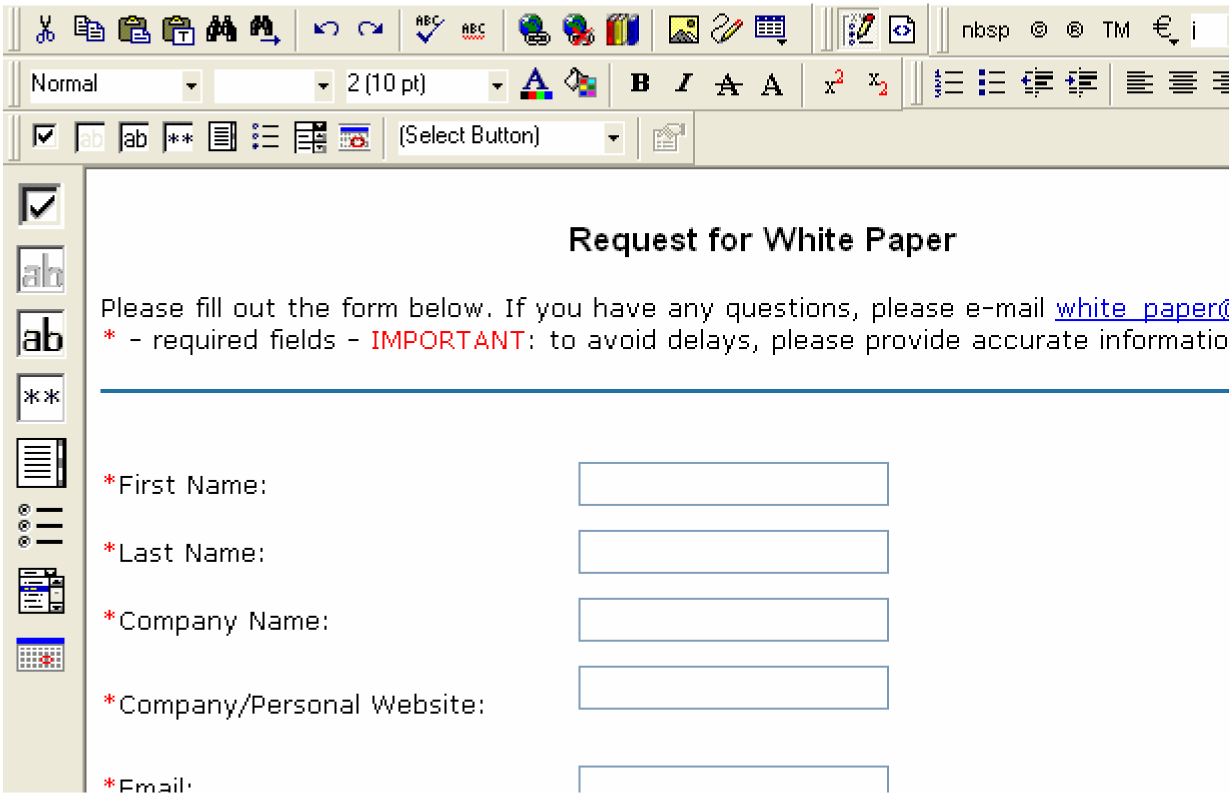
IMPORTANT! This section describes creating forms with eWebEditPro+XML. If you are using the **eWebEdit400** editor, see "Working with HTML Forms" on page 574.

Ektron CMS400.NET provides powerful online form capabilities, allowing you to create an online dialog with visitors. Now anyone in your organization – not just a developer or Webmaster– can create and deploy Web forms to capture visitor information. Support marketing strategies by getting feedback on their needs. Follow up on their interest in your products and services. Register people for events.

Form capabilities include

- Creating a form and its postback message
- Creating polls and surveys for a Web site
- Adding validation criteria to form fields
- Automatically assigning tasks for follow-up activities to form submissions
- Reporting on form information
- Exporting results to Microsoft Excel

A sample form appears below.



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

- ”Viewing Form Information” on page 204
- ”Editing a Form” on page 210
- ”Mailto or Database Form” on page 211
- ”Deleting a Form” on page 212
- ”View Form Toolbar” on page 212
- ”Creating Polls and Surveys” on page 214

Overview of Form Processing

Step	For more information, see
1. Create a form	”Creating a New Form” on page 159
2. Assign it to a Web page	”Implementing a Form on a Web Page” on page 194
3. Site visitor goes to your Web site and completes form. Form is mailed to an email address, saved to a database, or both.	
4. View submitted form data and download it to a spreadsheet.	”Viewing Form Reports” on page 197

The Structure of Form Data

Forms reside within the root folder or one of its subfolders. A form has the following components.

- **Form** (title, ID number, whether the form data is sent as email, and/or saved to a database, etc.)
- **Content** information (title, start and/or end date, status, postback message, etc.)
- **Form fields** (plain text field, password field, text area, hidden text, choices, checkbox, select list, calendar, submit button, etc.)

Creating a New Form

The screen you use to create a new form has five simple steps. After you complete the steps, you have a new form that's ready to collect the information you need. To make the task even easier, **Ektron CMS400.NET** provides sample forms that you can start with then customize.

As explained in "Mailto or Database Form" on page 211, form data can be emailed and/or saved to a database. Forms created using the procedure described below are saved to a database by default, but not emailed. To change either setting, use the Edit Properties screen. See "Viewing and Editing a Form's Properties" on page 205.

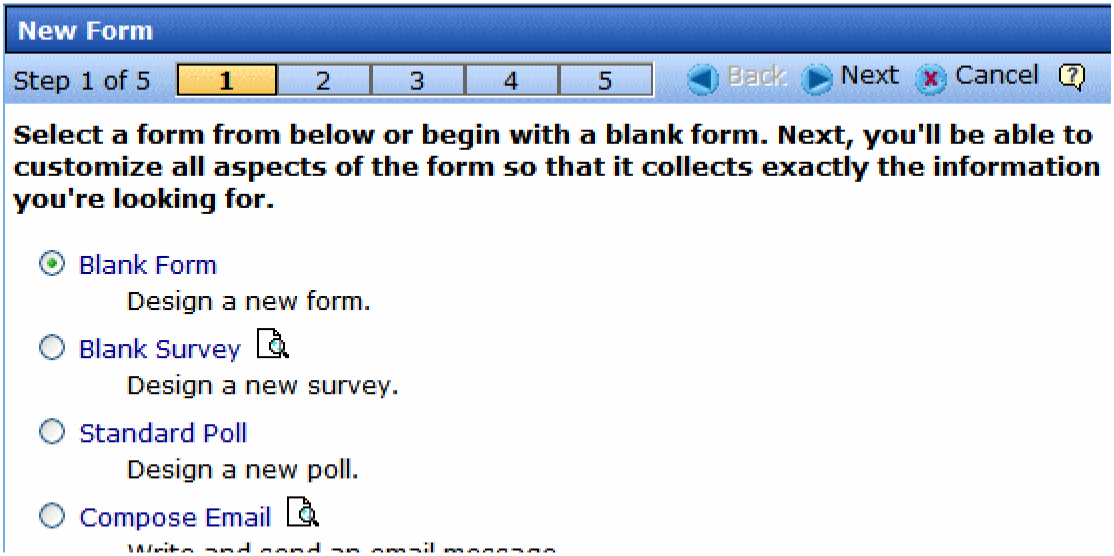
To create a new form, follow these steps.

NOTE You can also create a new edition of a form in another language by copying an existing form and translating it. For more information, see "Translating Content" on page 818.

NOTE For the steps to create a new poll, see "Working With Polls" on page 215. For the steps to create a new survey, see "Creating a Survey" on page 220.

1. Choose a content folder.
2. From the **View** menu, click **Language**, and select the language in which to create the form.
3. Click the **New** menu > **HTML Form/Survey**.

4. The New Form screen appears.



NOTE When you choose Standard Poll or Blank Survey, the number of steps in the Forms Wizard changes from five to four. This happens because the Assign Tasks step is removed. *See Also:* ”Working With Polls” on page 215 and ”Creating a Survey” on page 220.

5. Choose the form that you want to begin with. You can click the preview icon ( ) next to any sample form to preview it before choosing it.

   Select a sample that most closely matches the form you want to create. After you create it, you can add fields, remove fields, modify possible responses, etc.

6. Click **Next**.

7. Enter or edit the form’s **Title** and **Description**.

   - **Title** - used to reference the form within the Workarea (required)
   - **Description** - an extended description of the form

8. The next screen lets you assign a task to a user or user group. If you do, a task will be created every time a site visitor submits this form. *See Also:* ”Assigning a Task to a Form” on page 195

9. A new screen lets you determine what happens after the site visitor completes the form. The choices are:

- **Display a message** - See ”Composing the Postback Message” on page 161
- **Redirect to a file or page** - Identify a file or a page on your Web site that is launched when the visitor completes the form
  - An example of a file is a white paper (a common file format is .PDF) that the visitor requested
  - An example of a page is one that lets the visitor download your product
- **Redirect to an action page and forward form data** - See ”Redirect to an Action Page and Forwarding Form Data” on page 162
- **Report on the form** - See ”Making Form Results Available to Site Users” on page 163

10. Now that you have completed information about the form, you can enter the form’s content. This procedure is described in ”Creating a Form’s Content” on page 166.

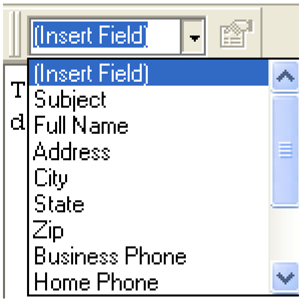
Composing the Postback Message

The postback message can contain text or graphics, just like any other HTML content. Typically, it acknowledges the site visitor’s completion of the form.

For most sample forms provided, sample text appears in the editor. Modify it as you wish, using **Ektron CMS400.NET**’s editor to change the font size, style, color, insert library items, etc.

Inserting Fields into the Postback Message

You can also insert fields that retrieve form information upon its submission. Use the **Insert Fields** pull-down to do this (illustrated below).



All form fields appear on the list. In addition, the following fields can be used to insert form information into the postback message, although they're not completed by the person submitting the form.

- Form title
- Form description
- Date form was submitted by site visitor

For example, your postback message may be

`Thank you` **`«Full Name»`** `for completing the` **`«[Form Title]»`**`.`

When the postback message appears, it looks like this.

`Thank you` **`Jay Kohler`** `for completing the` **`breakroom survey`**`.`

Redirect to an Action Page and Forwarding Form Data

The following section of the **Ektron CMS400.NET** Administrator Manual explains how your administrator sets up the action page: "Working with HTML Forms"> "Redirecting Submitted Form Data".

After your administrator follows that procedure, he identifies a folder and hyperlink that you use to select an action page.

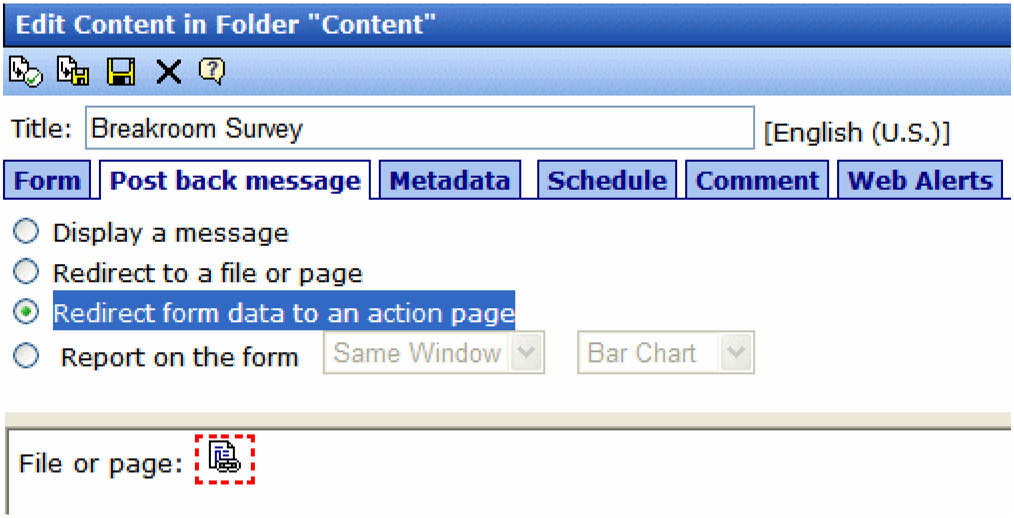
WARNING! You must obtain from your administrator the name of the custom action page and its folder to complete this procedure.

To redirect submitted form data to an action page, follow these steps.

1. Go to the page on which you determine the form's response. If this is a new form, it is page 4 of the Forms Wizard.

To modify an existing form, select the form's folder, then the form. Next, select Edit and click the **Post Back Message** tab.

2. Select **Redirect to an action page and forward form data**.



3. Click the icon next to **File or page**.
4. The Hyperlink manager dialog appears.
5. In the URL field, enter the path to the custom action page. For example, */site root folder/*customaction.aspx. Do not get a quicklink from the library.
6. Press **OK**.

Making Form Results Available to Site Users

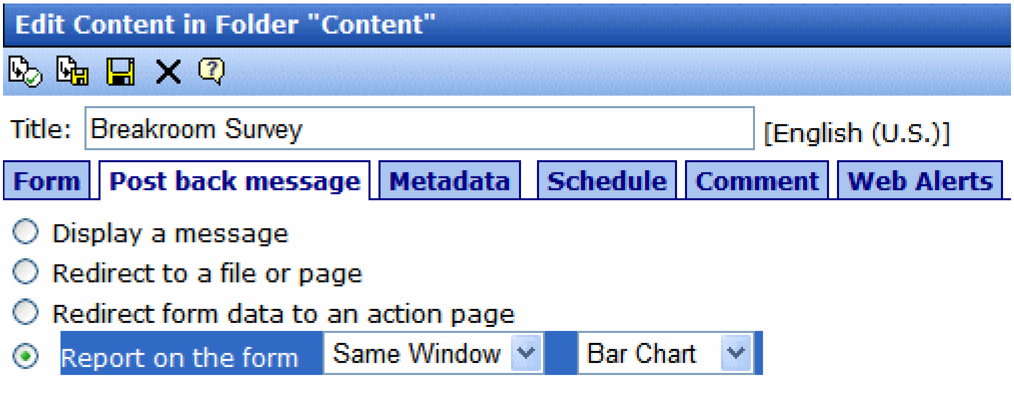
When you create polls and surveys, you can choose to display the results after site users submit data. The results can be displayed in the same window or output to a new window. In addition, you can choose how to chart the data. For a description of chart types, see "Chart Types" on page 165.

To show site visitors the results, follow these steps:

1. Go to the page on which you determine the form's response. If this is a new form, it is page 4 of the Forms Wizard.

   To modify an existing form, select the form's folder, then the form. Next, select Edit and click the **Post Back Message** tab.

2. Select **Report on the form**.



3. Choose whether you want the results to appear in the **Same Window** or a **New Window**.
4. Choose the style of the report.

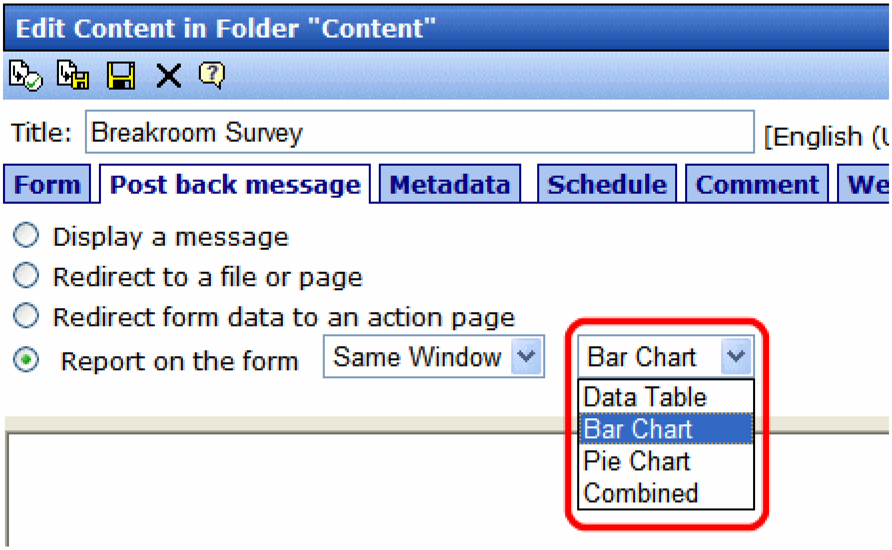
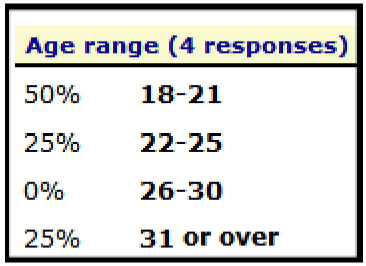
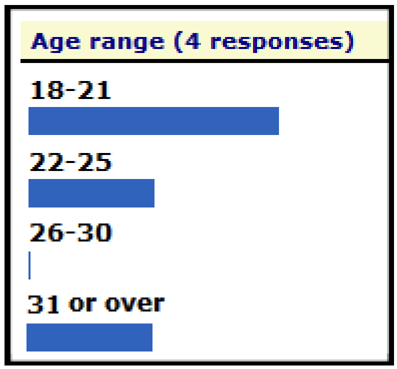
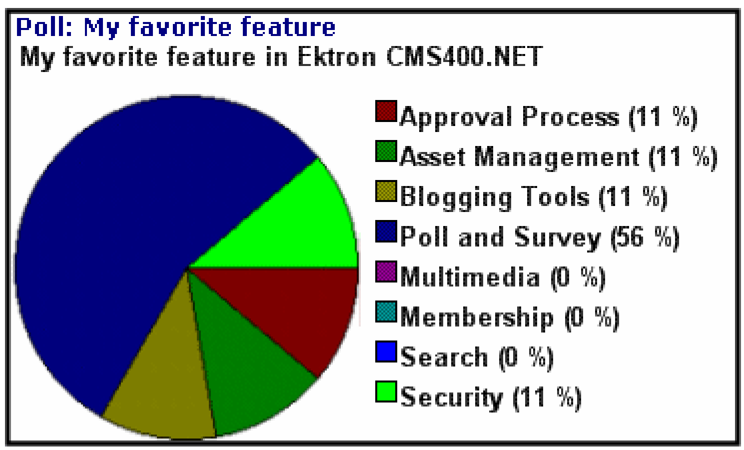
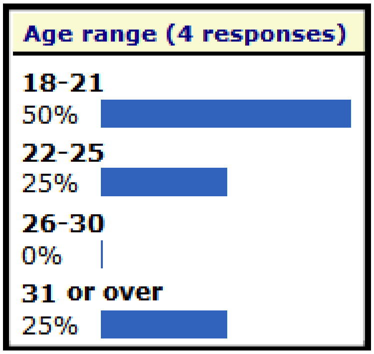


Chart Types

The following table describes the types of charts available.

Chart Type	Description	Sample
Data Table	The poll or survey answers are displayed with the percentage of users who responded to each item.	
Bar Chart	The poll or survey answers are displayed with a bar graph. Use this chart type when you want a quick visual representation of the responses.	
Pie Chart	Displays a standard pie chart. Poll or survey answers are color coded, and the percentage of people who chose each answer is shown.	

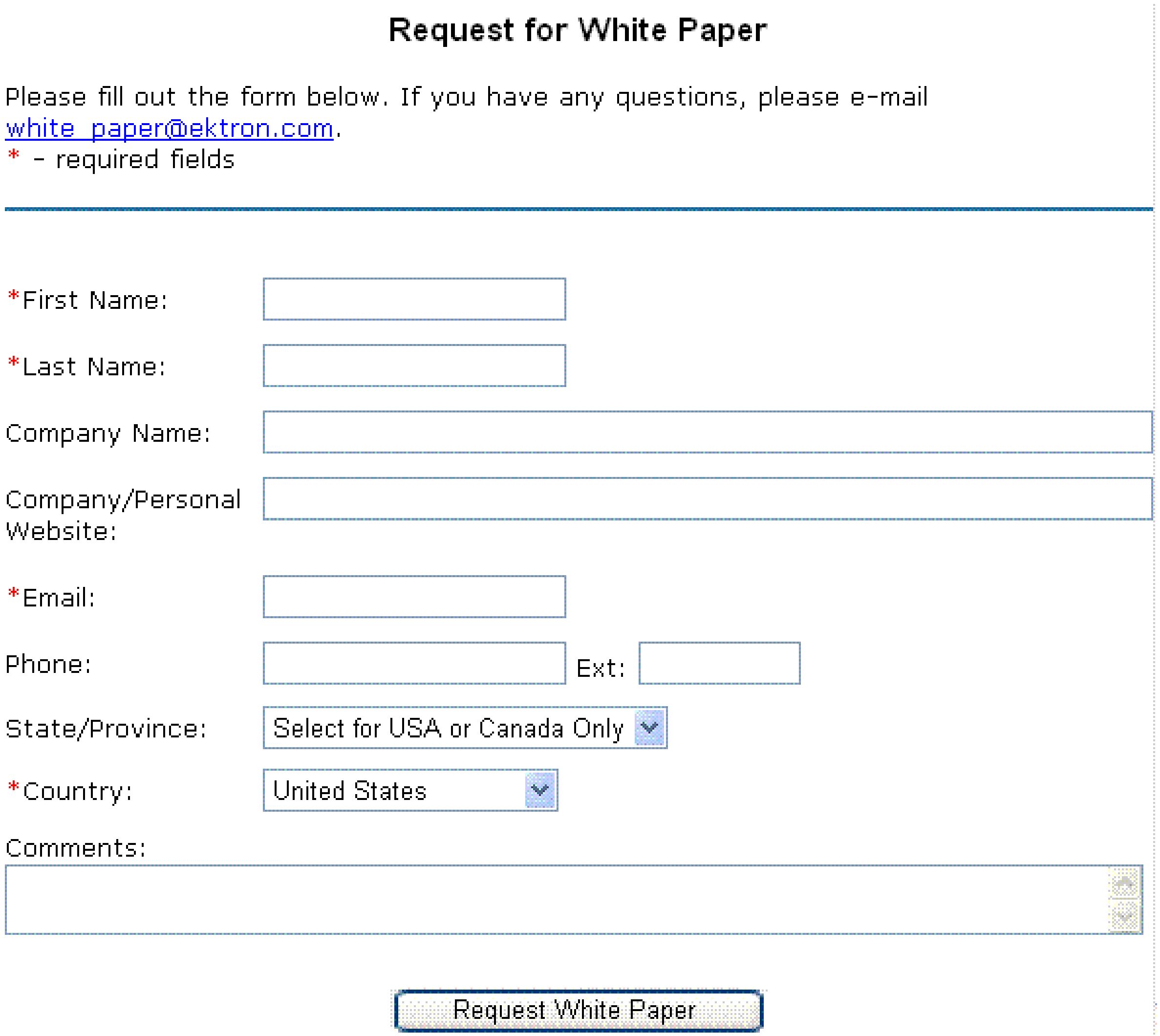
<table>
<tr><th>Chart Type</th><th>Description</th><th>Sample</th></tr>
<tr><td>Combined</td><td>Combines the Data Table and the Bar Chart.</td><td>


</td></tr>
</table>

IMPORTANT! You cannot chart data that is entered into a text box. For example, if one of the choices in a poll is **Other**, and the survey has a text box for site users to enter additional information, the text in the box is not charted. However, the fact that the a user chose **Other** is charted.

Creating a Form’s Content

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



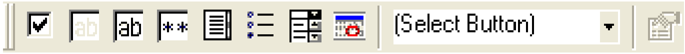
Note that some fields are required, and some provide a dropdown list of choices. You can learn how to create such a screen by following the directions below.

The following topics explain how to create a form.

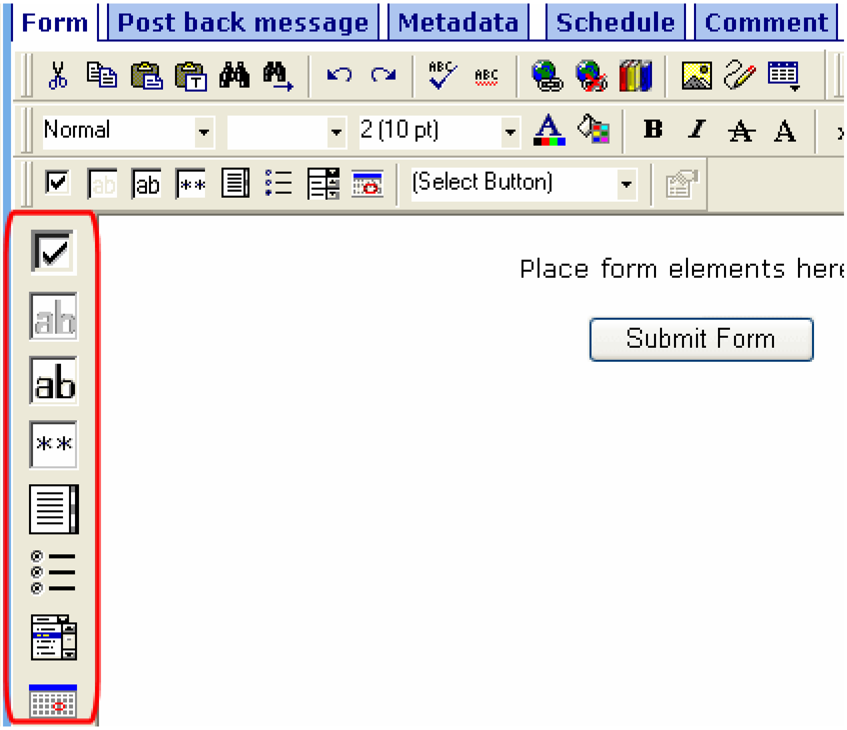
- ”The Form Toolbar Options” on page 168
- ”Inserting Form Fields” on page 169
- ”Form Validation” on page 172

The Form Toolbar Options

Creating form content is similar to creating a standard content item. (See "Adding HTML Content" on page 74). The big difference is a special toolbar (illustrated below) to make it easier to insert form elements.



All toolbar options except the Select Button pull-down also appear on a vertical toolbar to the left of the editor. You can use whichever toolbar you prefer -- all options are the same.

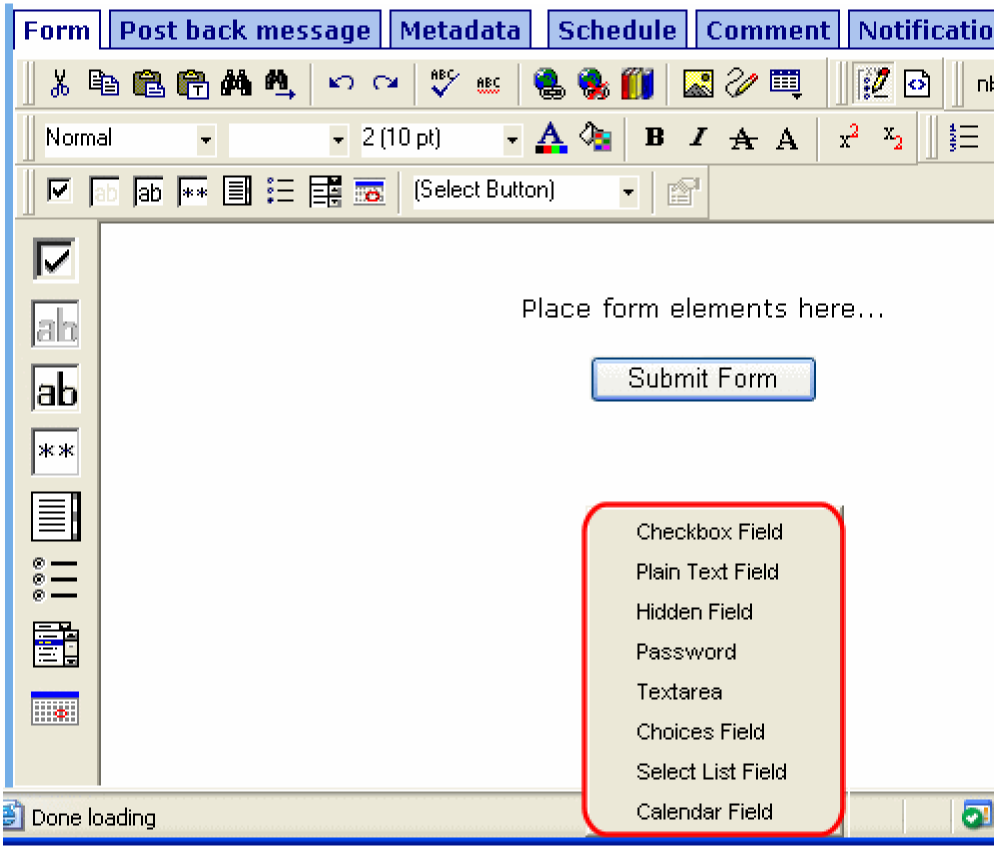


Adding a Field to the Screen

The major difference between the toolbars is how you 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 *vertical* toolbar, drag a button to the desired screen location.

Note that a context-sensitive menu, available by right clicking the mouse, is also available to perform these actions. You can right click the mouse then select **Insert Field** to display a context-sensitive menu of all commands.



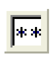
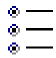
Inserting Form Fields

The final screen of the Forms setup lets you arrange the screen so that it collects exactly the information you want. To create the screen, you insert fields that prompt a site visitor to enter information. Then, add buttons that let the user submit the data on the screen.

If you chose a sample form at the beginning, the screen includes fields. If you did not, the screen has only a **Submit** button.

NOTE In addition to inserting fields, you can add explanatory text, lines, images, etc. onto the form screen. If you want to place fields in columns, insert a table and place the fields within table cells.

The table below explains each field type you can enter.

Button	Inserts this kind of field	Description	For more information, see
	Checkbox	User’s response is either checked or unchecked	”Inserting a Checkbox Field” on page 173
	Hidden Text Field	Information a site visitor doesn’t need to know about	”Inserting a Hidden Text Field” on page 175
	Text Field	Free text field; user cannot format text	”Inserting a Text Field” on page 176
	Password	A password field	”Inserting a Password Field” on page 180
	Text Area	Same as Text Field except field scrolls vertically to accept more text	”Inserting a Text Area Field” on page 182
	Choices	Several choices appear on screen. User checks any number of appropriate boxes.	”Inserting a Choices Field” on page 185
	Select	Same as Choices except options appear in a drop-down box, and site visitor can only select one choice	”Inserting a Select List Field” on page 189
	Calendar	Lets user insert a date by clicking a calendar	”Inserting a Calendar Field” on page 192

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

Button or Tab	Description
Postback Message	See ”Composing the Postback Message” on page 161
Metadata	Edit the metadata for the content. *See Also:* ”Adding or Editing Metadata” on page 77
Schedule	Assign start or end dates, or both, for when content is published to Web site *See Also:* ”Scheduling Content to Begin and End” on page 65
Comment	Enter history comment to indicate changes made to content
Web Alerts	Assign or update Web Alert information for the form. See the **Ektron CMS400.NET** Administrator Manual chapter “Web Alert Feature””Web Alert Feature” on page 931.
Submit	Submit content into approval process.
Publish	Publish content to Web 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. Note: Only the last approver in the approval chain sees this button.
Check In	Save and check-in content. This button does not submit the content into the approval process, but rather lets other users change it.
Save	Save the content without submitting it into the approval process. If a user clicks save and then closes the editor, other users cannot edit the content.
Decline	This buttons appears if you are the next approver in the approval list. Click it to decline the changes made to the content. Note: If 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.

Button or Tab	Description
Cancel	Close the editor without saving changes.

Next, click the Save and Submit or Publish button ( ). The form only appears on your Web site after it is published.

After you complete and save the form, it may need to go through the approval process. When that is complete, add it to the site by assigning it to a page template. See ”Implementing a Form on a Web Page” on page 194.

Form Validation

You can apply validation rules while creating or editing the following field types:

- text
- password
- textarea
- calendar

Validation rules ensure that the form information entered by site visitors meets your criteria. For example, a validation rule can specify that a site visitor’s response to the **Telephone** field conforms to a standard format (for example, 7 or 10 digits). If the response does not conform, an error message informs the site visitor of the problem. The input must conform before the form can be submitted.

For a list of validation rule types, see ”Validation Options” on page 178.

When Validation Rules are Applied

Validation rules are applied when a site visitor submits an entire form, not as soon as the input is entered. If invalid input is found, the error message that you define appears.

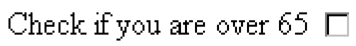
The site visitor must change his response to conform to the validation rule. When he does, the next field is checked and, if that is invalid, its error message appears, etc.

TIP! If you apply validation rules to more than one field, include the field name in the error message. For example, enter **The name field only allows text**. This is good practice because error messages only appear *after* the form is submitted and, if the message does not identify the field, the user may not know which field needs correction.

Form Fields

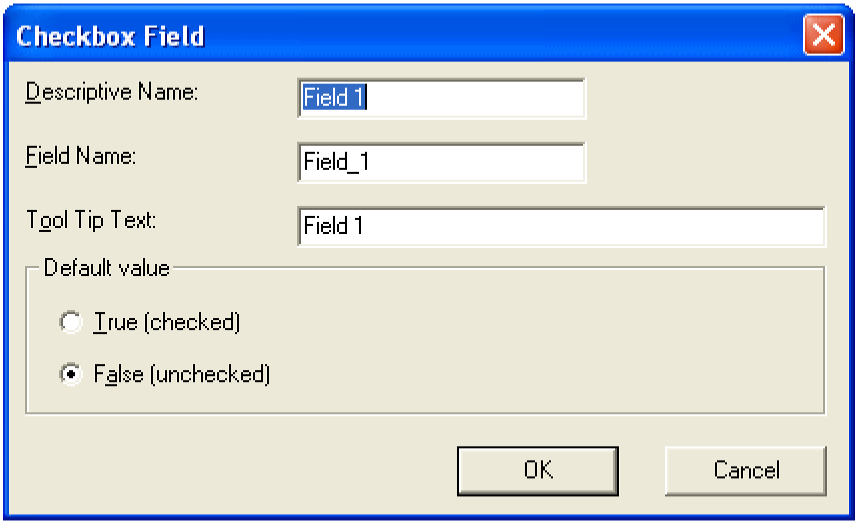
Inserting a Checkbox Field

A Checkbox field is only one character wide and accepts one of two possible values: checked or unchecked. For example

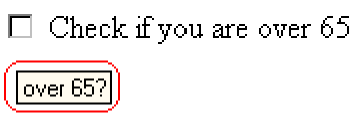


To insert a checkbox field, follow these steps.

1. Place a checkbox type field  onto the screen. *See Also:* "Adding a Field to the Screen" on page 168
2. The following dialog appears.



Fields on the Checkbox Dialog

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Descriptive Name</td><td>Enter a description of the field.
This text describes the field on form reports. See ”Viewing Form Reports” on page 197.</td></tr>
<tr><td>Field Name</td><td>Enter a name for this field. This text identifies the field in the database and in email if the form is mailed.
Note: You cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;’"{}[]|‘~) into this field. If you do, they are replaced by underscores.</td></tr>
<tr><td>Tool Tip Text</td><td>Enter text that appears when a site visitor hovers the cursor over this field (circled in red below).

</td></tr>
</table>

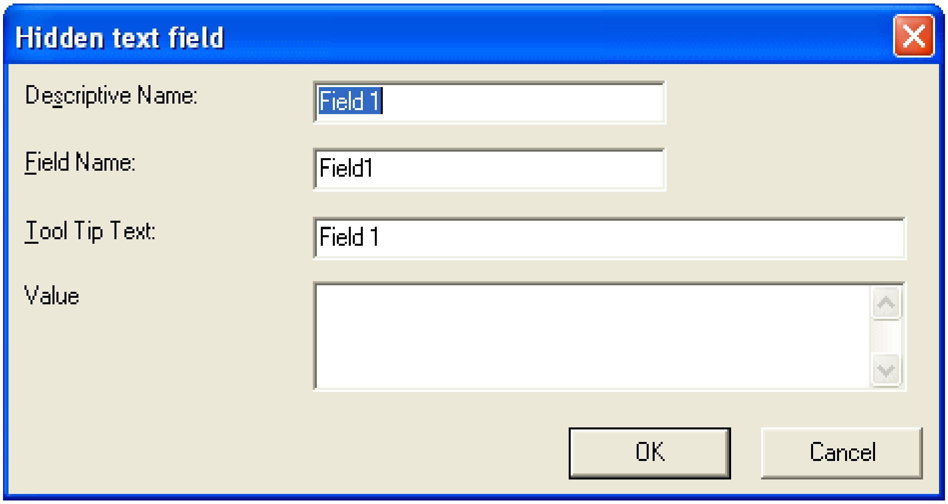
Field	Description
Default value	If you want this field to be checked when the screen first appears, click **True**. Otherwise, click **False**. Regardless of the default value, the site visitor can change it while completing the screen.

Inserting a Hidden Text Field

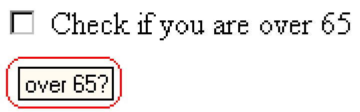
When the form is submitted, this field can pass information that the site visitor doesn't need to know about, such as a tracking number. This is typically data to be stored in the database and/or emailed along with the rest of the data.

To insert a hidden text field, follow these steps.

1. Place a hidden text field  onto the screen. *See Also:* "Adding a Field to the Screen" on page 168
2. The following dialog appears.



Fields on the Hidden Text Field Dialog

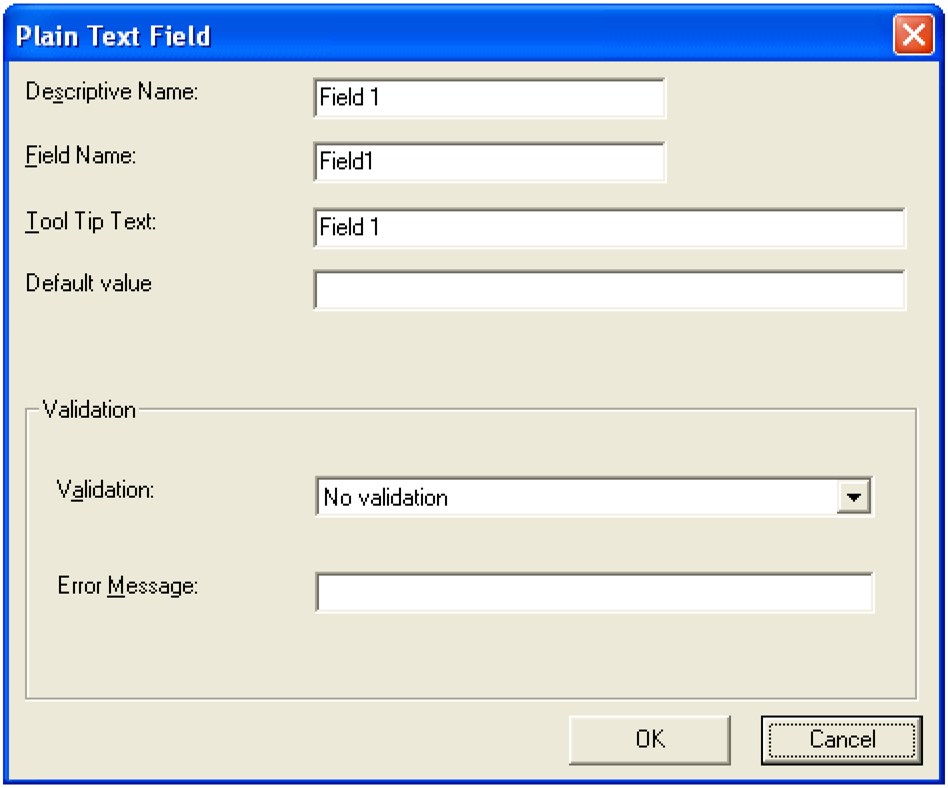
Field	Description
Descriptive Name	Enter a description of the field. This text describes the field on form reports. See ”Viewing Form Reports” on page 197.
Field Name	Enter a name for this field. This text identifies the field in the database and in email if the form is mailed. Note: You cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|'~) into this field. If you do, they are replaced by underscores.
Tool Tip Text	Enter text that appears when a site visitor hovers the cursor over this field (circled in red below). 
Value	Enter the value that will be saved with this field when the form is submitted.

Inserting a Text Field

Use a plain text field when you want the user to enter an unformatted, free text response.

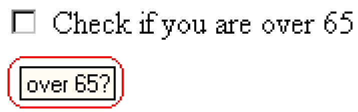
To insert a plain text field, follow these steps.

1. Place a plain text field  onto the screen. *See Also:* ”Adding a Field to the Screen” on page 168
2. The following dialog appears.



Fields on the Plain Text Field Dialog

Field	Description
Descriptive Name	Enter a description of the field. This text describes the field on form reports. See ”Viewing Form Reports” on page 197.
Field Name	Enter a name for this field. This text identifies the field in the database and in email if the form is mailed. Note: You cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;’”{}[]|‘~) into this field. If you do, they are replaced by underscores.

Field	Description
Tool Tip Text	Enter text that appears when a site visitor hovers the cursor over this field (circled in red below). 
Default value	If you want to set a default value for this field, enter it here. For example, if this field collects a city, and most users enter New York, enter New York as the value. Regardless of the default value, the site visitor can change it while completing the screen.
Validation	Select the kind of validation to apply to this field. See ”Validation Options” on page 178 If you assign to this field any value other than **No validation**, the field is initially surrounded by red dashes in Data Entry mode. If the user’s response does not meet the validation criterion, the field remains surrounded by red dashes. The system administrator determines whether or not the user can save an invalid document.
Error Message	Enter text that appears on the screen if the site visitor‘s response to this field does not satisfy the validation criterion. For example, if the validation criterion is telephone number, the error message could be **Please enter 7 or 10 digits**. It would appear if the user entered, for example, S061882. By default, the error message is the same as the validation criterion you choose. You can use this field to customize its text. Note: You can only enter double-byte characters if your Windows settings include that language. If you enter characters that are not in a language defined in your Windows settings, question marks (?) appear instead of the characters.

Validation Options

NOTE Your Web developer can customize validation options. For details, see the **Ektron CMS400.NET** Developer's Guide section "Customizing Validation."

Option	Characteristics of Valid Response
No validation	Response is not checked.
Cannot be blank	Response is required. The format of the response is not checked.
Non-negative whole number or blank	A positive whole number *or* no response.
Non-negative whole number (required)	A positive whole number.
Decimal number or blank	A decimal number (for example, 12.345 or 12) or blank . A leading minus sign "-" is allowed. The decimal point must be a period (.), even in locales that normally use a comma (,). Decimal numbers include whole numbers because the decimal point is implied. That is, 12 is 12.0000.
Decimal number required	A decimal number (it cannot be blank) of none, one, or two decimal places. A leading minus sign "-" is allowed. The decimal point must be period (.), even in locales that normally use a comma (,). Decimal numbers include whole numbers because the decimal point is implied. That is, 12 is 12.0000.
Percent: (0-100) required	A whole number from 0 to 100.
email address	*a@a.a*, where a is one or more characters.
email address list	Several email addresses. Each address's format is *a@a.a*, where a is one or more characters. The user must separate each address with a semicolon (;).
Zip code (US)	5 (*nnnnn*) or 9 digits separated by a dash after the fifth (*nnnnn-nnnn*).
Zip code (US) required	5 (*nnnnn*) or 9 digits separated by a dash after the fifth (*nnnnn-nnnn)*. A response is required.
Social Security (US) required	Nine digits in this pattern: *nnn-nn-nnnn.* A response is required.

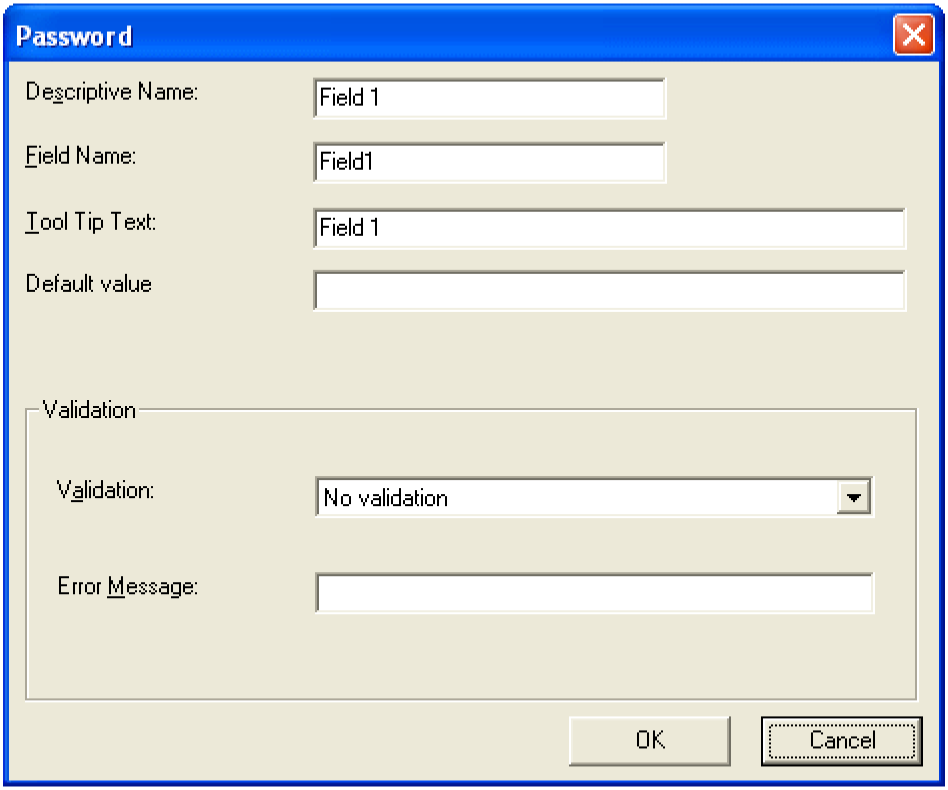
Option	Characteristics of Valid Response
Postal Code (Canada)	*ana nan*, where a is an alphabetic character and n is numeric.
Postal Code (Canada) - (required)	*ana nan*, where a is an alphabetic character and n is numeric. A response is required.
Social Insurance Number (Canada)	A nine digit number in the format: *nnnnnnnnn.*
Social Insurance Number (Canada) Required	A nine digit number in the format: *nnnnnnnnn.* A response is required.
Telephone number (US and Canada)	A seven or 10 digit number in the format *nnnnnnn* or *nnnnnnnnnn*. The site visitor can insert separator characters, such as dashes (-), between numbers.
Telephone number (US and Canada) (required)	A seven or 10 digit number in the format *nnnnnnn* or *nnnnnnnnnn*. The site visitor can insert separator characters, such as dashes (-), between numbers. A response is required.

Inserting a Password Field

Use a password field when you want the user to enter a password. A password is like a text field but the user's entry appears as dots instead of characters. This prevents an onlooker from seeing the password. A user's password entry cannot exceed 18 characters.

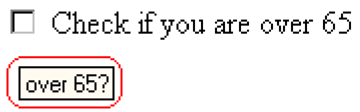
To insert a password field, follow these steps.

1. Place a plain text field  onto the screen. *See Also:* "Adding a Field to the Screen" on page 168
2. The following dialog appears.



Fields on the Password Dialog

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Descriptive Name</td><td>Enter a description of the field.
This text describes the field on form reports. See ”Viewing Form Reports” on page 197.</td></tr>
<tr><td>Field Name</td><td>Enter a name for this field. This text identifies the field in the database and in email if the form is mailed.
Note: You cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;’"{}[]|‘~) into this field. If you do, they are replaced by underscores.</td></tr>
</table>

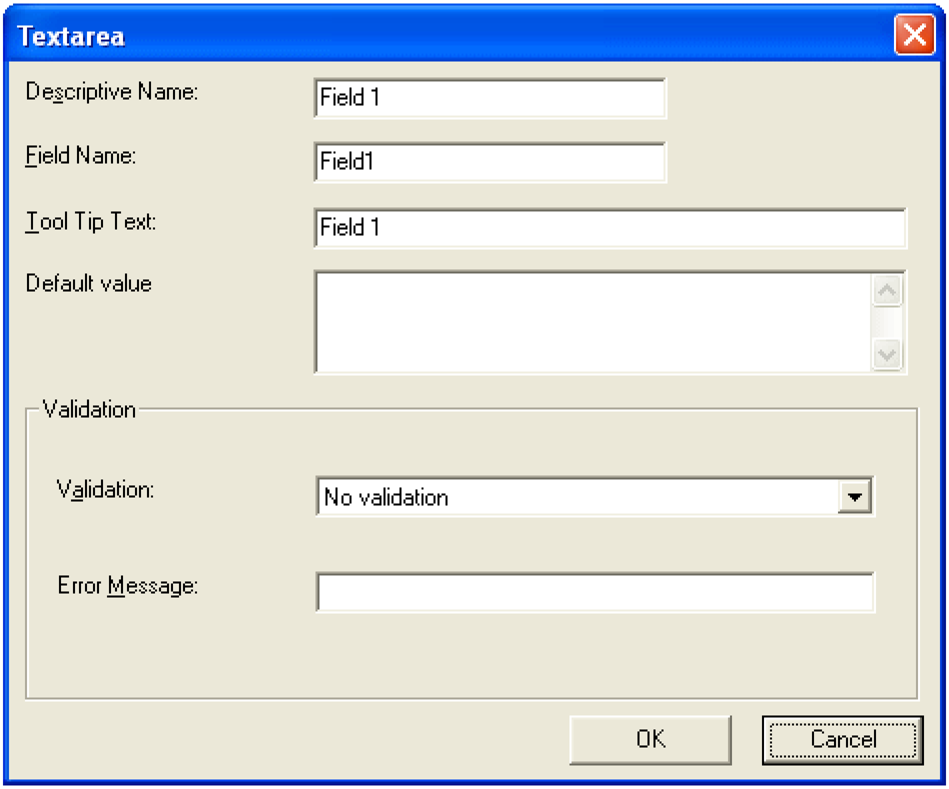
Field	Description
Tool Tip Text	Enter text that appears when a site visitor hovers the cursor over this field (circled in red below). 
Default value	If you want to set a default value for this field, enter it here. Regardless of the default value, the site visitor can change it while completing the screen.
Validation	Select the kind of validation to apply to this field. The choices are: • **No validation** - response is not checked • **Cannot be blank** - Response is required. The format of the response is not checked. • **Minimum of 8 characters with at least one digit** - Site visitor’s entry must be at least 8 characters and include one digit. If you assign to this field any value other than **No validation**, the field is surrounded by red dashes when it appears on your Web site.
Error Message	Enter text that appears on the screen if the site visitor‘s response to this field does not satisfy the validation criterion. For example, if the validation criterion is **Minimum of 8 characters with at least one digit**, the error message could be **Please enter at 8 or more characters with at least one digit**. By default, the error message is the same as the validation criterion you choose. You can use this field to customize its text. Note: You can only enter double-byte characters if your Windows settings include that language. If you enter characters that are not in a language defined in your Windows settings, question marks (?) appear instead of the characters.

Inserting a Text Area Field

Use a text area field when you want the site visitor to enter an unformatted, free text response. A text area field is similar to a Text Field except it scrolls vertically to accept more text.

To insert a text area field, follow these steps.

1. Place a text area field onto the screen. *See Also:* "Adding a Field to the Screen" on page 168
2. The following dialog appears.

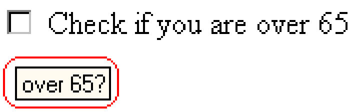


Fields on the Textarea Dialog

Field	Description
Descriptive Name	Enter a description of the field. This text describes the field on form reports. See "Viewing Form Reports" on page 197.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Field Name</td><td>Enter a name for this field. This text identifies the field in the database and in email if the form is mailed.

Note: You cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;’"{}[]|‘~) into this field. If you do, they are replaced by underscores.</td></tr>
<tr><td>Tool Tip Text</td><td>Enter text that appears when a site visitor hovers the cursor over this field (circled in red below).


</td></tr>
<tr><td>Default value</td><td>If you want to set a default value for this field, enter it here. For example, if this field collects a city, and most users enter New York, enter New York as the value.

Regardless of the default value, the site visitor can change it while completing the screen.</td></tr>
<tr><td>Validation</td><td>Select the kind of validation to apply to this field. The choices are:
• No validation - response is not checked
• Cannot be blank - Response is required. The format of the response is not checked.
• Allow maximum of 1000 characters - Site visitor’s entry cannot exceed 1000 characters.

If you assign to this field any value other than No validation, the field is surrounded by red dashes when it appears on your Web site.</td></tr>
<tr><td>Error Message</td><td>Enter text that appears on the screen if the site visitor‘s response to this field does not satisfy the validation criterion.

For example, if the validation criterion is Cannot be blank, the error message could be Please enter a response.

By default, the error message is the same as the validation criterion you choose. You can use this field to customize its text.

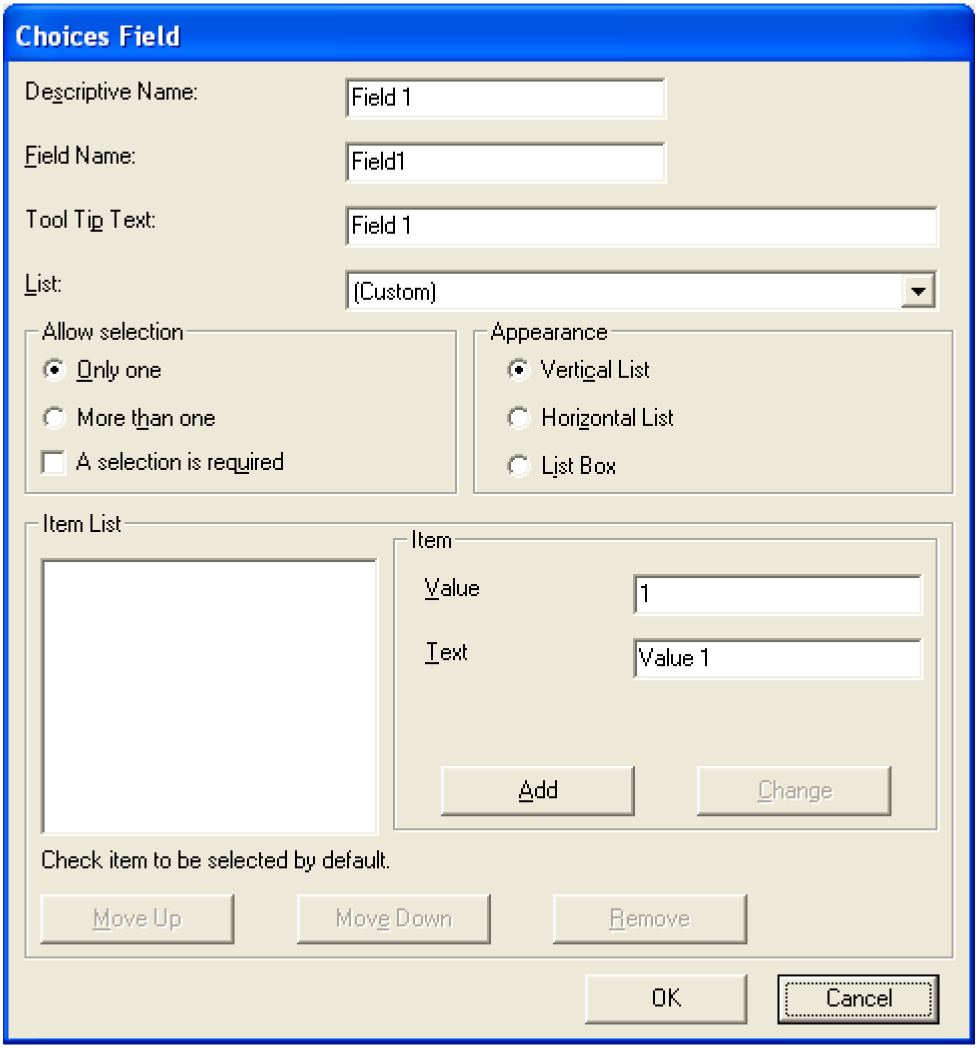
Note: You can only enter double-byte characters if your Windows settings include that language. If you enter characters that are not in a language defined in your Windows settings, question marks (?) appear instead of the characters.</td></tr>
</table>

Inserting a Choices Field

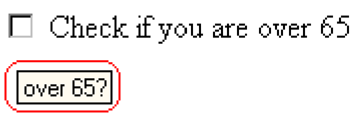
Use a Choices field when you want the site visitor to select from a predetermined list of choices. You can allow the site visitor to select only one or more than one choice. You can also determine the list of choices and the appearance of the list.

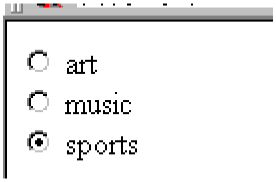
To insert a choices field, follow these steps.

1. Place a choices field onto the screen. *See Also:* ”Adding a Field to the Screen” on page 168
2. The following dialog appears.



Fields on the Choices Dialog

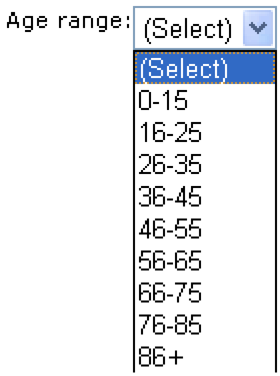
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Descriptive Name</td><td>Enter a description of the field.
This text describes the field on form reports. See ”Viewing Form Reports” on page 197.</td></tr>
<tr><td>Field Name</td><td>Enter a name for this field. This text identifies the field in the database and in email if the form is mailed.
Note: You cannot enter spaces nor most special characters (!@#$%^&*()+=<>,..:;’"{}[]|‘~) into this field. If you do, they are replaced by underscores.</td></tr>
<tr><td>Tool Tip Text</td><td>Enter text that appears when a site visitor hovers the cursor over this field (circled in red below).

</td></tr>
<tr><td>List</td><td>Custom - You create your own set of choices. Use the Item and Item List fields to do this.
Note: If, after seeing the following predefined choices, you want to customize the choices available to site visitors, return to this field, replace the value with Custom, then define the ranges you want in the Item field.
Age Ranges - Use the predefined choices for age ranges. You can see the ranges on the screen after you choose this option.
Numeric Ranges -Use the predefined choices for numeric ranges. You can see the ranges on the screen after you choose this option.
Gender -Use the predefined choices for gender. You can see the values on the screen after you choose this option.
Marital Status - Use the predefined choices for marital status. You can see the values on the screen after you choose this option</td></tr>
<tr><td>Allow Selection</td><td>Click More than one to allow the site visitor to select more than one item on the data entry screen. Otherwise, click Only one.
For example, if you click More than one, and the choices are: music, art, sports, the user could select all three choices.
If you click Only one, the user could only select one choice.
A selection is required - Check this box if the user must select at least one item in the list.</td></tr>
</table>

Field	Description
Appearance	Click **Vertical List** to arrange the choices vertically.  Click **Horizontal List** to arrange the choices horizontally.  Click **List Box** to display all choices in a box. The box lengthens to display all entries. 
Item: Value	Enter the value that is collected when the data entry user selects this item. For example, if **Interests** appears in the Name field, and you want `music` to be collected when the data entry user selects this item and saves the page, enter **music** here.
Item: Text	Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use **eWebEditPro+XML**'s formatting capabilities to modify its size, font, color, and other attributes.
Item List	This section of the screen displays the items that you enter in the **Value** and **Text** fields. Buttons near the bottom of the screen let you remove items from this list as well as rearrange them.  Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox. Note that if **Only One** is selected under **Allow selection** (above), only one item can be selected.

Inserting a Select List Field

Use a Select List field when you want the site visitor to select from a predetermined list of choices. Although similar to the choices field, when you insert a Select List field, the site visitor only sees the first option in a drop down box.

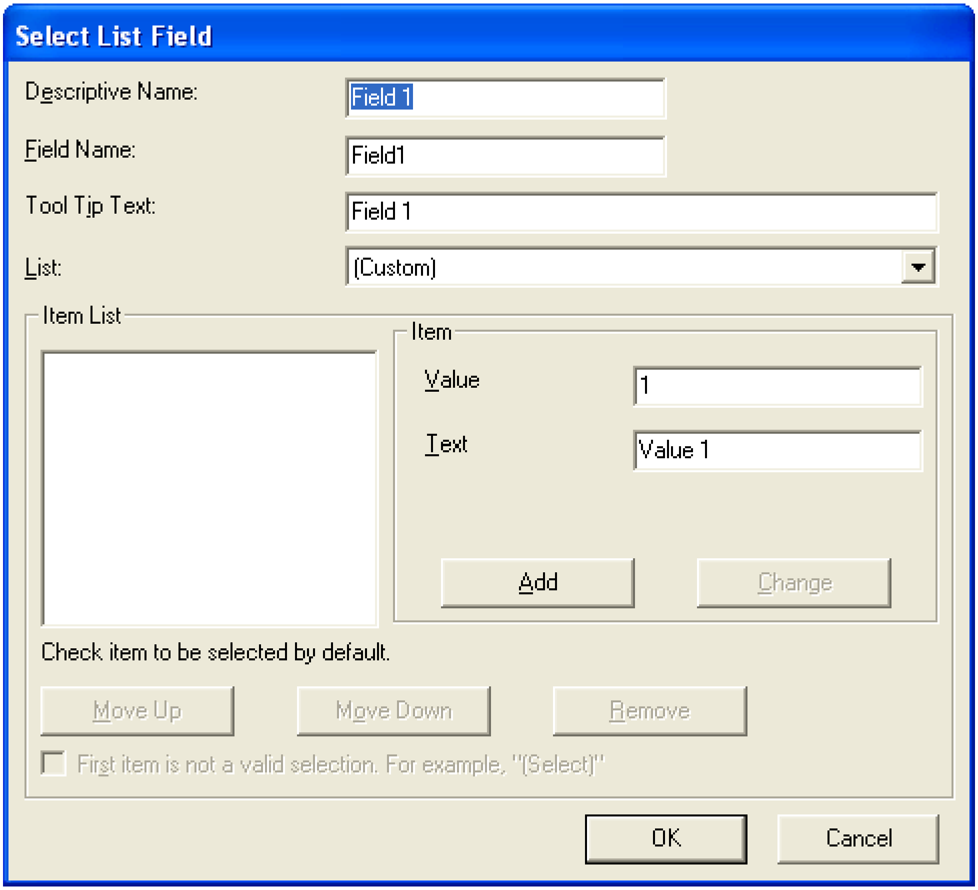
He must click the down arrow to see the remaining values and select one.



So, the Select List field occupies less room on the screen than a choices field. Also, the site visitor can only choose on item on the list. In contrast, you can allow a visitor to select several choices if you use a choices field.

To insert a Select List field, follow these steps.

1. Place a Select List field onto the screen. *See Also:* "Adding a Field to the Screen" on page 168
2. The following dialog appears.

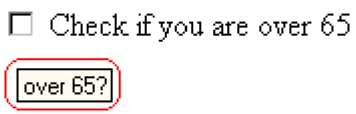


Fields on the Select List Field Dialog

Field	Description
Descriptive Name	Enter a description of the field. This text describes the field on form reports. See "Viewing Form Reports" on page 197.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Field Name</td><td>Enter a name for this field. This text identifies the field in the database and in email if the form is mailed.

Note: You cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;’"{}[]|‘~) into this field. If you do, they are replaced by underscores.</td></tr>
<tr><td>Tool Tip Text</td><td>Enter text that appears when a site visitor hovers the cursor over this field (circled in red below).


</td></tr>
<tr><td>List</td><td>Custom - You create your own set of choices. Use the Item and Item List fields to do this.
See Also: ”Customizing a Standard List” on page 192
Languages - list of languages supported by Windows
Countries - list of all countries in the world
U.S States and Territories - list of all states and territories that make up the U.S.
Canadian Provinces - list of all Canadian provinces
Age Ranges - Use the predefined choices for age ranges. You can see the ranges on the screen after you choose this option.
Numeric Ranges -Use the predefined choices for numeric ranges. You can see the ranges on the screen after you choose this option.
Years - list of calendar years, ranging from 2004 to 2014</td></tr>
<tr><td>Item:
Value</td><td>Enter the value that is collected when the data entry user selects this item.
For example, if Interests appears in the Name field, and you want <code>music</code> to be collected when the data entry user selects this item and saves the page, enter music here.</td></tr>
<tr><td>Item:
Text</td><td>Enter text to describe this item on the data entry screen.
After you insert this field onto the screen, you can use eWebEditPro+XML’s formatting capabilities to modify its size, font, color, and other attributes.</td></tr>
</table>

Field	Description
Item List	This section of the screen displays the items that you enter in the **Value** and **Text** fields. Buttons near the bottom of the screen let you remove items from this list as well as rearrange them.  Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox.
First item is not a Valid Selection	Check here if the first item on the list is not a valid value but instead text that prompts the user to respond to the field. An example of such text for a list of states would be **Select a state**. If you check this box and the user selects the first value on the list (most likely by default), an error message appears when he tries to save the screen.

Customizing a Standard List

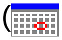
You can customize any list of predefined choices. For example, you can change the calendar years so they begin in 1995 and run through 2020.

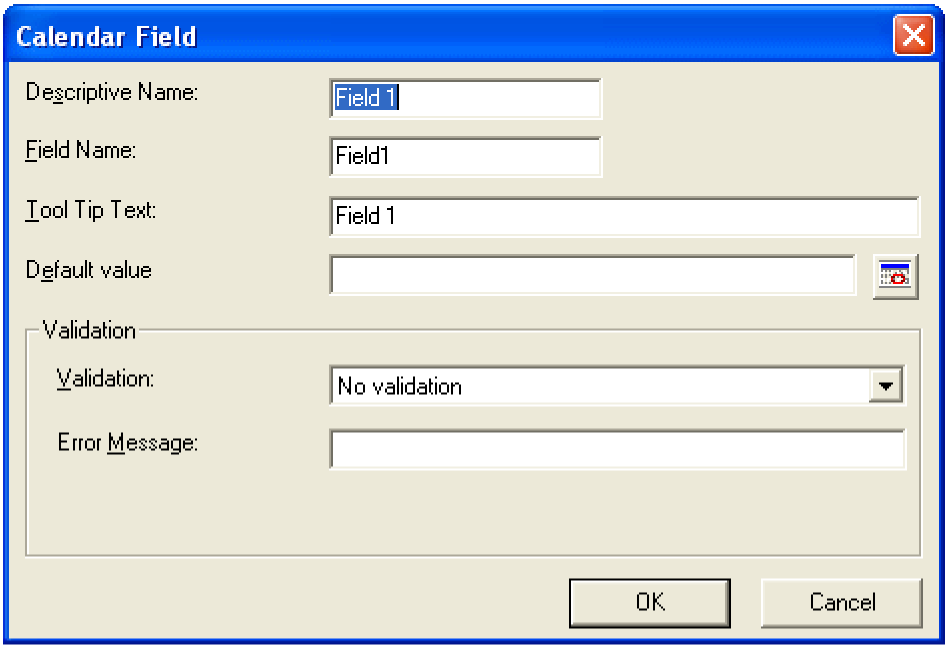
To do this, follow these steps.

1. Choose the standard list that you want to customize.
2. Change the value of the List field to **Custom**.
3. All of the predefined choices appear in the **Item List** box.
4. To
   - add new items, use the Item **Value** and **Text** fields
   - delete an existing list item, select it and click **Remove**
   - rearrange the list, use the **Move Up** and **Move Down** buttons
   - edit a list item, select it and press the **Change** button

Inserting a Calendar Field

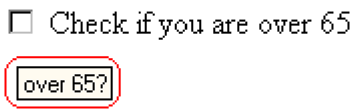
To insert a field that lets a site visitor select a date, use a Calendar Field. To do that, follow these steps.

1. Place a Calendar field () onto the screen. *See Also:* ”Adding a Field to the Screen” on page 168
2. The following dialog appears.



Fields on the Calendar Field Dialog

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Descriptive Name</td><td>Enter a description of the field.
This text describes the field on form reports. See ”Viewing Form Reports” on page 197.</td></tr>
<tr><td>Field Name</td><td>Enter a name for this field. This text identifies the field in the database and in email if the form is mailed.
Note: You cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;’"{}[]|‘~) into this field. If you do, they are replaced by underscores.</td></tr>
</table>

Field	**Description**
Tool Tip Text	Enter text that appears when a site visitor hovers the cursor over this field (circled in red below). 
Default value	If you want to set a default value for this field, enter it here. For example, if this field collects a city, and most users enter New York, enter New York as the value. Regardless of the default value, the site visitor can change it while completing the screen.
Validation	Select the kind of validation to apply to this field. The choices are: • **No validation** - response is not checked • **Cannot be blank** - Response is required. The format of the response is not checked. If you assign **Cannot be blank**, the field is surrounded by red dashes when it appears on your Web site.
Error Message	Enter text that appears on the screen if the site visitor‘s response to this field does not satisfy the validation criterion. For example, if the validation criterion is **Cannot be blank**, the error message could be **Please enter a response**. By default, the error message is the same as the validation criterion you choose. You can use this field to customize its text. Note: You can only enter double-byte characters if your Windows settings include that language. If you enter characters that are not in a language defined in your Windows settings, question marks (?) appear instead of the characters.

Implementing a Form on a Web Page

After you create the form, you need to link it to another page on your Web site. You would insert the link as you would any form link. See ”Adding a Library File to Content” on page 148.

Next, open your Web Site, navigate to the host page, and click the hyperlink to access the form. Now, you can test the form and make sure it works as you expected. If needed, you can return to edit mode, change the form, and test it again until you are happy with it.

Assigning a Task to a Form

While tasks typically help **Ektron CMS400.NET** users track content activities, you can also assign a task to users or user groups whenever a form is submitted.

For example, your Web site offers a free product demonstration to anyone who completes a form. Whenever a site visitor submits the form, a task is assigned to your sales department's administrative assistant. He uses the information on the form to schedule a demonstration. The sales manager can review the task history to audit sales leads and ensure demonstration requests are being handled in a timely manner.

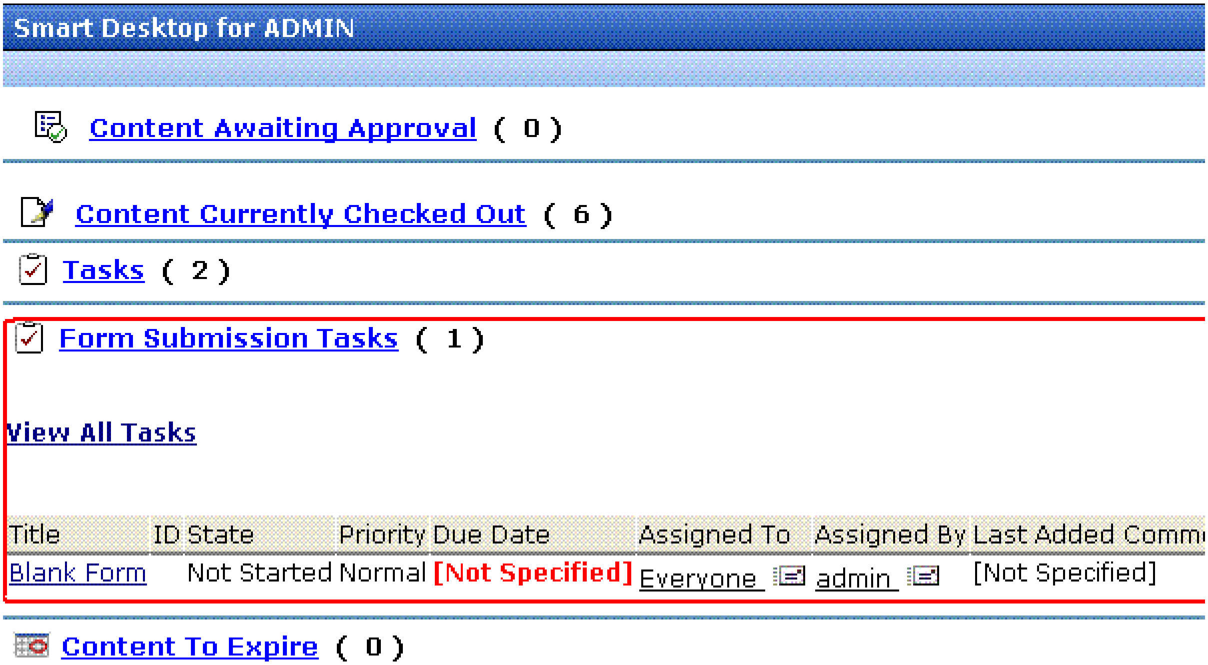
To set up a task that it is assigned to users or groups whenever a site visitor completes the form, follow these steps.

Note You should be familiar with tasks before beginning this procedure. *See Also:* "Managing Tasks" on page 286

1. If you are creating a new form, assign the task at Step 3 of the Forms Wizard.

   If you are editing a form, assign the task on the form's Edit Properties screen.

   In both cases, you identify only users and groups to whom the task will be assigned whenever a site visitor completes the form. **Ektron CMS400.NET** assigns the remaining task information.
2. You complete the form and make it available on your Web site.
3. A visitor to your site fills out and submits the form.
4. A task is created and assigned to users and groups you identified in Step 1.
5. Any **Ektron CMS400.NET** user can view all tasks created via form submission in the Smart Desktop. See illustration below. *See Also:* "Understanding the Smart Desktop" on page 17



Ektron CMS400.NET users and administrators can also view and update tasks assigned to them via the Task screens on the Smart Desktop. See "Viewing a Task" on page 300 and "Viewing a Task's History" on page 310.

Task Information

The task created upon form submission has the following information.

Field	Value
Title	Form title, as entered by the author
Assigned to	As set up by the user who created or edited the form
Assigned by	User who created or last edited form
Priority	Normal

Field	Value
Task Category	Form Submission Task Category
Task type	Form Submission Task
Created by	User who created or last edited form
State	Not started
Due date	Not specified
Start date	Not specified
Description	Data from form "*form name*" was received on *date time*. *form description* *Name of every field on the form: value submitted by user into that field*

email Automatically Generated Upon Form Submission

An email is automatically sent to every user named in Step 1 above who has a valid email address in the User Information Screen. The email's subject line is the form name. The body of the email contains the following information for each field on the form.

- name
- value submitted by user

Viewing Form Reports

If a form is set to store data in the database, you can run a report that displays the submitted data. To view a form report, follow these steps.

1. Navigate to the folder for which you want to view the report. The View Contents of Folder screen appears.

2. Click the form you want to view. (If you do not see your form in the folder, make sure the Content Type drop-down box is set to All Types or Forms.)
3. Click the View Reports button ().
4. The View Forms Report screen appears.
5. Enter report criteria using the following table as a reference.

Field	Description
Start Date	If desired, specify a start date. The report displays only forms that were submitted on or after the start date.
End Date	If desired, specify an end date. The report displays only forms that were submitted on or before the end date.
Report Display	Specify the format to display the report.
Select Legacy Report	Specify the version of the form or poll for which to get a report. Using this option allows you to see the results from previous polls and forms.

6. Click the **Get Result** button to display the report.

Display Formats

The submitted form data can be viewed in any of these formats.

- ”Table with Totals” on page 198
- ”Bar Chart” on page 165
- ”Summary of Selected Choices” on page 199
- ”Table of Values” on page 200
- ”List of Submitted Values” on page 201
- ”Submitted Data as XML” on page 202

Table with Totals

The table of values shows the following information for each completed form.

- a checkbox that lets you delete the response
- an internal identification number of the response
- the name of the user who submitted the form, if he signed in to **Ektron CMS400.NET** beforehand. If the user did not sign in, **anonymous** appears.
- date response was submitted
- The name of each field on the survey
  - under each field name is the submitted response for the each user
- the bottom line sums the numerical and percentage totals for each response

Sample of Table with Totals Format

General Demographic Survey

(Delete) ☐	ID	Submitted By	Date Submitted	Gender		Age range			Ed
				Male	Female	22-25	26-30	31-40	H Scho
☐	22	Member, John	12/6/2005 4:18:50 PM	✔		✔			
☐	23	anonymous	12/6/2005 4:22:58 PM		✔			✔	
☐	24	Edit, John	12/6/2005 4:23:40 PM	✔			✔		
			Total:	2	1	1	1	1	
			Average (3 rows):	66.67%	33.33%	33.33%	33.33%	33.33%	66.

Summary of Selected Choices

This format totals, for choice and select type fields, the number of times each choice was selected. Only choices that were selected at least once appear.

Sample Summary of Selected Choices Format

General Demographic Survey

Field	Value	Count
Age range	22-25	1
	26-30	1
	31-40	1
Annual Income	$30,000-$39,999	1
	$40,000-$49,999	1
	$70,000-$79,999	1
Education Level	High School/GED	2
	Master's Degree	1
Father's Education Level	High School/GED	1
	Master's Degree	1
	Some College	1
Gender	Female	1
	Male	2
Household Income	$100,000-$149,000	1
	$30,000-$39,999	1
	$60,000-$69,999	1
Marital Status	Legally Separated	1
	Married	1
	Single	1
Mother's Education Level	High School/GED	2
	Master's Degree	1
Race	African-American	1
	Native American	1
	White	1

Table of Values

The table of values shows the following information for each completed form.

- a checkbox that lets you delete the response
- an internal identification number of the response
- the name of the user who submitted the form, if he signed in to **Ektron CMS400.NET** beforehand. If the user did not sign in, **anonymous** appears.
- date response was submitted
- descriptive name of each form field appears in the column header
  - the value entered for each field appears below the header

Sample of Table of Values Format

General Demographic Survey

(Delete)	ID	Submitted By	Date Submitted	Gender	Age range	Education Level	Annual Income	Household Income	
☐	22	Member, John	12/6/2005 4:18:50 PM	Male	22-25	High School/GED	$40,000-$49,999	$60,000-$69,999	L S
☐	23	anonymous	12/6/2005 4:22:58 PM	Female	31-40	Master's Degree	$70,000-$79,999	$100,000-$149,000	M
☐	24	Edit, John	12/6/2005 4:23:40 PM	Male	26-30	High School/GED	$30,000-$39,999	$30,000-$39,999	S

List of Submitted Values

The List of Submitted Values format provides the same information as the Table of Values, but is formatted vertically rather than horizontally. *See Also:* "Table of Values" on page 200

Sample List of Submitted Values Format

General Demographic Survey

(Delete)	ID	Submitted By	Date Submitted	Field	Value
☐	22	Member, John	12/6/2005 4:18:50 PM	Gender	Male
				Age range	22-25
				Education Level	High School/GE
				Annual Income	$40,000-$49,9
				Household Income	$60,000-$69,9
				Marital Status	Legally Separat
				Religious	Evangelical Chr
				Other Religious Affiliation	
				Race	African-America
				Mother's Education Level	High School/GE
				Father's Education Level	Some College
☐	23	anonymous	12/6/2005 4:22:58 PM	Gender	Female
				Age range	31-40
				Education Level	Master's Degre
				Annual Income	$70,000-$79,9
				Household Income	$100,000-$14
				Marital Status	Married
				Religious	Protestant Chri

Submitted Data as XML

Displays the results of the form in an XML format. The following information is included:

- <Title> - title of the form block

IMPORTANT! With polls you can create a new poll question to replace an existing poll question. By default the poll still has the same Title, ID, and other properties. You can change the title of a new poll question when you are editing the poll.

- <Description> - description of the form
- <SubmittedData> - information that was submitted

Sample of Submitted Data as XML


```
<Form>
<Title>Where did you hear about Ektron Medical?</Title>
<Description>Poll for finding out where visitor's heard about
our site</Description>
<SubmittedData>
<Date value="2006-05-16T17:25:35">5/16/2006 5:25:35 PM</Date>
<User id="1" member="false">
<Name><FirstName>Application</FirstName>
<LastName>Administrator</LastName></Name>
<Username>admin</Username>
<Email></Email>
</User>
<Data form_data_id="250">
<ektpoll1147812046505>Navigation_2</ektpoll1147812046505>
</Data>
</SubmittedData>
<SubmittedData>
<Date value="2006-05-16T16:48:22">5/16/2006 4:48:22 PM</Date>
<Data form_data_id="248">
<ektpoll1147812046505>Everything_4</ektpoll1147812046505>
```


Exporting a Form’s Raw Data

After you run a report, you can export its data to a Microsoft Excel spreadsheet file (.xls) for further analysis. If a form uses an XML structure, each XML tag becomes a column header in the spreadsheet.

To export form data, follow these steps.

1. Access the View Form Reports screen for the report you want to export, as described in ”Viewing Form Reports” on page 197.
2. Click the Export Reports button ().
3. A File Download dialog box is displayed. Choose the option that best suits your needs.

4. After the data is exported, you can analyze and modify the .xls file.

Viewing Form Information

You can view

- information about a form
- information about a form’s properties

Viewing a Form’s Information

After a form is created, you can view its information in the Forms folder. To view a form, follow these steps.

1. Access the folder that contains the form you want to view.
2. Click the form you want to view.
3. The View Form screen displays.
4. Click the Form Properties tab.
5. The following table explains the information on the screen.

Field	Description
Form Title	Title used to reference the form
FormID	ID number automatically assigned to form
Status	The form’s current status
Description	Extended description for the form
Form Data	The type of form data: Mail or Database. *See Also:* ”The Structure of Form Data” on page 158
Form Submissions	The maximum number of times a user can submit the form. This is typically used with polls and surveys to limit one user’s influence over the results.

Field	Description
Assign Task to	Users and groups to whom a task will be automatically assigned whenever a site visitor completes the form. *See Also:* ”Assigning a Task to a Form” on page 195
Content Properties	Displays the properties of the form’s content
Content Title	Title of content associated with form Note: The content name is the same as the Form name.
Content ID	Content ID number assigned to content
Status	The status of the content
Last Editor	Last user to edit the content
Start Date	Date and time when content will go live on Web site (if set for future date)
End Date	Date and time when content will be removed from Web site (if set for future date)
Date Created	Date and time when content was created

The View Form screen also contains several buttons to perform actions. To learn about the buttons, see ”View Form Toolbar” on page 212.

Viewing and Editing a Form’s Properties

To see and update additional form information that does not appear on the View Form screen, view its properties. To do so, follow these steps.

1. Navigate to the form’s View Form screen, as described in ”Viewing a Form’s Information” on page 204.
2. Click the **Form Properties** button ().
3. The Form Properties screen displays a subset of form information.

- Title and Description
- Database or Mail - if form data is emailed whenever a site visitor submits it, enter mail property information below. See ”Mail Properties” on page 206
- Autofill form values - checked by default, this allows the form’s fields to fill automatically when a logged-in site visitor has previously completed the form.
- Limit Submission - when checked, you can enter the number of times a user can submit a form in the **Number of Submissions** text field
- Assign task to - see ”Assigning a Task to a Form” on page 195
- Form block’s ID number
- Mail Properties

Mail Properties

Field	Description
To	Email address to which the form is sent when submitted. *See Also:* ”Retrieving email Address from the Submitted Form” on page 207
From	Text that appears in the email’s **From** field. *See Also:* ”Retrieving email Address from the Submitted Form” on page 207
CC	Text that appears in the email’s **CC** field. *See Also:* ”Retrieving email Address from the Submitted Form” on page 207
Subject	Text that appears in the email’s subject field. *See Also:* ”Retrieving Form Data Into the Subject and Preamble Fields” on page 209
Preamble	Beginning text of the email. *See Also:* ”Retrieving Form Data Into the Subject and Preamble Fields” on page 209

Field	Description
Send data in XML Format	A green check means email data will be in a structured XML packet. A red X means the email data will be in a standard mailto format. For more information, see “Sending Data as XML” in the Ektron CMS400.NET Administrator Manual Forms chapter.

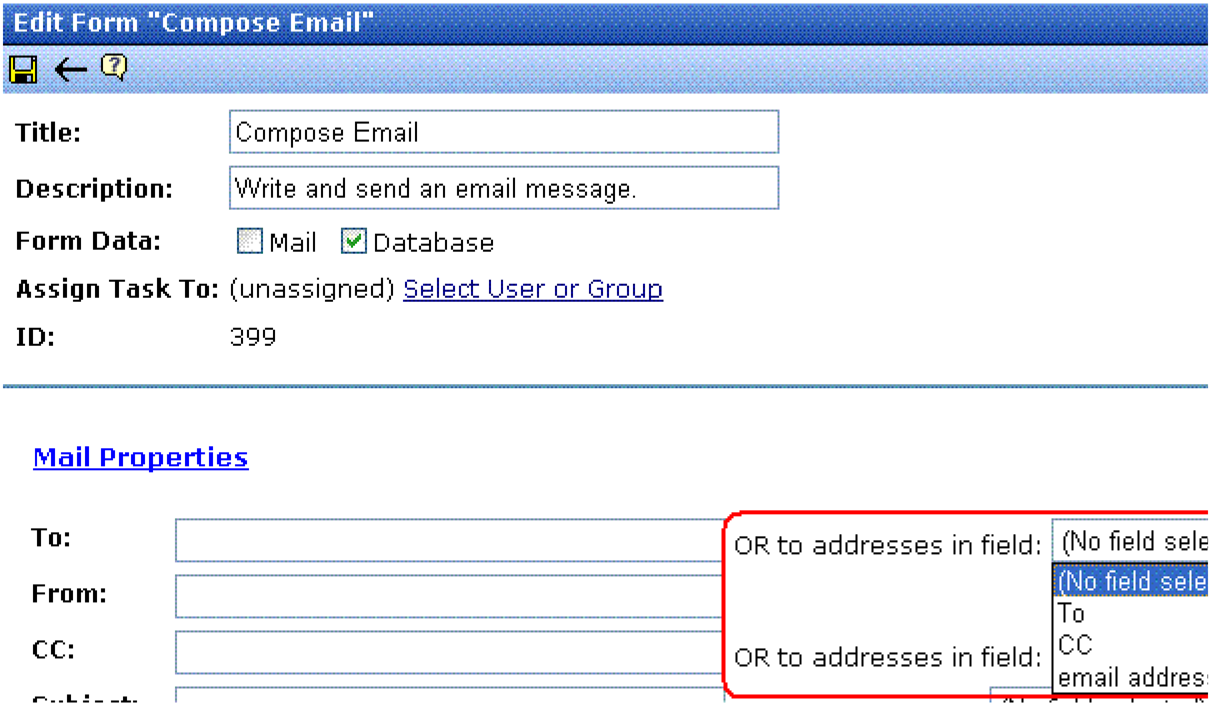
Retrieving email Address from the Submitted Form

In the **Mail Properties** section of the Edit Form screen, you can select email addresses submitted on the form to be inserted into these **Mail Property** fields:

- To
- From
- CC

So, instead of entering a static email address, it can be dynamically retrieved from the user’s form submission. For example, you want to retrieve the “from” field of an email from the information a user enters when completing the form.

To do this, use the **OR to addresses in field** dropdown lists circled below. These lists contain fields that dynamically retrieve data from the submitted form.

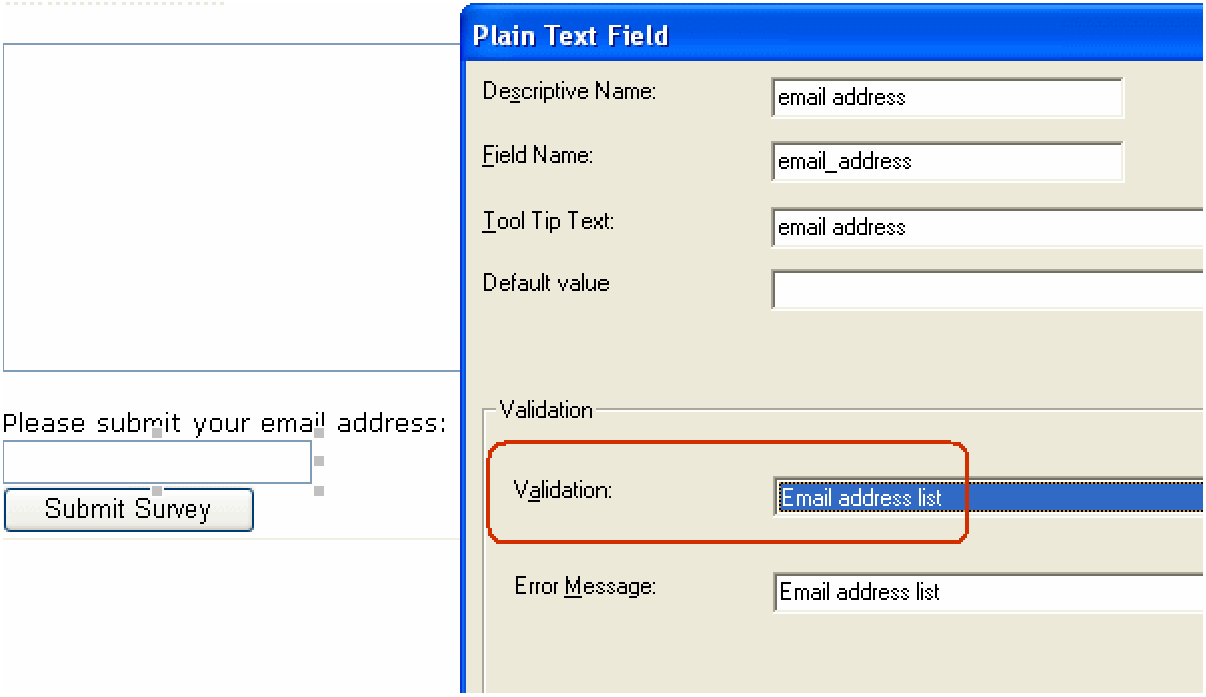


Note that the **To** and **CC** fields can accept fields whose validation type is **email address** or **email address list**. On the other hand, the **From** field can only accept fields whose validation type is **email address** (that is, a single email address).

To set this up, follow these steps.

1. Add a form field whose **Validation** type is **Email address** or **Email address list** . The field prompts the user completing the form to enter his email address. Label the field something like **Enter your email address**.

TIP! If the field allows more than one address, add on-screen instructions to separate each address with a semicolon (;).



2. Go to the **Edit Form** screen > **Mail Properties** section.
3. Move to the field labeled **From:**.
4. At the dropdown list following **OR to addresses in field**, select the field you created in Step 1.

Now, when a user completes the form, the value he enters in the field created in Step 1 is used for the email's From address.

Retrieving Form Data Into the Subject and Preamble Fields

You can retrieve data from a submitted form directly to the form's **Subject** and **Preamble** fields. (The subject is a standard mail field, and the preamble is text that appears at the beginning of the email.)

For example, the form may provide a list of your products. While the user is completing the form, he selects a product that he is interested in. The product then becomes the subject line of the email.

NOTE Since a Textarea field can span multiple lines, it can only be used with the preamble. However, a plain text field can be used with both the subject and preamble.

To retrieve data dynamically from a form field into the email's subject line or preamble, follow these steps.

1. Add a form field that collects the information you want to insert into the email's subject line or preamble. *See Also:* "Inserting Form Fields" on page 169
2. Go to the **Edit Form** screen > **Mail Properties** section. *See Also:* "Editing a Form" on page 210
3. Move to the field labeled **Subject** or **Preamble**.
4. At the dropdown list following **OR use text in field**, select the field you created in Step 1.

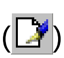
Editing a Form

After you create a form, it can easily be edited if information needs to be changed. You can update the following information by following the procedure below.

- the form fields
- post back message
- metadata
- schedule
- comments
- Web Alerts

However to edit a form's **Title**, **Description**, form data, or task values, use the Edit Properties screen.

To edit a form, follow these steps.

1. Access the View Form screen for the form you want to edit, as described in "Viewing and Editing a Form's Properties" on page 205.
2. Click the Edit button ().

3. The Edit Form screen is displayed. The screen is the same as the Add New Form screen. For documentation of individual fields, see "Creating a New Form" on page 159.
4. Make the necessary changes to the form.
5. Click the Save button ().

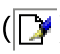
See Also: "Working with HTML Forms" on page 156

Editing a Form's Content

You can edit the content associated with the form by a variety of methods, including:

- Accessing the content by the floating toolbar on the Web page
- Editing the content by the View Form screen
- Accessing the content by the View Form content properties screen

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

1. Access the View Form screen for the content, as described in "Viewing a Form's Information" on page 204.
2. Click the Edit Content button ().
3. The Edit Content screen appears.
4. Make the necessary changes to the form's content.
5. If needed, click the Postback Message, Metadata, Schedule, Comment or Web Alerts tab to edit that information.
6. Click a workflow button (Submit for Publication or Publish).

Editing a Form's Properties

See "Viewing and Editing a Form's Properties" on page 205

Mailto or Database Form

The Forms feature lets you create a mailto or a database form to use on your Web site. When creating or editing a form, you must specify the type of form you are creating. The options are:

- Send it via email
- Store it in a database
- Send it via email *and* store in a database

See "Viewing and Editing a Form's Properties" on page 205 for information about toggling this option on and off.

Advantages of a Mailto Form

By creating a mailto form, any email generation is done on the server-side, not on the client. This means that site visitors can submit email whether or not the client has email software.

Storing Form Data in a Database

By storing form data in the Ektron CMS400.NET database, you can keep information submitted by site visitors and view reports on that information. You can also export the form data to a spreadsheet.

Deleting a Form

You can easily delete forms that are no longer needed.

NOTE Deleting a form also deletes its associated content and information.

To delete a form, follow these steps.

1. Access the View Form screen for the form you want to delete.
2. Click the Delete Form button ().
3. A confirmation message is displayed.
4. Click **OK**.

View Form Toolbar

Several toolbar buttons and tabs help you work with forms.

To learn about toolbar buttons available when creating or editing a form, see "Inserting Form Fields" on page 169.

Button or Tab	Name	Description	More Information
	Edit Content	Edit the form's content, which contains the form fields	"Editing a Form's Content" on page 211
 	View Staged/ Published Content	Click **View Staged** button to view content that has not yet been published. Click **View Published** button to view content that is live on the Web site.	
	View History	View (and possibly restore) older versions of a content block	"Accessing Content History" on page 108
	View Difference	Compare two versions of content	"Comparing Versions of Content" on page 98
	Edit Form Properties	Edit Form properties not available via the Edit Content button	"Viewing and Editing a Form's Properties" on page 205
	Delete Form	Delete a form	"Deleting a Form" on page 212
	Check Links	Check for other content that contains a link to this form. You would typically use this feature to remove the links before deleting content. If you do not remove the links, they are inoperative after the content is deleted.	
	Add Task	Add a task	"Managing Tasks" on page 365
	View Task	View task information	
	Add Form	Add a new form	"Creating a New Form" on page 159
	Export Raw Data	Download form data to a Microsoft Excel spreadsheet	"Exporting a Form's Raw Data" on page 203

Button or Tab	Name	Description	More Information
	View Reports	View submitted form data; can select range of dates	”Viewing Form Reports” on page 197
 or Form Properties	View Content Properties	Access view properties for the content	”Viewing and Editing a Form’s Properties” on page 205
View (language)	View	If you can view forms in more than one language, select a language from the drop down list	
Add **-select language-**	**Add** **-select language-**	Lets you copy current form into new block and translate it to selected language	”Translating Content” on page 818

Creating Polls and Surveys

Polls and surveys are a type of form. All of the same functionality is available and applies.

WARNING! For complete understanding of Forms, polls, and surveys, you should read the entire chapter ”Working with HTML Forms” on page 156.

- A *poll* is generally one question and appears on a site for a very short time, an hour or a day.
- *A survey* is usually multiple questions and appears on your site for a longer time than a poll.

NOTE For information on scheduling when your polls and surveys appear on the site, see ”Scheduling Content to Begin and End” on page 65.

With polls and surveys, you can show ongoing results to site visitors after they submit their answers.

The following sections provide information about creating a poll or survey beyond the normal form information.

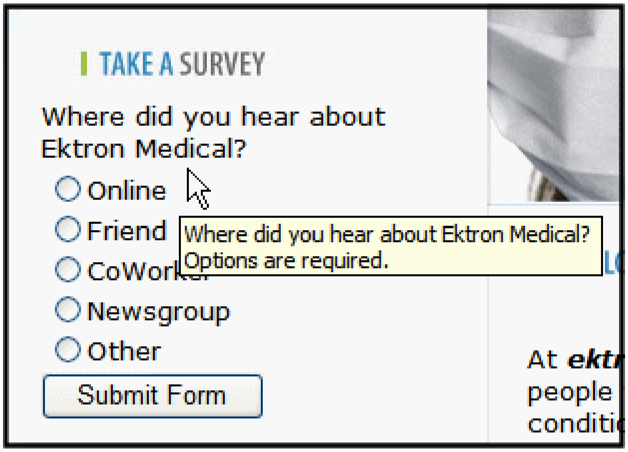
- ”Working With Polls” on page 215
- ”Creating a Survey” on page 220
- ”Making Form Results Available to Site Users” on page 163

- ”Viewing a Form’s Information” on page 204
- ”Viewing and Editing a Form’s Properties” on page 205

For information on how to display a poll or survey on a Web site, see the Developer Reference Manual section “Introduction to Ektron CMS400.NET Server Controls” > “Poll Server Control”.

Working With Polls

Below is an example of a poll. Note that when a site visitor hovers over the poll, the question also appears as ToolTip text.



This subsection contains the following:

- ”Creating a New Poll in the Workarea” on page 215
- ”Replacing a Poll from the Web Site” on page 217
- ”Editing a Poll from the Web Site” on page 219

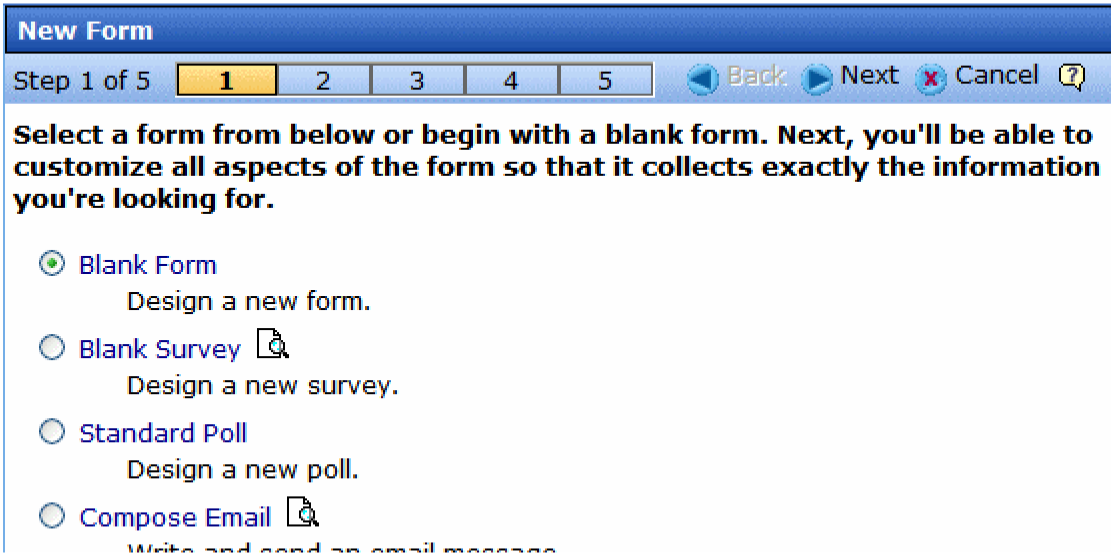
Creating a New Poll in the Workarea

To create a new poll, follow these steps.

NOTE You can also create a new edition of a poll in another language by copying an existing poll and translating it. For more information, see ”Translating Content” on page 818.

NOTE For the steps to create a new form, see "Creating a New Form" on page 159. For the steps to create a new survey, see "Creating a Survey" on page 220.

1. Choose a content folder.
2. From the **View** menu, click **Language**, and select the language in which to create the poll.
3. Click **New** > **HTML Form/Survey**.
4. The New Form screen appears.



NOTE If you choose Standard Poll or Blank Survey, the number of steps in the Forms Wizard changes from five to four. This happens because the Assign Tasks step is removed.

5. Choose **Standard Poll**. You can click the preview icon ( ) next to any sample form to preview it before choosing it.
6. Click the **Next** button.
7. Enter or edit the form's **Title** and **Description**.
   - **Title** - used to reference the poll within the Workarea (required)
   - **Description** - an extended description of the poll.
8. Click the **Next** button.
9. This screen lets you add a poll question and possible replies.

NOTE This screen allows you to add up to eight replies. If you have more than eight replies, you can add them in the forms editor after clicking the **Done** button.

10. Click the **Next** button.
11. This screen indicates that you have entered the basic poll information and should click the **Done** button to further edit and view the form's fields.
12. After clicking the **Done** button, the form editor launches so you can edit existing fields and properties. In addition, you can set post back and schedule information, add metadata and comments, change the title, and submit the poll for publication.

NOTE From this screen, you can add more replies to your poll by right clicking on the choices field and clicking properties. *See Also:* "Inserting a Choices Field" on page 185.

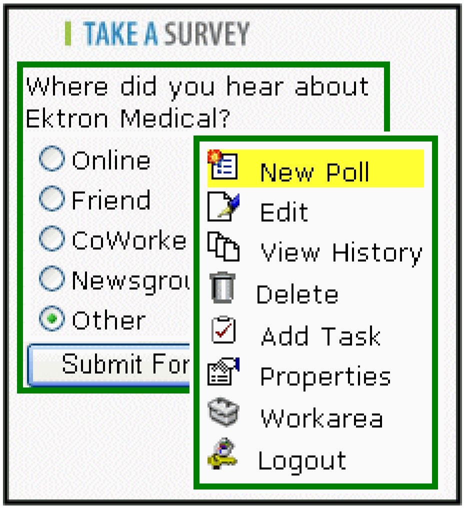
Replacing a Poll from the Web Site

When logged into **Ektron CMS400.NET**, you can right click on a poll and choose **New Poll** to replace the current one. The title of the poll, its ID, and properties stay the same. Only the questions and answers change.

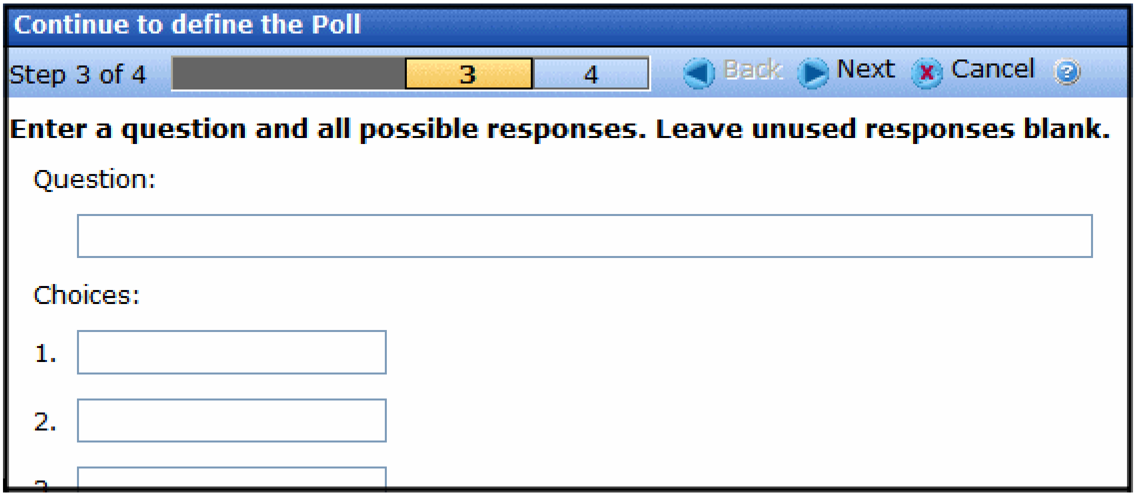
To replace a poll, follow these steps.

1. Log into **Ektron CMS400.NET**.
2. Navigate to the Web page that hosts the poll.

3. Right click the poll and choose **New Poll**.



4. The Workarea opens, indicating you are at step three of the Poll Wizard.



5. Add a new question to the **Question** text box.
6. Add possible responses to the **Choices** text boxes.
7. Click **Next**.
8. Click **Done**.
9. The form editor launches, allowing you to edit the fields and properties. In addition, you can set post back and schedule information, add metadata and comments, change the title and submit the poll for publication.

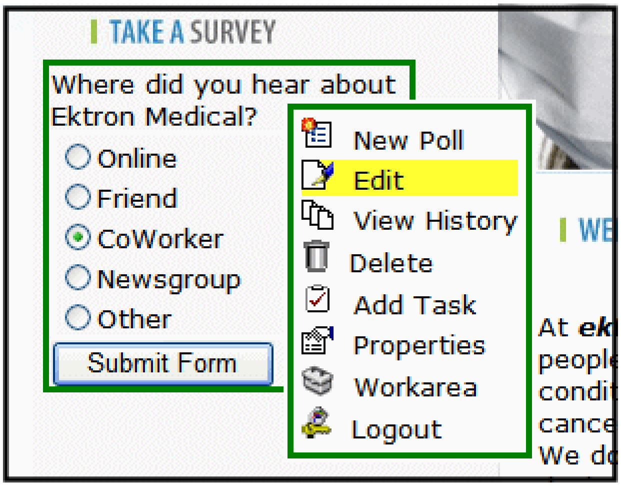
10. Once published, the updated poll appears on the site.

Editing a Poll from the Web Site

To edit an poll on a Web site, follow these steps.

WARNING! If you are logged into the site and create a new poll by right clicking on a poll selecting **New**, the existing poll is replaced by the new one.

1. Log on to the **Ektron CMS400.NET** Web site.
2. Right click the poll you want to change and click **Edit**.



3. Make changes to the poll using the Forms editor.
4. Submit the poll to the Approval Process.

Creating a Survey

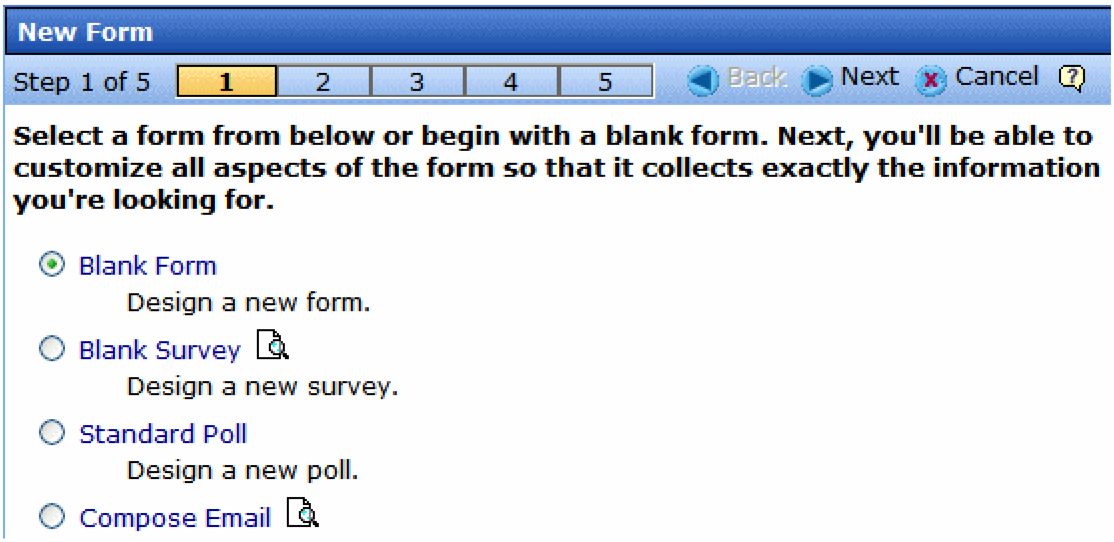
To create a new survey, follow these steps.

NOTE You can also create a new edition of a survey in another language by copying an existing form and translating it. For more information, see "Translating Content" on page 818.

NOTE For the steps to create a new poll, see "Working With Polls" on page 215. For the steps to create a new form, see "Creating a New Form" on page 159.

1. Choose a content folder.
2. From the **View** menu, click **Language**, and select the language in which to create the form.
3. Click the **New** > **HTML Form/Survey**.
4. The New Form screen appears.

.



NOTE When you choose Standard Poll or Blank Survey, the number of steps in the Forms Wizard changes from five steps to four steps. This happens because the Assign Tasks step is removed.

5. Choose **Blank Survey**. You can click the preview icon ( ) next to any sample form to preview it before choosing it.
6. Click the **Next** button.
7. Enter or edit the form's **Title** and **Description**.

- **Title** - used to reference the survey within the Workarea (required)
- **Description** - an extended description of the survey.

8. Click the **Next** button.
9. This screen lets you determine what happens after the site visitor completes the survey. The choices are:
   - **Display a message** - See "Composing the Postback Message" on page 161
   - **Redirect to a file or page** - Identify a file or a page on your Web site that is launched when the visitor completes the form
     - An example of a file is a white paper (a common file format is .PDF) that the visitor requested
     - An example of a page is one that lets the visitor download your product
   - **Redirect to an action page and forward form data** - See "Redirect to an Action Page and Forwarding Form Data" on page 162
   - **Report on the form** - See "Making Form Results Available to Site Users" on page 163
10. Click the **Next** button.
11. A screen indicates that you have entered basic information about the survey and should click the **Done** button to enter the survey's content. This procedure is described in "Creating a Form's Content" on page 166.

Using the Document Management System

The Document Management System (DMS) lets you import Microsoft Office files along with other types of files into **Ektron CMS400.NET**. (Non-Office files are known as *managed files*.) Collectively, these files are known as *assets*.

After being saved to **Ektron CMS400.NET**, assets can be updated and tracked like HTML and XML content. If you're familiar with how content is handled, most of what you know applies to assets. For example, assets

- can be stored in folders with other content, or in separate folders that you create just for them
- are assigned content ID numbers
- can have summary, metadata, comment, task, schedule, and taxonomy information
- inherit permissions and approvals from their folder properties
- progress through the workflow (check out, check in, publish)
- retain a history so you can restore earlier versions
- can be searched
- support foreign language editions
- can have a task assigned to them
- appear on content reports
- update the Smart Desktop listing of files awaiting approval, checked out, tasks, to expire

When an asset is imported to the CMS then saved, a copy of it is saved to the Document Management server. Then, whenever a user edits and saves the asset, a new copy is stored. In this way, you can review and, if needed, restore a prior version.

This chapter explains the Document Management Functionality through the following topics.

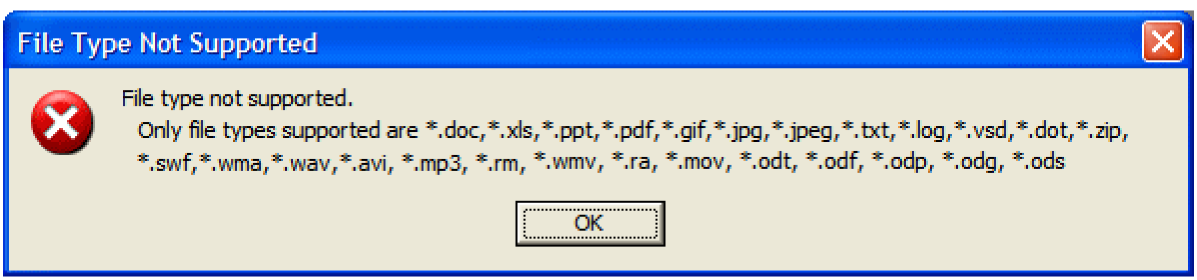
Supported Types of Assets

Ektron CMS400.NET can support all file types. By default, only the following types are supported. However, your administrator can add or remove any file type via the Asset Server Setup screen.

EXCEPTION! Ektron CMS400.NET does not support double extensions, such as *filename*.aspx.vb.

- Microsoft Office 2000 or later documents: Word, Excel, Powerpoint, Project, Publisher, Visio, etc.
- Managed files: *.zip files, PDFs, *.txt files, graphic files such as *.gif and *.jpeg, Open Office documents such as *.odf, *.odt
- Multimedia files such as *.swf, *.mp3, *.wav. *.avi

NOTE The file types that can be uploaded are determined by your administrator. If you try to upload the wrong type of file, the following error message appears.



Security

For the purposes of security, assets are treated like other content. Your system administrator applies security to each folder, determining which user groups can perform which tasks on the content in a folder. For more information, see the “Setting Permissions” chapter of the **Ektron CMS400.NET** Administrator Manual .

Software Requirements

Your production server must run Windows 2003 server or Windows 2000.

See Also:

- ”Browser Requirements” on page 224
- ”Installing FireFox Plug In” on page 225

Browser Requirements

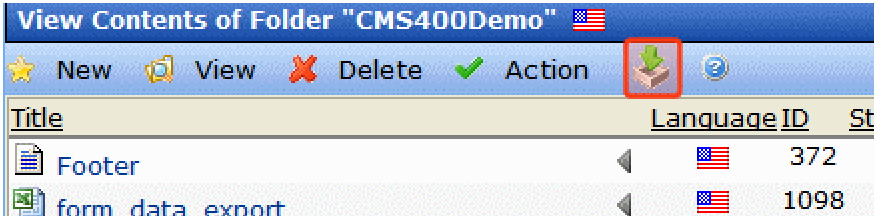
Feature	Browser Requirements	For more information, see
Edit Microsoft Office documents within **CMS400.NET**	Internet Explorer. Option does not appear with Firefox. Note: Firefox users can check an Office document out to their computer, edit it using Office, then drag and drop the file back into **CMS400.NET**. See ”Editing a Managed File” on page 256. Note: If your computer has Windows Vista, you must turn off its User Account Control to use this feature. For details, see http://www.microsoft.com/technet/technetmag/issues/2007/06/uac/default.aspx	”Editing an Office Document” on page 244
Multiple DMS Documents Option	Internet Explorer. Option does not appear with other browsers.	”Adding Documents Using the Multiple DMS Documents Option” on page 233

Installing FireFox Plug In

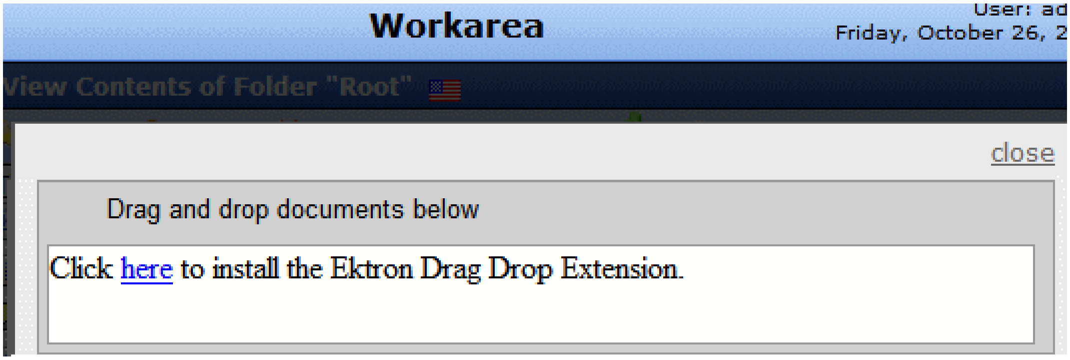
If you want to use the Document Management's drag and drop feature with the Firefox browser, you need to install software to enable it. You only need to do this the first time on a computer. Afterwards, the features are available to you with no additional effort.

Follow these steps to install the Firefox plug-in software.

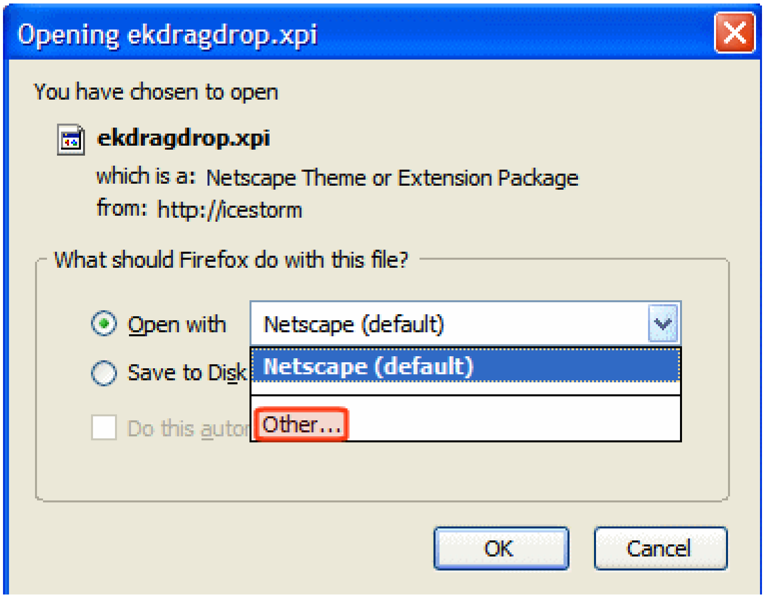
1. Launch the FireFox browser.
2. In the **Ektron CMS400.NET** Workarea, open a content folder.
3. Click the Add Assets button (circled below).



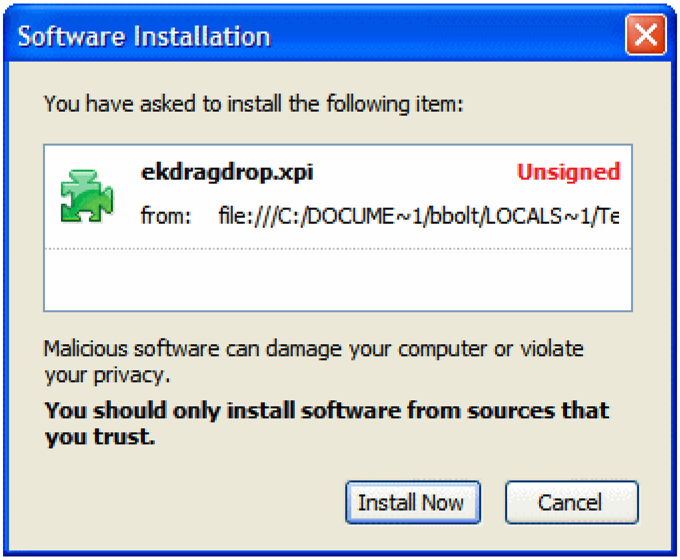
4. The following box appears in the center of the screen.



5. Click the word here.
6. The following dialog appears.



7. Click the down arrow next to **Netscape (default)** and select **Other**.
8. Browse to **C > Program Files > Mozilla Firefox > Firefox.exe**.
9. Click **Open**.
10. **Firefox.exe** appears next to the **Open with** field.
11. Press **OK**.
12. The following dialog appears.



13. Click **Install Now**.
14. Close then reopen the Firefox browser.
15. You can now drag and drop files into **Ektron CMS400.NET**.

Working with Microsoft Office Documents

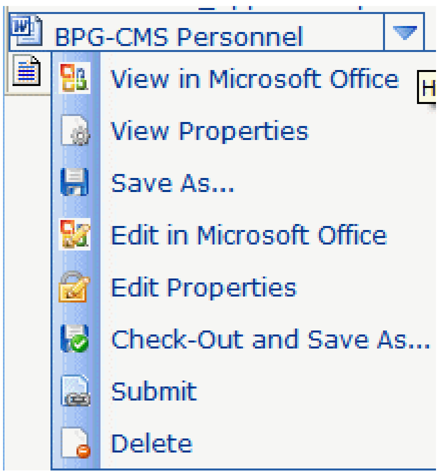
This section explains how to work with Microsoft Office documents through the following subtopics:

- "MS Office Document Menu Options" on page 228
- "Notes on Working with Microsoft Office Documents" on page 228
- "Importing Office Documents" on page 230
  - "How Imported Documents are Named" on page 231
  - "Adding Documents Using the DMS Document Option" on page 232
  - "Adding Documents Using the Multiple DMS Documents Option" on page 233
  - "Adding Documents Using Drag and Drop" on page 235

  - ”Adding Documents to a Mapped Network Folder” on page 238
- ”Editing an Office Document” on page 244
- ”Deleting an Office Document” on page 246
- ”Checking Out, Saving, and Replacing an Office Document” on page 247
- ”Saving an Office Document” on page 249
- ”Saving an Office Document in .html Format” on page 249

MS Office Document Menu Options

Depending on a document’s status, your role, and position in the document’s approval chain, any of the following options may be available when you display the dropdown menu for an Office document.



See Also: ”Dropdown Menu Options” on page 37

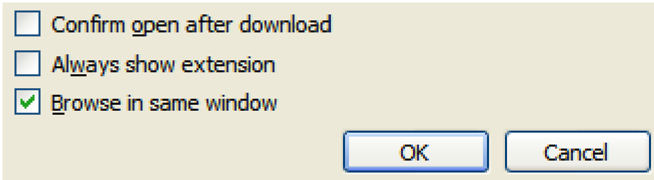
Notes on Working with Microsoft Office Documents

- Prerequisites
  - Your computer has MS Office

- Internet Explorer to work with Office documents within **Ektron CMS400.NET**.

NOTE While you cannot edit within Ektron CMS400.NET using Firefox, you can save an Office document to your computer, edit it, then drag and drop the updated version to Ektron CMS400.NET.

- Verify the following settings for every Office document type that you work with.
  - Open Windows Explorer.
  - Click **Tools > Folder Options > File Types**.
  - Click an Office file type you work with (for example, DOC Microsoft Word Document).
  - Click the **Advanced** button.
  - Change the checkboxes at the bottom of the screen so they look like this.



  - Click **OK**

- Problems can arise if you try to open a document created with Office 2007 and your computer has an earlier version of Office. The best solution is to upgrade your computer to Office 2007.

  If you cannot do this, the next best option is to install Microsoft Windows Compatibility Pack. See https://www.microsoft.com/downloads/details.aspx?FamilyId=941B3470-3AE9-4AEE-8F43-C6BB74CD1466&displaylang=en .

  Once installed, you can successfully work with Microsoft Word 2007 documents even though you have Office 2003, Office XP, or Office 2000. At this time, there is no Compatibility Pack that lets you work with other Office documents, such as Excel or Powerpoint.

Importing Office Documents

DMS can store and help you manage Office documents. This section explains how to import any document into Ektron's Document Management System.

Ektron CMS400.NET provides five ways to import Microsoft Office documents. They are described below.

NOTE Only users with **Add** permission for a folder can import documents into it. *See Also:* Ektron CMS400.NET Administrator Manual chapter "Setting Permissions"

Method	Advantages	Disadvantages	For more information, see
New > DMS Document from View Contents of Folders screen	• Can enter Summary, Metadata information etc. for each document • Can create unique title for each document • You can check in or submit document for approval	• Slower when importing several Office documents • Cannot maintain Windows folder structure	"Adding Documents Using the Multiple DMS Documents Option" on page 233
New > Multiple DMS Documents from View Contents of Folders screen	• Can upload several files at once, so it's faster than **New DMS Document** option • More efficient when same summary, metadata, schedule, etc., apply to many documents • You can check in or submit document for approval	• Document title taken from Windows file name • Requires Internet Explorer and MS Office	"Adding Documents Using the Multiple DMS Documents Option" on page 233

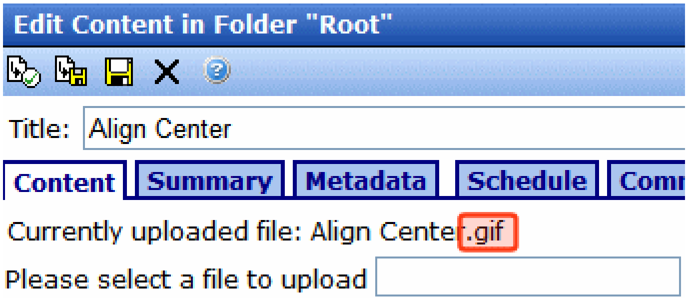
Method	Advantages	Disadvantages	For more information, see
Drag and drop into **CMS400.NET**, from View Contents of Folders screen	• Can upload several files at once, so it's faster than **New DMS Document** option • Can drag/drop folder structure; **CMS400.NET** recreates it in Workarea • More efficient when same summary, metadata, schedule, etc. apply to many documents	• Content is in checked in status; submitting it for publishing is a separate step • Document title taken from Windows file name	"Adding Documents Using Drag and Drop" on page 235
Drag and drop into a mapped network folder	• User doesn't need to install or learn CMS software • Can drag/drop folder structure; **CMS400.NET** creates it in Workarea	• Document title taken from Windows file name • Content is in checked in status; submitting it for publishing is a separate step • Cannot assign language to content or work with content in a language other than your computer's default language	"Adding Documents to a Mapped Network Folder" on page 238

How Imported Documents are Named

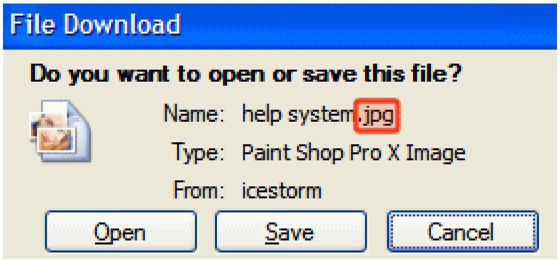
When you use the **New > DMS Document** file import option, you enter an **Ektron CMS400.NET** title for the file.

When you import an Office document or managed file into **Ektron CMS400.NET** using any other method, its name is the file name without the extension. So, a file named `mypicture.jpg` becomes `mypicture` in **Ektron CMS400.NET**.

While it may appear that the file extension was removed, it is retained and reappears for assets when you use the **Edit** option, on the View Contents of Folder screen (circled below).



The original file extension also appears when you check out.



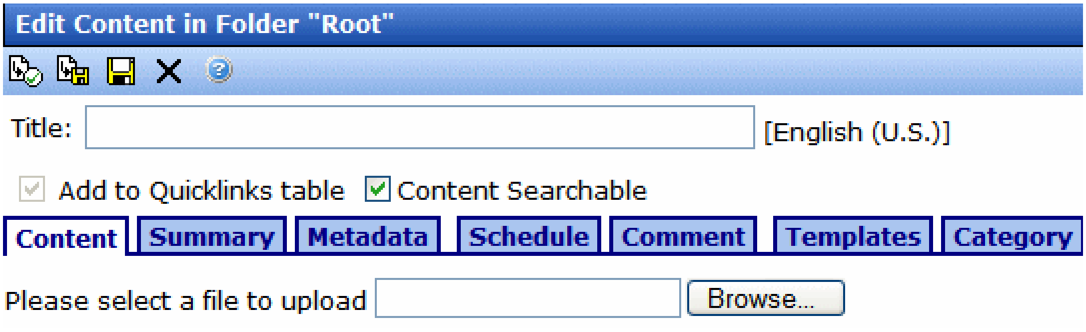
If you import a file of the same name but a different extension into the folder, the new file's name has the next available number appended to it. For example, `mypicture(2)`.

Adding Documents Using the DMS Document Option

To add a new Office document to **Ektron CMS400.NET** via the **New > DMS Document** menu option, follow these steps.

1. From the Workarea, select the **Content** tab.
2. Select the folder in which you want to place the document. *See Also:* "Working with Folders and Content" on page 28
3. The default language icon appears next to the screen title. To create a document for a different language, click **View > Language** and select the language.
4. Click **New > DMS Document**.

5. The following screen appears.



6. Click the **Browse** button and browse to the file you want to import. Click **OK**.
7. Enter a **Title**.

NOTE If you want to retain the original document name, insert the full filename into the **Title** field. For example, you could enter *mydocument.doc*.

8. Use the **Content Searchable** checkbox to determine if the content should be searchable. *See Also:* "Content Searchable" on page 46.
9. If desired, add a summary, metadata, a schedule, and comments. *See Also:*
   - "Adding a Content Summary" on page 73
   - "Adding or Editing Metadata" on page 77
   - "Scheduling Content to Begin and End" on page 65
10. Check in or submit the content for publishing as you would HTML content. *See Also:* "Buttons on the Add Content Screen" on page 50

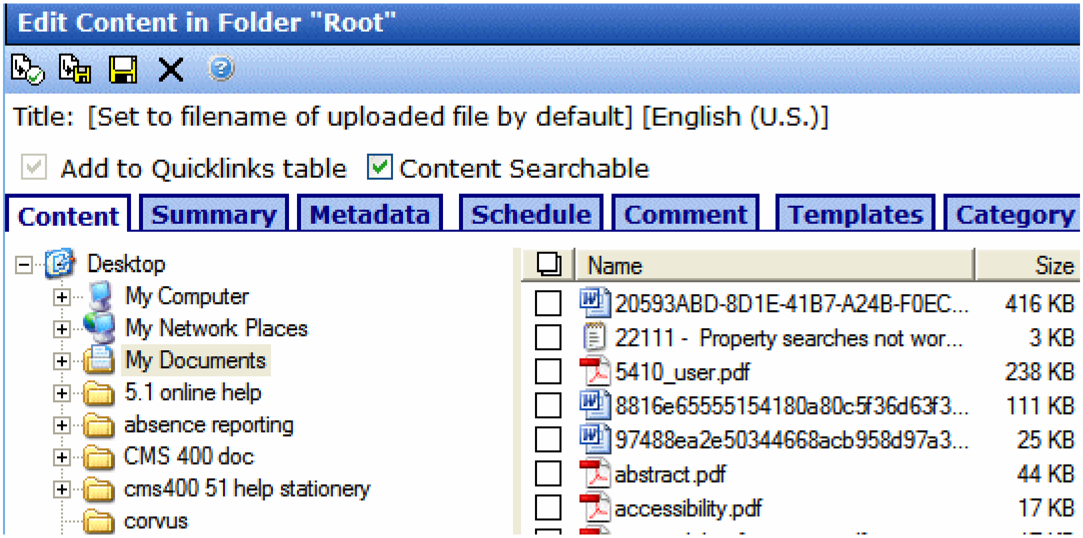
Adding Documents Using the Multiple DMS Documents Option

To add Office documents to **Ektron CMS400.NET** via the **New > Multiple DMS Documents** menu option, follow these steps.

NOTE This option is only available if you are using Internet Explorer and Office is installed on your computer.

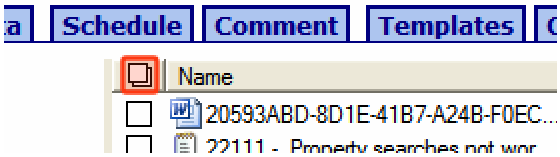
TIP! If you will apply the same information (Summary, Metadata, Categories, etc.) to several files, place those files in the same Windows folder before starting this procedure.

1. From the **Ektron CMS400.NET** Workarea, select the **Content** tab.
2. Select the **Ektron CMS400.NET** folder in which you want to place the documents. *See Also:* "Working with Folders and Content" on page 28
3. The default language appears next to the screen title. To create a document for a different language, click **View > Language** and select the language.
4. Click **New > Multiple DMS Documents**.
5. The Edit Content in Folder screen appears. The lower portion of the screen resembles Windows Explorer.



The left frame shows folders in your computer. The right frame shows files in the selected folder.

6. In the left frame, select the folder that contains files you want to upload.
7. In the right frame, check the box next to each file you want to upload. To select all files in the folder, check the box in the header (circled below).



NOTE You can only import files from one folder at a time.

8. If appropriate, enter the files' summary, metadata, schedule, tasks, comments, or category. Any information you enter is applied to all selected files.

9. To *check in* the files, click the Check In button ( ) from the top left corner.

   To *submit* the files into the approval chain, click the Submit ( ) or Approve ( ) button.

Adding Documents Using Drag and Drop

When using drag and drop, you can choose individual files or a folder. If you choose a folder, its structure is recreated in **Ektron CMS400.NET** even if it is several levels deep.

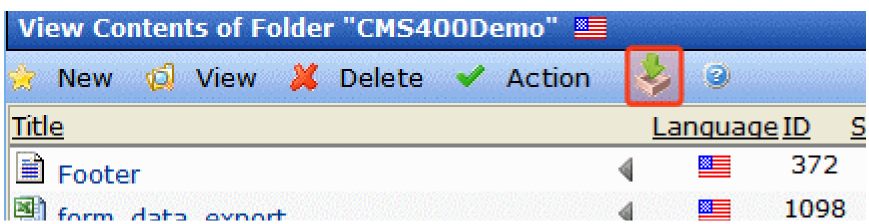
1. From the **Ektron CMS400.NET** Workarea, select the **Content** tab.

2. Select the **Ektron CMS400.NET** folder in which you want to place the documents. *See Also:* "Working with Folders and Content" on page 28

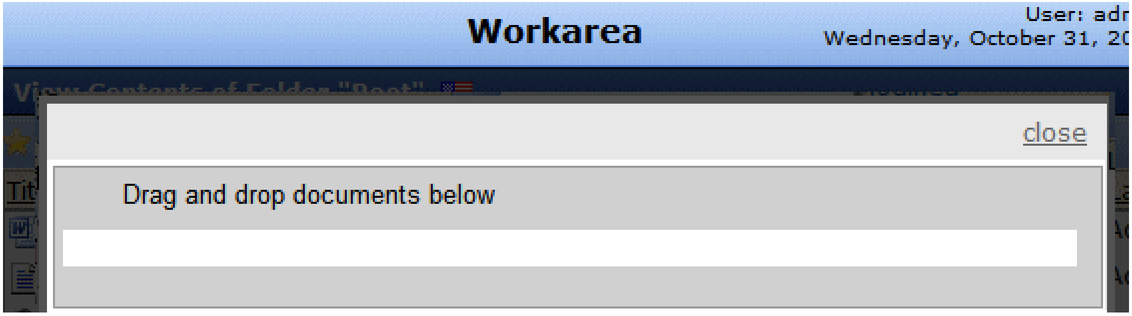
NOTE You cannot drag and drop a file into a folder for which XML Smart Forms are required.

3. The default language appears next to the screen title. To create the documents in a different language, click **View > Language** and select the language.

4. Click the Add Assets button (circled below).

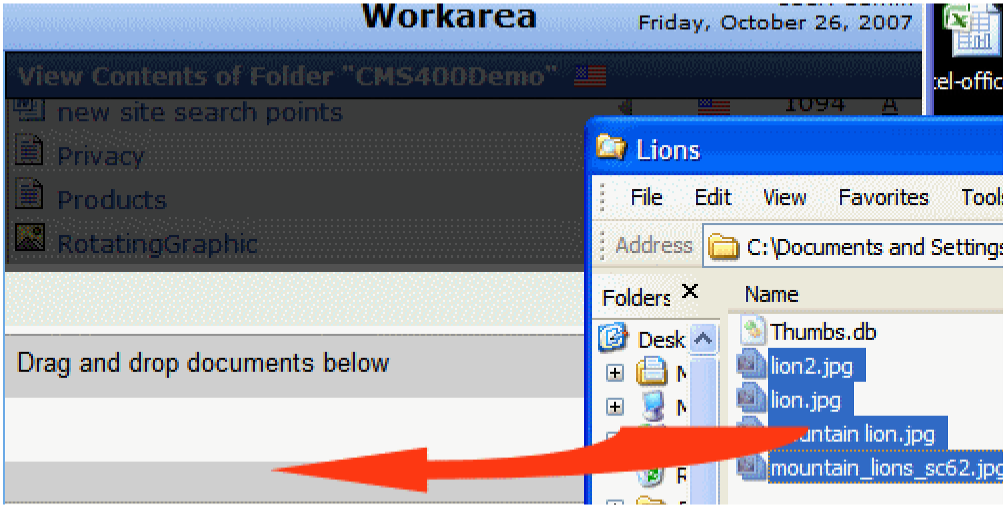


5. The drag and drop window appears.



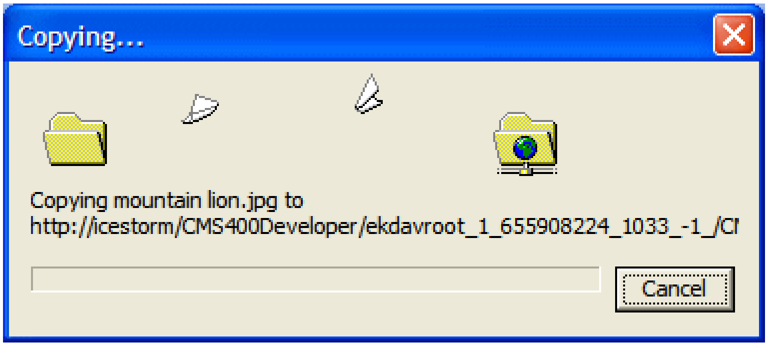
NOTE If you are using Ektron CMS400.NET with the FireFox browser for the first time, see "Installing FireFox Plug In" on page 225.

6. Resize **Ektron CMS400.NET** so that it occupies the left half of the screen.
7. Open Windows Explorer. Resize it so it occupies the right half of the screen.
8. Find the folder or assets you want to upload.
9. From Windows Explorer, select then drag and drop the folder or assets onto the drag and drop window.



10. The following screen appears.

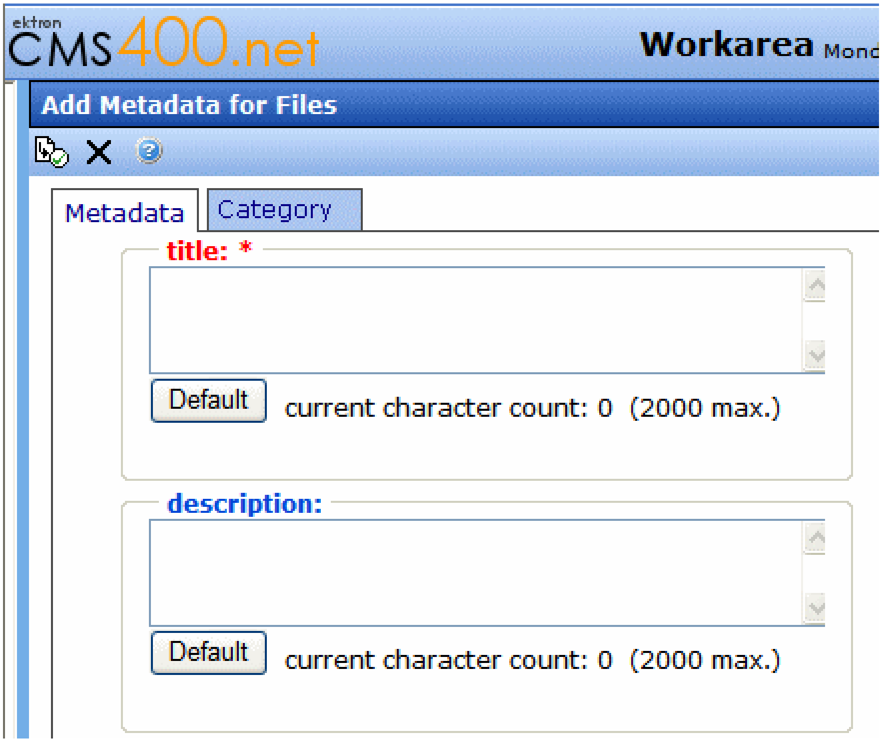
.



If any asset being uploaded is not supported, an error message appears: **An error occurred copying some or all of the selected files**. However, all supported files are uploaded. *See Also:* "Supported Types of Assets" on page 223

11. If **Ektron CMS400.NET** requires you to apply metadata or a taxonomy category to the content, the following screen appears.

NOTE Your system administrator creates the metadata screen. The image below is only an example of what it might look like.



12. Required metadata field labels are red and have an asterisk (as **title** does above). Complete all required metadata. *See Also:* ”Adding or Editing Metadata” on page 77

If the **Category** tab appears, apply at least one taxonomy category to this asset. *See Also:* **Ektron CMS400.NET** Administrator Manual section “Taxonomy.”The status of a dragged and dropped document depends on the approval chain.

- If you are the last approver, or if there is no approval chain, its status is *Approved*.
- If there is an approval chain and you are not the last approver, its status is *Checked In* (I).

Adding Documents to a Mapped Network Folder

You can set up a mapped network folder then drag and drop folders or assets into it. The advantage of this method is that you can upload documents without installing or learning how to use **Ektron CMS400.NET**.

When using drag and drop, you can choose individual assets or a folder. If you choose a folder, **Ektron CMS400.NET** recreates that folder structure, even if it is several levels deep. After the assets are uploaded, they are set to Checked In status.

You can also delete and move assets using the mapped network folder.

This section explains these procedures.

- ”Language Restrictions on Content in a Mapped Network Drive” on page 239
- ”Setting up a Mapped Network Drive” on page 239
- ”Dragging and Dropping Assets into a Mapped Network Drive” on page 241
- ”Viewing Managed Files in a Mapped Network Drive” on page 242
- ”Removing Mapped Network Drives” on page 243

Language Restrictions on Content in a Mapped Network Drive

You cannot choose a language for assets in a mapped network folder-- they are automatically assigned the **Ektron CMS400.NET** default language (set in the siteroot/web.config file at the `ek_DefaultContent Language` element).

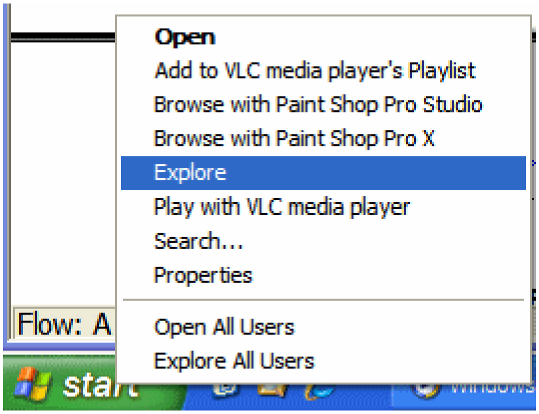
And, you cannot work with assets of a language other than your computer’s default language. For example, if your computer’s default language is English and your version of **Ektron CMS400.NET** has Spanish content, you cannot edit that content in a mapped network folder.

Setting up a Mapped Network Drive

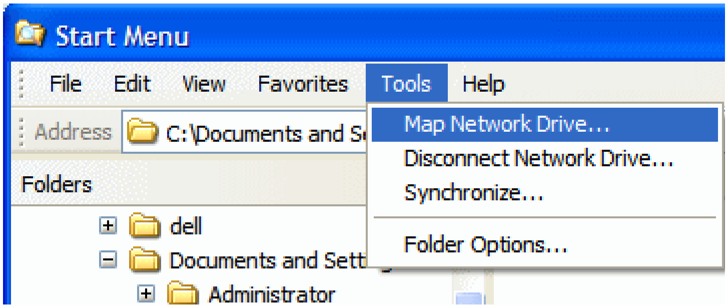
Prerequisites:

- The path to your **Ektron CMS400.NET** Web site. It is something like this: `http://server23/CMS400`. If you do not know the path, ask your system administrator.
- an **Ektron CMS400.NET** user name and password

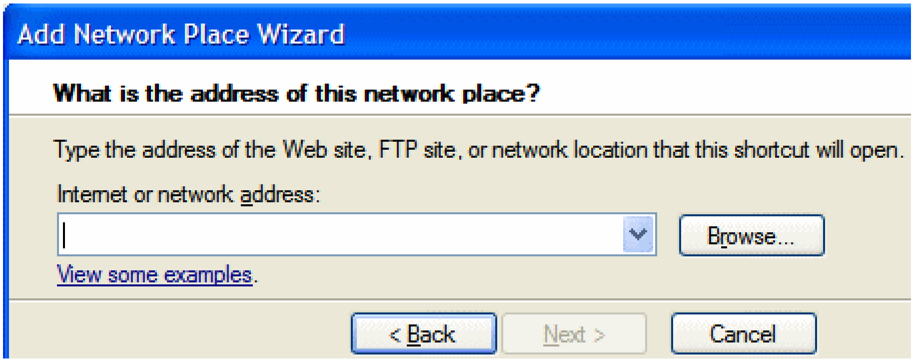
1. Right click the Windows Start button.



2. Choose **Explore**. Windows Explorer opens.
3. Click **Tools > Map Network Drive**.

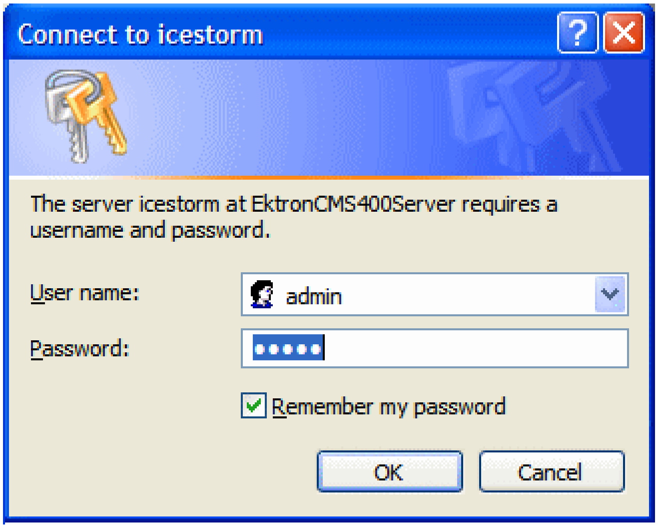


4. The Map Network Drive screen appears. Click **Sign Up for Online Storage or Connect to a Network Server**.
5. A wizard screen appears. Click **Next.**
6. Another wizard screen appears. Click **Choose another network location**. Click **Next**.
7. A third wizard screen appears. Enter the path to your **Ektron CMS400.NET** site, followed by the ekdavroot folder. For example, `http://server23/CMS400/ekdavroot.` Click **Next.**



WARNING! If your computer runs Microsoft Vista and you see this error message **The folder you entered does not appear to be valid. Please choose another**, refer to this Ektron KB article: http://dev.ektron.com/kb_article.aspx?id=15176.

8. A login screen appears (see below). Enter your **Ektron CMS400.NET** username and password. Click **OK**.



9. Another wizard screen appears. Name the folder. You will use this name to identify the folder when you want to drag and drop assets to it. Click **Next**.
10. The Finish screen appears.

Dragging and Dropping Assets into a Mapped Network Drive

Use Windows Explorer to drag and drop folders or assets into the mapped network folder.

WARNING! If a Windows folder has more than 1500 files, Windows Explorer may time out while trying to open it. To remedy this problem, divide your files in that folder into several child folders.

1. Open Windows Explorer. Resize it so it occupies the left half of the screen.
2. Open the folder that contains the folders or assets you want to upload to **Ektron CMS400.NET**.
3. Open a second instance of Windows Explorer. Resize it so it occupies the right half of the screen.
4. In that window, open **My Network Places**. Under that, find the mapped network folder you created in "Setting up a Mapped Network Drive" on page 239.
5. A login screen appears. Enter your **Ektron CMS400.NET** username and password. Click **OK**.
6. Open the **Ektron CMS400.NET** folder into which you want to upload assets or folders.
7. From the left window, drag and drop assets or folders into the mapped network folder.

If any of the assets being uploaded is not supported, an error message appears: **An error occurred copying some or all of the selected files**. However, all supported assets are uploaded. *See Also:* "Supported Types of Assets" on page 223

Viewing Managed Files in a Mapped Network Drive

If you want to view individual managed files within a mapped network folder, follow this procedure.

1. Open the `site root/web.config` file.
2. Go to this line:

```
<!--remove verb="GET,HEAD,POST" path="*"/-->
```

3. Remove the comment characters (in red above).
4. In the following lines, insert beginning and ending comment characters as shown in red below.

```
<!--add verb="GET,POST" path="*.doc" type="Ektron.ASM.EkHttpDavHandler.EkDavHttpHandlerFactory"/>
<add verb="GET,POST" path="*.docx" type="Ektron.ASM.EkHttpDavHandler.EkDavHttpHandlerFactory"/>
<add verb="GET,POST" path="*.xls" type="Ektron.ASM.EkHttpDavHandler.EkDavHttpHandlerFactory"/>
<add verb="GET,POST" path="*.xlsx" type="Ektron.ASM.EkHttpDavHandler.EkDavHttpHandlerFactory"/>
```

```
<add verb="GET,POST" path="*.ppt" type="Ektron.ASM.EkHttpDavHandler.EkDavHttpHandlerFactory"/>
<add verb="GET,POST" path="*.pptx" type="Ektron.ASM.EkHttpDavHandler.EkDavHttpHandlerFactory"/>
<add verb="GET,POST" path="*.vsd" type="Ektron.ASM.EkHttpDavHandler.EkDavHttpHandlerFactory"/>
<add verb="GET,POST" path="*.vsdx" type="Ektron.ASM.EkHttpDavHandler.EkDavHttpHandlerFactory"/-->
<!-- Enable the line below and remove all office specific mappings above for Server 2003 with
private assets and enable remove verb command-->
```

5. Go to this line:

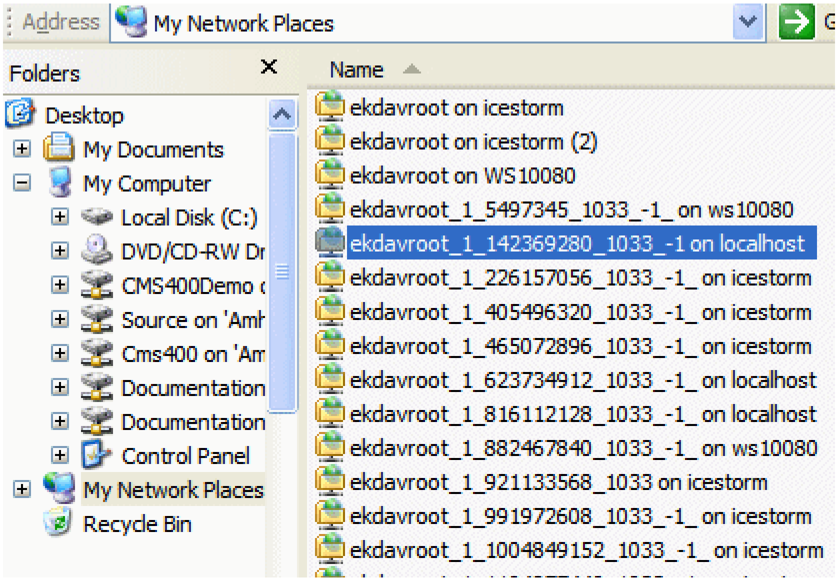
```
<!--add verb="GET,HEAD,POST" path="*"
type="Ektron.ASM.EkHttpDavHandler.EkDavHttpHandlerFactory"/-->
```

6. Remove the comment characters (in red above).

After you make this change, you can click to view any image file in the ekdavroot folder.

Removing Mapped Network Drives

Ektron CMS400.NET's DMS feature creates a mapped, `ekdavroot` network drive for many functions. For example, if you sign on to **Ektron CMS400.NET** and create a new folder, a new mapped, `ekdavroot` network drive is created.



If you find that `ekdavroot` folders clutter up your My Network Places folder, you can delete them. Deleting `ekdavroot` folders has no impact on your ability to use **Ektron CMS400.NET**.

Editing an Office Document

There are two ways to edit an Office document if you are using the Internet Explorer browser and Office is installed on your computer.

- "Edit in Microsoft Office" on page 244
- "Edit Using a Mapped Network Folder" on page 245

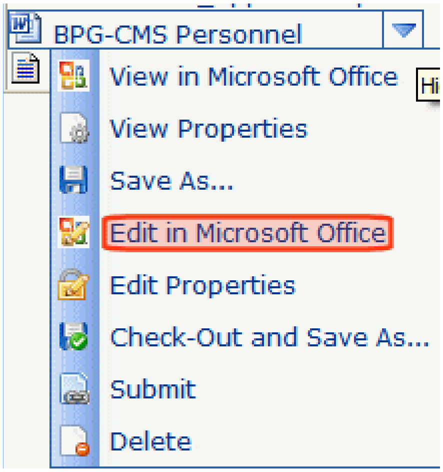
NOTE Firefox users can check an Office document out to their computer, edit it using Office, then drag and drop the asset back into CMS400.NET.

Edit in Microsoft Office

Prerequisites

- Your computer has MS Office.
- The Internet Explorer browser. You cannot use Firefox.

To use this option, click the document from the **Ektron CMS400.NET** folder and select **Edit in Microsoft Office** from the dropdown menu.



The document opens within Office. Make your changes and save it. When you do, the revised version is saved to **Ektron CMS400.NET**.

NOTE If you want to edit the document's Summary, Metadata, Schedule, Comment, Task, or Taxonomy category information, click the asset from the **Ektron CMS400.NET** folder, then select **Edit Properties** from the dropdown menu.

When you begin to edit the document, its status changes to Checked Out (0). When you make your changes and save, it is Approved.

See Also:

- "Adding a Content Summary" on page 73
- "Adding or Editing Metadata" on page 77
- "Managing Tasks" on page 286
- "Scheduling Content to Begin and End" on page 65
- Ektron CMS400.NET Administrator manual chapter "Web Alert Feature" "Web Alert Feature" on page 931

Edit Using a Mapped Network Folder

You can edit an Office document directly from a mapped network folder. To do that, follow these steps.

1. Set up a mapped network folder, as described in "Setting up a Mapped Network Drive" on page 239.
2. Use Windows Explorer to open the folder.

NOTE If any Windows folder has more than 1500 files, Windows Explorer may time out while trying to open it. To remedy this problem, divide your files in that folder into several child folders.

3. Open a document using Office, make changes, and save it.

You can also delete and move documents using the mapped network folder.

The document is now in checked into **Ektron CMS400.NET**, and can appear on your Web site when approved. Also, a history of every saved version is retained so you can restore previous ones if necessary. You cannot enter or change **Ektron CMS400.NET** document information (Summary, Metadata, etc.) in the mapped network folder -- someone must use **Ektron CMS400.NET** to do that.

Status of Document Saved to Mapped Network Folder

The status of a document saved to a mapped network folder depends on the approval chain and the user who signed in when the mapped network folder was created.

- If you are the last approver, or if there is no approval chain, its status is *Approved*.
- If there is an approval chain and you are not the last approver, its status is *Checked In* (I).

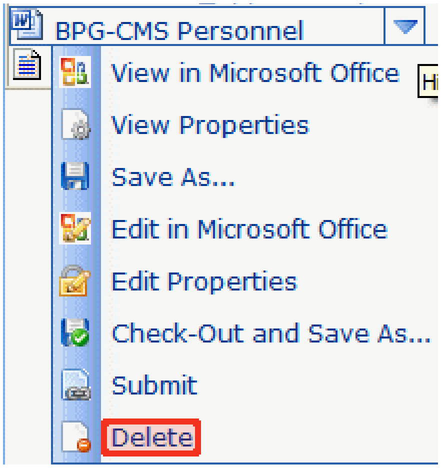
Also, if the content's folder requires metadata or a taxonomy category which has not been entered, its status is *Checked In* (I).

Deleting an Office Document

NOTES You must have delete permissions for the folder that contains the document. (Permissions are explained in the **Ektron CMS400.NET** Administrator manual
It is good practice to check for broken quicklinks before deleting documents. See ”Checking for Broken Quicklinks” on page 59.

To delete an Office document, follow these steps.

1. Navigate to the Workarea's **Content** folder.
2. Open the folder that contains the document.
3. Place the cursor over the document
4. Hover the cursor over the triangle ( ) on the right end of the document and click. A dropdown menu appears.
5. Click **Delete**.



NOTE If you do not see **Delete**, either you lack permission to delete the content or its status makes it ineligible for deleting.

6. The following message appears.

7. Click **OK** to delete the document.

Like publishing, deleted content must go through the approval chain before it is removed. If you are the last approver in the approval chain, the content is deleted immediately. *See Also:* "Approving/Declining Content" on page 87

Checking Out, Saving, and Replacing an Office Document

If you check out and save an Office document to your computer, you would typically edit it using Office. While it is checked out, only you or a system administrator can check it back in. Other users cannot edit it. You may use this feature to work on the document on your computer, copy it to another computer, or even email it to someone who does not have access to **Ektron CMS400.NET**.

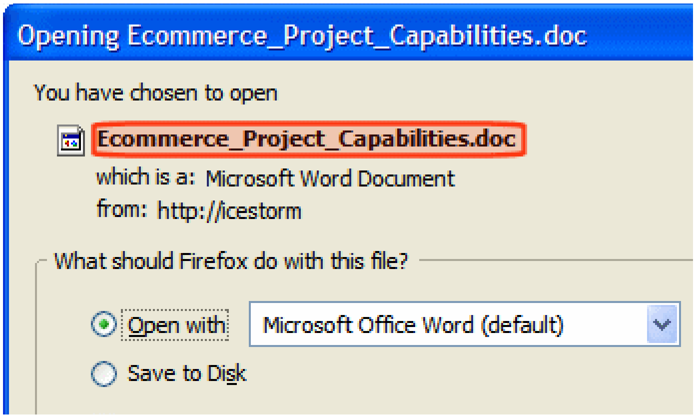
You can also use the **Check Out and Save As** option to edit an Office document if you use the Firefox browser. Firefox does not let you edit Office documents within **Ektron CMS400.NET**, as you can with Internet Explorer. To work around this limitation, check out the Office document, save it to your computer, and edit it.

When all edits have been entered, drag and drop the document back to **Ektron CMS400.NET**.

Follow these steps to copy an Office document to your computer, edit it, then replace the version in **Ektron CMS400.NET**.

IMPORTANT! There are several ways to import a document into Ektron CMS400.NET. Some methods retain the original file name while others let the user assign a name.

When you check out and save a document to your computer, it is saved under the *original file name*, which may be different from its Ektron CMS400.NET name. The original file name is on the screen that appears after you select **Check out and Save as** (circled below).



Make note of the original file name, because you use it to identify the file after it is saved to your computer.

1. In **Ektron CMS400.NET**, open the folder that contains the Office document.
2. Hover the cursor over the triangle ( ) on the right end of the document and select **Check out and Save As**.
3. You are prompted to open or save the document. Click **Save**.
4. Select a folder to which you want to save the document.
5. The document's status changes to *checked out* (O).
6. Edit the document in Office.

NOTE If you change your mind and do not change the document, but simply close Office, the document remains Checked Out (O). Use the **Check In** menu option to check it in.

7. Drag and drop the edited document. See "Adding Documents Using Drag and Drop" on page 235.
8. You are asked to confirm the file replace. Click **Yes**.
9. The document is submitted for approval.
10. The revised document is saved in **Ektron CMS400.NET**.

Saving an Office Document

You would typically save an Office document to your computer in order to distribute it to others, or if you want a personal copy. You should *not* save a document to your computer if you plan to edit it then replace the version in **Ektron CMS400.NET** -- doing this may overwrite edits made by other users.

If you want to edit a document, use the **Edit in MS Office** or **Check out and Save As** menu option. Both options set the content to checked out status, which prevents non-administrator users from editing it until you check it back in.

Follow these steps to save an Office document.

1. In **Ektron CMS400.NET**, open the folder that contains the Office document.
2. Hover the cursor over the triangle ( ) on the right end of the document and click **Save As**.
3. You are asked if you want to open or save the document. Choose **Save**.
4. Select a folder to which you want to save the document.

Saving an Office Document in .html Format

This feature converts Office documents 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 Microsoft Office is installed on their computer.

WARNING! Only Microsoft Word and Excel documents can be published as HTML. **Ektron CMS400.NET** does not support saving Powerpoint or Visio documents as HTML.

There are two ways to save an Office document in .html format.

Method	Advantages	For details, see
1. Drag and drop Office document into **CMS400.NET**. 2. Use **Edit in MS Office** option to save it in html format.	You don't need to know the path to your Web site's root folder.	"Saving an Office Document as .html from Ektron CMS400.NET" on page 251
1. Open an Office document on your computer. 2. Save it in html format to the ekdavroot folder in your Web root.	You don't need to drag and drop document to **CMS400.NET**	"Saving Office Document as .html from Your Computer" on page 252

Warnings About Saving in .html Format

Regardless of how you save Office documents as HTML, be careful to set up procedures that prevent HTML content from being overwritten. For example:

1. You save a Word document as .html.
2. Someone edits the .html version.
3. You save the original Office Document as .html again.

In this scenario, the edits made in step 2 are overwritten by step 3.

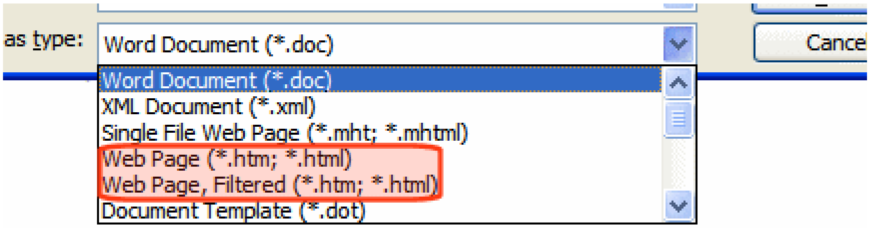
It is important to establish procedures that avoid such problems.

Saving an Office Document as a Web Page

When saving a Word document, after you choose **Save as** from Word's File menu, there are two choices for saving as .html.

NOTE When saving an Excel document, **Save as Web Page (*.htm, *.html)** is the only option.

- save as Web Page
- save as Web Page Filtered



NOTE For a description of the differences between these options, see http://office.microsoft.com/en-us/help/HP030852781033.aspx.

Ektron recommends **save as Web Page, Filtered** because the resulting HTML is almost identical to the original document. The **save as Web Page** is not a good option because its HTML content does not match the original document and may cause problems when being edited.

Handling Images Embedded within a Word Document

If you save an Office document that includes images, they appear when anyone is editing the document as well as when it appears on your Web site. In addition, the images are saved to the corresponding **Ektron CMS400.NET** Library folder. In this way, other **Ektron CMS400.NET** users can apply the images to HTML content as needed.

See Also: "Library Folder" on page 131

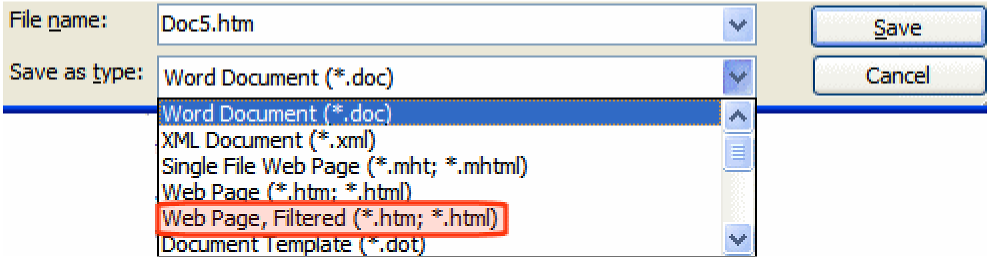
Saving an Office Document as .html from Ektron CMS400.NET

This procedure assumes the Office document has been saved to **Ektron CMS400.NET**. Procedures for doing this are explained in "Importing Office Documents" on page 230.

See Also: "Warnings About Saving in .html Format" on page 250

1. Within the **Ektron CMS400.NET** Workarea, open the Content area.
2. Open the folder that contains the Office document you want to save as .html.

3. Hover the cursor over the triangle ( ) on the right end of the document you want to save
4. Click **Edit in Microsoft Office**. The document opens within Office.
5. From Office's **File** menu, select **Save as Web Page**.
6. In the **Save as Type** field, select **Web page, Filtered (*,htm, *.html)**. *See Also:* "Saving an Office Document as a Web Page" on page 250



7. Click the **Save** button.
8. You may be warned about formatting features not supported in HTML. Press **Continue**.
9. A dialog prompts you to enter your **Ektron CMS400.NET** user name and password.
10. **Ektron CMS400.NET**'s folders appear in a Save as window. The folder that contains the Word document is the default folder. Select that or any other **Ektron CMS400.NET** folder and click **Save**.
11. The Office document is saved as an .html file into **Ektron CMS400.NET**.
12. Close the document and exit from Office.

Saving Office Document as .html from Your Computer

1. Open the Office Document.
2. Click **File > Save as (*,htm, *.html)**.
3. Click **My Network Places** and navigate to `ekdavroot` folder on the server that hosts **Ektron CMS400.NET**.

4. **Ektron CMS400.NET**'s folders appear. The folder that contains the Word document is the default folder. Select that or any other **Ektron CMS400.NET** folder.
5. In the **Save as Type** field, select **Web page (*.htm, *.html)** or **Web Page, filtered (*.htm, *.html)**. *See Also:* "Saving an Office Document as a Web Page" on page 250.
6. Click the **Save** button.
7. You may be warned about formatting features not supported in HTML. Press **Continue**.
8. A dialog prompts you to enter your **Ektron CMS400.NET** user name and password.
9. The Office document is saved as an .html file into **Ektron CMS400.NET**.
10. Close the document and exit from Office.

The status of the document depends on the approval chain and the user who signed in when the mapped network folder was created.

- If you are the last approver, or if there is no approval chain, its status is *Approved*.
- If there is an approval chain and you are not the last approver, its status is *Checked In* (I).

Working with Managed Files

Ektron CMS400.NET can also track and manage any non-Office type of file that runs on your computer (for example, .PDF, .gif and .zip).

You use a host application to create the file. For example, you might use Photoshop to create a .jpg file. Next, save it to **Ektron CMS400.NET** using any method explained in "Importing Office Documents" on page 230. While importing, add supporting information, such as summary, metadata, taxonomy category and schedule. Use standard toolbar buttons to perform actions like view history, submit for publishing, and delete.

If you want to edit a managed file, use the **Check out and Save As** menu option to place a copy of it on your computer. Then, edit it using the host application. When done, drag and drop the changed file to **Ektron CMS400.NET**.

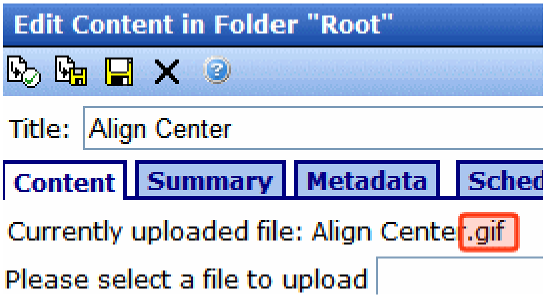
This section explains how to work with managed files through the following subtopics.

- ”Managed File Menu Options” on page 254
- ”Creating a New Managed File” on page 255
- ”Importing Managed Files” on page 255
- ”Editing a Managed File” on page 256
- ”Deleting a Managed File” on page 257

Managed File Menu Options

Depending on a managed file’s status, your role, and position in the document’s approval chain, any of the following options may be available when you display the dropdown menu for a managed file. *See Also:* ”Content Dropdown Menu” on page 35

Menu option	Description	For more information, see Note: These sections describe working with Office documents. Everything works the same with managed files.
View	View and edit managed file and its **CMS400.NET** information (Summary, Metadata, History, etc.). Can also be used to replace file.	
Save As	Save copy of managed file to your computer	”Saving an Office Document” on page 249
Check Out and Save As	Change a managed file’s status to checked out and save a copy to your computer	”Checking Out, Saving, and Replacing an Office Document” on page 247

Menu option	Description	For more information, see Note: These sections describe working with Office documents. Everything works the same with managed files.
Edit	Overwrite a managed file in **CMS400.NET** with a version on your computer. The file name can be different but its type must match the file being edited. A file's type appears after you click **Edit**, on the Edit Content in Folder screen (circled below). 	"Checking Out, Saving, and Replacing an Office Document" on page 247
Check In	Change a checked-out managed file's status to checked in. Useful if you checked out and saved a managed file then it became lost or corrupted. This option lets you change its status back to checked in.	
Submit/ Publish	Submit managed file into approval chain	"Asset Workflow" on page 258
Delete	Delete managed file; deleted file cannot be retrieved	"Deleting a Managed File" on page 257

Creating a New Managed File

You cannot create a managed file within **Ektron CMS400.NET**. Instead, create it on your computer using the host application then import it into DM.

Importing Managed Files

WARNING! You cannot import files whose name includes a percentage sign (%) or ampersand (&).

You import managed files into **Ektron CMS400.NET** using the same methods you use to import MS Office documents. See ”Importing Office Documents” on page 230.

If you do not see a file you uploaded, verify that the View Menu box is displaying the type of file you are looking for. Files upload to the correct type regardless of what is selected when you drag and drop them.

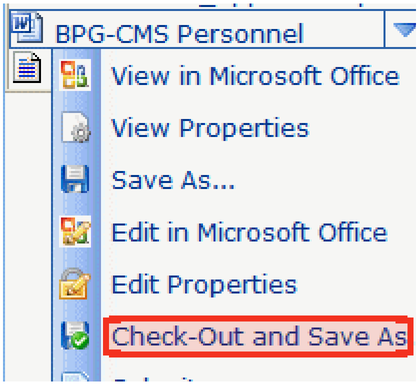
Editing a Managed File

You do not edit a managed file within **Ektron CMS400.NET**. Instead, you check it out, save it on your computer, edit it using the host application, then check it back in to **Ektron CMS400.NET**. While it is checked out, only you or a system administrator can edit the managed file within **Ektron CMS400.NET**.

NOTE Alternatively, you can edit within a mapped network folder. See ”Edit Using a Mapped Network Folder” on page 245.

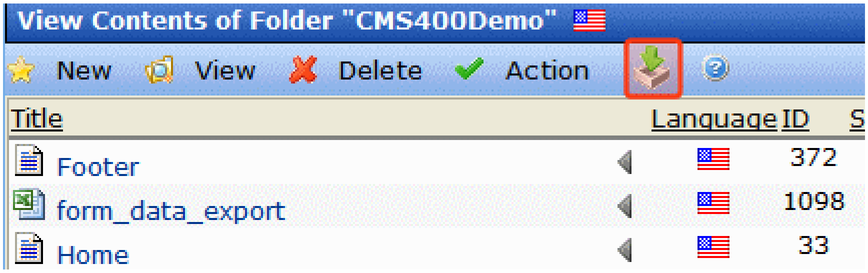
Follow these steps to edit a managed file.

1. From the Workarea, select the **Content** folder.
2. Select the managed file’s folder.
3. Select the managed file you want to edit.
4. Hover the cursor over the triangle (◀) on the right end of the file and click.
5. Click **Check out and Save As** from the dropdown menu.



6. Select a folder on your computer in which to save the file.

7. Open the host application.
8. Edit and save the file.
9. Return to **Ektron CMS400.NET** and open the file's folder.
10. Click the Add Assets button (circled below).

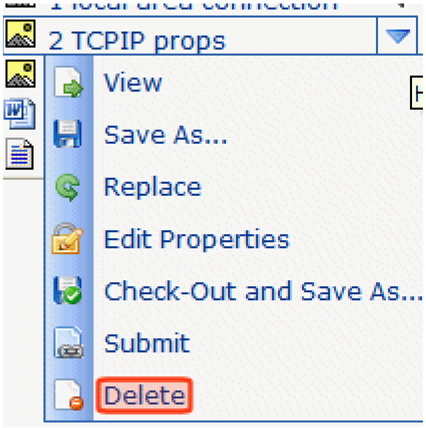


11. Drag the changed file to the Assets area in the middle of the screen.

Deleting a Managed File

NOTES You must have delete permissions for the folder that contains the document. (Permissions are explained in the **Ektron CMS400.NET** Administrator manual
It is good practice to check for broken quicklinks before deleting documents. See "Checking for Broken Quicklinks" on page 59.

1. From the Workarea, select the **Content** folder.
2. Select the managed file's folder.
3. Find the managed file you want to delete.
4. Hover the cursor over the triangle ( ) on the right end of the file and click.
5. Click **Delete** from the dropdown menu.

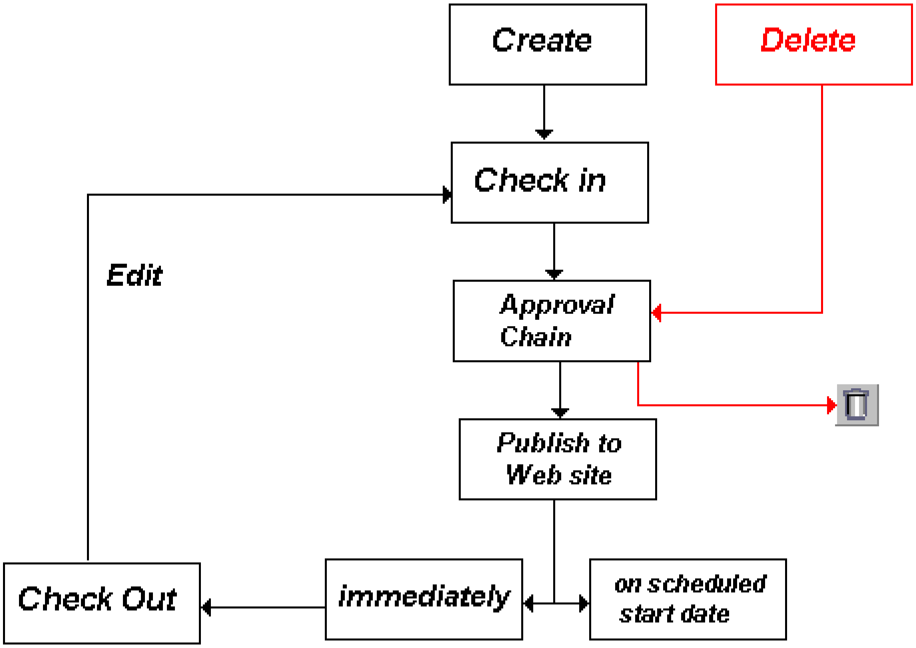


6. You are asked to confirm the deletion. Press **OK**.
7. The asset enters its approval chain.

Like publishing, deleted content must go through the approval chain before it is removed. If you are the last approver in the approval chain, the content is deleted immediately. *See Also:* "Approving/Declining Content" on page 87

Asset Workflow

An asset proceeds through the same workflow as any other type of content. A diagram is below.



See Also:

- "Approving Assets" on page 259
- "Adding Assets to Collections and Menus" on page 259

Approving Assets

Assets are placed into the approval chain, like other types of content. For more information, see "Approving/Declining Content" on page 87.

Adding Assets to Collections and Menus

You can add an asset to a collection or menu as you would any other type of content. For more information, see "Working with Collections" on page 424 and "Working with Menus" on page 444.

Asset Reports

Ektron CMS400.NET provides several reports that track assets by status.

Report	Displays assets in this status	For more information, see
Approvals	Requiring your approval	**CMS400.NET** Administrator Manual > “Content Reports” > “Approvals Report”
Checked In Content	Checked in	**CMS400.NET** Administrator Manual > “Content Reports” > “Checked In Report”
Checked Out Content	Checked out	**CMS400.NET** Administrator Manual > “Content Reports” > “Checked Out Report”
New Content	New (that is, created and saved but never published)	**CMS400.NET** Administrator Manual > “Content Reports” > “New Content Report”
Submitted Content	Submitted for publication	**CMS400.NET** Administrator Manual > “Content Reports” > “Submitted Report”
Pending Content	Approved and pending a start date	**CMS400.NET** Administrator Manual > “Content Reports” > “Content Pending Start Date Report”
Refresh Reminder Report	End date has been reached	**CMS400.NET** Administrator Manual > “Content Reports” > “Refresh Reminder Report”
Expired Content	Expired date has been reached	**CMS400.NET** Administrator Manual > “Content Reports” > “Expired Content Report”
Content to Expire	Will expire within specified number of days	**CMS400.NET** Administrator Manual > “Content Reports” > “Content to Expire Report”

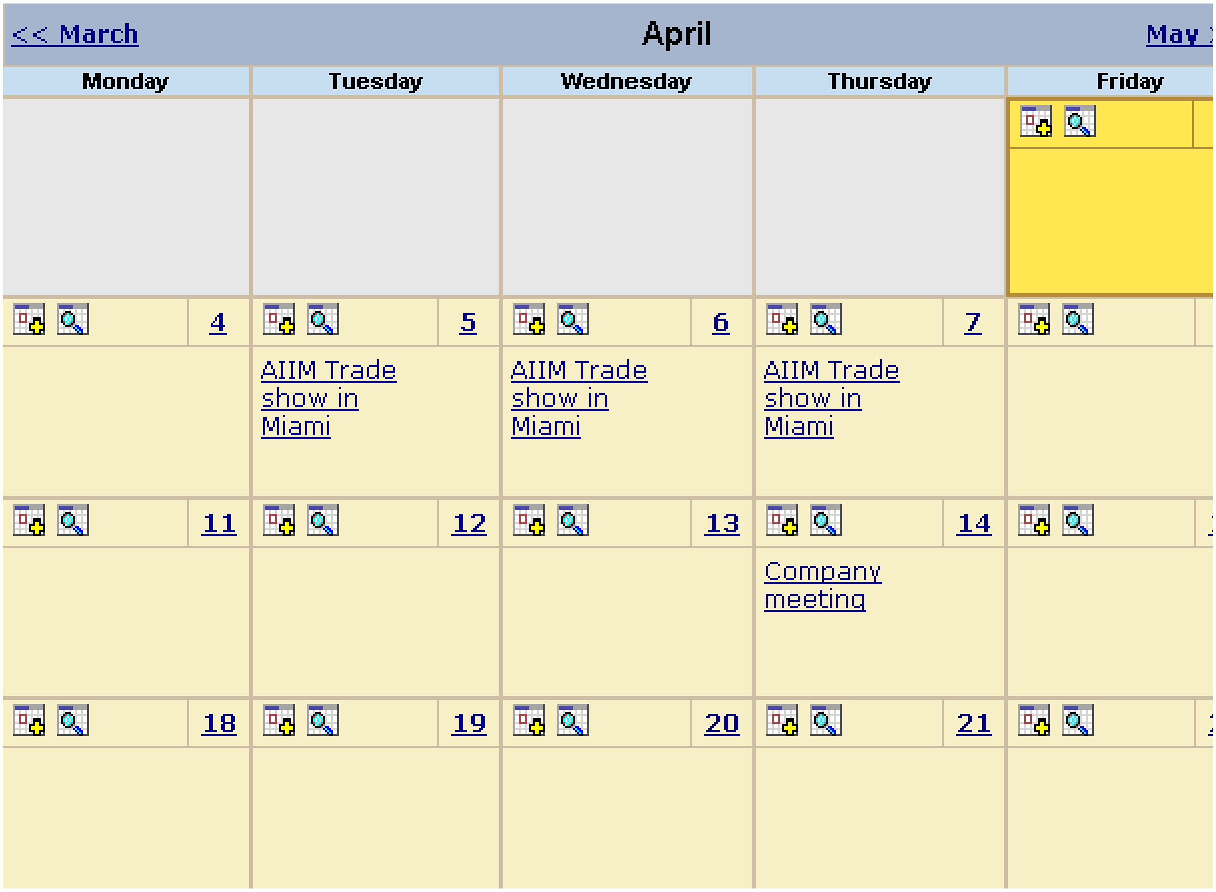
Working with Calendars

Calendars in **Ektron CMS400.NET** perform the same function as a paper calendar: they keep one or more users informed about upcoming events. They can be displayed to all visitors to your Web site, and any authorized user can add events to a calendar.

Typical calendar events could include

- company meeting
- reserving a conference room for an interview
- company holidays
- deadlines

These are only a few uses of calendar events. Calendars are versatile and can easily meet all of your needs. A sample calendar appears below.

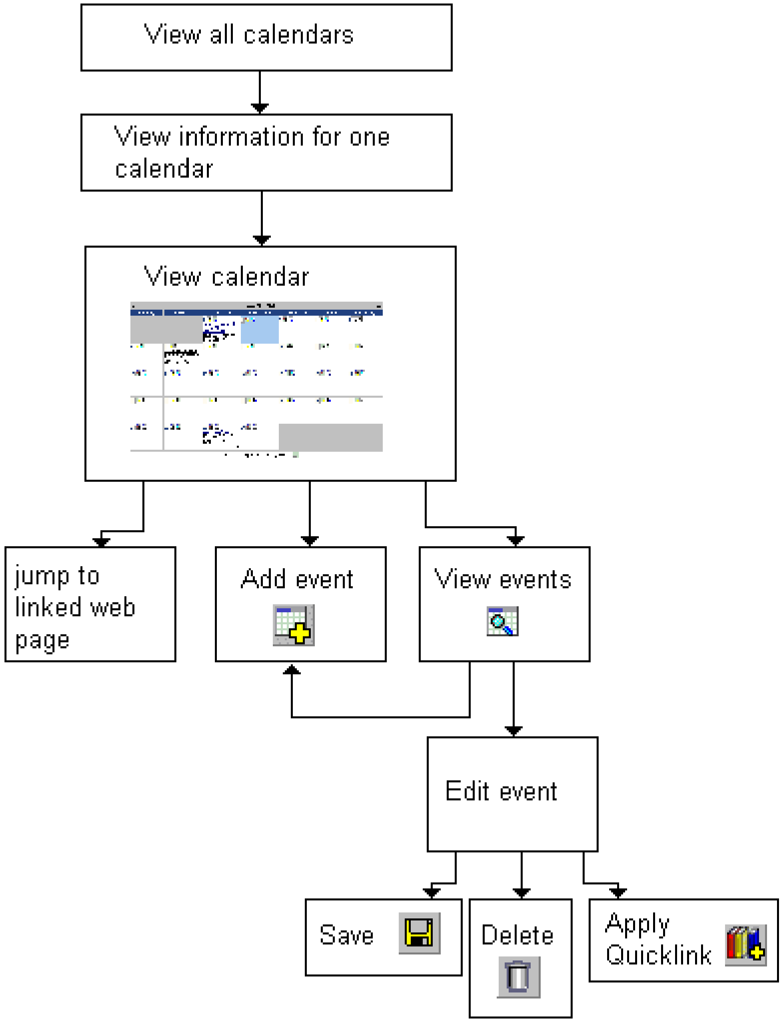


The Calendar Feature is explained through the following topics.

Understanding Calendars

Before working with calendars, you should understand the following points.

- **Ektron CMS400.NET** supports several calendars at one time. There might be a site-wide calendar, and other calendars for special interests, such as an athletic events calendar.
- Each date can display several events.
- Only system administrators can create a calendar.
- Each calendar is assigned to a content folder (*See Also:* "Working with Folders and Content" on page 28). Your ability to view, add, edit, and remove calendar events is determined by your permissions for that folder.
- The following illustrates the workflow of calendar tasks.



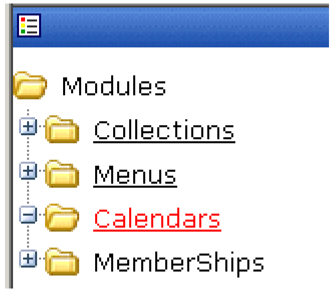
Accessing the View Calendar Screen

The View Calendar screen collects general information about a calendar, and provides toolbar buttons that let you perform calendar-related activities.

To access the View Calendar screen, follow these steps.

1. Access the **Modules** folder from the lower left corner of the Workarea.

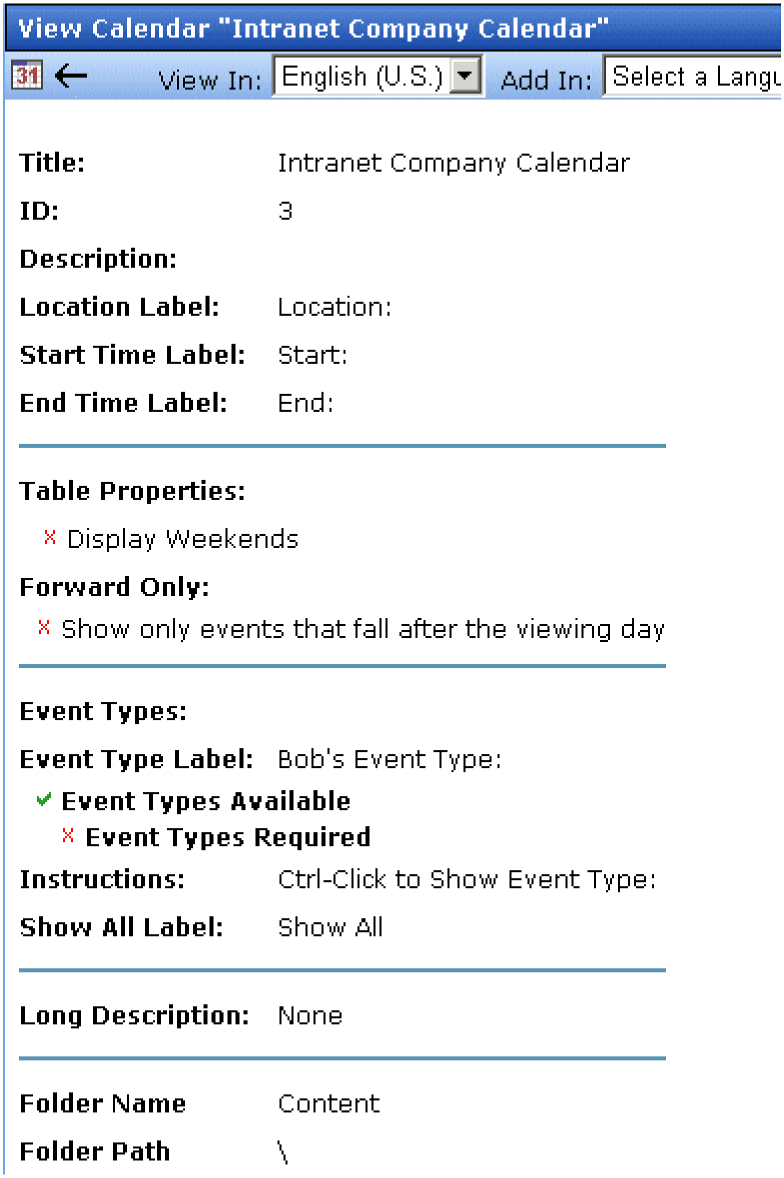
2. Click the **Calendars** folder.



3. The Calendar Modules screen appears. It lists all calendars in **Ektron CMS400.NET**.

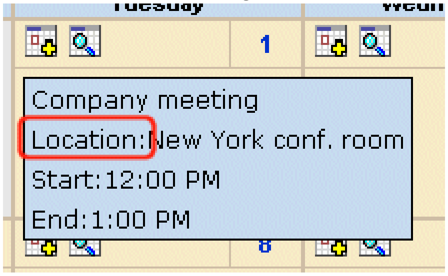
NOTE Only system administrators can create a new calendar.

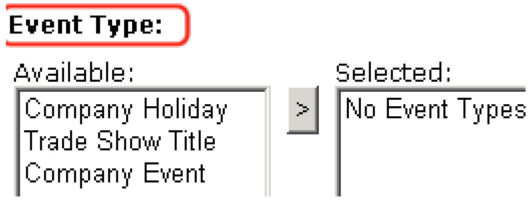
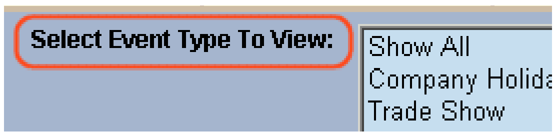
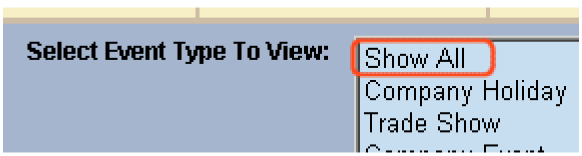
4. Click a calendar.
5. The View Calendar screen appears, showing information about the calendar.



The following table explains the fields on the View Calendar screen.

Field	Description
Title	Title given to the calendar. The title identifies the calendar within the Workarea.

Field	Description
ID	ID number automatically assigned to calendar. This is used to display the calendar on a Web page.
Description	Description given to the calendar.
Location Label	Label for the calendar's location information. This label appears on the calendar when a location is assigned to a calendar event. 
Start Time Label	Label for the calendar's start time. This appears on the calendar when a start time is assigned to a calendar event.
End Time Label	Label for the calendar's end time data. This appears on the calendar when an end time is assigned to a calendar event.
Table Properties: Display Weekends	A green check ( ) means the calendar displays every day of the week. A red X ( ) means the calendar displays weekdays only.
Forward Only	If a green check ( ) appears next to **Show only events that fall after the viewing day**, and the user viewing the calendar is not logged in, the calendar only displays events from the viewing date forward. No past events appear. A logged-in user can view past calendar events.

Field	Description
Event Type Label	Indicates if event types are assigned to this calendar. *See Also:* "Understanding Event Types" on page 277 One section of the Add Calendar Events screen displays available event types and lets the user assign them to the event.  By default, this text is **Event Type:**. Your system administrator can edit the text.
Event Types Available	A green check ( ) means you can add event types to the calendar.
Event Types Required	A green check ( ) means that when entering a calendar event, you must assign an event type to it.
Instructions	If this calendar uses event types, text appears at the bottom of the screen that explains how to use the event type selection box. By default, this text is **Select Event Type to View:**.  Your system administrator can change this text.
Show All Label	If this calendar uses event types, the list of event types appears at the bottom of the screen. On top of the list is text indicating that all event types will appear on the calendar. By default, this text is **Show All**.  Your system administrator can change this text.
Long Description	Lets the user enter additional text while adding a calendar event.

Field	Description
Folder Name	Name of content folder to which the calendar is assigned for permission purposes. You can only add, edit or delete events for calendars in folders to which you have been granted permission.
Folder Path	Complete path to the calendar’s content folder.

The View Calendar screen may contain the following toolbar buttons that let you perform other tasks.

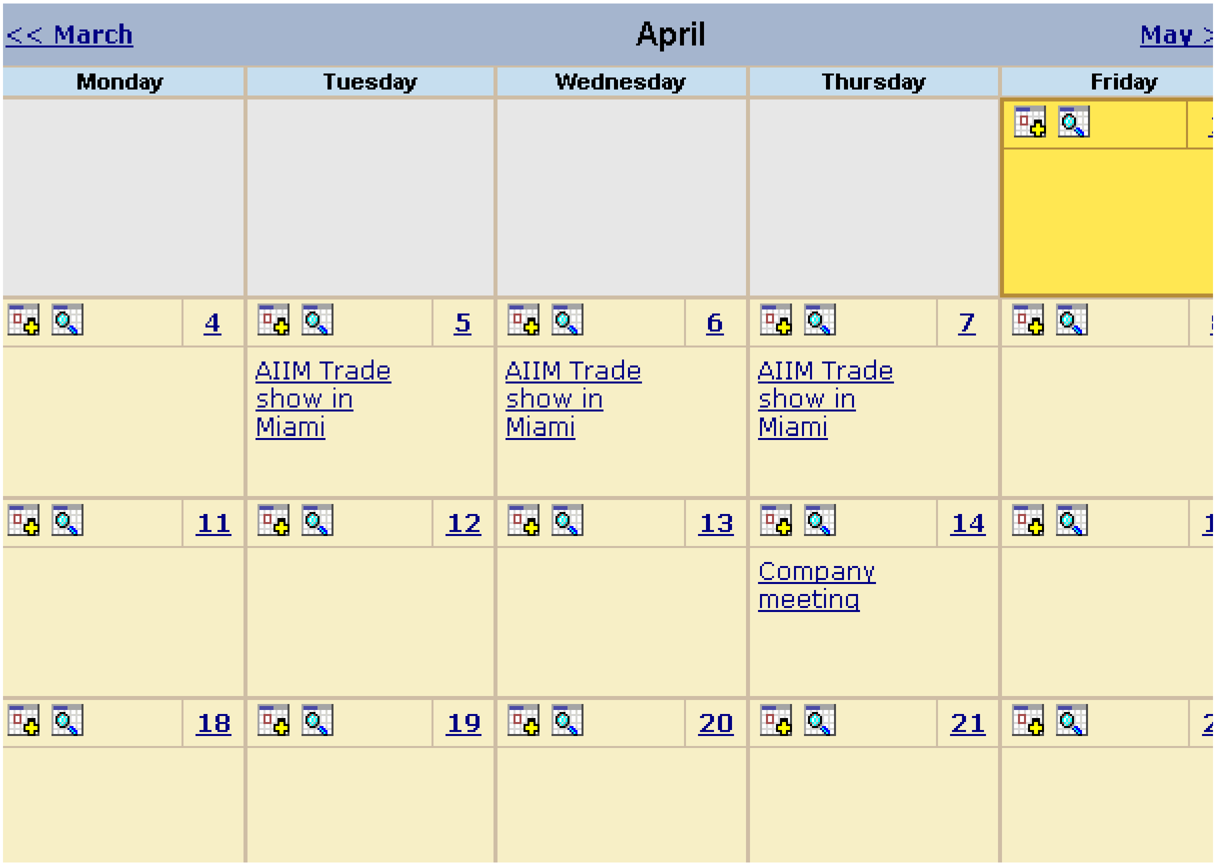
Button	Name	Description	More Information
	View Calendar	Show calendar in the Workarea	”Viewing a Calendar” on page 269
	Back	Return to previous screen	

Viewing a Calendar

NOTE This section explains how to view a calendar and enter calendar events from the Workarea. Once a calendar is available on your Web site, you can also perform these actions by logging in and navigating to the calendar on your site.

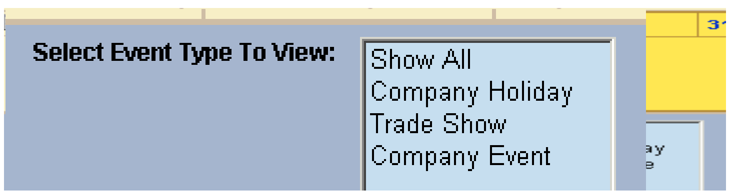
To view a calendar, follow these steps.

1. Access the View Calendar screen for the calendar you want to see, as described in ”Accessing the View Calendar Screen” on page 264.
2. Click the View Calendar () button.
3. The calendar appears.



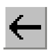
See Also: "Tips on Viewing a Calendar" on page 271.

4. If you want to view events of a certain type only, click the **Select Event Type to View** drop-down list (illustrated below). Then, choose an event type. *See Also:* "Understanding Event Types" on page 277



The page is refreshed, and the calendar displays events of that type only.

From the View Calendar screen, you can perform the following tasks. Note that the Add and View buttons appear on each calendar day, while the Return button is on the toolbar at the top of the screen.

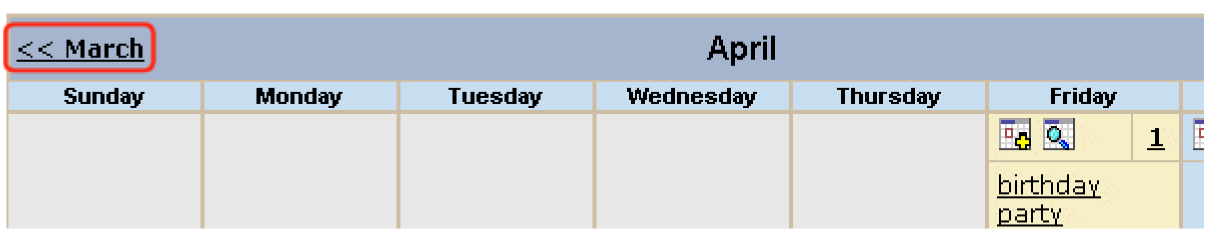
Click on	Action	More Information
	Add Calendar Event	”Adding a Calendar Event” on page 273
	View Calendar Events	”Viewing a Calendar Event” on page 280
	Return to Previous Screen	Return to previous screen
Event title within calendar (sample below) 	Jump to calendar event’s Web page (if available)	

See Also: ”Working with Calendars” on page 261

Tips on Viewing a Calendar

- The monthly calendar displays the current month. In the intranet sample, today is highlighted in yellow (illustrated below).

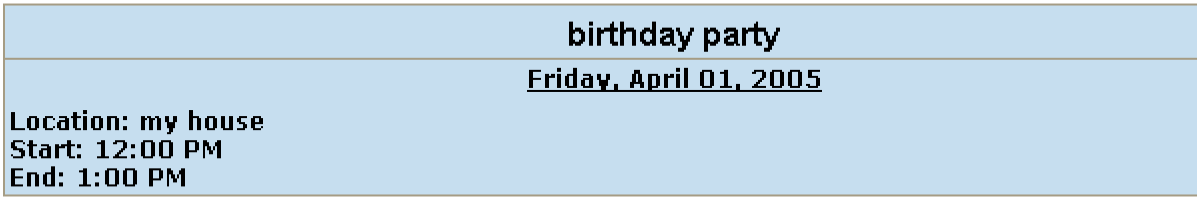
  At the top of the calendar are the previous and next months. Click them to view those months.



- Where an event appears, move the cursor over it to see a popup box with the event name, location, and start and end times.

  If a Web page is linked to the event, you can click the event name to jump to that page.
- Click the number that represents any day to view detail for that day (illustrated below).

- From the daily view, you can
  - see all events and the hours they span
  - proceed to the previous or next day (click a date in the upper left or right corner)
  - return to the month view by clicking on today's date
  - view detail about an event by clicking on it
- From the event view (illustrated below), you can view the event's location and start and end times. Click the date to return to the daily view.



Adding a Calendar Event

NOTE You can only add a calendar event if you have add or edit permission for the calendar's folder.

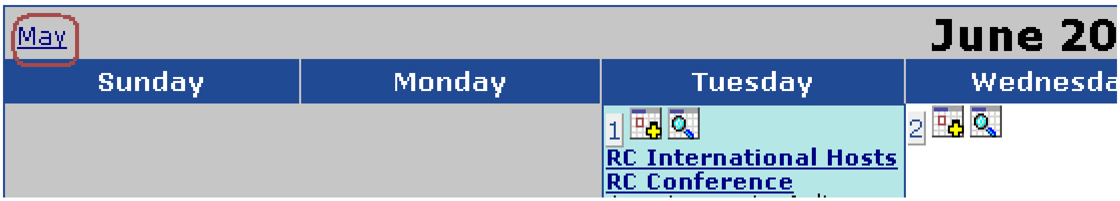
To add a calendar event, follow these steps.

1. Access the calendar to which you want to add an event, as described in "Viewing a Calendar" on page 269.

NOTE You can also add a calendar event after viewing the View Events screen. *See Also:* "Viewing a Calendar Event" on page 280

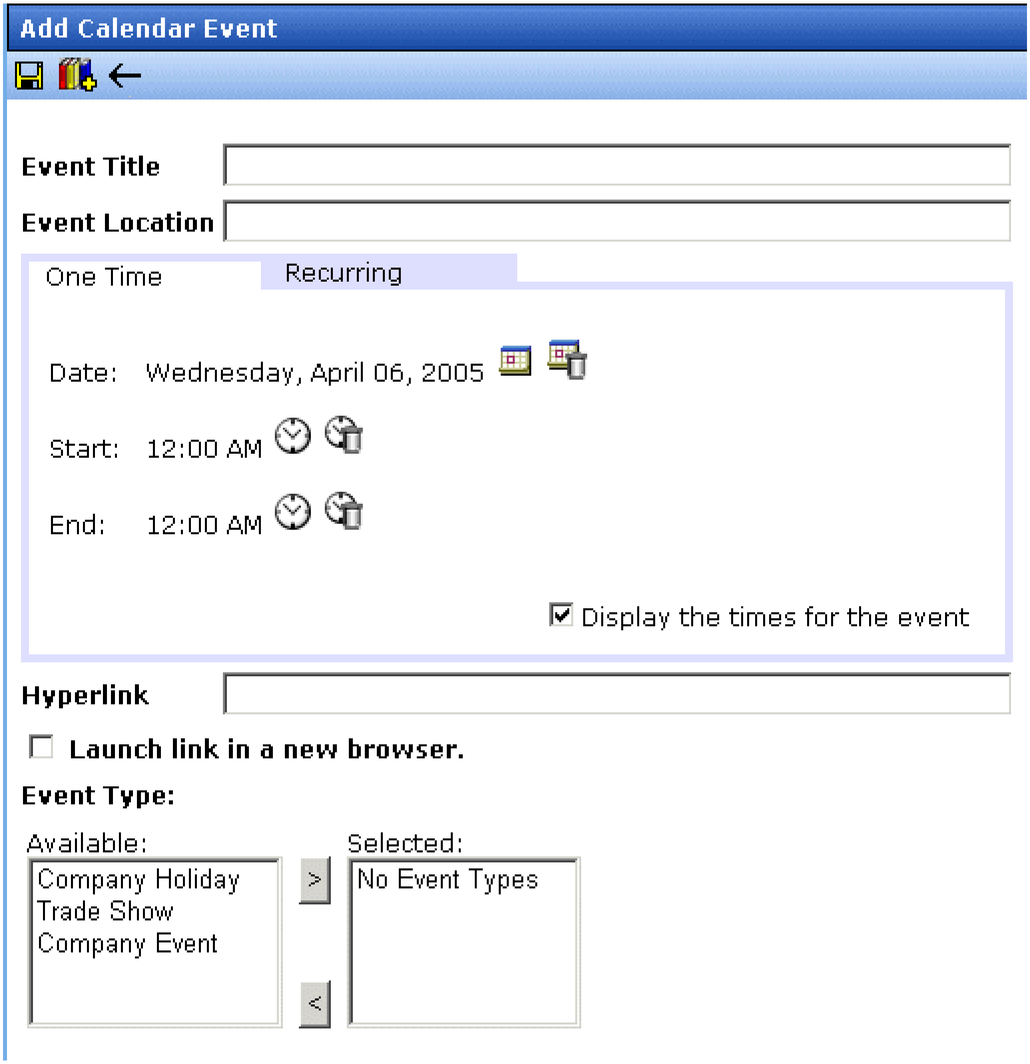
2. Navigate to the month and day for which you want to add a calendar event.

   Your calendar display is determined by your system administrator.



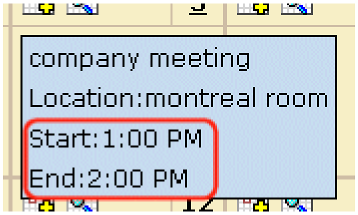
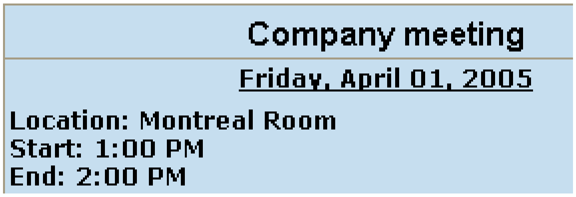
3. Click the Add Event ( ) button.
4. The Add Calendar Event screen appears.

NOTE Folder information appears at the bottom of the screen only if the folder has subfolders or content under it.



5. Respond to the fields using the following table as a reference.

Field	Description
Event Title	Enter a title for the event. Note: If you enter a Quicklink in the **Hyperlink** field, the Quicklink's content title replaces this title. You can then edit the new title if desired.
Event Location	If desired, enter a location for the event (for example, Conference Room 1 or Cafeteria).
One Time/ Recurring	If you want to enter a one-time only event, continue reading. If you want to add a recurring event, see "Adding a Recurring Event" on page 277.
Date	Click the calendar icon ( ) to display a calendar. From it, select a start date. Technical note: If you see a mix-up of the month and date of your entry (for example, you select March 2 but see February 3), make sure the date format specified in the Windows Control Panel Regional Settings dialog matches your current language. Also, make sure the settings apply to the default user.
Start Time	If you want to enter a start time, click the clock icon ( ) to display a clock. From it, select a start time.
End Time	If you want to enter an end time, click the clock icon ( ) to display a clock. From it, select an ending time for the event.

Field	Description
Display the times for the event	Check this box if you want the calendar to display the event's start and end times (illustrated below).  The time also appears on the event detail if this box is checked. 
Hyperlink	You can link a Web page to this calendar event. The Web page could contain more information about the event, directions to it, etc. If you insert a hyperlink, when this event appears on the calendar, the reader can click the event to jump to that page. To enter any page on the internet, enter its Web address. For example, `www.example.com`. To link to content on your Web site, click the library button (). (This type of link is known as a *Quicklink*.) The Quicklinks dialog appears, and you can navigate to the content. The last published version of linked content appears. If content has never been published, nothing appears. If you select a hyperlink, the title of the selected content replaces any text in the **Event Title** field. You can edit the new title if desired.
Launch link in a new browser	Check this box if you want the Web page or Quicklink specified in the **Hyperlink** field to appear in a new browser window when someone clicks it. If you do not check this box, the new Web page replaces the current one when the link is clicked.

Field	Description
Event Type	Note: This field only appears if your system administrator set up one or more event types for this event. *See Also:* "Understanding Event Types" on page 277 To apply an event type to this event, click an Event Type from the right column. Then, click the Right Arrow ( ) to move the event type to the **Selected** column. Repeat for each event type you want to assign to the event.

6. Click **Save** ( ).

Understanding Event Types

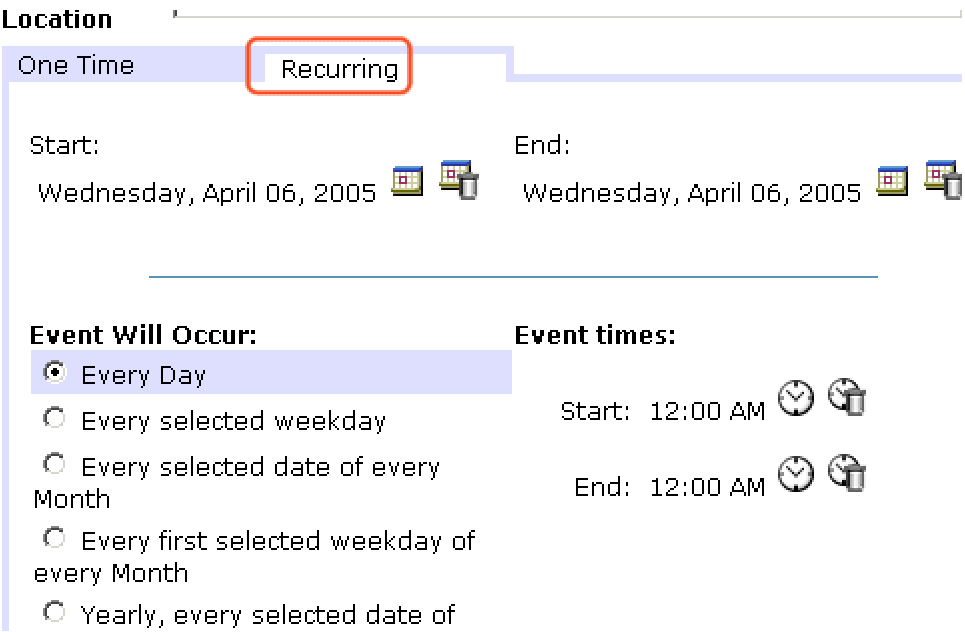
Your system administrator can set up types of calendar events. For a personal or workgroup calendar, examples might be staff meetings, employment interviews, conference calls. For an educational institution, examples might be academic deadlines, sporting events, and tuition due dates.

If you assign a type to an event while creating it, you can later display only events of that type. This feature lets the viewer temporarily suppress unwanted events. As a result, the calendar display is cleaner, because it only shows relevant information.

Adding a Recurring Event

You can assign an event to occur multiple times on a calendar. To do so, follow these steps.

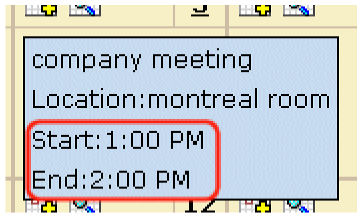
1. Add a calendar event (as described in "Adding a Calendar Event" on page 273).
2. Click the **Recurring** tab to assign the event for more than one day.



3. Refer to the table below to complete to the Recurring fields.

Field	Description
Start Date	Click the calendar icon ( ) to display a calendar. From it, select a start date. Technical note: If you see a mix-up of the month and date of your entry (for example, you select March 2 but see February 3), make sure the date format specified in the Windows Control Panel Regional Settings dialog matches your current language. Also, make sure the settings apply to the default user.
End Date	Click the calendar icon ( ) to display a calendar. From it, select an end date for the series of recurring events.
Event will occur	Select the frequency of the event from among the choices.

4. Finish your edits.

For documentation of	See
Start Time	Click the clock icon ( ) to display a clock. From it, select a start time.
End Time	Click the clock icon ( ) to display a clock. From it, select an ending time for the event.
Display the times for the event	Check this box if you want the calendar to display the event's start and end times (illustrated below).  The time also appears on the event detail if this box is checked. 
Hyperlink	You can link a Web page to this calendar event. The Web page could contain more information about the event, directions to it, etc. If you insert a hyperlink, when this event appears on the calendar, the reader can click the event to jump to that page. To enter any page on the internet, enter its Web address. For example, `www.example.com`. To link to content on your Web site, click the library button ( ). (This type of link is known as a *Quicklink*.) The Quicklinks dialog appears, and you can navigate to the content. The last published version of linked content appears. If content has never been published, nothing appears. If you select a hyperlink, the title of the selected content replaces any text in the **Event Title** field. You can edit the new title if desired.

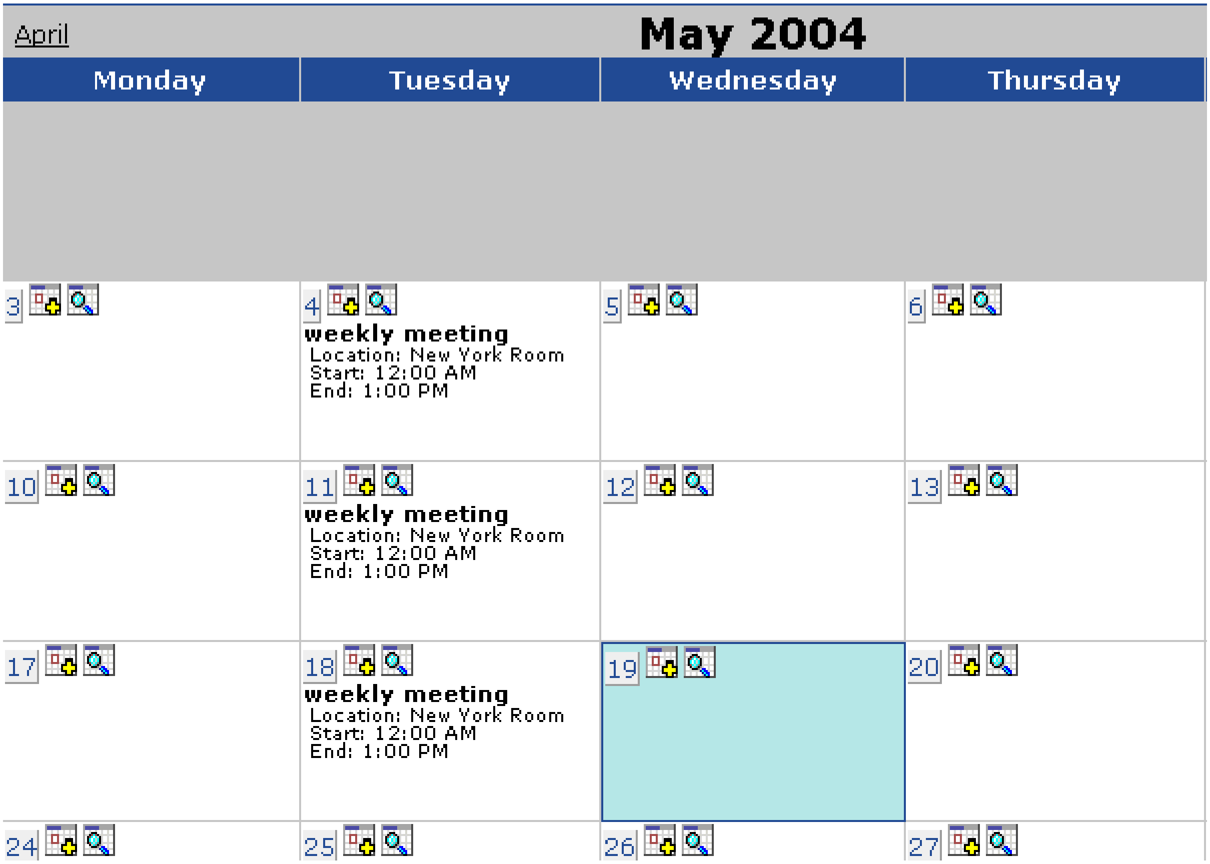
For documentation of	See
Launch Link in New Browser	Check this box if you want the Web page or Quicklink specified in the **Hyperlink** field to appear in a new browser window when someone clicks it. If you do not check this box, the new Web page replaces the current one when the link is clicked.
Event Types	Note: This field only appears if your system administrator set up one or more event types for this event. *See Also:* "Understanding Event Types" on page 277 To apply an event type to this event, click an Event Type from the right column. Then, click the Right Arrow ( ) to move the event type to the **Selected** column. Repeat for each event type you want to assign to the event.

5. Click the Save button ( ).

Viewing a Calendar Event

Once events are added to a calendar, you can easily view them. To view a calendar event, follow these steps.

1. Access the Show Calendar screen for the calendar that contains the event you want to view, as described in "Viewing a Calendar" on page 269.
2. Place the cursor on the event you want to view.



3. Click the View Events ( ) button.

4. The View Events screen appears, listing all calendar events for that date. If an event is part of a series of recurring events, the following icon appears next to it:

   From this screen, you can perform the following functions:

   - Add a new event (*See Also:* ”Adding a Calendar Event” on page 273)
   - View, edit, and delete an existing event

Editing Calendar Events

The section explains how to edit a single event or a recurring series of events.

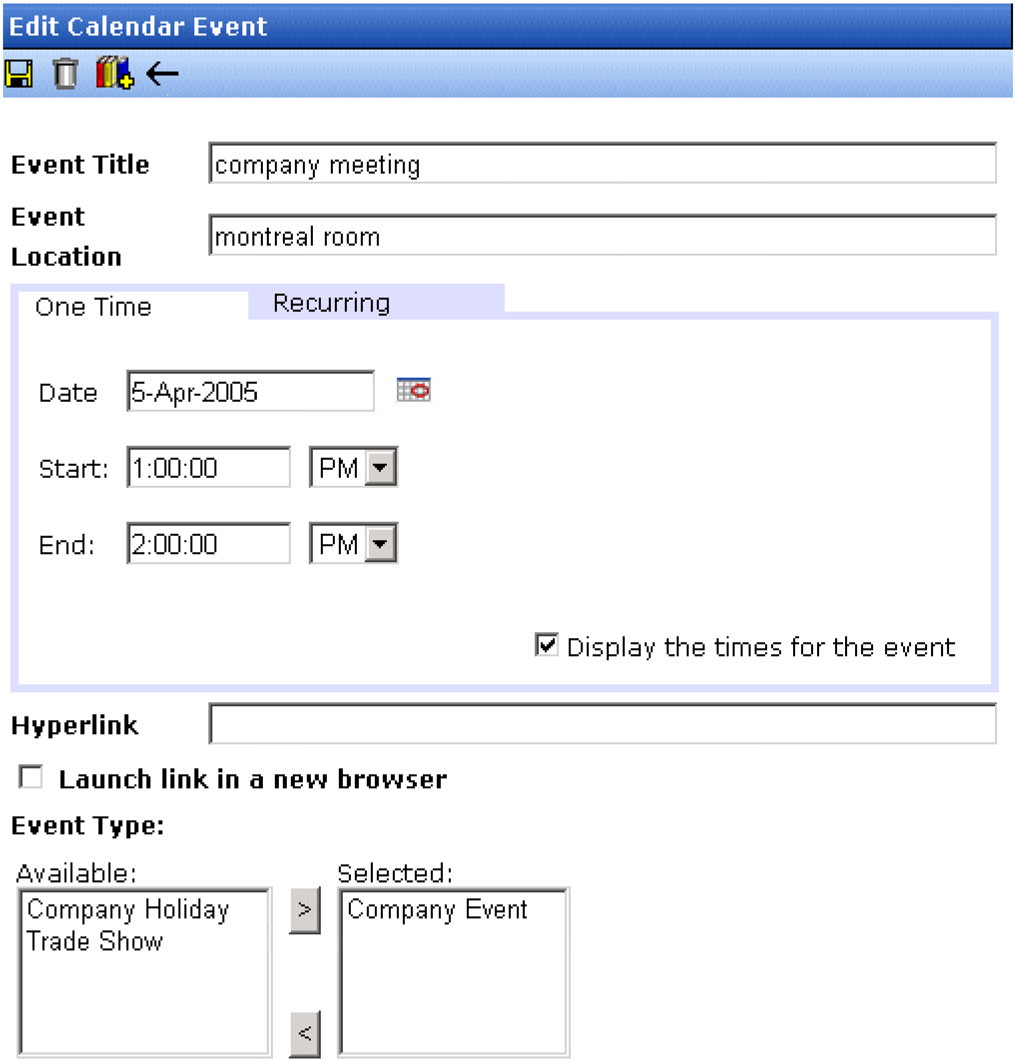
NOTE You can only edit a calendar event if you have edit permission for the folder to which the calendar is assigned.

See Also: "Adding a Calendar Event" on page 273

Editing a Single Event

After a calendar event is added to a calendar, you may edit it to change the title, location, times, etc. To edit a calendar event, follow these steps.

1. Access the View Calendar Events screen for the date that contains the event you want to edit, as described in "Adding a Calendar Event" on page 273.
2. Click the event you want to edit.
3. The Edit Calendar Event screen appears.



4. Update the fields using the table described in "Adding a Calendar Event" on page 273 as a reference.

5. Click the Save button ( ).

Editing Recurring Events

After a recurring series of events is added to a calendar, you may edit it to change the title, location, hyperlink, and event type.

NOTE You cannot edit event dates or times. To change those, delete and re-enter the series of events.

To edit a recurring series of events, follow the steps in "Editing a Single Event" on page 282. The only difference is the **Update all recurring events associated with this event** box.

To apply the edits to only the instance of the event that you selected, uncheck the box. To apply the changes to *all* instances, check the box.

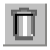
Deleting Calendar Events

The section explains how to delete a single event or a recurring series of events.

NOTE You can only delete a calendar event if you have add, edit, or delete permission for the content folder to which the calendar is assigned.

Deleting a Single Occurrence Calendar Event

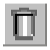
You can easily delete calendar events that are no longer needed, or do not belong to the calendar they were added to. To delete a calendar event, follow these steps.

1. Access the View Calendar Events screen for the date that contains the event you want to delete, as described in "Adding a Calendar Event" on page 273.
2. Click the event you want to delete.
3. The Edit Calendar Event screen appears.
4. Click the Delete button ().
5. A confirmation message appears.
6. Click **OK**.

Deleting a Recurring Calendar Event

You can delete a single event in a recurring series or all events in the series.

Deleting a Single Recurring Event

1. Access the View Calendar Events screen for the date that contains the event you want to delete, as described in ”Adding a Calendar Event” on page 273.
2. Click the event you want to delete.
3. The Edit Calendar Event screen appears.
4. Click the Delete Content button ().
5. A confirmation message appears.
6. Click **OK**.

Deleting All Events in a Recurring Series

1. Access the View Calendar Events screen for any date that contains an events in the series that you want to delete, as described in ”Adding a Calendar Event” on page 273.
2. Click the event in the series that you want to delete.
3. The Edit Calendar Event screen appears.
4. Click the Delete This and Associated Recurring Events button ().
5. A confirmation message appears.
6. Click **OK**.

Managing Tasks

A task is a request from one user to another to perform an action within **Ektron CMS400.NET**. Examples of a tasks include:

- updating content
- publishing content
- updating an image
- reordering a collection

The Tasks folder displays all tasks that are either assigned to you or that you assigned to another user or user group. You can also assign tasks to yourself.

A task may or may not be related to a specific piece of content. If it is, you can access content then “attach” a task to it. This kind of task is managed just like the other tasks, but you can also view and update it via the attached content. For more information, see ”Viewing a Task” on page 300.

This chapter explains how to work with tasks through the following topics.

NOTE Tasks can also be created automatically when forms are submitted. *See Also:* ”Assigning a Task to a Form” on page 195

- "Viewing a Task's History" on page 310
- "Task Module Toolbar" on page 311

Creating a Task via the Task Folder

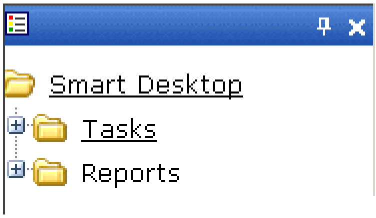
This topic consists of the following subtopics:

- "Accessing the Tasks Folder" on page 287
- "Creating a Task via the Task Folder" on page 288
- "Adding a Task Category and Task Type" on page 294

Accessing the Tasks Folder

To access the Tasks folder, follow these steps.

1. Access your Smart Desktop, as explained in "Understanding the Smart Desktop" on page 17.
2. The Smart Desktop folders appear in the top left frame.



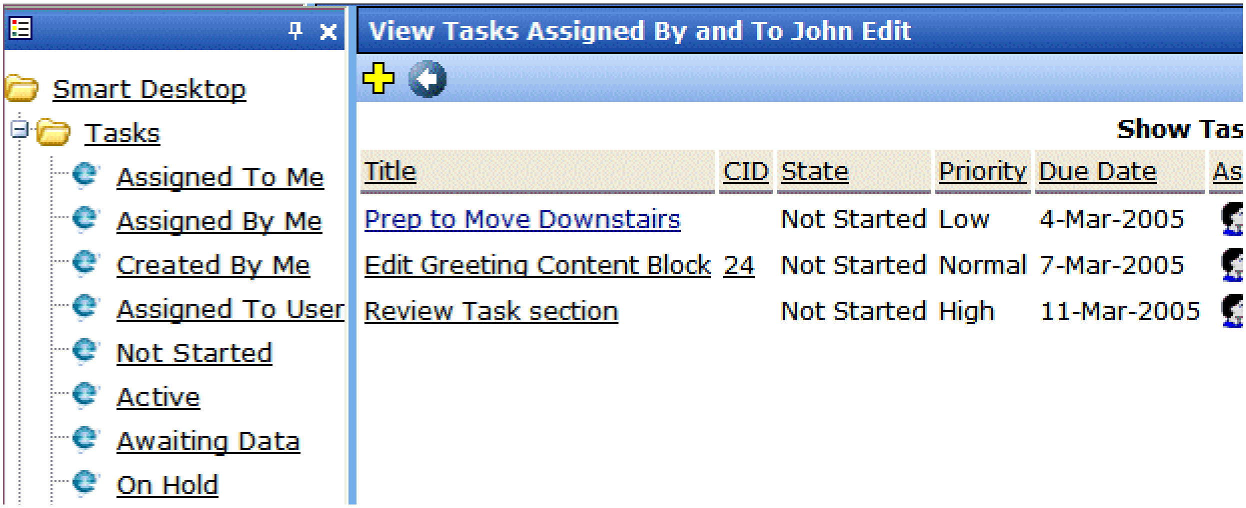
3. Click the **Tasks** folder. The following subfolders appear:

- **Assigned To Me** - tasks assigned to you
- **Assigned By Me** - tasks you assigned to someone else
- **Created By Me** - tasks you created
- **Assigned To User** - search for tasks assigned to a user
- **Not Started** - tasks whose state is set to not started
- **Active** - tasks whose state is set to Active
- **Awaiting Data** - tasks whose state is set to Awaiting Data
- **On Hold** - tasks whose state is set to On Hold
- **Pending** - tasks whose state is set to Pending

- **Reopened** - tasks whose state is set to Reopened
- **Complete** - tasks whose state is set to Complete

You can click any folder to view only tasks in that category.

Also, the View Tasks screen appears in the right frame, listing all tasks assigned to you, or assigned by you.



From this page, you can view, sort, update, or add tasks. To learn more about the View Tasks screen, see "Viewing a Task" on page 300.

To learn about sorting by Task Type, see "Sorting Tasks By Task Type" on page 304.

Creating a Task via the Task Folder

See Also: "Task Module Toolbar" on page 311

To create a task, follow these steps.

1. Access your Tasks folder, as described in "Accessing the Tasks Folder" on page 287.
2. Click the Add button ( ).

IMPORTANT! The Add button only appears if your system administrator has granted you permission to add tasks. For more information, see the **Ektron CMS400.NET** Administrator Manual > “Managing Tasks” > “Task Permissions.”

3. The Add Task screen appears.

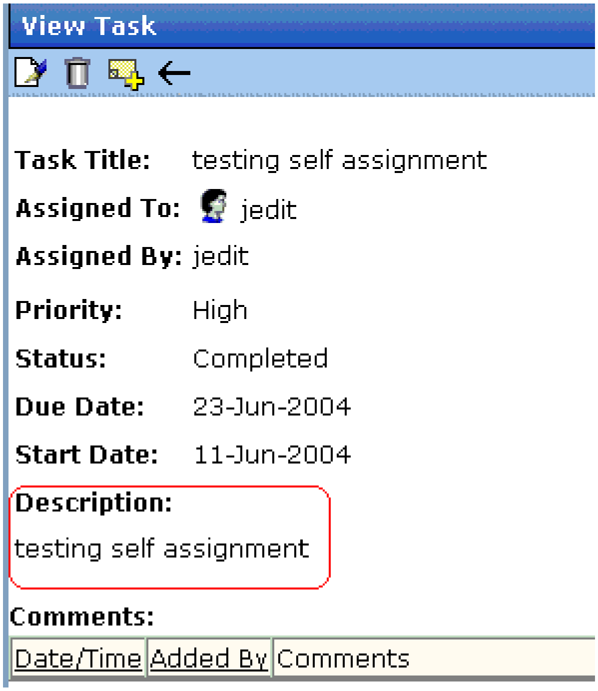
Enter information for the task using the following table

Field	Description
Task Title	Enter a title for the task (for example, Update Content). The title appears in the left column of the View Tasks screen.
Assigned To	Your user name appears. • If you do not have Redirect permissions, you cannot assign tasks to other users. • If you have Redirect permissions, your user name appears followed by **Select User or Group**. To assign the task to yourself, proceed to the next field. To assign the task to someone else, click **Select User or Group** and choose a user or group. (The user to whom the task is being assigned must have permission to edit the content.) When you complete the screen, an email is sent to the selected user or user group informing him of the assigned task. Note: email is only sent if email notification is enabled for **Ektron CMS400.NET**.
Language	Select the language of the user who will perform the task.
Content	If this task involves a piece of content, select it. When you click **Select**, a new window appears. From this window, you can navigate through folders to find the content. You can only select a piece of content whose language matches the user language selected above. *See Also:* ”Selecting Content for the Task” on page 292
Priority	Select the priority of the task. Your choices are High, Normal and Low. The priority appears on the View Tasks screen. A user can sort tasks on the screen by priority.

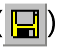
Field	Description
Task Category	Select a category for the task. When a Task Category is chosen, the Task Type drop down box is auto filled with task types associated with that category. *See Also:* ”Adding a Task Category and Task Type” on page 294.
Task Type	Select the Task Type for this task. You must specify a Task Category before you assign a task type. *See Also:* ”Adding a Task Category and Task Type” on page 294.
Add	By clicking the Add link, you can add Task Categories and Task Types. *See Also:* ”Adding a Task Category and Task Type” on page 294 Note: If you Add a Task Category or Task Type while adding a task, the task information (Task Title, Assigned To, Language, etc.) entered will be lost when the screen refreshes.
Edit	By clicking the Edit link, you can edit the Task Type chosen in the Task Type drop down box. *See Also:* ”Editing a Task Type” on page 296 Note: If you edit a Task Type while adding a task, the task information (Task Title, Assigned To, Language, etc.) entered will be lost when the screen refreshes.
State	Choose a status for the task. Your choices are: • Not Started • In Progress • Completed • Waiting on Someone else • Deferred If the task is not linked to content, you can assign it to any state. However, if you later link the task to content (via the **Content** link above), the state switches to Not Started. The state appears on the View Tasks screen. A user can sort tasks on the screen by state.

Field	Description
Start Date	Using the calendar button, choose a start date for the task. The start date appears on the View Tasks screen. A user can sort tasks on the screen by start date. Technical note: If you see a mix-up of the month and date of your entry (for example, you select March 2 but see February 3), make sure the date format specified in the Windows Control Panel Regional Settings dialog matches your current language. Also, make sure the settings apply to the default user.
Due Date	Using the calendar button, choose the date by which the task needs to be completed. The due date appears on the View Tasks screen. A user can sort tasks on the screen by due date. Technical note: If you see a mix-up of the month and date of your entry (for example, you select March 2 but see February 3), make sure the date format specified in the Windows Control Panel Regional Settings dialog matches your current language. Also, make sure the settings apply to the default user.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Description</td><td>Add additional information to describe the task. The description appears on the View Task screen (circled below).



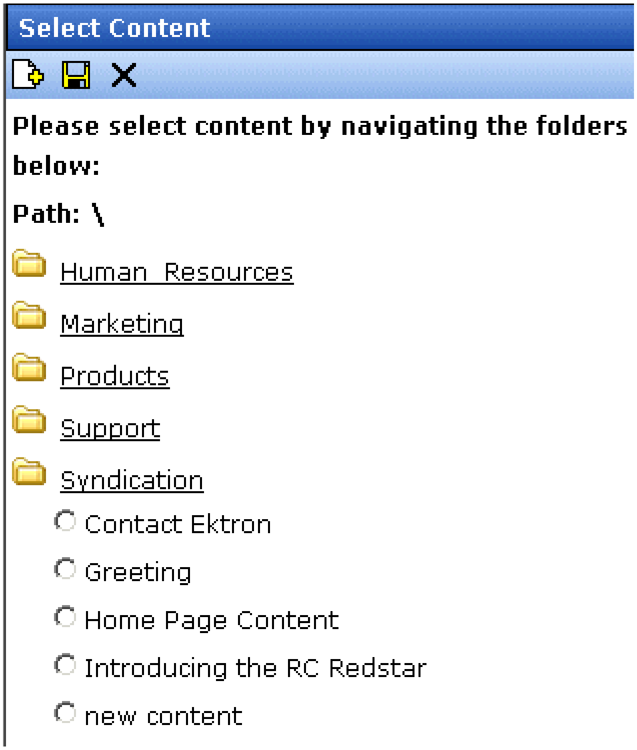
</td></tr>
</table>

4. Click the Save button ().

If email notification is enabled, an email is sent to the user/user group to which the task was assigned.

Selecting Content for the Task

When you click **Select Content** from the Add Task screen, the Select Content screen appears. It shows only content in the selected language.



You should only select a content folder for which you have permissions.

To select a piece of content to assign to the task, follow these steps.

1. Navigate to the content. (Click any folder to open it.)
2. Click the circle to the left of the content.

3. Press the Save button ( ).

Adding a Task Category and Task Type

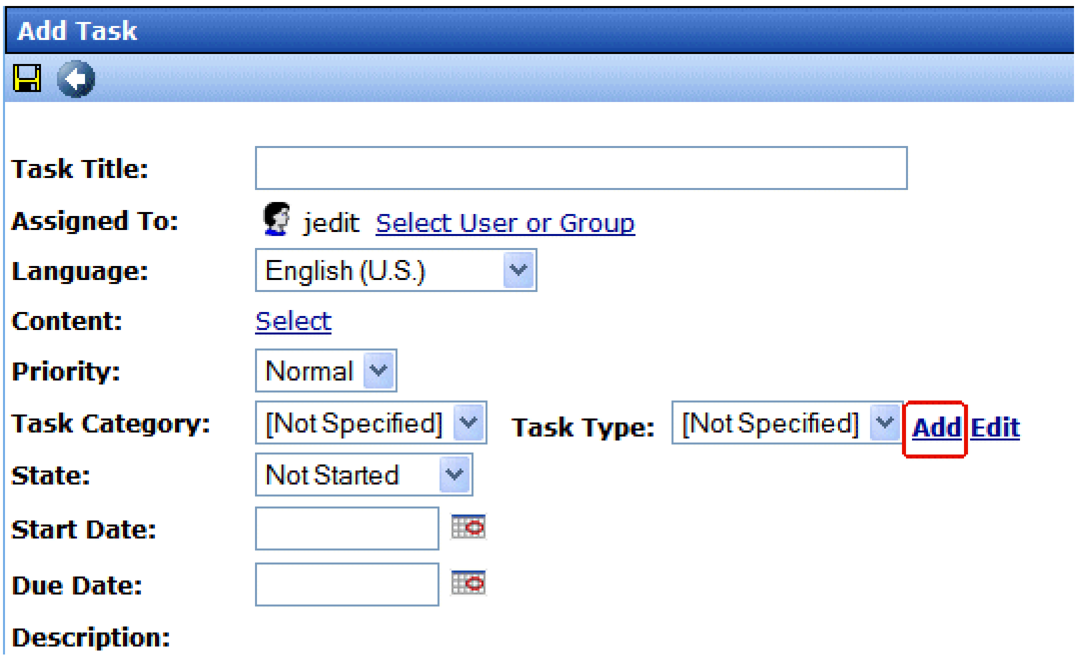
Task Categories and Task Types let users and administrators sort task by user defined categories and types.

By clicking the Add link, located next to the Task Type drop down box, you can add Task Categories and Task Types. This allows you to add categories and types without leaving the Add Task screen.

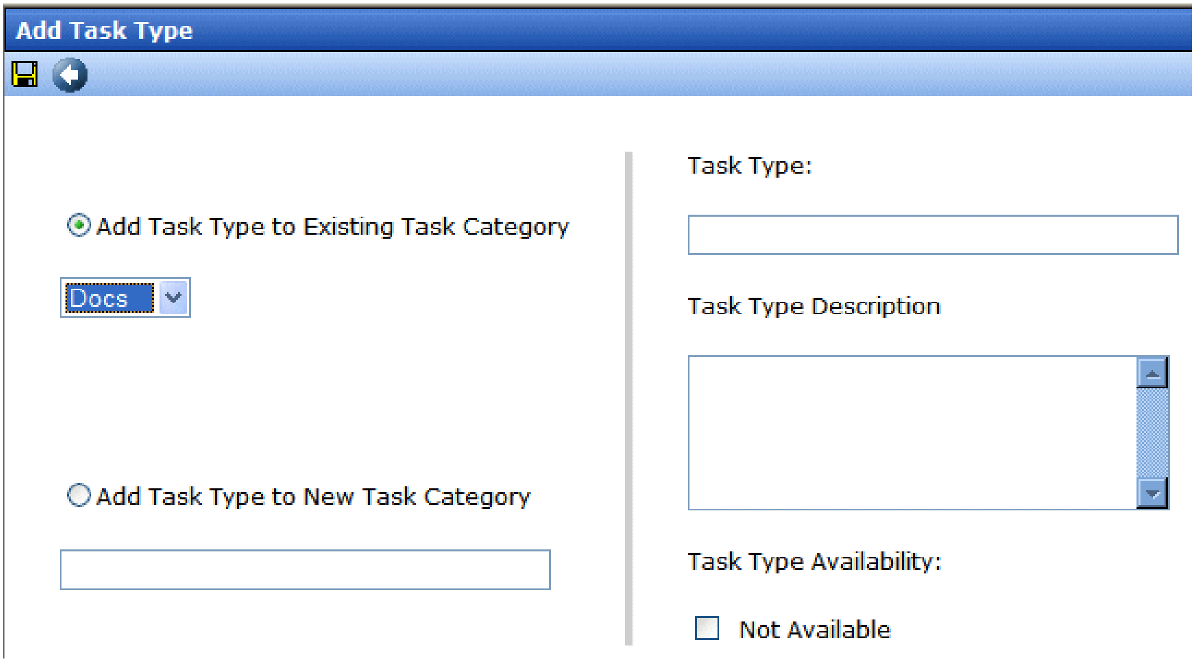
NOTE Administrators can also add and edit Task Categories and Task Types from the Workarea by clicking **Settings > Configurations > Task Types**. *See Also:* Ektron CMS400.NET Administrator Manual > “Managing Tasks” > “Adding a Task Category and Task Type”.

To add a Task Category and a Task Type, follow these steps.

1. Go to the Add Task screen, as described in ”Creating a Task via the Task Folder” on page 288.
2. Click the **Add** link, next to the Task Type dropdown box.



3. The Add Task Type screen appears.



From this screen you can perform the following:

- Add a task type to an existing task category
- Create a new task category
- Add a new task type
- Add a task type description
- Define task type availability

NOTE As a user, if you set the Task type to Not Available, you cannot edit the Task Type after that. To make the Task Type available, see your administrator. Task Type availability is explained in the Ektron CMS400.NET Administrator Manual > “Managing Tasks” > “Task Categories and Types” > “View Categorization Screen“> “Task Type Availability”

4. Enter your information.
5. Click Save ().
6. Your new Task Category and Task Type appear in the drop down boxes.

Task Type Availability

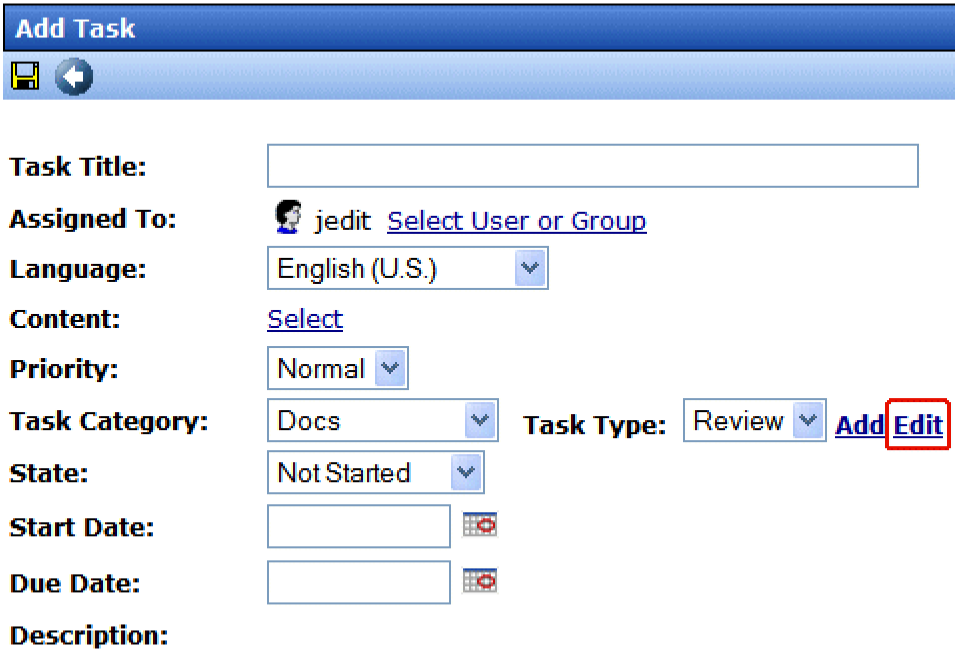
Task types can be hidden from users by clicking the Not Available check box in the Add Task Type and Edit Task Type screens. By making Task Types not available, you can make the Task Type unavailable without deleting it.

Editing a Task Type

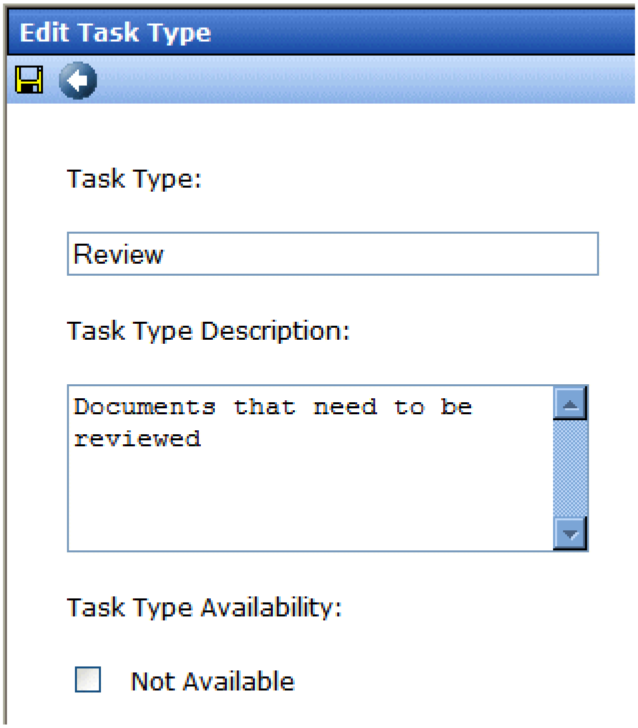
From the Add Task screen, you can edit a Task Type. This will allow you to change the Task Type name, Task Type description, and Task Type availability.

To edit a task type, follow these steps.

1. Go to the Add Task screen, as described in ”Creating a Task via the Task Folder” on page 288.
2. Choose a Task Category and the Task Type to edit.
3. Click **Edit**, next to the Task Type dropdown box.



4. The Edit Task Type screen appears.



From this screen you can edit the following:

- Task Type
- Task Type Description
- Task Type Availability. *See Also:* "Task Type Availability" on page 296

NOTE As a user, if you set the Task type to Not Available, you cannot edit the Task Type after that. To make the Task Type available, see your administrator. Task Type availability is explained in the Ektron CMS400.NET Administrator Manual > "Managing Tasks" > "Task Categories and Types" > "View Categorization Screen"> "Task Type Availability"

5. Edit the information.
6. Click Save ().
7. The Task Type information is changed.

Creating a Task from the Web Site

To create a task from a Web page, follow these steps.

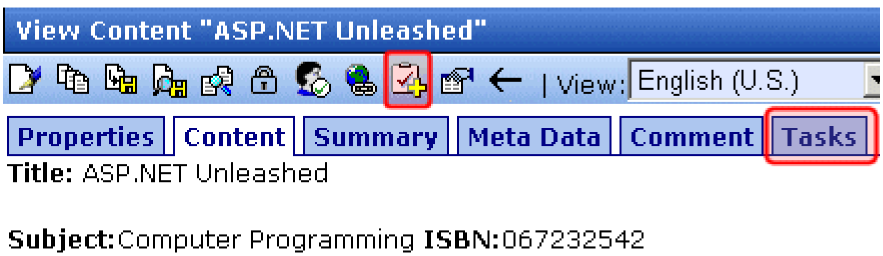
1. Browse to the content for which you want to assign a task.
2. Right click the mouse to display a menu.
3. Click the Add Task button ().

IMPORTANT! The Add Task button only appears if your system administrator has granted you permission to add tasks. For more information, see the **Ektron CMS400.NET** Administrator Manual > “Managing Tasks” > “Task Permissions.”

4. The Add Task screen appears. The content you were viewing is assigned to the task.
5. Follow the directions in ”Creating a Task via the Task Folder” on page 288. The only differences are
   - the content’s ID number and title appear on the screen
   - the language of the content is the default language

Creating a Task via the Content Folder

The above section describes assigning tasks from the Tasks folder. You can also assign task via the content folder, as illustrated below.



Assigning a Task from the View Content Screen

To assign a task from the View Content screen, follow these steps.

1. Access the View Content screen for the content to which you want to “attach” in a task, as described in ”Viewing Content” on page 40.

2. Click the Add Task button ().

IMPORTANT! The Add Task button only appears if your system administrator has granted you permission to add tasks. For more information, seethe **Ektron CMS400.NET** Administrator Manual > “Managing Tasks” > “Task Permissions.”

3. Follow the directions in ”Creating a Task via the Task Folder” on page 288. The only differences are

- the content’s ID number and title appear on the screen
- the language of the content is the default language

Viewing a Task

Once a task is added, (with the exception of Administrators and users given permission to create tasks) only the user who assigned the task and those to whom the task was assigned can view it.

To view a task, follow these steps.

Viewing a Task from the Content Folder

1. Access the Contents folder from the left side of your Workarea.
2. Open the folder that contains the content.
3. Click the content associated with the task.
4. Click the **Tasks** tab.
5. The page lists all tasks assigned to the content.
6. Select a task.

From the view task page, you can add a comment to the task. See ”Adding Comments to Tasks” on page 306 for more information.

Viewing a Task from the Tasks Folder

To view a task from the Tasks folder, follow these steps.

1. From the Smart Desktop, select the Tasks folder. *See Also:* ”Understanding the Smart Desktop” on page 17
2. Click the task you want to view.
3. The View Task screen is displayed. From here, you can perform these tasks.

- ”Editing a Task” on page 305
- ”Deleting a Task” on page 309
- ”Adding Comments to Tasks” on page 306

See Also: ”Task View Options” on page 301, ”Sorting Tasks By Task Type” on page 304, ”Sorting Tasks By Column” on page 304; ”Managing Tasks” on page 286; ”emailing Tasks” on page 305

Task View Options

Beneath the main task module folder, several view screens display all tasks filtered by specified categories. After viewing tasks in any category, most screens let you perform an action on the tasks (the actions are included in the table below). For example, you can change a tasks state to another state. To select all tasks on a screen, click the check box in the header row (illustrated below).

Folder	Displays these tasks	Action you can perform from view screen
Tasks	All tasks assigned to you, that are in one of the following states. • not started • active • awaiting data • on hold • reopened • pending	• Click on task to view it • Add a task • Sort tasks by Task Type • Sort tasks by column

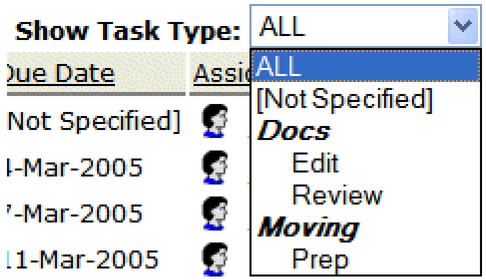
Folder	Displays these tasks	Action you can perform from view screen
Assigned To Me	All open tasks assigned to you	• Click on task to view it • Sort tasks by Task Type • Sort tasks by column
Assigned By Me	All open tasks you assigned to yourself or others	• Click on task to view it • Sort tasks by Task Type • Sort tasks by column
Created by Me	All open tasks you created	• Click on task to view it • Sort tasks by Task Type • Sort tasks by column
Assigned to User	All open tasks assigned to a user you select	• Select any user and view all tasks assigned to that user. To do so, select new user from **Assign to User** drop down list and click **Get Tasks**. • Click on task to view it • Sort tasks by Task Type • Sort tasks by column
Not Started	All whose state is Not Started	• Change to the following states: Awaiting Data, On Hold • Click on the task to view it • Sort tasks by Task Type • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
Active	All whose state is Active	• Change to the following states: Awaiting Data, On Hold • Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
Awaiting Data	All whose state is Awaiting Data	• Change to the following states: Awaiting Data, On Hold • Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
On Hold	All whose state is On Hold	• Change to the following states: Awaiting Data, On Hold • Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
Pending	All whose state is Pending	• Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
Reopened	All whose state is Reopened	• Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
Completed	All whose state is Completed	• Change to the following state: Archive • Click on the task to view it • Sort tasks by Task Type • Sort tasks by column

Sorting Tasks By Task Type

On every View Task page, you can sort tasks by the Task Type assigned to the task. You sort by Task Type using the Show Task Type drop down box. It is located in the upper right corner of the Workarea.

NOTE Task Types only appear in the Show Task Type dropdown box when they have been added to a task.



To sort by Task Type, click the drop down box and choose a Task Type. Words in ***bold Italics*** are Task Categories. You cannot sort by Task Categories.

Sorting Tasks By Column

On every View Tasks page, you can sort the information by most columns. Information can be sorted by the following.

Column	Click to sort tasks
Title	Alphabetically by title of associated content
CID	By content ID number
State	By task state, from first to last
Priority	By task priority. High appears first, followed by Normal then Low

Column	Click to sort tasks
Due Date	By due date, beginning with dates closest to today
Assigned To	Alphabetically by user to whom the task is assigned Note: Once set, a task's assigned-to user does not change throughout the life of the task.
Assigned By	Alphabetically by user who assigned the task
Last Added Comment	Alphabetically by the most recently created task comment
Create Date	By date task was created, beginning with dates closest to today

emailing Tasks

You can email the contents of any Task screen. emailing tasks works the same as emailing reports. See the **Ektron CMS400.NET** Administrator Manual section "Content Reports" > "Common Report Topics" > "emailing Reports."

Editing a Task

You can change task information, such as

- Title
- Assigned to
- Language
- Content
- Priority
- Task Category

- Task Type
- Status (State)
- Due Date
- Start Date
- Description

To edit a task, perform the following steps.

1. Access the View Task page for the task, as described in "Viewing a Task from the Tasks Folder" on page 300.

NOTE You cannot edit a task after viewing it from the Content folder.

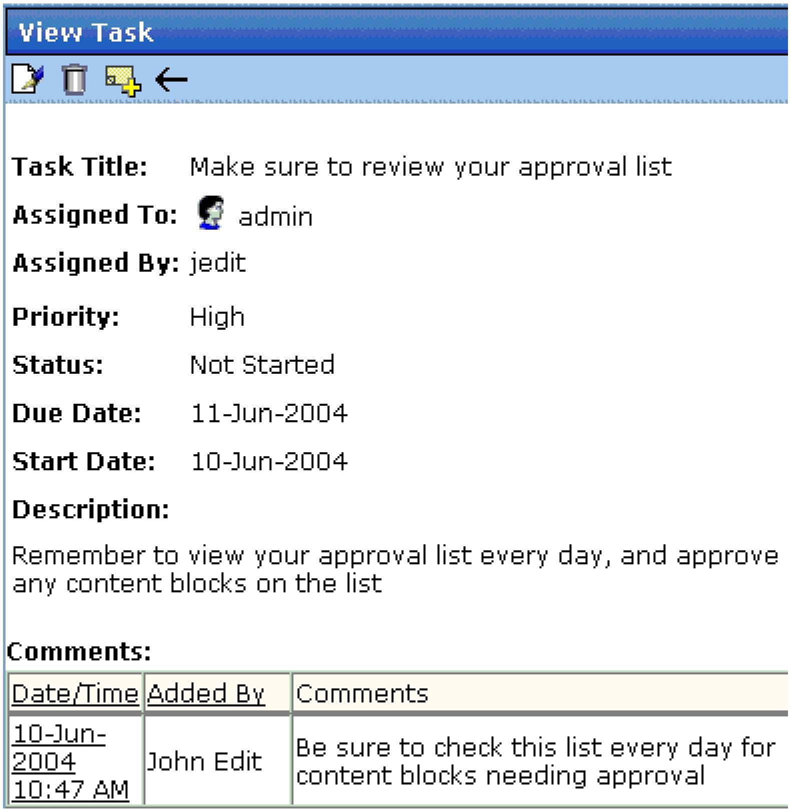
2. Click the Edit button ( ).
3. The Edit Task screen appears.
4. Edit the task.
5. Click the Update button ( ) to save the changes.

Adding Comments to Tasks

You can add comments to an assigned task if you want to provide additional information about its status. For example, if you update a task's status from *In progress* to *Waiting on Someone Else*, you can use a comment to describe the status change, such as:

```
left voice mail with John with questions about
his changes to the home page
```

Comments appear at the bottom of the View Tasks screen (illustrated below).

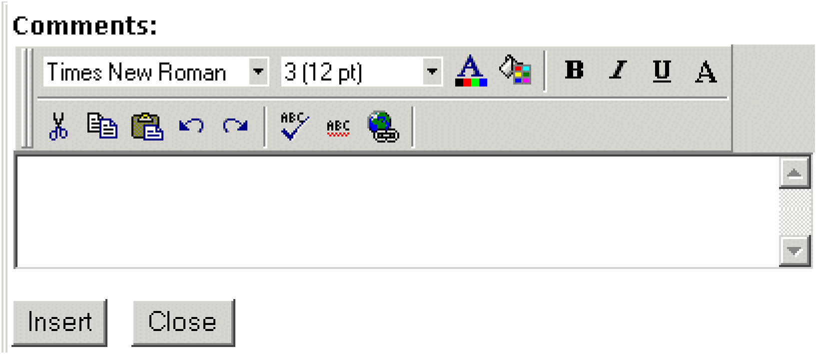


Several comments can be added to a task to record its progress from assignment to completion.

To add a comment to a task, follow these steps.

NOTE: When an approver approves/declines content from the Content Awaiting Approval screen, if the content has an active task, the Add Comments to Task screen appears. The screen lets the approver insert comments about the task associated with the content.

1. Access the View Task screen for the task, as described in "Viewing a Task" on page 300.
2. Click the Add Comment button ( ).
3. The Comments window appears.

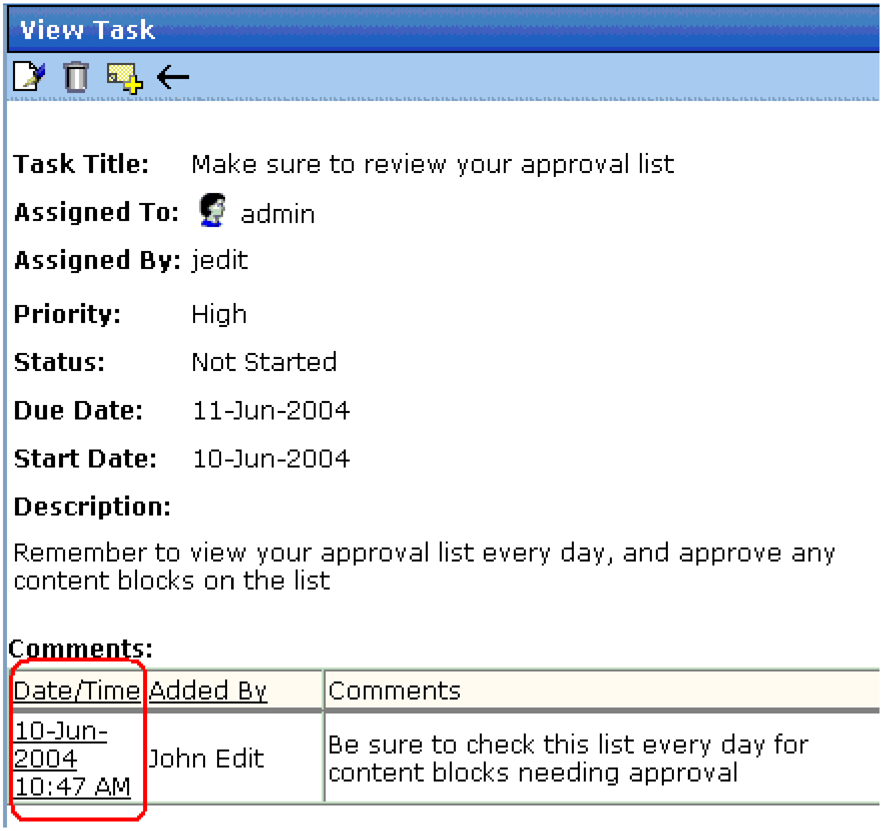


4. Enter your comment in the editor. Note that you can format and spell check the text using the toolbar buttons.
5. Click the  button.
6. The View Task screen reappears with the comment at the bottom of the page.

Updating Comments

To update a comment, follow these steps.

1. Access the View Task screen that contains the comment you want to update, as described in "Viewing a Task" on page 300.
2. Click the comment's **Date/Time** link (illustrated below).



3. The Comments window opens with the comment displayed.
4. Update the comment.
5. Click the Update button.

Deleting a Task

You can easily delete a task that is no longer needed. For example, the user who assigned a task would typically delete it when it is completed.

To delete a task, follow these steps.

1. Access the View Task screen for the task, as described in ”Viewing a Task” on page 300.
2. Click the Delete button ( ).

IMPORTANT! The Delete button only appears if your system administrator has granted you permission to delete tasks. For more information, see the **Ektron CMS400.NET** Administrator Manual > “Managing Tasks” > “Task Permissions.”

3. A confirmation message appears.
4. Click **OK**.

Viewing a Task’s History

Ektron CMS400.NET maintains a history of all events in the life of a task, as well as any comments entered. As examples, the task history shows when and by whom the task was created, when it changed to Active, when it was linked to content, when its state changed, when it was approved, etc.

You can view the task’s history until the task is purged. To view a task’s history, follow these steps.

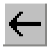
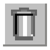
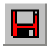
1. Navigate to the View Task screen, as explained in ”Viewing a Task” on page 300.
2. Click the History button ( ).
3. The history of task events appears (example below).

View Task History for review today

Date	Initiator	Activity	Information
16-Sep-2004	jedit	Creation	
16-Sep-2004	jedit	Other	Task Assigned to All Authors
16-Sep-2004	jedit	Content Linked	Plastic Molder #123(13)
16-Sep-2004	jedit	Start Date Changed	Date Set to 17-Sep-2004
16-Sep-2004	jedit	Due Date Change	Date Set to 22-Sep-2004

Task Module Toolbar

The following table explains the toolbar buttons available while managing tasks.

Button	Name	Description	More Information
	Add Comment	Add a comment to the task.	"Adding Comments to Tasks" on page 306
	Add Task	Access the Add Task screen from the View Content page.	"Task Module Toolbar" on page 311
	Add Task	Access Add Task screen from task module folder.	"Creating a Task via the Task Folder" on page 288
	Back	Return to previous page.	
	Calendar	Select a date.	
	Delete Task	Delete a task.	"Deleting a Task" on page 309
	Edit Task	Edit a task.	"Editing a Task" on page 305
	Save	Save task information.	
	Update	Save task information.	
	View Task	View task information.	"Viewing a Task" on page 300

Blogs

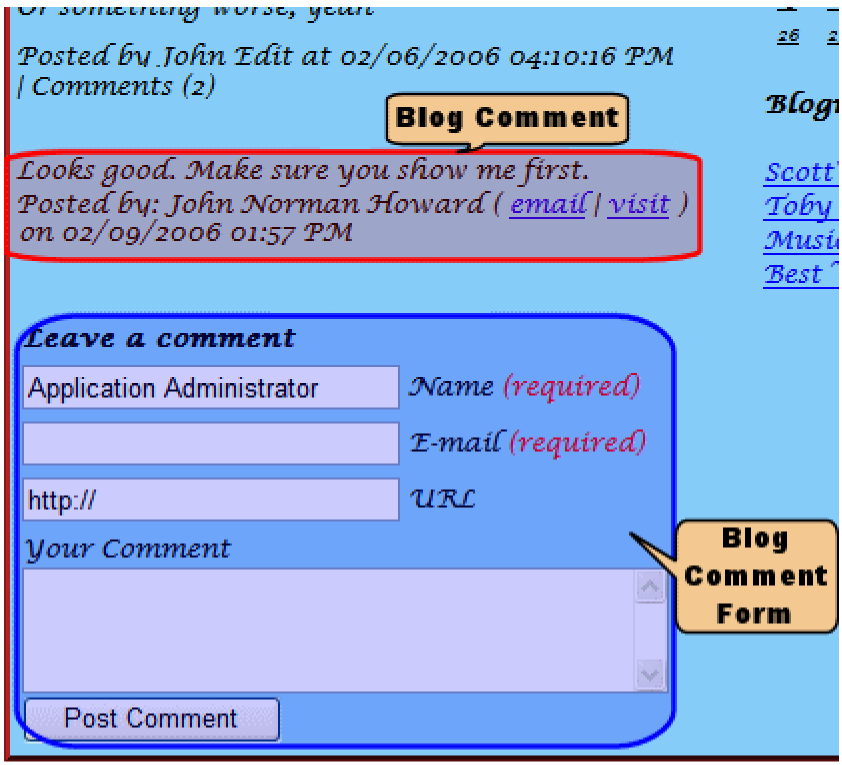
Blogs (short for Web Logs) are a form of online information sharing. A blog is often set up so a group of people can share their thoughts on a subject. One person creates the main post and other comment on post. In addition, blogs can be used to create an online diary of everyday life.

In the **Ektron CMS400.NET** Workarea, blogs and blog posts have a relationship similar to folders and content. The blog is the equivalent of a folder, and blog posts are the equivalent of content items. While blogs and blog posts have a few unique properties, they mostly work the same as folders and content.

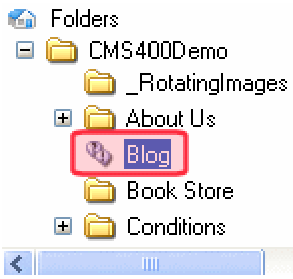
On your Web site, blogs are arranged so the latest post appears at the top. This differs from paper diaries, because you are reading the newest material first, instead of the oldest. Because blogs are laid out this way, site visitors can quickly find the most recent entries.

Blogs are made up of multiple elements. These elements allow site visitors to view or create a blog post, add comments, and see a roll call of associated blogs. In addition, if a blog calendar is present on the blog site, visitors can see which days have blog posts.


02/06/2006
Blog Post
Writing a Masterpiece
I'm gonna write the melody
That's gonna make history
Yeah, and when I paint my masterpiece
I swear I'll show you first
There just ain't a way to see
Who, when, why or what will be
'Til now is then it's a mystery
A blessing and a curse
Or something worse, yeah
Posted by John Edit at 02/06/2006 04:10:16 PM | Comments (0)
Calendar
Jan
February 2006
Mar
Blog Roll
Blogroll
Scott's Blog
Toby Tyler's Blog
Music Artist of the Week
Best Week Ever


Posted by John Edit at 02/06/2006 04:10:16 PM | Comments (2)
Blog Comment
Looks good. Make sure you show me first.
Posted by: John Norman Howard (email | visit)
on 02/09/2006 01:57 PM
Leave a comment
Application Administrator
Name (required)
E-mail (required)
http://
URL
Your Comment
Post Comment
Blog Comment Form

Blogs in the Workarea appear as a language bubble in the folder structure. This distinguishes a blog folder from a content folder.



The following table lists elements commonly found in a blog.

Element	Description
Blog Title	The name of your blog as you want it to appear on the site. For example, “My Life Story.”
Blog Post	The main entry for each topic. A blog post is made up of several sub elements: • Headline - the title of the post • Commentary - the details of the post • Comment Link - links to a comments page, where site visitors can view or add comments • TrackBack URL - a URL visitors can use to notify you when they are talking about the blog post on their site • PingBack - Pings back any URLs in the blog post • Images - add images to a blog post. You add images to a blog post the same way you add them to content. *See Also:* ”Adding a Library File to Content” on page 148

Element	Description
Blog Comments	A Comments link appears at the end of the blog post. The link includes a number in parentheses, for example (3). This number denotes how many comments have been made. Click this link to move to the comments page, where you can read comments on the post and possibly enter your own.
Blog Roll	Other blog sites that the blog's creator wants site visitors to view.
Blog Subjects	Subjects associated with the blog. If you click a subject, links to all posts associated with the subject appear.
Calendar	Indicates when blog posts were made. This lets site visitors navigate your blog by clicking a day that has blog posts.

Blog Workflow

The following table explains the workflow of a blog.

Workflow	Description	See Also
Phase 1	An administrator creates a blog in the Workarea. During this phase, he assigns blog subjects, creates a blog roll, and decides how comments are handled.	"Adding a Blog" on page 316
Phase 2	A developer adds the blog to a Web form using the blog server control. He then publishes the form.	The Developer Manual section "Introduction to Ektron CMS400.NET Server Controls" > "Blog Server Controls"
Phase 3	**Ektron CMS400.NET** users can add blog posts, either from the Workarea or the Web site. Depending on the user's permissions, the post is either published immediately or submitted to the blog's approval chain.	"Blog Posts" on page 341

Workflow	Description	See Also
Phase 4	The blog post is published. Now, site visitors can view it and possibly add comments. Depending on the blog's comment settings, they either appear immediately or must be approved first.	"Blog Comments" on page 350

The following sections explain using the blog feature in the Workarea.

- "Adding a Blog" on page 316
- "Blog Properties" on page 318
- "Blog Subjects" on page 322
- "The Blog Roll" on page 327
- "Language Support" on page 336
- "Searching Blogs" on page 337
- "Subscribing/Unsubscribing to a Blog" on page 337
- "Deleting a Blog" on page 336
- "Blog Posts" on page 341
- "Blog Comments" on page 350
- "Adding or Editing Blog posts with Windows Live Writer" on page 358

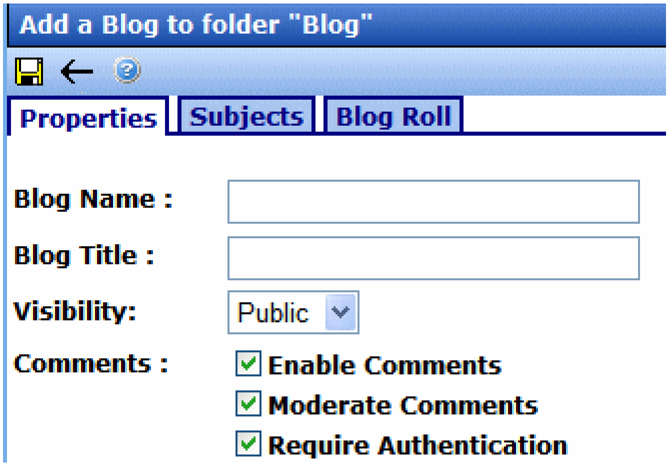
Adding a Blog

NOTE To be able to create a blog , you must have permission to **Add Folders** on the blog's Advanced Permissions screen.

To add a blog, follow these steps.

1. Go to the Workarea's Content folder.
2. Click the folder in which the blog will reside.
3. Click **New > Blog**.

4. The **Add a Blog** screen appears.



5. Fill out the **Properties** tab according to the table below.

Field	Description	
Blog Name	The name of your blog as it appears in the content folder tree.	
Blog Title	The title of your blog as it appears on the Web site.	
Visibility	Choose whether the site is private or public.	
	Public	Any site visitor can view the blog.
	Private	A site visitor must log in to view the blog. This includes membership and **Ektron CMS400.NET** users.
Comments	Choose how to handle comments by checking the appropriate boxes. For more information, see "Controlling Blog Comments" on page 350.	

6. On the **Subjects** tab, add subjects to the blog. For more information on blog Subjects, see "Blog Subjects" on page 322.
7. On the **Blog Roll** tab, add blog sites that you want blog readers to visit. For more information on blog rolls, see "The Blog Roll" on page 327.

IMPORTANT! See "Editing a Blog's Properties vs. Adding a Blog" on page 318 for additional properties that are only available when editing a blog's properties.

Blog Properties

NOTE To be able to edit blog properties, you must have permission to **Edit Folders** on the blog's Advanced Permissions screen.

By clicking the blog properties button ( ), you can change the following groups of information about a blog.

- "Editing a Blog's Properties vs. Adding a Blog" on page 318
- "Blog Folder Properties" on page 319
- "Metadata" on page 321
- "Blog Subjects" on page 322
- "Web Alerts" on page 326
- "The Blog Roll" on page 327
- "Permissions and Approvals" on page 334
- "Purge History" on page 336

Editing a Blog's Properties vs. Adding a Blog

When you edit a blog's properties and settings, more properties and settings are available than when you created it. This is done to save time when adding multiple blogs to a site.

The table below shows which properties or settings are available when adding and editing a blog.

Blog Properties and Settings Availability

Property or Setting	Available When Adding a Blog	Available When Editing a Blog
Visibility	✓	✓
Blog Name	✓	✓

Property or Setting	Available When Adding a Blog	Available When Editing a Blog
Blog Title	✓	✓
Tagline		✓
# of Visible Posts		✓
Comment Control	✓	✓
Update Service		✓
Style sheet filename for this folder		✓
Template filename for this folder		✓
Smart Forms		✓
Metadata		✓
Subjects	✓	✓
Web Alerts		✓
Blog Roll	✓	✓
Permissions		✓
Approval Chain		✓

Blog Folder Properties

The following table shows the fields on the Blog’s **Properties** tab. To edit these properties

- from the Workarea, navigate to the blog folder, click **View > Folder Properties**, then the Edit Properties button ( ).
- from the Web site, log in, navigate to the blog, right click the mouse, and select **Properties**

When you are finished, click Save ( ).

To learn about the other tabs on the Properties screen, see

- ”Metadata” on page 321
- ”Blog Subjects” on page 322
- ”Web Alerts” on page 326
- ”Smart Forms” on page 326
- ”The Blog Roll” on page 327
- **Ektron CMS400.NET** Administrator manual section “Managing Content Folders” > “Breadcrumbs”

<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td rowspan="3">Visibility</td><td colspan="2">Choose whether the site is a private blog or public.</td></tr>
<tr><td>Public</td><td>Anyone who visits the site is able to view the blog.</td></tr>
<tr><td>Private</td><td>A site visitor must log into the site to be able to view the blog. This could include membership users, CMS400 users or both.</td></tr>
<tr><td>Blog Name</td><td colspan="2">The name of your blog as it appears in the content folder tree.</td></tr>
<tr><td>Blog Title</td><td colspan="2">The title of your blog as it appears on the Web site blog. It only appears if the <code>ShowHeader</code> blog server control property is set to <code>true</code>.</td></tr>
<tr><td>ID</td><td colspan="2">The ID number of the blog. This number is assigned by Ektron CMS400.NET and cannot be changed.
Note: ID only appears when viewing the Properties screen. It does not appear while editing.</td></tr>
</table>

Field	Description
Tagline	A line of additional information that describes the blog. It appears below the title if the `ShowHeader` blog server control property is set to `true`. For example, the title of a blog is “John’s Blog Page.” The tag line could be “A place to learn about John's past, present, future, and his current state of mind!”
# Posts Visible	The number of posts visible on the blog page. If the number of posts exceeds this number, only this many of the most recent posts appear. For example, if this property is set to 10 and you add 11 posts, only the ten most recent posts appear. This number can be from 1 to 999. If you leave this field blank, all posts made during the current day are visible.
Comments	Choose how to handle comments by checking the appropriate boxes. For more information, see ”Controlling Blog Comments” on page 350.
Update Service	Enter a service that notifies a blog search site when blog posts are added to your blog site. These blog search sites allow Web users to search content contained in blogs around the world. To use this feature, check the **Notify blog search engines of new posts** box and enter a path to a search site. An example path is: `http://rpc.technorati.com/rpc/ping`.
Style sheet filename for this folder.	If you want to provide a custom style sheet for the blog, enter the path to it relative to the site root. For example, `WorkArea/csslib/my_custom_blogs.css`. Leave this field blank to inherit the default style sheet, blogs.css, located in `Workarea/csslib`. You can customize the default style sheet but your modifications will get overwritten when you upgrade **Ektron CMS400.NET**.
Page Templates	Lets you specify one or more templates for content in this folder. For more information, see the **Ektron CMS400.NET** Administrator manual section “Managing HTML Content” > “Creating/Updating Templates.”

Metadata

There is no difference when working with Metadata for blogs or folders. For more information, see ”Adding or Editing Metadata” on page 77.

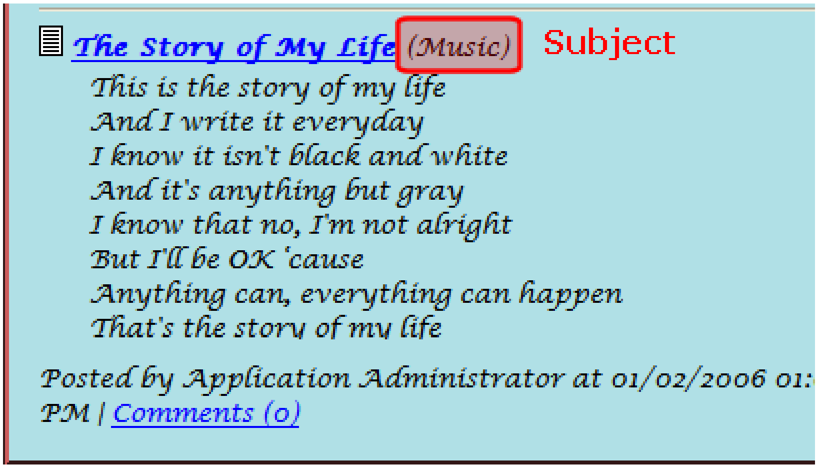
Blog Subjects

Subjects make it easier for site visitors scanning a blog page find posts that interest them. Here's how they work.

1. The creator of a blog post assigns one or more subjects to it.
2. When the post is published, a list of subjects assigned to all posts appears in the right column.
3. A site visitor clicks any subject and see all posts relating to it.

For example, a blog's subjects are Music, Sports, and Art. A user creates a new blog post about his favorite band, Ektronica, and assigns the music subject to the post.

When a site visitor views the blog page, he looks under Subjects and clicks Music. A list of music-related posts appears, including the post about Ektronica.



A subject can only be assigned to the blog in which it is created -- it cannot be used with other blogs. With each new blog, you need to create new subjects. This gives you the flexibility to tailor unique subjects to each blog.

Adding Blog Subjects

To add a blog subject, follow these steps.

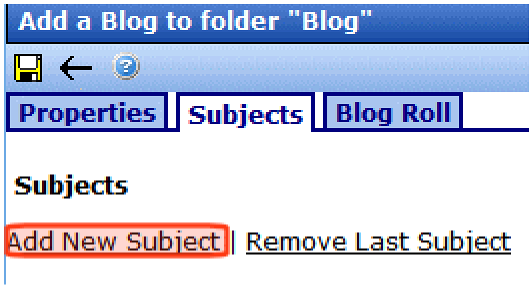
NOTE To add a blog subject from the Web site, you must be logged in.

1. In the Workarea, navigate to the blog folder.

   or

   From the Web site

   - right click the blog.
   - click **Properties**.
2. Click **View** > **Folder Properties**.
3. Click the Edit Properties button ( ).
4. Click the **Subjects** tab, then **Add New Subject**.



5. A text box appears.
6. Enter the subject.

NOTE Add as many subjects as you need by clicking **Add New Subjects**.

7. Click **Save** ( ).

Editing Blog Subjects

To edit a blog subject, follow these steps.

NOTE To edit a blog subject from the Web site, you must be logged in.

1. In the Workarea, navigate to the blog folder.

   or

   From the Web site

   - right click the blog.
   - click **Properties**.
2. Click **View** > **Folder Properties**.

3. Click the Edit Properties button ( ).
4. Click the **Subjects** tab.
5. Change the information in the text box for the subject you want to edit.
6. Click Save ( ).

NOTE You can edit several subjects before clicking Save.

Removing Blog Subjects

There are two ways to remove blog subjects.

- Remove the last link that was added.
- Remove any link in the list.

Each task is explained below.

Removing the Last Blog Subject

Follow these steps to remove the last blog subject on the page.

NOTE To remove a blog subject from the Web site, you must be logged in.

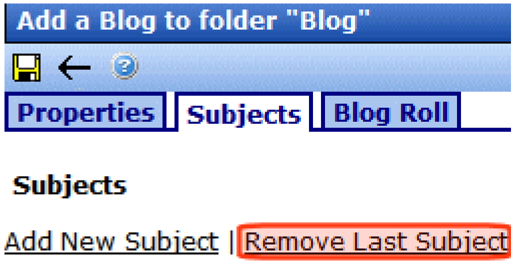
1. In the Workarea, navigate to the blog folder.

   or

   From the Web site

   - right click the blog.
   - click **Properties**.
2. Click **View** > **Folder Properties**.
3. Click the **Edit Properties** button ( ).
4. Click the **Subjects** tab.

5. Click **Remove Last Subject**.



6. A dialog box appears.
7. Click **OK** to remove the last subject.

NOTE You can continue to remove subjects at the end of the list by clicking the **Remove Last Subject** link.

8. Click Save ( ).

Removing a Blog Subject

NOTE To remove a blog subject from the Web site, you must be logged in.

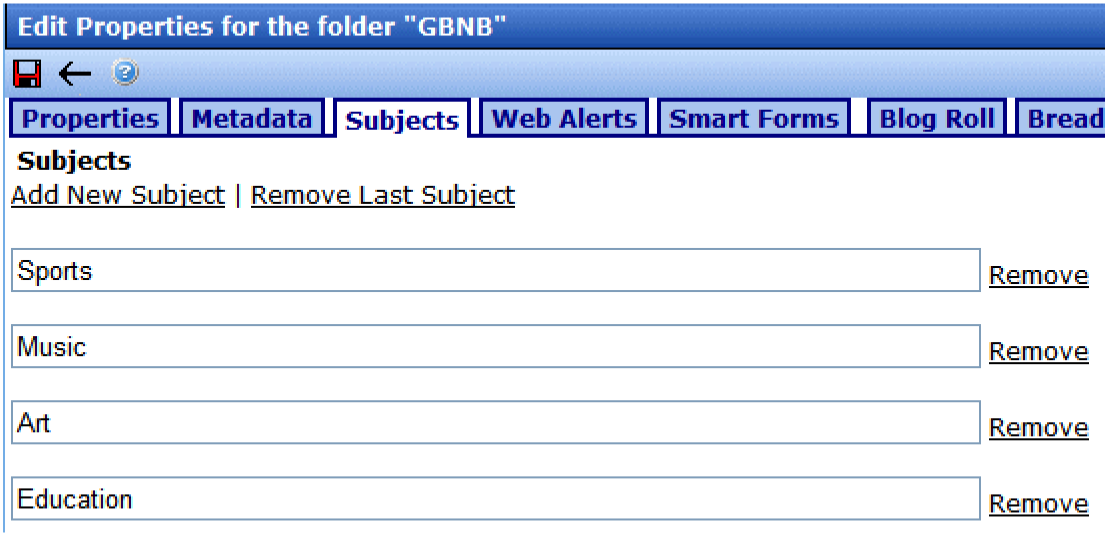
1. In the Workarea, navigate to the blog folder.

   or

   From the Web site

   - right click the blog.
   - click **Properties**.
2. Click **View** > **Folder Properties**.
3. Click the Edit Properties button ( ).
4. Click the **Subjects** tab.

5. Click **Remove** next to the subject to be removed.



6. A confirmation box appears.
7. Click **OK** if you want to remove the subject.

NOTE You can continue to remove subjects from the list by clicking the Remove link next to each subject.

8. Click **Save** ( ).

Web Alerts

Web Alerts notify users when a blog post is published. This feature is explained in the Administrator Manual Section “Web Alert Feature” > “Assigning Web Alert Information to Folders and Content.”

Smart Forms

Use a Smart Form when you want to create structured blogging. Structured blogging provides a form for the blogger to fill out instead of free form writing. For example, you create a blog for book reviews. You want to make sure that, when someone submits a review, he provides the following information:

- Book title
- Author
- Date of review

- Review text

For information on working with Smart Forms, see the Ektron CMS400.NET Administrator Manual section “Managing Content Folders” > “Smart Forms.”

NOTE Unlike the Smart Forms you can assign to regular folders, you cannot require the user to select a Smart Form when creating a new post. It is only an option.

The Blog Roll

The blog roll lets you add a list of Web site links to your blog page. Think of this as a roll call of blog pages, a list of blogs related to you or that you want visitors of your blog to also visit. Below is an example of a blog roll on a Web page.

Adding a Blog Roll Link

Follow these steps to add a blog roll link.

NOTE To add a blog roll link from the Web site, you must be logged in.

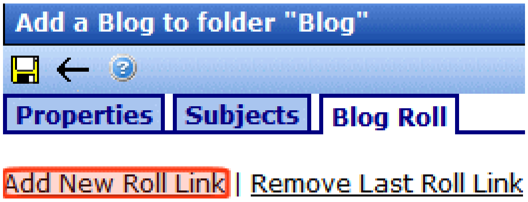
1. In the Workarea, navigate to the blog folder.

   or

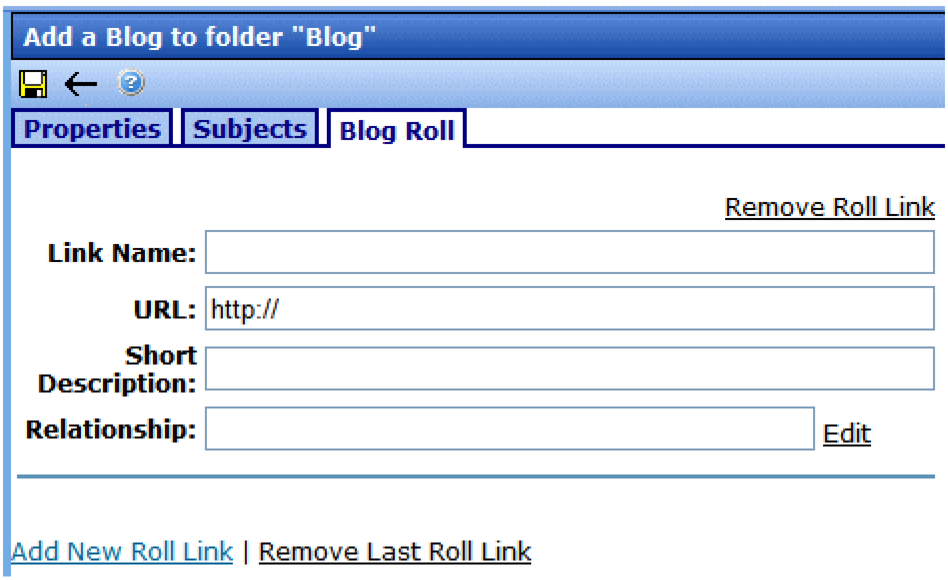
   From the Web site

- right click the blog.
- click **Properties**.

2. Click **View** > **Folder Properties**.
3. Click the Edit Properties button ( ).
4. On the **Blog Roll** tab, click **Add New Roll Link**.



5. The **Add Blog Roll Link** form appears.



6. Fill out the form according to the table below.

Field	Description
Link Name	Describes the link in the blog roll.
URL	The URL of the blog you are adding to the blog roll. It must begin with `http://`.
Short Description	Add a short description of the site.

Field	Description
Relationship	Enter the relationship of the blog roll link to you or to the site. For example, brother. Click **Edit** for a pop up screen that helps you choose the site's relationship.

The table below explains each relationship type.

Type of Relationship	Description
URL	Check this box if the address is owned by the same person or company.
Friendship	What level of friendship do you have with the person who owns the site? Choose one. • Contact • Acquaintance • Friend • None
Physical	Check this box if you have physically met the person who owns this blog.
Professional	Does the person who owns this site have a work level relationship with you.? Select all that apply. • Co-worker • Colleague
Geographical	Select one. • co-resident • neighbor • none

Type of Relationship	Description
Family	If the site owner is family, what is the relationship? Select one. • Child • Parent • Sibling • Spouse • Kin • None
Romantic	What are your feelings toward the owner of the site? Check all that apply. • Muse • Crush • Date • Sweetheart

7. Click **Close**.

NOTE Add as many links to the blog boll as you would like. Just click **Add a New Roll Link**. To remove a blog roll link, see ”Removing a Blog Roll Link” on page 331.

8. Click **Save** ().

Editing a Blog Roll

To edit a blog roll link, follow these steps.

NOTE To edit a blog roll link from the Web site, you must be logged in.

1. In the Workarea, navigate to the blog folder.

   or

   From the Web site

   - right click the blog.
   - click **Properties**.
2. Click **View** > **Folder Properties**.

3. Click the Edit Properties button ( ).
4. Click the **Blog Roll** tab.
5. Find the Blog Roll Link for which the information needs to be edited.
6. Edit the information.
7. Click **Save** ( ).

NOTE As with adding a blog roll link, you can edit multiple blog roll links before clicking Save.

Removing a Blog Roll Link

There are two ways to remove blog roll links.

- Remove the last link that was added.
- Remove any link in the list individually.

The steps to perform each task are documented below.

Removing the Last Blog Roll Link

Using this method to remove the last blog link on the page.

1. In the Workarea,
   - navigate to the blog folder.

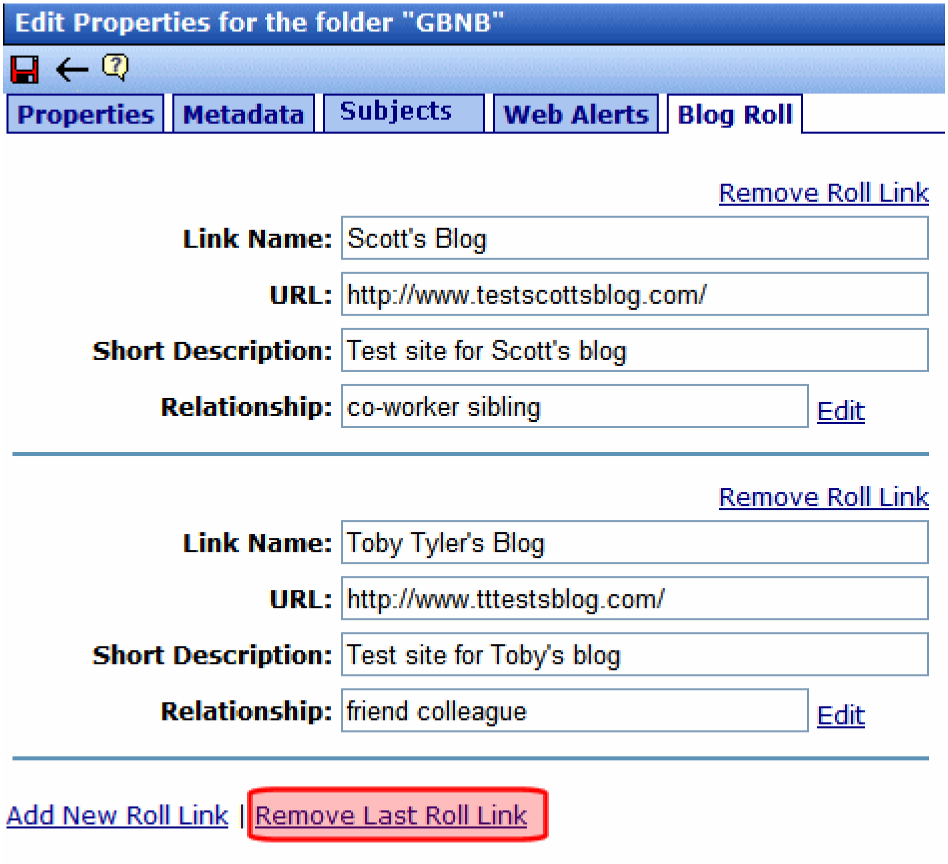
   or

   From the Web site

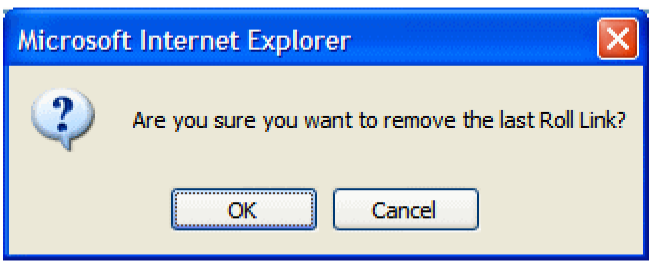
NOTE To remove a blog roll link from the Web site, you must be logged in.

   - right click the blog.
   - click **Properties**.
2. Click **View** > **Folder Properties**.
3. Click the Edit Properties button ( ).
4. Click the **Blog Roll** tab.

5. Click **Remove Last Roll Link**.



6. A dialog box appears.



7. Click **OK** if you want to remove the last blog roll link.

You can continue to remove subjects at the end of the list by clicking the **Remove Last Subject** link.

8. Click **Save** ( ).

Removing a Blog Roll Link

To remove any blog roll link on the list, follow these steps.

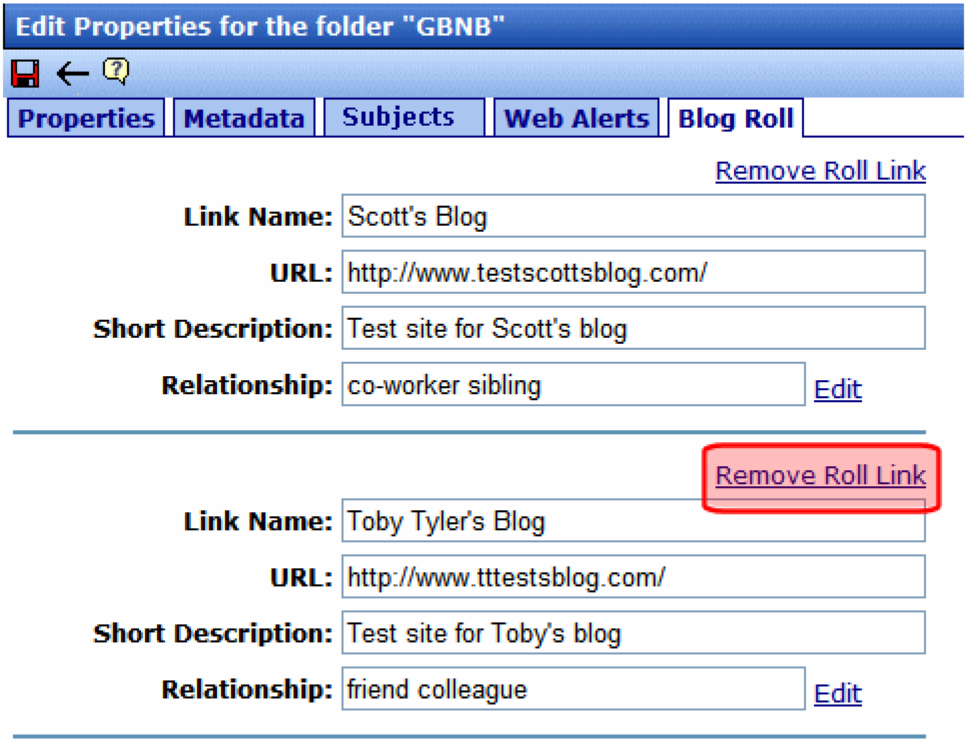
1. In the Workarea,
   - navigate to the blog folder.

   or

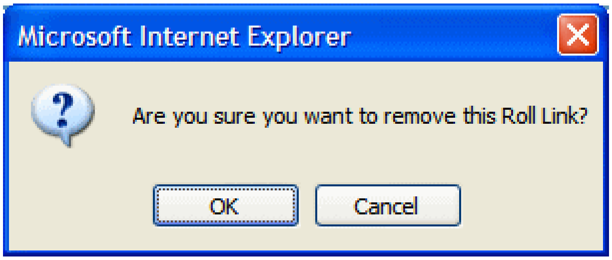
   From the Web site

NOTE To add a blog subject from the Web site, you must be logged in.

   - right click the blog.
   - click **Properties**.
2. Click **View** > **Folder Properties**.
3. Click the Edit Properties button ().
4. Click the **Blog Roll** tab.
5. Find the blog roll link to be removed.
6. Click **Remove Roll Link** above the Link Name to be removed.



7. A dialog box appears.



8. Click **OK** if you want to remove the blog roll link.

NOTE Continue to remove subjects by clicking the **Remove** link.

9. Click **Save** ( ).

Permissions and Approvals

Permissions for blogs work like folder permissions. The same functionality and features are available. For more information on working with permissions and approvals, see the Administrator Manual sections “Setting Permissions” and “Setting Approval Chains.”

User Blog Permission/ Approval Table

Function	Permissions that affect this function when performed from Web Site	Permissions that affect this function when performed from Workarea
Blog		
View	Published blogs are viewable by any site visitor	Blog properties standard permission **View-Only**
Add	Not available	Blog properties advanced permission **Add Folders**
Edit	Not available	Blog properties advanced permission **Edit Folders**
Delete	Not available	Blog properties advanced permission **Delete Folders**

Function	Permissions that affect this function when performed from Web Site	Permissions that affect this function when performed from Workarea
Post		
View	Published posts are viewable by any site visitor	Blog properties standard permission **View-Only**
Add	Not available	Blog properties standard permission **Add**
Edit	Not available	Blog properties standard permission **Edit**
Delete	Not available	Blog properties standard permission **Delete**
Approve	Not available	User must be member of blog’s approval chain
Comment		
Add	Three blog folder properties control how comments can be submitted from Web site. See ”Controlling Blog Comments” on page 350.	Blog properties standard permission **Add**
Edit	Not available	Blog properties standard permission **Read Only**
Delete	Not available	Blog properties standard permission **Read Only**
Approve	Not available	Blog properties standard permission **Edit**

Membership User Blog Permission Table

Membership users can be given permission to edit and add blog posts in the blog. Depending on the level of permissions, they can perform any of these functions:

Permission	Lets membership user
Read Only	Read blog posts. This box must be checked before you can add Edit and Add permissions.
Edit	Edit blog posts.
Add	Add blog posts.
Library Read Only	Add items to the library.
Add Images	Upload images to the corresponding library folder.
Add Files	Upload files to the corresponding library folder.

Purge History

Purge History works the same way for blogs as it does for the rest of the Ektron CMS400.NET. *See Also:* the Administrator Manual section “Managing Content” > “Managing Content Folders” > “Purge History”

Language Support

Language Support for blogs and blog posts work the same way as it does for folders and content. See the Administrator Manual section “Multi-Language Support” > “Working with Multi-Language Content” for an explanation on working with multiple languages.

Deleting a Blog

NOTE To delete a blog, you must have permission to **Delete Folder**s on the blog’s Advanced Permissions screen.

Deleting a blog removes the blog and all posts, comments, and quicklinks for the blog.

WARNING! After a blog is deleted, you cannot retrieve its posts, comments, or quicklinks.

The following steps explain how to delete a blog.

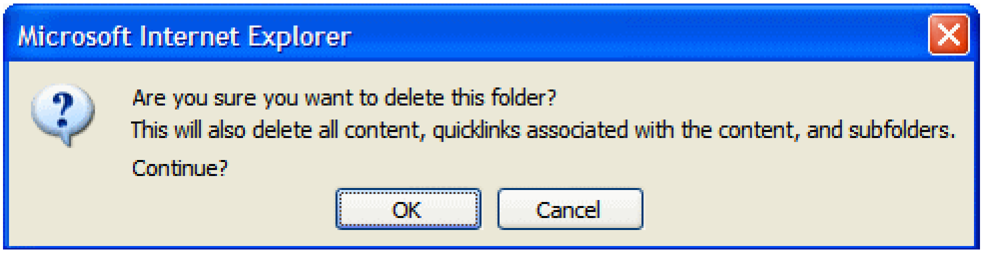
1. In the **Workarea**, navigate to the blog folder.

   Or

   From the Web site, right click the blog and click **Properties**.

NOTE To delete a blog from the Web site, you must be logged in.

2. Click the **Delete** > **This Blog**.
3. A dialog box appears.



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

Searching Blogs

Searching blogs works the same as searching HTML content. See the following topics for an explanation of using the Search feature.

- The Administrator Manual chapter “Searching Content on the Web Site”
- ”Searching the Library” on page 136

Subscribing/Unsubscribing to a Blog

Logged in Site users and Membership users can subscribe to a blog or a blog post.

By subscribing to a blog, users receive notification when posts are added to the blog. By subscribing to a blog post, users are notified when comments are added to the post. When you do not want to receive notices, you can unsubscribe.

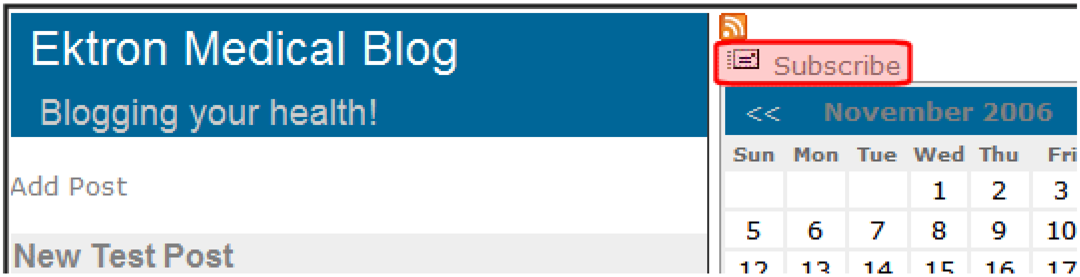
The section contains the following topics:

- ”Subscribe to a Blog” on page 338
- ”Unsubscribe to a Blog” on page 339
- ”Subscribe to a Blog Post” on page 340
- ”Unsubscribe to a Blog Post” on page 340

Subscribe to a Blog

To subscribe to a blog, follow these steps.

1. Navigate to the blog on the site.
2. Click the Subscribe icon ( ) for the blog.



3. The Subscribe/Unsubscribe screen appears.

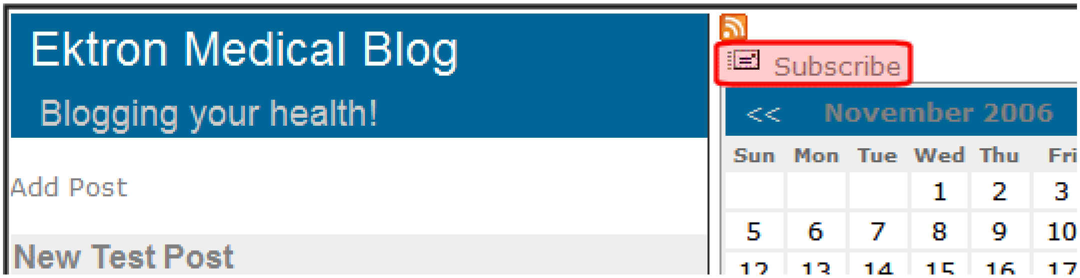
4. Select the Notification Type.
5. Click **Add Subscription**.

A message states that you are now subscribed to the blog. You are forwarded to the blog page.

Unsubscribe to a Blog

To unsubscribe to a blog, follow these steps.

1. Navigate to the blog on the site.
2. Click the Subscribe icon ( ) for the blog.



3. The Subscribe/Unsubscribe screen appears.
4. Select a **Notification Type**.
5. Check the **Unsubscribe** check box.

6. Click **Update Subscription**.

A message states that you are now unsubscribed to the blog.

Subscribe to a Blog Post

To subscribe to a blog post, follow these steps.

1. Navigate to the blog post on the site.
2. Click the Subscribe icon ( ) for the blog post.
3. The Subscribe/Unsubscribe screen appears.

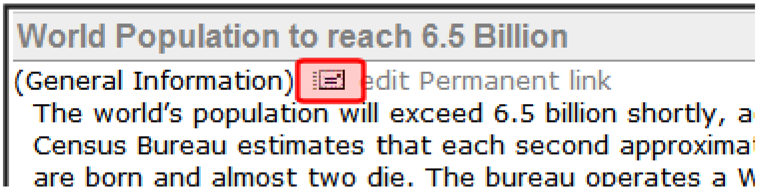
4. Select the Notification Type.
5. Click **Add Subscription**.

A message states that you are now subscribed to the blog post. You are forwarded to the blog post's page.

Unsubscribe to a Blog Post

To unsubscribe to a blog, follow these steps.

1. Navigate to the blog post on the site.
2. Click the Subscribe icon ( ) for the blog.



3. The Subscribe/Unsubscribe screen appears.

4. Select the Notification Type.
5. Check the **Unsubscribe** check box.
6. Click **Update Subscription**.
7. A message states that you are unsubscribed to the blog post.

Blog Posts

For a definition of blog posts, see "Blogs" on page 312.

From your Web site, only published blog posts are visible. But, from the Workarea, you can see all blog posts, regardless of status. Using the Workarea, you can also create, edit, delete, and archive blog posts the same way you work with content.

This section contains the following subtopics.

- "Blog Posts on the Site" on page 342
- "Blog Posts in the Workarea" on page 344
- "Adding a Blog Post" on page 346
- "Editing a Blog Post" on page 348
- "Deleting a Blog Post" on page 349

Blog Posts on the Site

You can view published blog posts on the Web site. The following is an example of one.

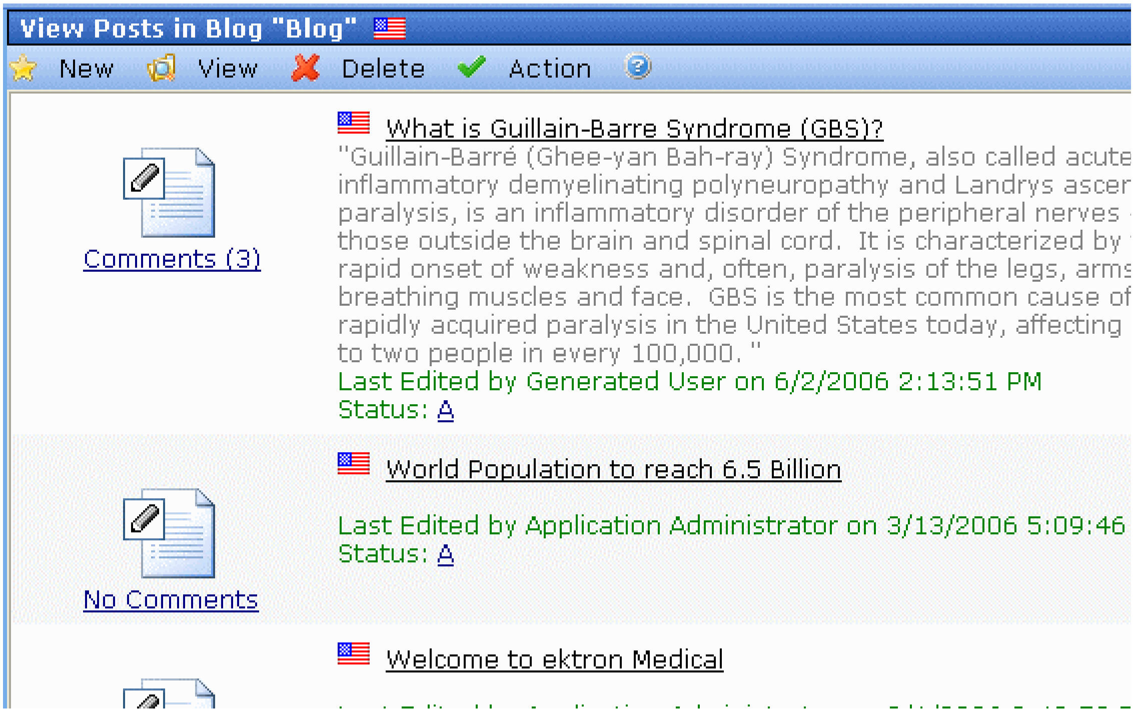
A blog post has a Title, Content, Comments Link, Post Time, Date, and Editor Information. Below is a breakdown of a blog post on a site.

Item	Description
Title	The headline of the post. Usually what a site visitor scans through to find a post to read.
Permanent Link	If you click this link, a new screen appears. The new screen indicates the *permanent link* to this blog post. As long as the blog post is active within **Ektron CMS400.NET**, you can access it via the URL in the browser's address bar. Most blog pages show only recent posts. After a post is moved off the blog's front page, it is still accessible via this link.
Content	The body of the post.
Comments Information	The comments link shows the number in parentheses of comments for a post . When this link is clicked, a new page of comments for the post appears. Also on the page is a form to add comments about the post. The comments only appear if a site visitor has logged in or authentication is not required for blog comments.

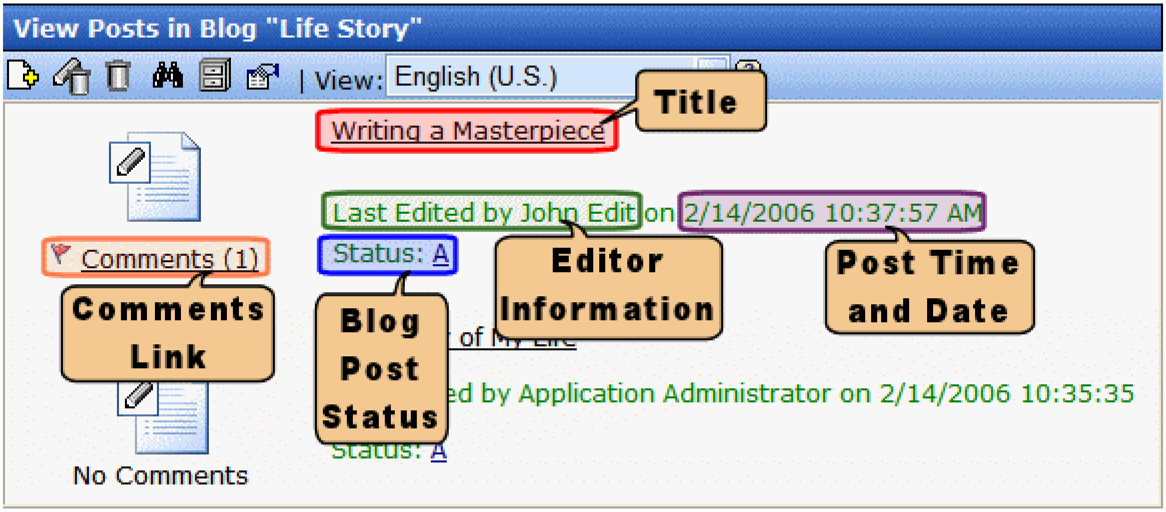
Item	Description
Editor Information	The person who created or last edited the blog post.
Post Time and Date	The date and time a blog post was created or last edited.

Blog Posts in the Workarea

Viewing a blog post in the Workarea is similar to viewing content in the Workarea. Navigate to the folder that contains the blog. Next, in the View Posts in Blog screen, click the title of the blog post. Below is an example of a viewing a blog post in the Workarea.



The View Posts in Blog screen shows the following information about each blog post.



See Also: "Blog Posts" on page 341; "Blogs" on page 312

Item	Description
Title	The headline of the post. Usually what a site visitor scans through to find a post to read.
Comments Information	The comments link shows the number in parentheses of comments for a post . When this link is clicked, the View Comments for Post screen appears. If a red flag ( ) appears next to the comments icon, they are awaiting approval.
Editor Information	The person who created or last edited the blog post.
Post Time and Date	The date and time the blog post was created or last edited.
Status	The status of the blog post. For example, if the blog post is checked in, the status is **I**. *See Also:* "Appendix A: Content Statuses" on page 798

From this screen, you can perform all functions with a blog post that you can with content. You can give it a summary, add metadata, associate a task, assign Web Alerts, etc. You must have Edit permission for the blog to perform these functions.

WARNING! You can also add a history comment to the blog post by clicking the Comment tab. This is not the same as adding a comment to a blog post on a site. When you add a history comment, it has the same properties as a comment associated with content.

Adding a Blog Post

NOTE To be able to add a blog post, you must have **Add** permission on the blog's Standard Permissions screen.

Follow these steps to add a blog post.

1. In the Workarea, navigate to the blog folder. Click **New** > **HTML Post**.

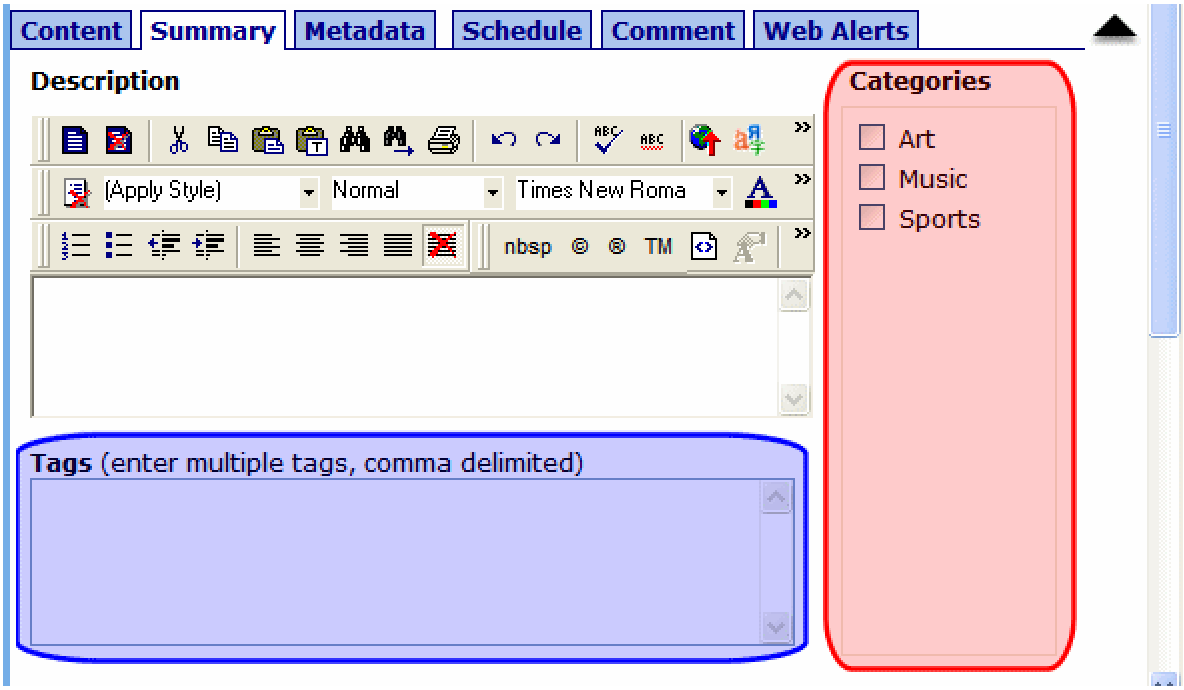
   Or

   From the Web site, right click the blog then choose **New Post**.

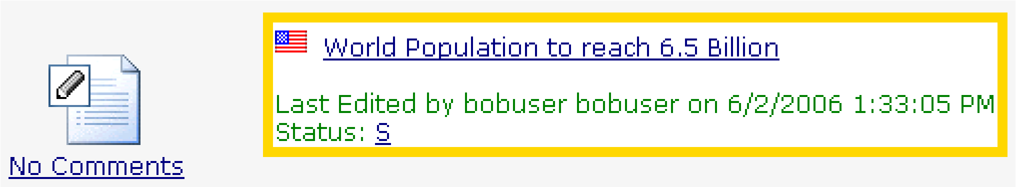
NOTE To add a blog post from the Web site, you must be logged in.

2. When the Add Content screen appears, use the editor to create the blog post. You create a blog post the same way you create content. *See Also:* "Adding HTML Content" on page 48.

IMPORTANT! If you are using subjects or tags, they can be assigned to a blog post by clicking the Summary tab and choosing a subject. For more information on subjects, see "Blog Subjects" on page 322. For more information on Tags, see "Tags on the Summary Page" on page 347.



3. If the user creating the post is a member of the blog's approval chain, it is published immediately. If not, it is surrounded by a yellow border, and a member of the approval chain must approve it before it can appear on the Web site. (For more information on working with permissions and approvals, see the Administrator Manual section "Setting Approval Chains.")



4. Once the post is published, it appears within the blog on the Web site.

Tags on the Summary Page

You can add tags to a blog post to further define information about the post for blog search engines. For example, you create a blog post about your favorite band, Ektronica, and enter the following tags: Music, Guitars, Rock & Roll.

When a person visits a blog search site and searches for Rock & Roll music, your blog post appears. Some blog search sites have a page specifically for searching blog tags.

Editing a Blog Post

NOTE To be able to edit a blog post, you must have **Edit** permission on the blog's Standard Permissions screen.

Follow these steps to edit a blog post.

IMPORTANT! If another editor changes a blog post, the posting information reflects the new editor, the date, and the time the information was changed. This is important to remember if you want the original person who posted the blog to get credit for the post.

1. In the Workarea, navigate to the blog folder.

   Or

   From the Web site, right click the blog then choose **Properties**. Next, choose the post.

NOTE To add a blog post from the Web site, you must be logged in.

2. Click the blog post title you want to edit.
3. Click the Edit button ().
4. Change the blog post.
5. When the blog is published, the changes appear in the blog post on the Web site.

Approving a Blog Post

If someone who is not a member of the blog's approval chain creates or edits a blog post, its status is set to Submitted. It will only appear on the Web site after a member of the chain approves it. While its status is Submitted, it has yellow border on the View Posts in blog screen.

To approve a blog post, see "Approving/Declining Content" on page 87.

Deleting a Blog Post

NOTE To be able to delete a blog post, you must have **Delete** permission on the blog's Standard Permissions screen.

The following steps explain how to delete a blog post.

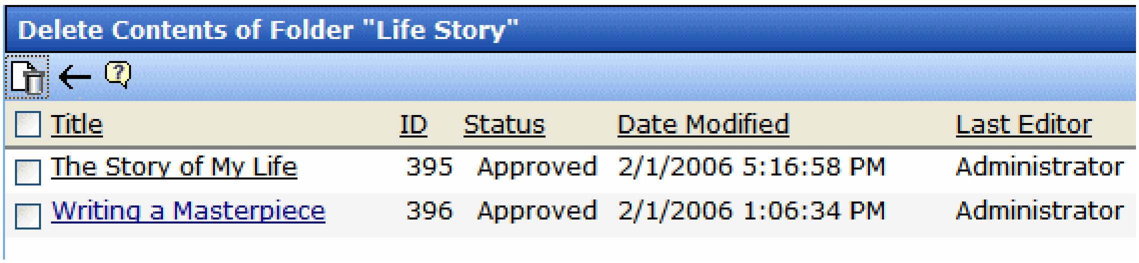
1. In the Workarea, navigate to the blog folder.

   Or

   From the Web site, right click the blog then choose **Properties**. Next, choose the post.

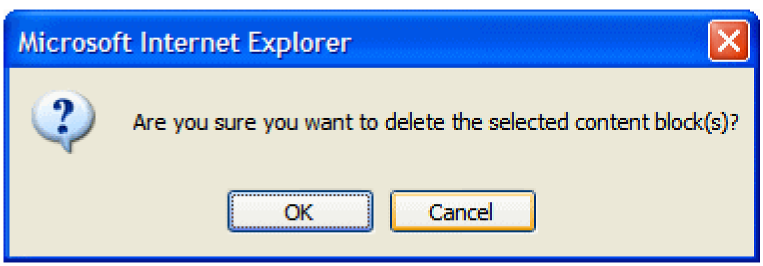
NOTE To delete a blog post from the Web site, you must be logged in.

2. From the menu, click the **Delete** > **Posts**.
3. The **Delete Blog Post** screen appears.



Title	ID	Status	Date Modified	Last Editor
The Story of My Life	395	Approved	2/1/2006 5:16:58 PM	Administrator
Writing a Masterpiece	396	Approved	2/1/2006 1:06:34 PM	Administrator

4. Click the check box next to each post you want to delete. To select all posts, click the check box next to **Title**.
5. Click the Delete Contents button ( ).
6. A dialog box appears.



7. Click **OK** to delete the selected posts.

Blog Comments

WARNING! Do not confuse blog comments with history comments. You can add a history comment to the blog post by clicking the Comment tab. This is not the same as adding a comment to a blog post on a site. When you add a history comment, it has the same properties as a comment associated with content.

Blog comments allow site visitors to interact with a blog by adding their thoughts about a blog post. The blog administrator controls commenting by deciding who can add comments and if they require approval for publication.

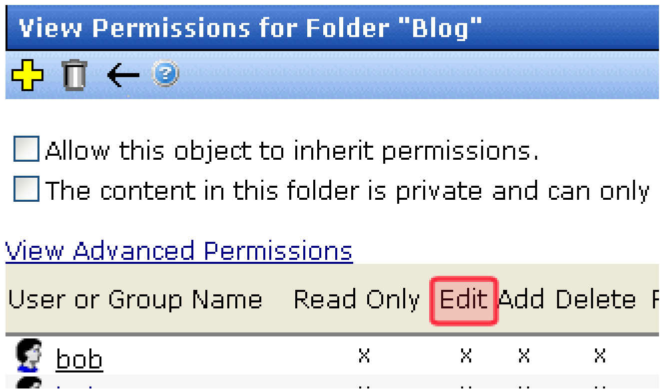
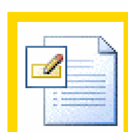
See Also:

- ”Controlling Blog Comments” on page 350
- ”Comments on the Site” on page 352
- ”Comments in the Workarea” on page 354

Controlling Blog Comments

Ektron CMS400.NET provides three properties for controlling comments. Use the Blog Properties screen to set them. *See Also:* ”Blog Properties” on page 318. The following table describes these properties.

Field	Description
Enable Comments	Allows user in Workarea and site visitor to add blog comments. Also displays comments on site and in Workarea. Note: A member of the Administrators group can always add comments, regardless of how this checkbox is set.

Field	Description
Moderate Comments	Determines if comments must be approved before they appear on site. If this field is checked, only users with permission to edit the post can approve comments (see illustration of this permission below).  If users without this permission add comments, they only appear on the Web site after being approved by someone with permission to edit the post. If someone has edit post permission and authenticates before submitting a comment, it is approved automatically. **Appearance of Unapproved Comments** On the Workarea's View Posts in Blog screen, an unapproved comment is indicated by a red flag .  On the View Comments for Post screen, an unapproved comment is indicated by a yellow border. 

Field	Description
Require Authentication	Determines if a user must be authenticated (that is, logged in as a CMS400 user or membership user) to add comments via the Web site.

Comments by default are fully controlled. This means they are enabled, must be approved, and a site visitor must be authenticated to create them.

If comments are enabled but not moderated, any site visitor can add a comment. If you don't want censorship, this is the way to go.

WARNING! While you can delete a comment at any time, if comments are not moderated, they appear on your site as soon as a site visitor submits them.

However, to make sure comments on your site meet certain criteria, moderate them.

The following topics are explained in this section.

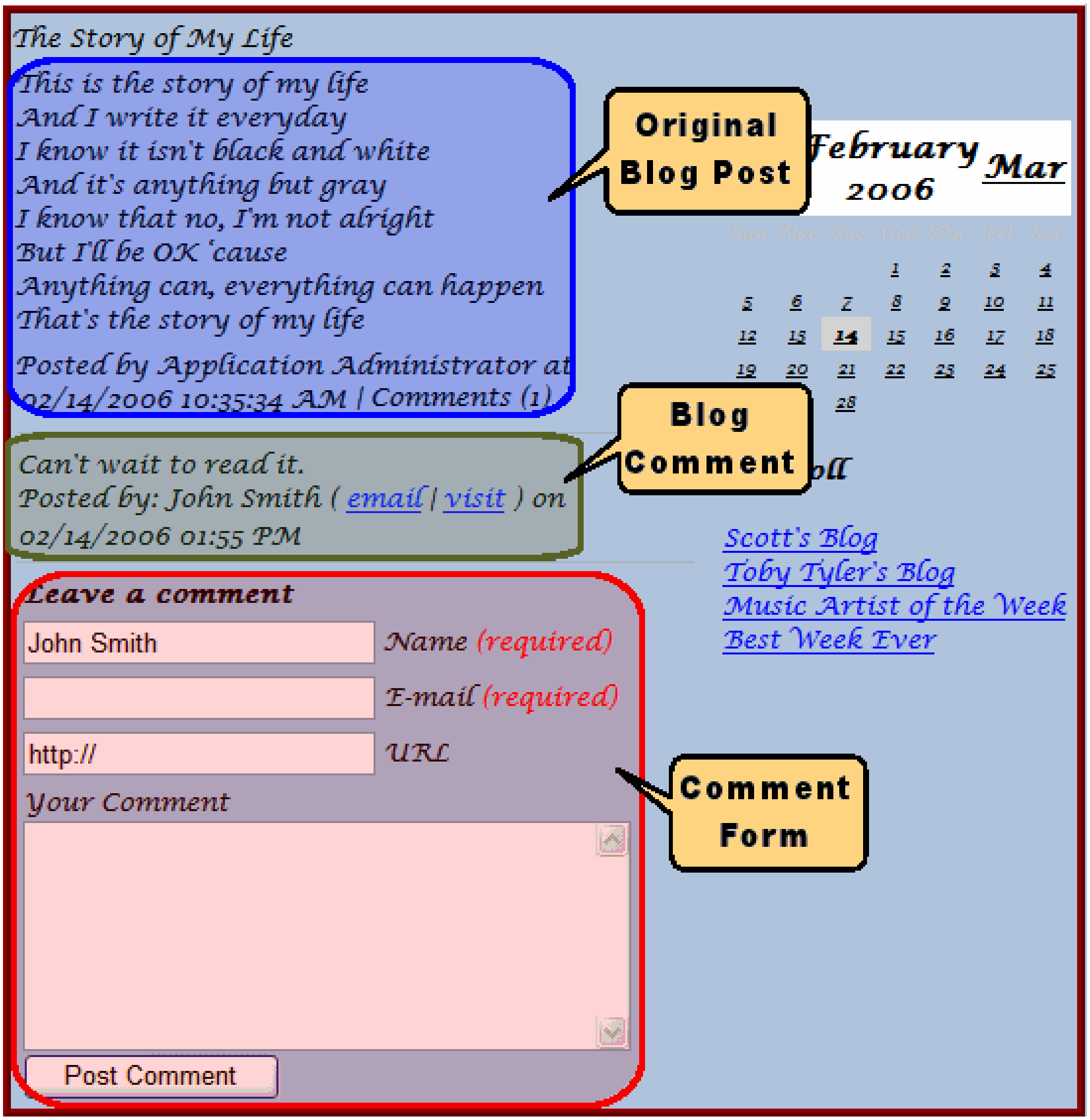
- "Comments on the Site" on page 352
- "Comments in the Workarea" on page 354

Comments on the Site

On the site, comments for a blog post appear when one of the following blog post items is clicked:

- the Comments link
- the Title of the blog post

The comment page contains the original post, any comments that have been added, and a form to post new comments. Depending on how the page is designed, the calendar and blog roll can also appear.



The Comment Form

NOTE See "Controlling Blog Comments" on page 350 to learn about how an administrator determines if and by whom comments can be submitted.

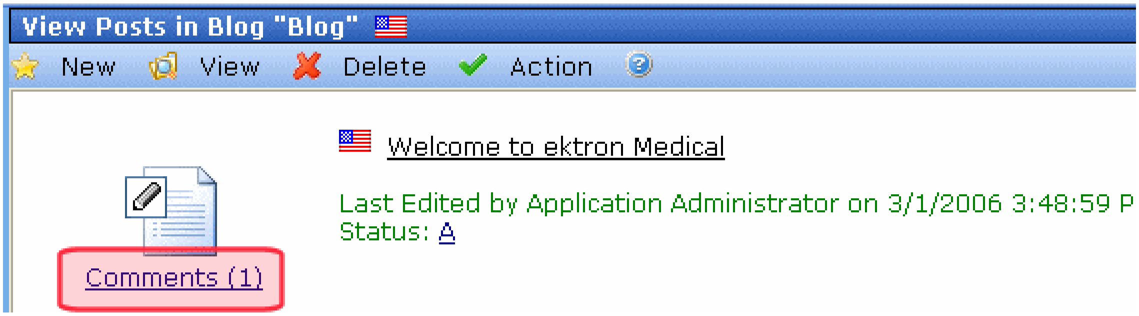
Site visitors, regular users, and Membership users can add comments by filling out the form on the comments page. The form has five fields.

Field	Description
Name	The person submitting the comment. This information is required. **Note**: This text box appears only when a site visitor, who is not a regular user or membership user, is adding a comment. If a regular user or membership user adds a comment, their name and email address is taken from their user profile.
Email	The email address of the person submitting the comment. This information is required. **Note**: This text box appears only when a site visitor, who is not a regular user or membership user, is adding a comment. If a regular user or membership user adds a comment, their name and email address is taken from their user profile.
Homepage	A URL for the person's web site.
Comment Section	A text area to insert comments about the post.
Post Comment Button  	Post a comment by clicking this button. Depending on the comment's settings, it either posts immediately or is submitted for approval. *See Also:* "Controlling Blog Comments" on page 350

Comments in the Workarea

In the Workarea, you can add, view, approve, edit, and delete comments for a blog post.

The comment link (illustrated below) indicates the number of comments. To work with comments, navigate to the blog folder and click the comment link next to a blog post.



This leads you to View Comments screen. Here, you can view approve, edit, delete, and add new comments.

NOTE To learn about recognizing unapproved comments and approving them, see "Controlling Blog Comments" on page 350.

See Also:

- "Adding a Comment" on page 355
- "Editing a Comment" on page 356
- "Deleting a Comment" on page 357
- "Approving a Comment" on page 357

Adding a Comment

NOTE To be able to add a comment, you must have **Add** permission on the blog's Standard Permissions screen.

To add a blog post comment from the Workarea, follow these steps.

1. From the **Content** area, navigate to the blog.
2. Click the Comments icon to the left of the post that you want to comment on.
3. Click **New > Comment**.
4. The Add Comment screen appears.

For a description of the fields on this screen, see "The Comment Form" on page 353.

Note that Add Comment screen provides an additional field, **State**. This field lets the submitting user set the comment's state to approved or pending. Approved comments appear on the site immediately. Pending comments must be approved before they appear.

To learn about the approval process for pending comments, see "Moderate Comments" on page 351.

Editing a Comment

1. From the **Content** area, navigate to the blog.
2. Click the Comments icon to the left of the post whose comment you want to edit.
3. Locate the comment you want to edit.
4. Click **edit**.

5. The Edit Comment screen appears.

For a description of the fields on this screen, see "The Comment Form" on page 353.

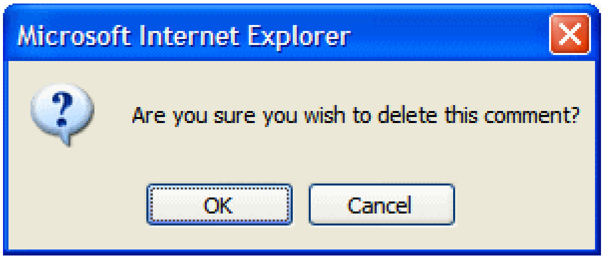
Note that Edit Comment screen provides an additional field, **State**. This field lets the submitting user set the comment's state to approved or pending. Approved comments appear on the site immediately. Pending comments must be approved before they appear.

To learn about the approval process for pending comments, see "Moderate Comments" on page 351.

Deleting a Comment

Once a comment is deleted, you cannot retrieve it.

1. From the **Content** area, navigate to the blog.
2. Click the Comments icon to the left of the post whose comment you want to delete.
3. Click **delete**.
4. A dialog box appears:



5. Click **OK** to delete the comment.

Approving a Comment

Comments can require approval if

- they are submitted from the Web site and **Moderate Comments** is checked in the blog's folder properties

- a user submits the comment from the Workarea set its state to Pending

Only users with permission to edit content (posts) within the blog folder can approve comments. To learn about the approval process for pending comments, see ”Moderate Comments” on page 351.

To approve a comment, follow these steps.

1. From the **Content** area, navigate to the blog.
2. Click the Comments icon to the left of the post whose comment you want to approve. (Unapproved comments are indicated by a red flag ( ).
3. Click **approve**.
4. The comment’s status changes to approved.

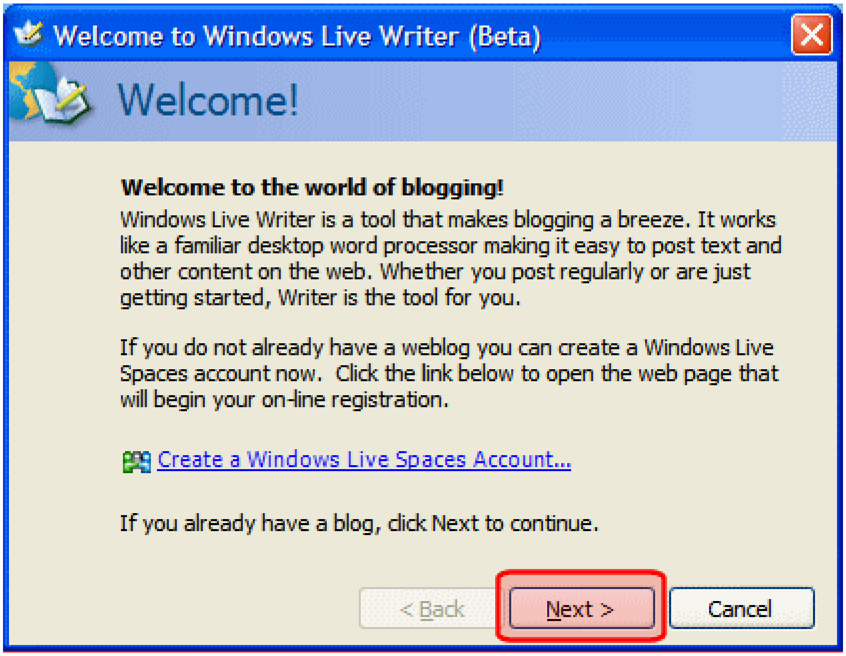
Adding or Editing Blog posts with Windows Live Writer

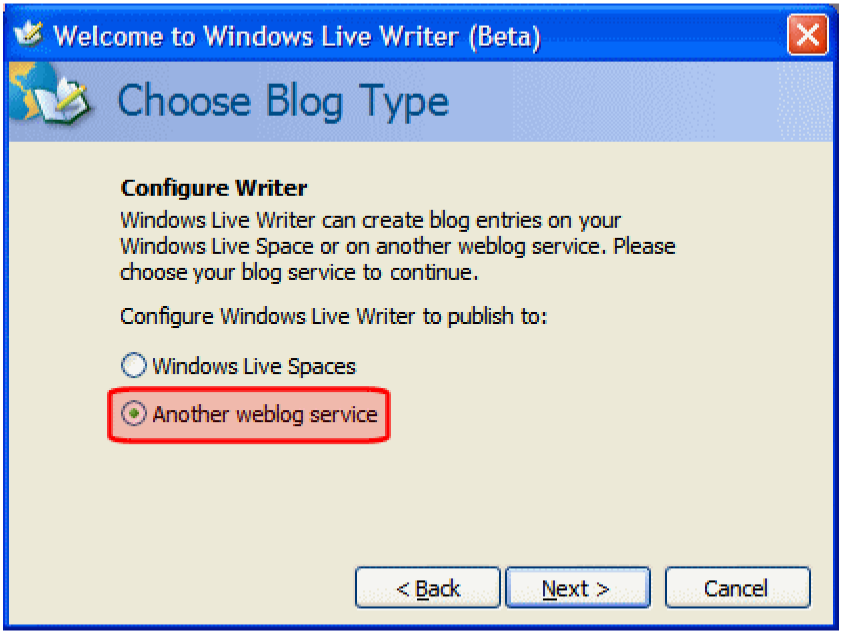
Ektron CMS400.NET authors and membership users can use Windows Live™ Writer to add and edit blog posts to your site. If users have the proper permissions, they upload images and attach files from their system. *See Also:* ”Permissions and Approvals” on page 334.

For additional Windows Live Writer help from Microsoft, click here.

Follow these steps to set up Windows Live Writer to work with your Ektron CMS400.NET Blog. If you have previously set up Windows Live Writer, click **Weblog** > **Edit Weblog Settings**. Then, skip to step four.

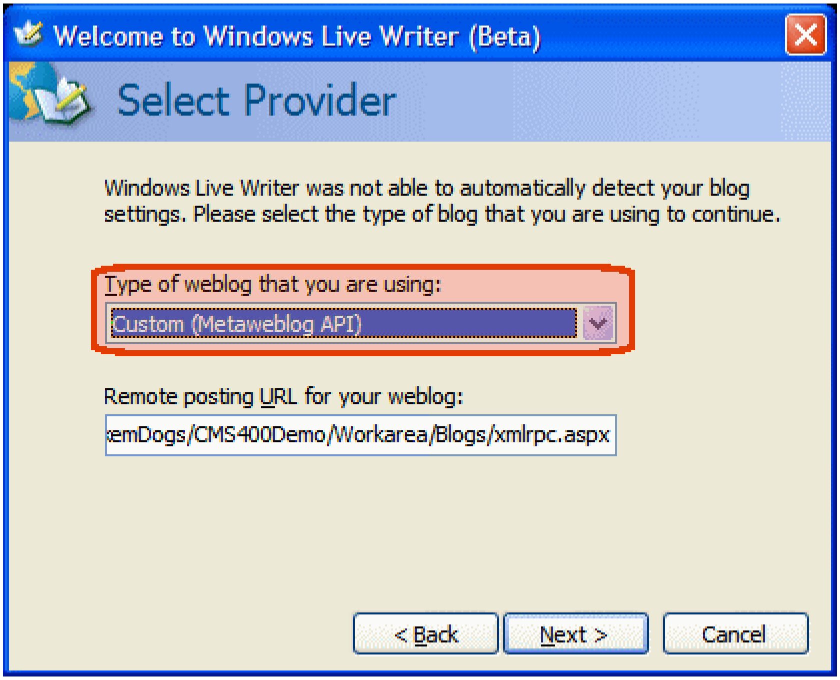
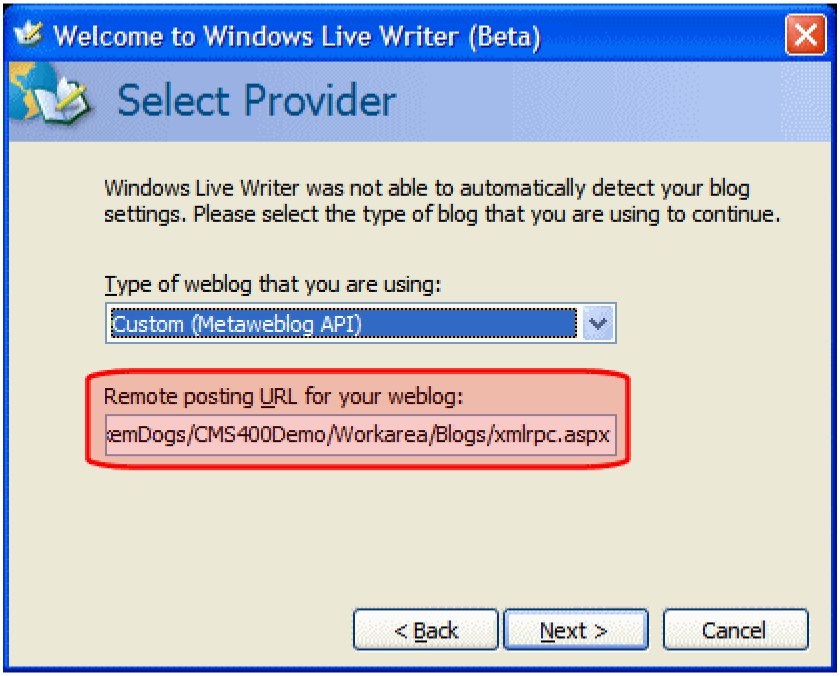
<table>
<tr><th>Step</th><th>Windows Live Writer Setup Screen</th></tr>
<tr><td>1. Download and Start Windows Live Writer.

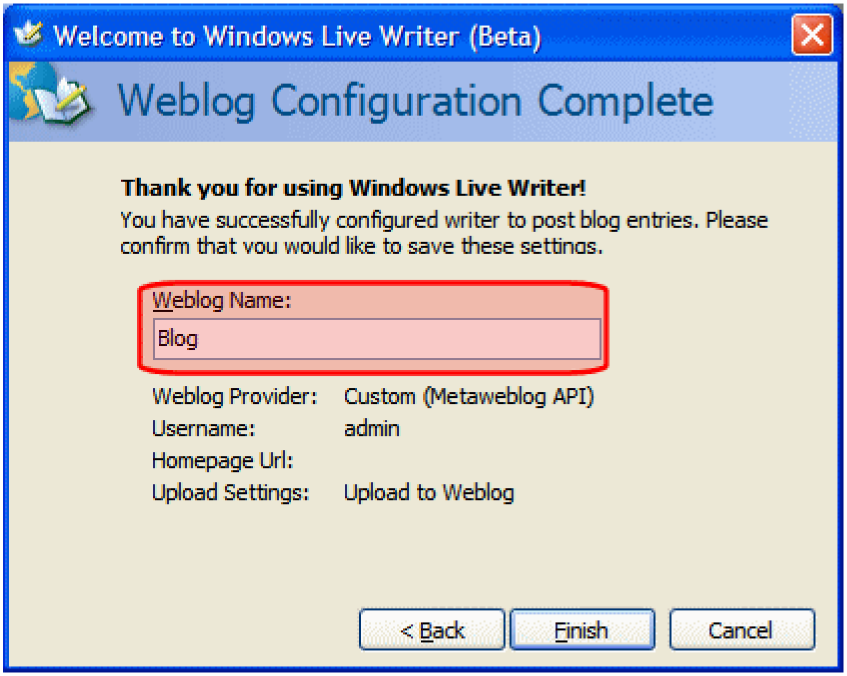
When the Welcome window appears, click the Next button. Do not create a Windows Live Spaces account.</td><td>
</td></tr>
<tr><td>2. In the Choose Blog Type window, select the Another weblog service radio button.

Click Next.</td><td>
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Windows Live Writer Setup Screen</th></tr>
<tr><td>
3. In the Weblog Homepage and Login window, enter the following information:
• Weblog Homepage URL - this is the page that contains the blog. For example, http://<your site>/CMS400Min/blogs.aspx.
• Username - your username to log on to the Ektron CMS400.NET site.
• Password - your password to log on to the Ektron CMS400.NET site.
• Edit Proxy Settings... - edit the proxy settings as needed.
Click Next.
</td><td>


</td></tr>
</table>

Step	Windows Live Writer Setup Screen
4. In the Select Provider widow, choose **Custom (Metaweblog API)** from the **Type of weblog that you are using** dropdown box.	
5. In the **Remote posting URL for your weblog** textbox, add a link to the xmlrpc.aspx file for the site. The default location for the file in the demo site is `http://<your site>/CMS400Min/Workarea/Blogs/xmlrpc.aspx`. Click **Next**.	

Step	Windows Live Writer Setup Screen
6. When the Weblog Configuration Complete window appears, Add a blog name in the **Weblog Name** field. Click **Finish**.	

Personalizing a Web Page

The Personalization feature lets a signed-in (typically membership) user determine a page's layout and content. The user can customize the page, displaying whatever interests him in an arrangement of his own design.

Examples of content that might appear on a personalized page are frequently-updated information, such as news stories, sports scores, a calendar, and stock market data.

A user gets his personalized view of the customized page after logging into any computer. The customization is tied to the user, not a specific computer.

IMPORTANT! The Personalization feature requires Internet Explorer 5 or higher. You cannot use other browsers.

The following topics explain personalization in more detail.

- "Types of Content that Can Be Personalized" on page 363
- "Which Web Pages Can be Personalized" on page 364
- "Personalization and Permissions" on page 364
- "Layout of a Personalization Page" on page 364
- "Personalizing a Web Page" on page 365
- "The Personalization Menu" on page 366
- "Editing Sequence" on page 367

Types of Content that Can Be Personalized

- Content
- Calendars
- Collections
- Blogs
- HTML Forms

- List Summary
- Contentlist
- Discussion Forum

NOTE Assets cannot be personalized.

Which Web Pages Can be Personalized

Your administrator will tell which Web pages you can personalize. Personalization can be enabled on any number of pages.

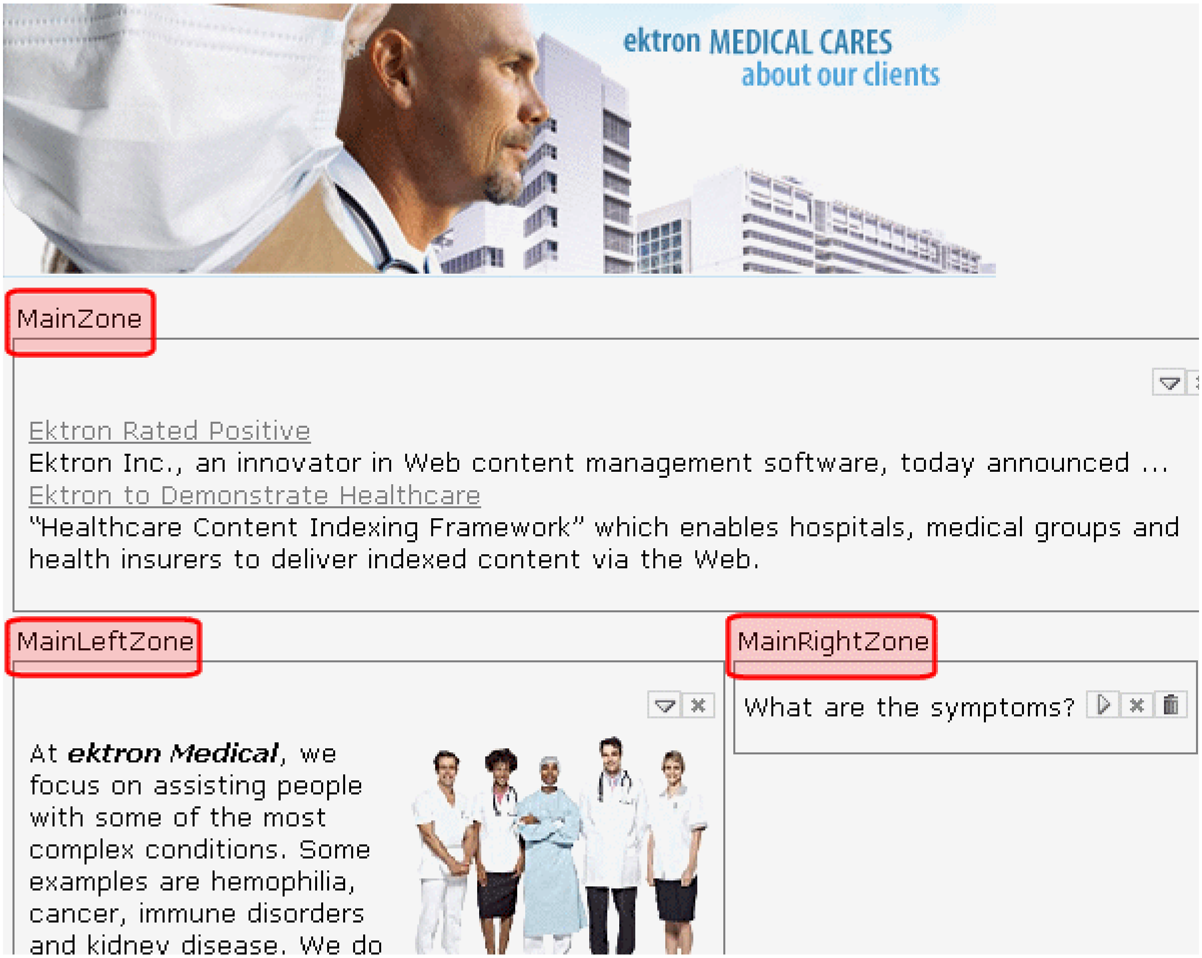
In the sample Web site provided with **Ektron CMS400.NET**, the `http://localhost/`*`siteroot`*`/mypage.aspx` and `http://localhost/`*`siteroot`*`/mypageadvance.aspx` pages demonstrate how personalization may be implemented.

Personalization and Permissions

To learn about how permissions affect your ability to personalize, see the **Ektron CMS400.NET** Administrator Manual section “Personalization Feature” >””Permissions that Affect Personalization” .

Layout of a Personalization Page

A Personalization page consists of one or more *Web Part Zones*. Each zone can contain one or more content items. You select the content you wants to see in each zone.



Personalizing a Web Page

Your system administrator gives you permission to personalize a Web page. Several permission levels are available (listed below). You may have any combination of these permissions.

- *moving* content among zones
- *editing* a content item
- *adding* new content
- *globally changing* the page. So, anyone visiting the page sees your content and arrangement.

NOTE While the first three permissions affect your ability to personalize a page, the last one lets you design a page that anyone browsing to it will see.

If you have any permission, you can also perform these actions on a personalization page.

- remove content from a zone temporarily (close)
- remove content from a zone permanently (delete)
- suppress content from a zone (minimize)

These tasks are explained in more detail below.

The Personalization Menu

The top right corner of any content item contains a menu of options you can perform on it (circled below).

The options change depending your permissions, your mode (for example, Add Content mode), and the current state of the content.

Also, each content item has its own menu. So, if a Web part zone contains three items, you see three menus, one in the top right corner of each item.

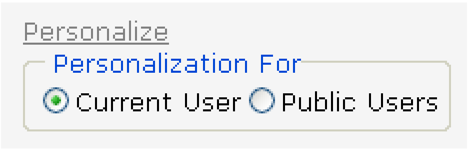
The following table describes Personalization menu options.

Button	Name	Description	For more information, see
	Minimize	In personalization mode, only display the content title. To a site visitor, suppress the content.	”Minimizing a Content Item” on page 373
	Restore	Undo minimize.	”Minimizing a Content Item” on page 373
	Close	Removes content item from its zone and places it in the page catalog. From the page catalog, the content item can be moved to any Web Part Zone. *See Also:* ”The Page Catalog” on page 375	”To remove a content item from its zone, click the close button (circled below).” on page 368
	Delete	Remove content item from its Web part zone. Only appears for content you added.	”Deleting Content” on page 373
	Edit	• replace with other content of the same type • move content item to different Web part zone • change its width and height	”Editing Content” on page 369

Editing Sequence

1. Access the Web page that lets you personalize. Your system administrator tells you how to access this.
2. If you have permission to change the page for unauthenticated users, the **Personalization For** box appears.

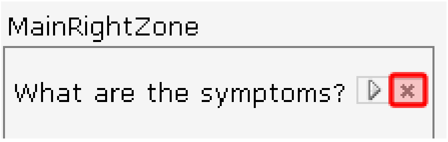
   Otherwise, skip to Step 3.



Use this box to decide if your page customization applies to just yourself (**Current User**) or all site visitors who do not sign in (**Public Users**).

3. Click **Personalize**.
4. The page refreshes, and you see its Web part zones.

- If you have permission to move content, you can do that now.
- If you have permission to edit content, you can do that now.
- If you have permission to add content, click **Add Content**. The screen refreshes, and a new area appears that lets you add content.
- You can delete any content item that you added. See ”Deleting Content” on page 373.
- To suppress the display of a content item but leave it in its zone, click its minimize button. To restore the content item, click the restore button.
- To remove a content item from its zone, click the close button (circled below).



A closed item is placed in the Page Catalog. If your Web administrator places the Page Catalog on a personalization page, you can later move the content from the Page Catalog to any zone. *See Also:* ”The Page Catalog” on page 375

- At any time, you can restore the page to the original layout and content using **Reset To Default**.

Moving Content

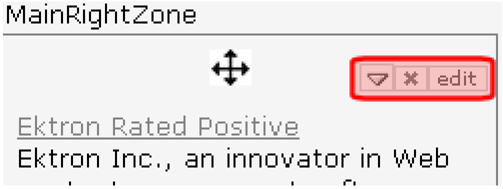
You can move content to an empty zone or one with content. If you do the latter, the new content appears at the top of the zone, and existing content in the zone is pushed down.

To move content, follow these steps.

1. Go to the personalization Web page. Your system administrator will tell you how to find it.

In the sample database provided with **Ektron CMS400.NET**, the page is `http://localhost/`*`siteroot`*`/mypage.aspx`.

2. Click **Personalize** to enter personalization mode.
3. Move the cursor to the left of a content item's personalization menu (illustrated below).



4. The cursor changes to a four-headed arrow.
5. Drag the content to a different Web part zone.

Editing Content

Editing allows you to do the following to a content item.

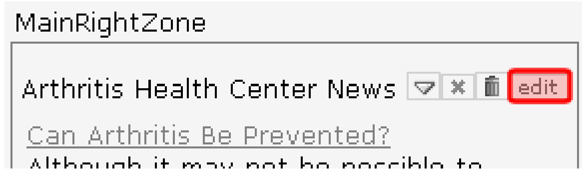
- replace it with another item of the same type
- move it to a different Web part zone
- change its width and height

Editing does not allow you to change the content of any item.

To edit content, follow these steps.

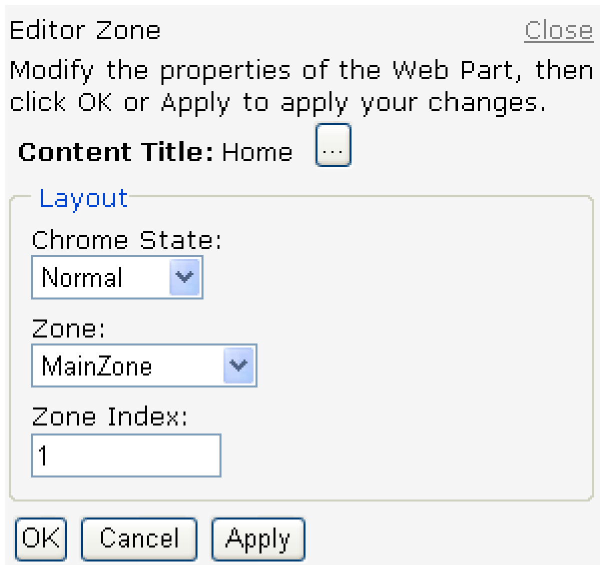
1. Go to the personalization Web page. Your system administrator will tell you how to find it.

   In the sample database provided with **Ektron CMS400.NET**, the page is `http://localhost/`*`siteroot`*`/mypage.aspx`.
2. Click **Personalize** to enter personalization mode.
3. The screen refreshes. If you have edit permission, **edit** appears on each content item's personalization menu (circled below).



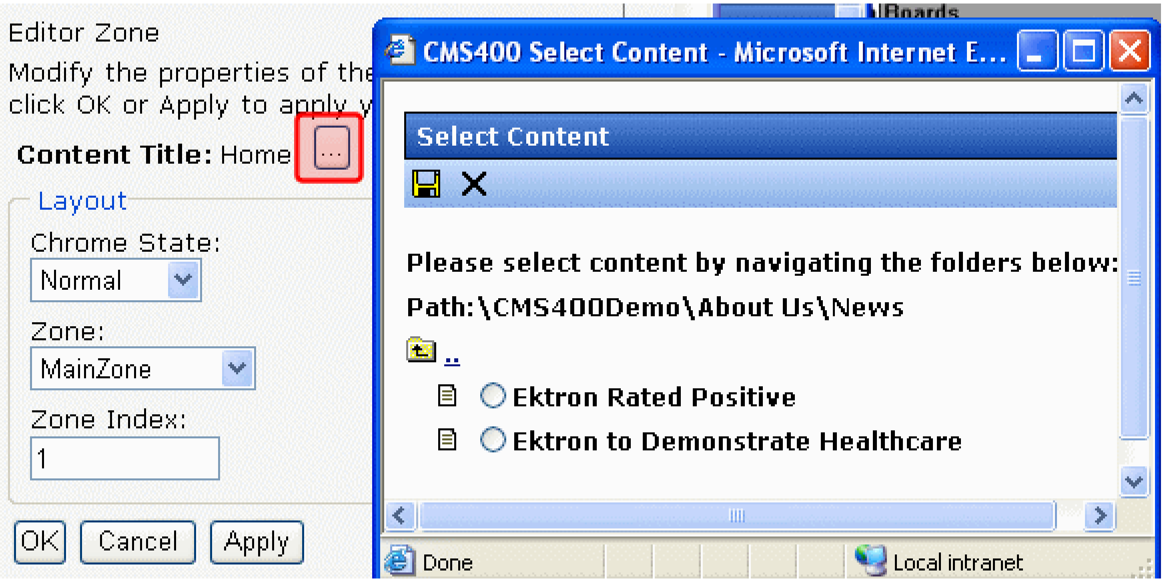
4. Click **edit** next to any content item.
5. The editor zone appears. Your system administrator determines its location on the page.

   The fields in the editor zone vary depending on the type of content you are working with.



6. You can replace the content item with another of the same type. In the above illustration, you can replace the content block “Home.”

   To do so, click the button to the right of the title. When you do, a popup window prompts you to select a different item of the same type.



NOTE You cannot select another type of item. If needed, you can delete this content item and add a different type of item in its place.

7. If a **Zone** dropdown list appears in the Editor Zone, you can use it to move the selected item to another zone.

Adding Content

When you enter Add Content mode, a new screen zone appears, displaying content you can add to the page. Your system administrator determines which content items appear.

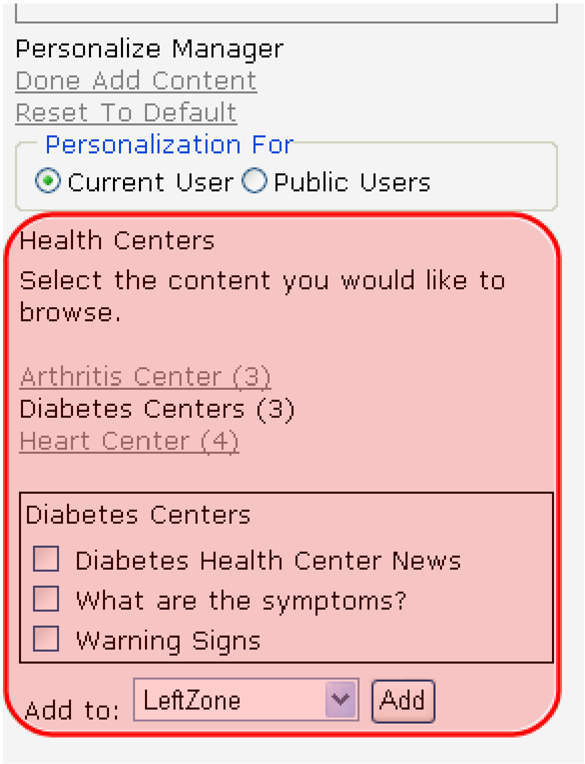
To add content, follow these steps.

1. Go to the personalization Web page. Your system administrator tells you how to find it.

   In the sample database provided with **Ektron CMS400.NET**, the page is http://localhost/*siteroot*/mypage.aspx.
2. Click **Personalize** to enter personalization mode.
3. The screen refreshes. If you have add permission, **Add Content** appears below the Personalization Manager (see below).

4. An add content zone appears. Your system administrator determines its location on the page.

   Below is the add content zone on the sample page.



   In this example, the administrator provided three categories of content, and each category has several items. When you select a category, its items appear below.

5. Select the items you want to display.

6. Select the zone in which you want to place them.
7. Click the **Add** button.
8. When you do not need to add more content, click **Done Add Content**.

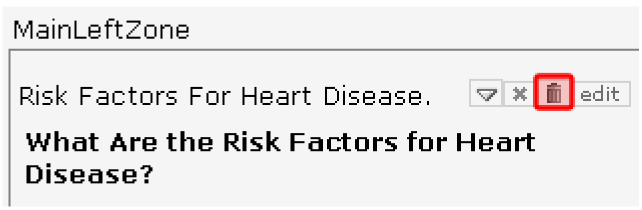
Deleting Content

You can only delete content that you added. (See ”Adding Content” on page 371) When you delete content, you remove a version of it from its Web part zone. But, if it exists in another location on the same page or on any other page, it remains there. And, you can still add it to any Web part zone.

To delete content, follow these steps.

1. Go to the personalization Web page. Your system administrator will instruct you on how to find it.

   In the sample database provided with **Ektron CMS400.NET**, the page is `http://localhost/`*`siteroot`*`/mypage.aspx`.
2. Click **Personalize** to enter personalization mode.
3. A delete button appears on the personalization menu for any content item you added to the page. See illustration below.

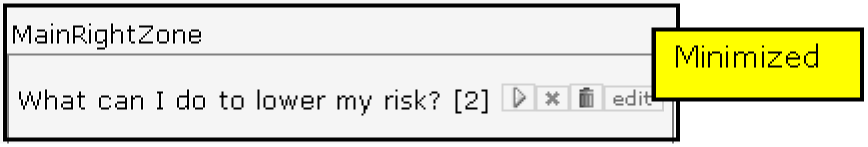


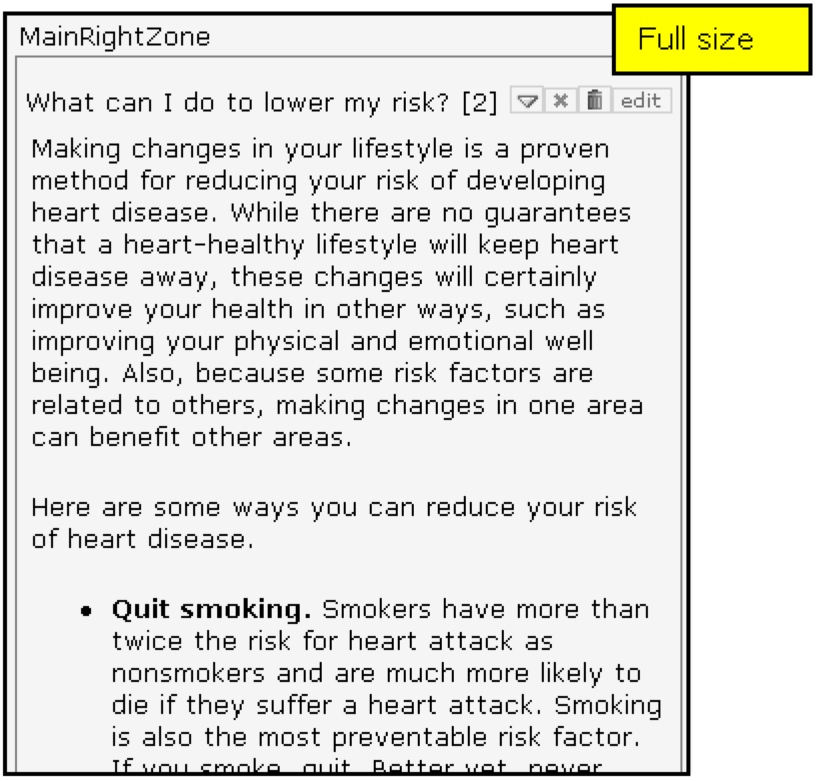
4. To remove that item from that Web part zone, click the delete button.
5. A warning message appears. Click **OK**.

Minimizing a Content Item

There are two reasons for minimizing content:

- You want to reduce the clutter while working on a page in personalization mode. When you minimize, only the title and menu appear in the zone.

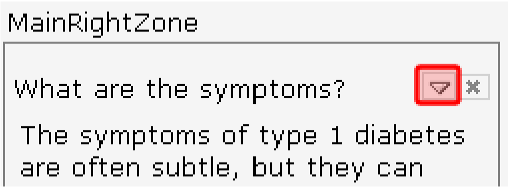




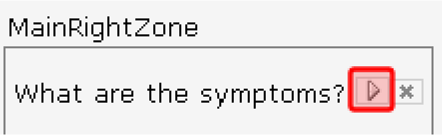
In this case, you would restore content to full size when you finish.

- You want to suppress the content for anyone visiting the page. For example, you are customizing a page for all site visitors, and want to temporarily hide a content item.

To minimize a content item, click the minimize button on the personalization menu (circled below).

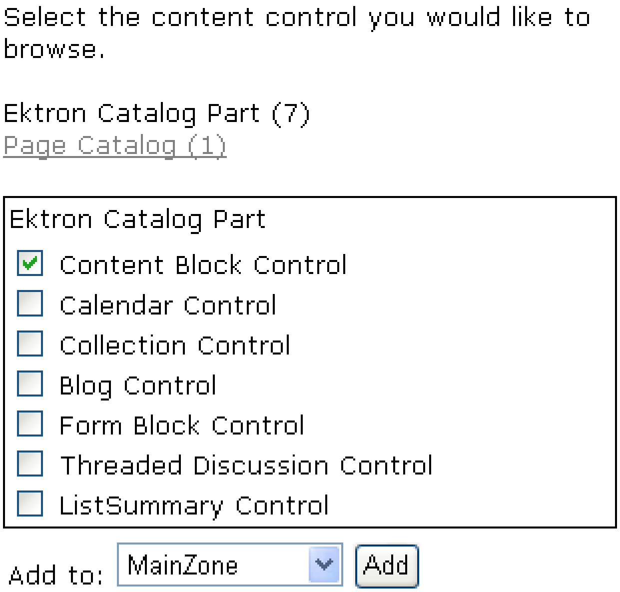


After you minimize, the button changes to a restore button (circled below). Click it to restore the content.



The Page Catalog

If your Webmaster has placed a Page Catalog on your personalization page, it only appears after you enter Add Content mode (click **Personalize > Add Content**). The Page Catalog looks something like the following.



You can do two things from the catalog area.

- Add to any Web Part Zone items that have been deleted from other Web Part Zones.
- Add a type of content to any Web part zone. As you can see from the illustration above, you can add content, a calendar, a collection, a blog, etc.

  After you add the content type, click **Done Add Content**. Then, within that content area, click **edit**. A new screen area appears. Use that area to define the content.

My Workspace

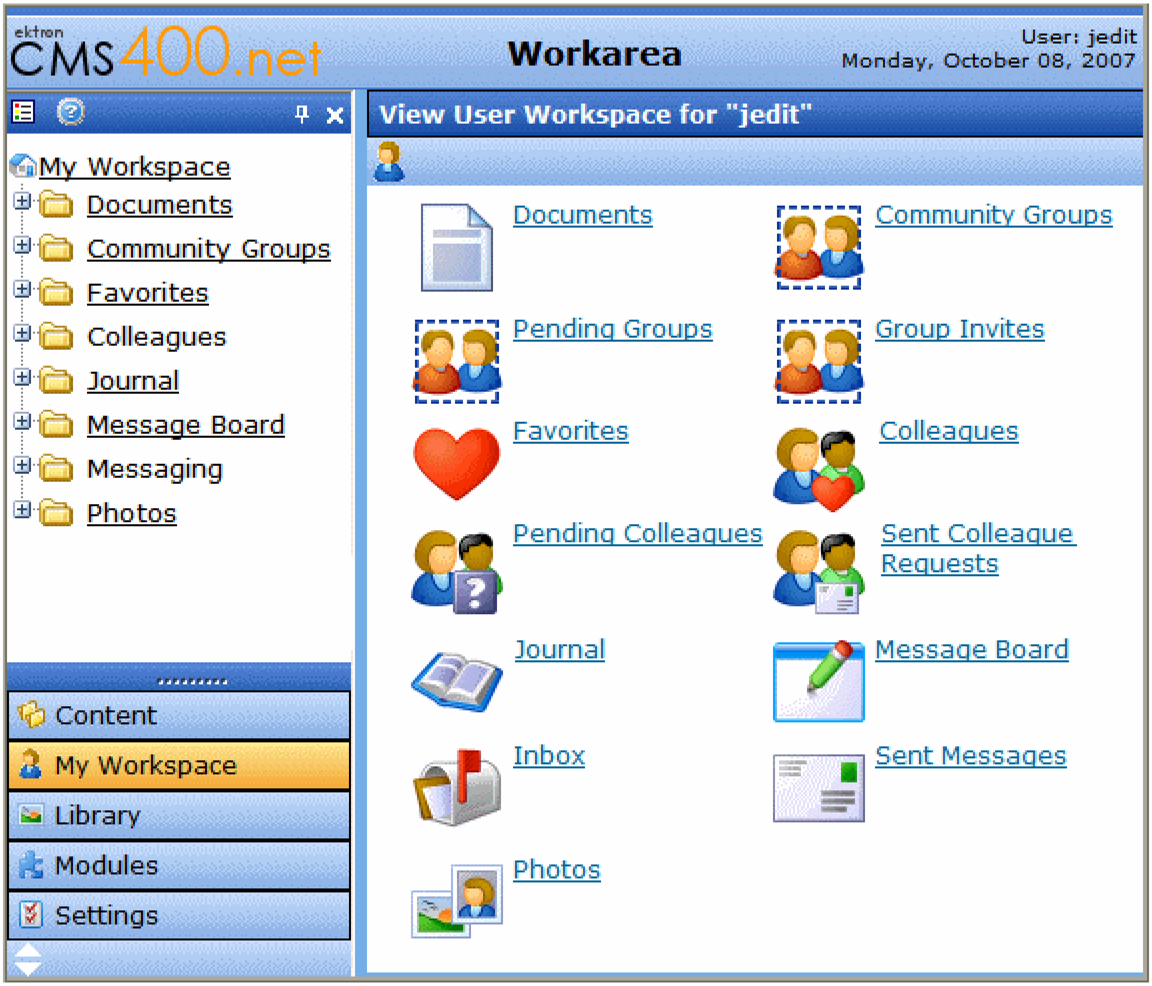
A community is a group of people who network with each other to share information, ideas, likes and dislikes. Typically, people or members in the community are connected to each other by a relationship. For example, they work for the same company, went to the same school, share the same values or have a friendship.

When a person initially visits a community site, they can explore to see what type of information, people and groups are on the site. While the person can see some information on the site, they often need to become a member of the site to see exclusive information.

When a person signs up to be member, they define information about themselves. This is known as their member profile. As a Ektron CMS400.NET user, you already have a member profile on the site.

The Community Platform in CMS400 is a set of features that allow users to network socially on the site. Access to the community platform is available from both the Web site and the Workarea. Only **Ektron CMS400.NET** users and administrators can access their information via the Workarea. Membership Users, **Ektron CMS400.NET** users and administrators can access their profile pages via the Web site.

My Workspace is a component of the Community Platform. This area allows you to manage your community information from the Workarea.



The following features are included in My Workspace:

- **Documents** - see ”Documents” on page 379
- **Community Groups** - see ”Community Groups” on page 412
- **Favorites** - see ”Favorites” on page 415
- **Colleagues** - see ”Colleagues” on page 400
- **Journal** - a Journal is a personal blog for a user. See ”Blogs” on page 312

- **Message Board** - see ”Message Board” on page 397
- **Messaging** - see ”Messaging” on page 390
- **Photos** - see ”Photos” on page 417

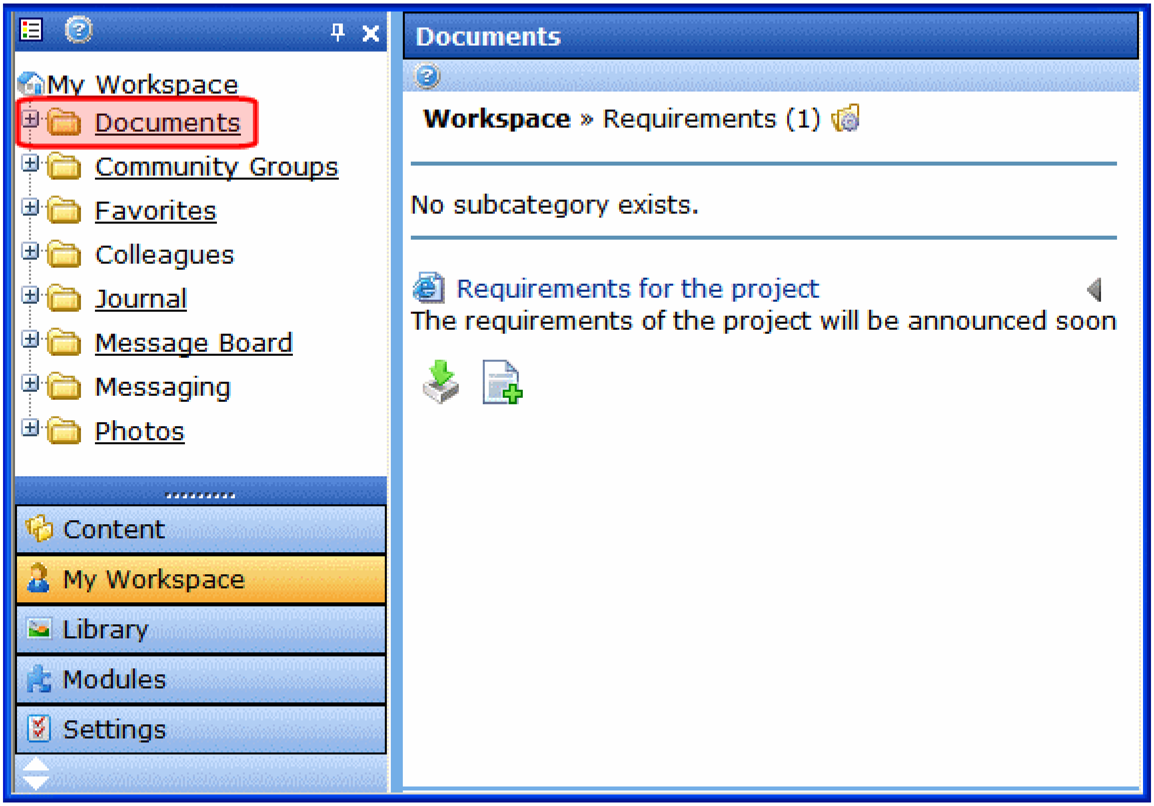
Documents

The Documents area of My Workspace allows you to add assets and HTML content to **Ektron CMS400.NET** and associate it with your profile. You can create subfolders to separate content by category.

Folders and files in the Documents area are separate from the Content folder structure and its files. Assets and HTML content in this list have the same properties and actions available to those found in the Content folder structure. For example, you view, edit, delete and copy content and assets.

From the Documents area, you can:

- add a folder - see ”Adding Folders to My Workspace >> Documents” on page 380
- edit a folder’s name - see ”Edit a Folder Name in My Workspace >> Documents” on page 381
- delete a folder - see ”Deleting a Folder in My Workspace >> Documents” on page 383
- drag and drop an asset - see ”Adding Assets to My Workspace >> Documents” on page 384
- create an HTML file - see ”Creating HTML Content in My Workspace >> Documents” on page 385
- move a content item to another folder - see ”Moving and Copying Content in My Workspace >> Documents” on page 387
- select whether to share the folder with the Public, Colleagues, Selected Colleagues or keep the folder private. - see ”Sharing Content in My Workspace >> Documents” on page 389



HTML Content and Assets can be displayed on the site when a developer adds the CommunityDocuments server control to a Community Web site. For additional information on the CommunityDocuments server control, see the Developer Manual section “Introduction to Ektron CMS400.NET Server Controls” > “Community Platform Server Controls” > “CommunityDocuments Server Control.”

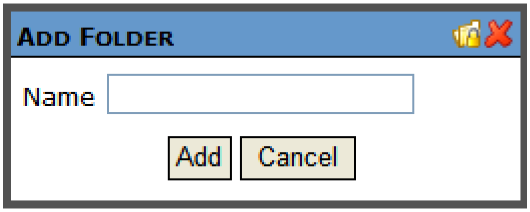
Adding Folders to My Workspace >> Documents

You can add subfolders in the Documents area to help you sort assets and content into categories. The subfolders represent a taxonomy of the items contained in the documents area.

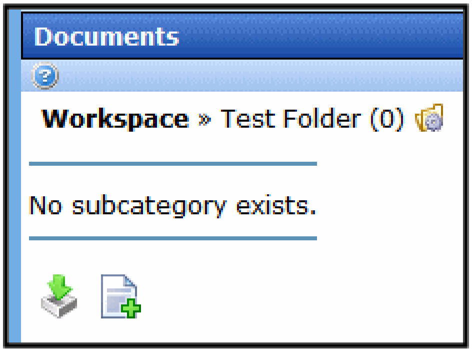
To add subfolders, follow these steps.

1. In the Workarea, navigate to **My Workspace** >> **Documents**.

2. Click the Manage Folder Button ( ).
3. The Add Folder box appears.



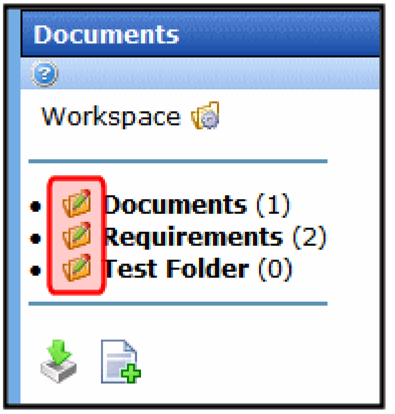
4. Enter a Name for the folder.
5. Click the Add button (Add).
6. When the page refreshes, it opens to the newly added folder.



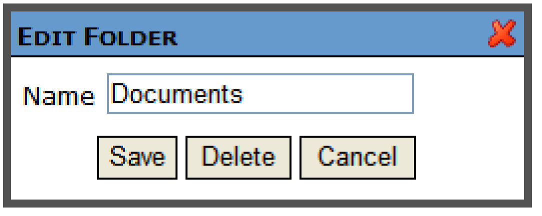
Edit a Folder Name in My Workspace >> Documents

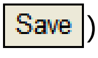
Sometimes, it is necessary to change the name of folder in the My Workspace >> Documents area. To accomplish this, follow these steps.

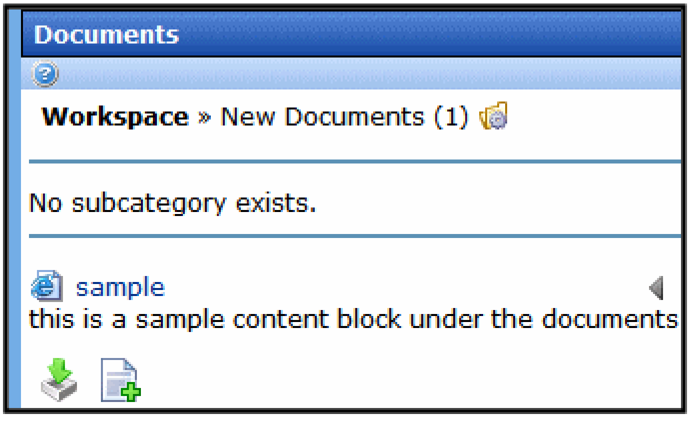
1. In the Workarea, navigate to **My Workspace** >> **Documents**.
2. Click the folder's Edit button ( ). This button is located to the left of the folder's title.



3. The Edit Folder box appears.



4. Change the name of the folder.
5. Click the Save button ().
6. When the page refreshes, it opens to the folder with changed name.



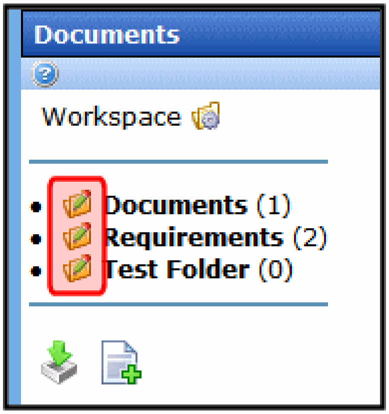
Deleting a Folder in My Workspace >> Documents

You can delete obsolete folders from My Workspace >> Documents. To delete a folder, follow these steps.

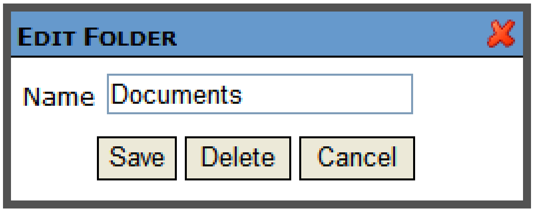
NOTE You can not delete the top-level folder, Workspace.

CAUTION! Deleting a folder permanently deletes all assets and HTML content, as well as its subfolders.

1. In the Workarea, navigate to **My Workspace** >> **Documents**.
2. Click the folder's Edit button ( ). This button is located to the left of the folder's title.



3. The Edit Folder box appears.

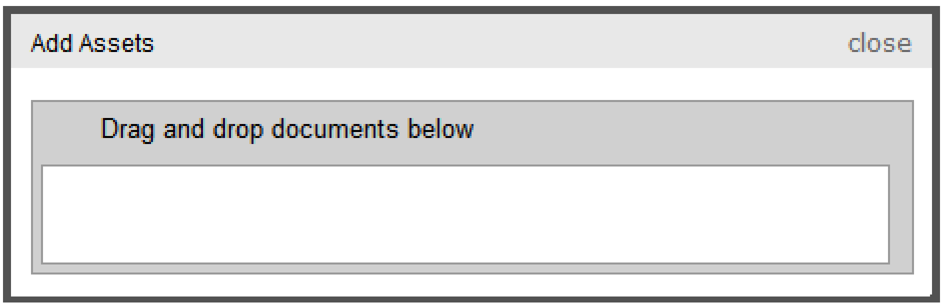


4. Click the Delete button (Delete).
5. A dialog box appears asking you to confirm deleting the folder.
6. Click **OK**.
7. The page refreshes and the folder is removed.

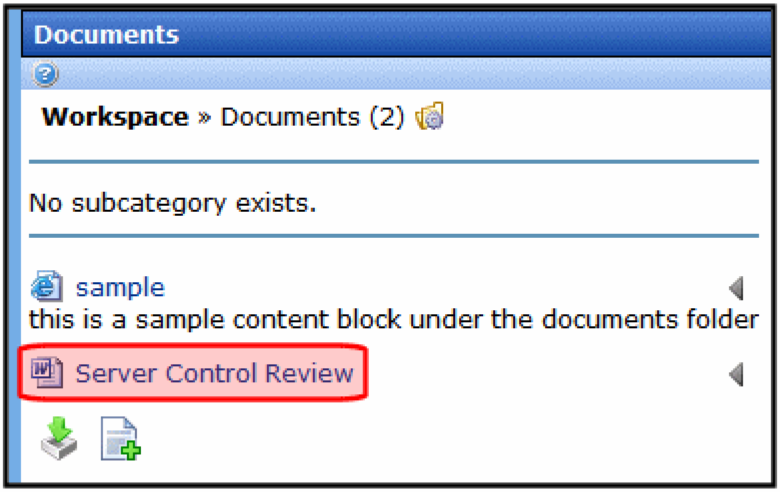
Adding Assets to My Workspace >> Documents

Assets are files that are not HTML content, such as Office documents and PDFs. To add an asset to My Workspace >> Documents, follow these steps.

1. In the Workarea, navigate to **My Workspace** >> **Documents**.
2. Select a folder where the asset will be added. If you want to create a new folder, see "Adding Folders to My Workspace >> Documents" on page 380.
3. Click the Add Asset button ().
4. The Add Asset box appears.



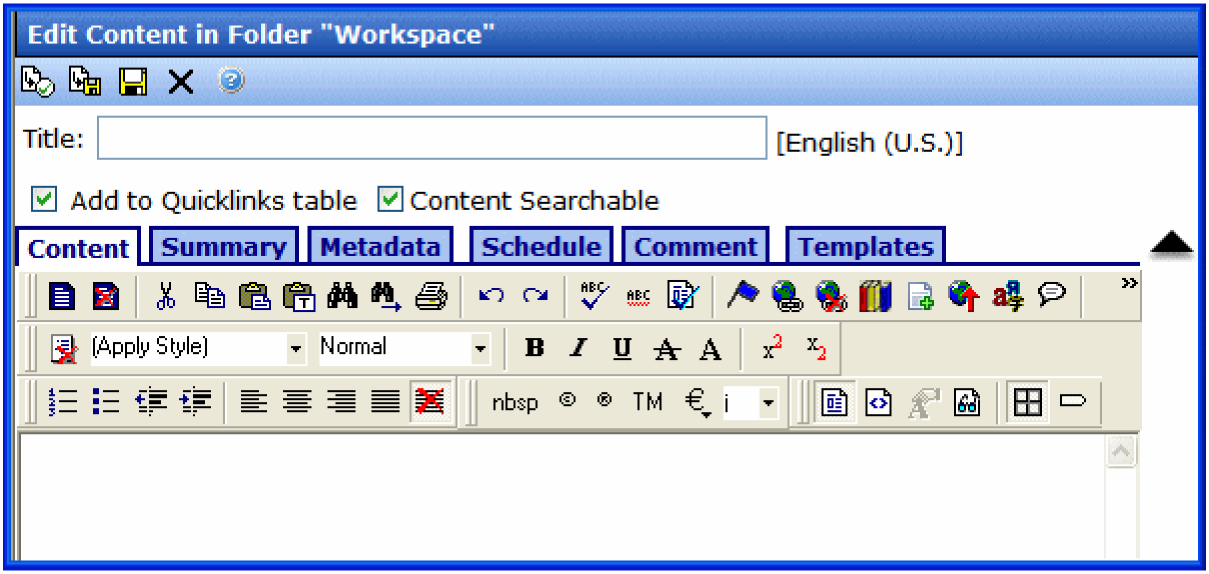
5. Drag and drop an asset in the Add Asset box.
6. A status box appears and shows the files being uploaded.
7. Once the upload is complete, the page refreshes and the asset appears in the file list.



Creating HTML Content in My Workspace >> Documents

To create HTML content in My Workspace >> Documents, follow these steps.

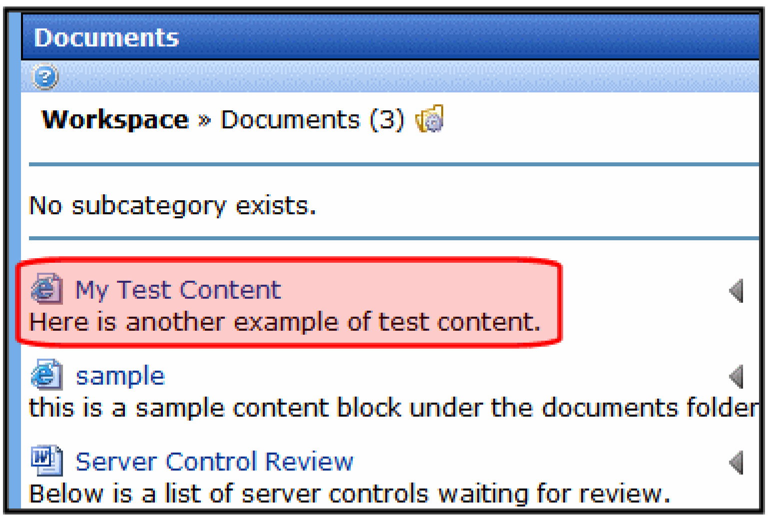
1. In the Workarea, navigate to **My Workspace** >> **Documents**.
2. Select a folder where the content will be added. If you want to create a new folder, see ”Adding Folders to My Workspace >> Documents” on page 380
3. Click the Add HTML Content button ( ).
4. The Add HTML Content window appears.



5. Add a title and content. See ”Adding HTML Content” on page 48 for an explanation of the buttons and tabs in this window.

6. Click the Publish button () to publish the content.

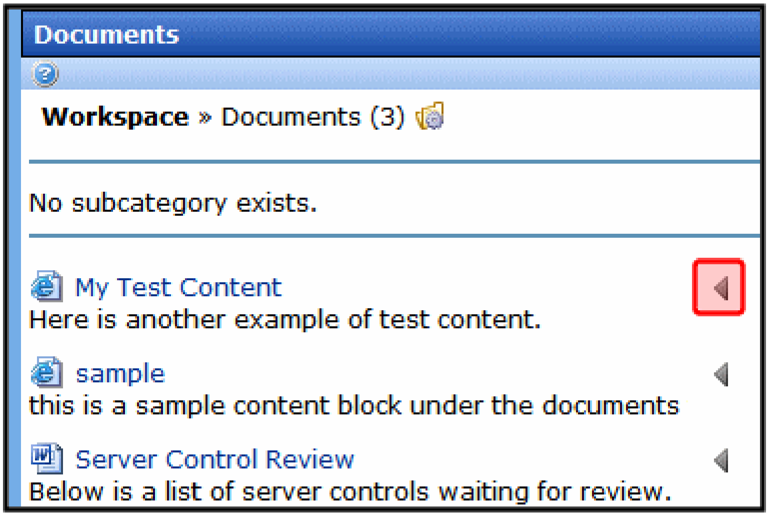
7. The page refreshes and the HTML content appears in the file list.



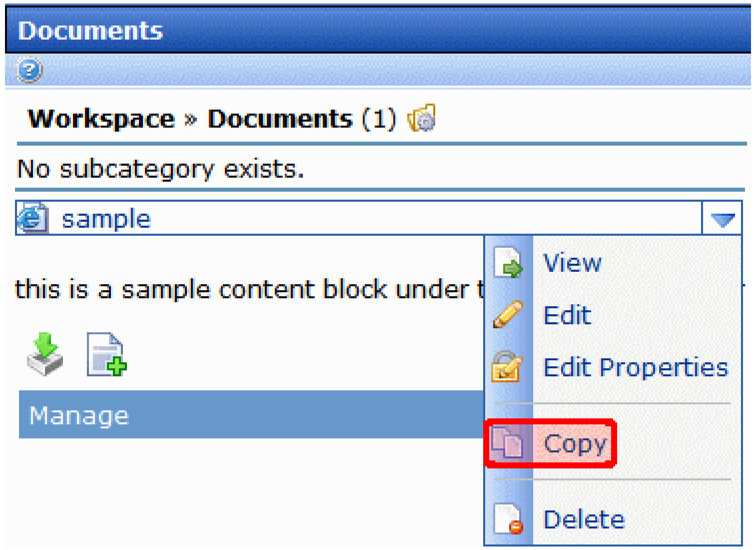
Moving and Copying Content in My Workspace >> Documents

You can change the folder where assets and HTML content are stored in My Workspace >> Documents by moving the content from one folder to another. In addition to moving files, you can copy files to another folder. To accomplish either of these actions, follow these steps.

1. In the Workarea, navigate to **My Workspace** >> **Documents**.
2. Select the folder from which to move or copy the content.
3. Click the triangle to the right of the content title (circled below).

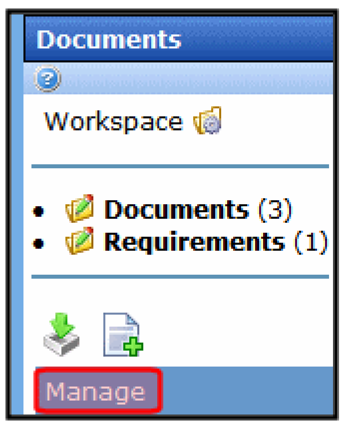


4. From the drop down list, select **Copy**.



5. Navigate to the my Workspace > Documents folder into which you want to copy the content.
6. Click the **Manage** link.

NOTE The **Manage** link only appears after you copy a document but have not pasted it.



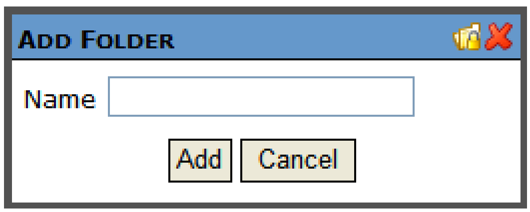
7. Click the Move Items ( ) or Copy button ( ).

8. A dialog box appears asking you to confirm the move or copy action.
9. Click **OK**.
10. The page refreshes and the moved or copied content appears in the folder.

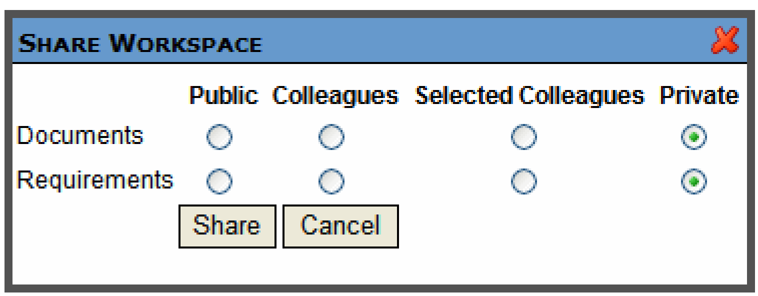
Sharing Content in My Workspace >> Documents

The Documents area of My Workspace allows you to add and edit content you want share with your colleagues. You can share content with the Public, Colleagues, Selected Colleagues or keep the content private. You apply sharing options to folders not to individual content. To share a folder, follow these steps.

1. In the Workarea, navigate to **My Workspace** >> **Documents**.
2. Click the Manage Folder Button ( ).
3. The Add Folder box appears.



4. Click the Share Folder button ( ).
5. The Share Workspace box appears.



6. Select with whom to share your folders. The table below describes each option.

Viewer Type	Description
Public	All people viewing your profile page can view your documents.
Colleagues	Only people who are your colleagues can view your documents. *See Also:* ”Colleagues” on page 400.
Selected Colleagues	Only colleagues who are marked as selected colleagues can view your documents.
Private	You are the only one who can view your documents.

7. Click the Share button (Share).
8. Documents in the folder are now available for viewing by the selected viewer type.

Messaging

The messaging system allows you to send messages to other CMS400 and membership users. Messages are similar to email. The difference is, messages are sent and received within CMS400 Web site or the Workarea. When sending a message, users can send it to multiple recipients. The recipients can then read, reply or forward the message.

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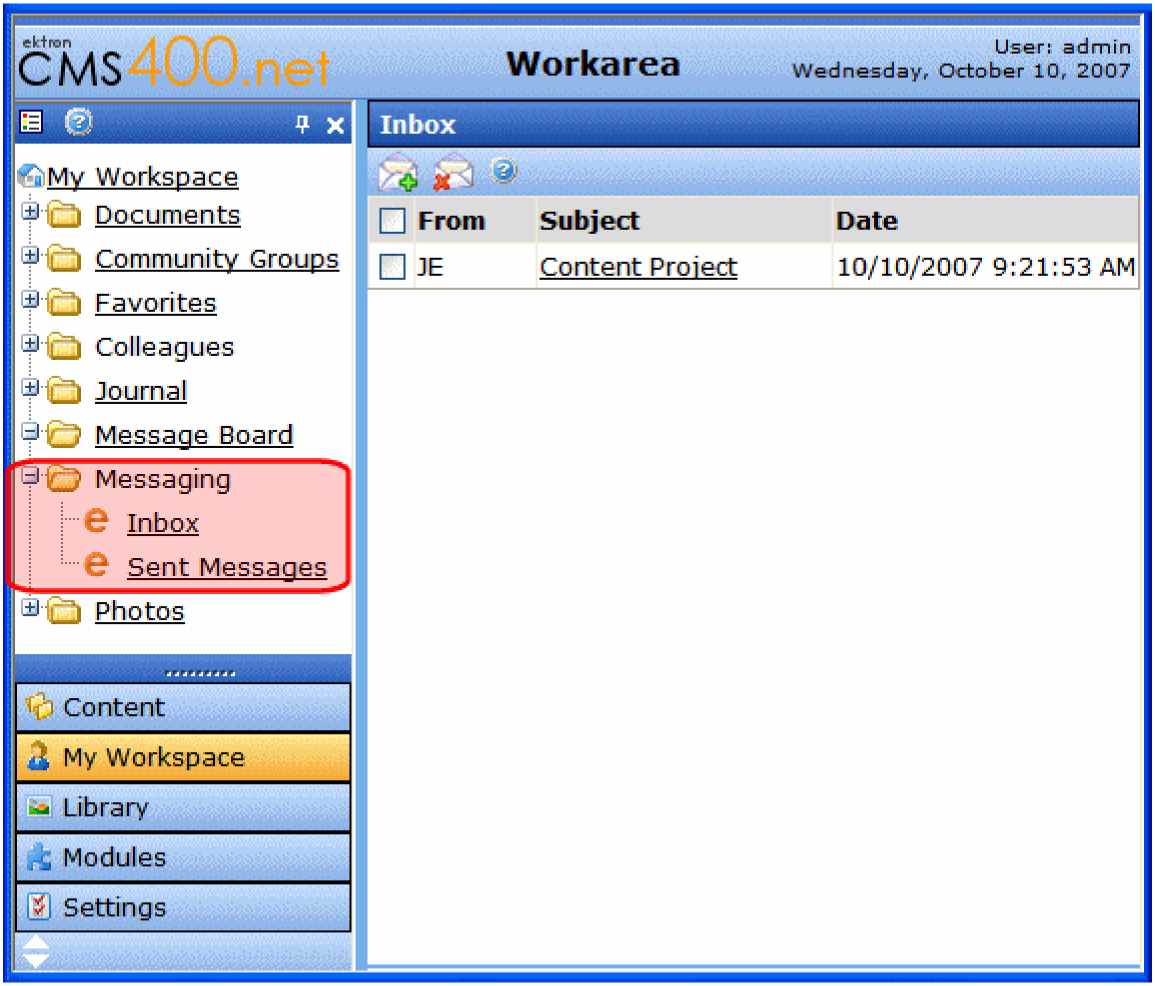
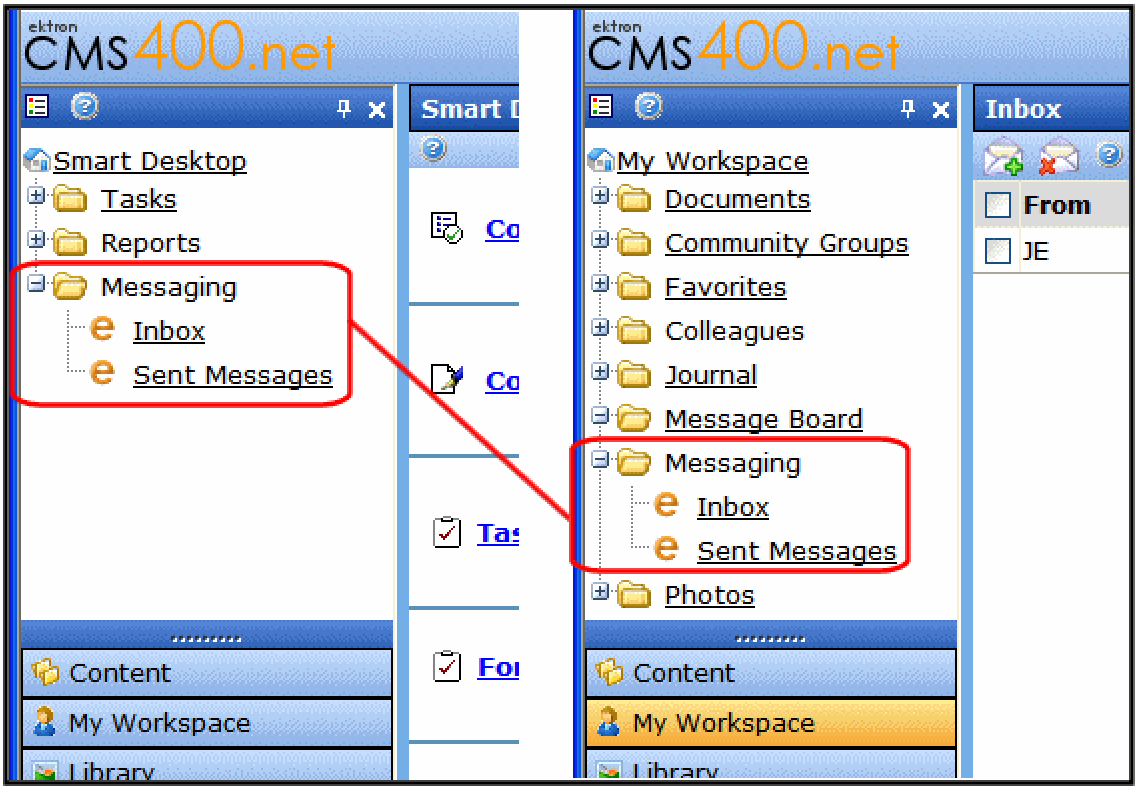


In the Workarea, Messages links are located in two places. The first, a link in the left side panel of the Smart Desktop. The second, a link under the My Workspace folder button. Messages are stored in two areas, the Inbox and Sent Messages.

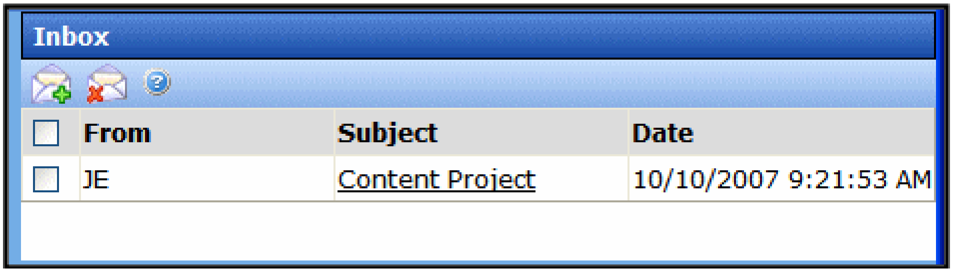


See Also:

- "Messaging Inbox" on page 392
- "Messaging Sent Messages Box" on page 393

Messaging Inbox

In the Inbox, you see a list of messages that have been sent to you. You can see who the message is from, the subject, and the date the message was sent.



From the Inbox, you can:

- view a message's details. See "Viewing a Message" on page 393.
- compose a new message. See "Compose a New Message in the Workarea" on page 394.
- delete a message. See "Delete a Message" on page 396.

Messaging Sent Messages Box

Sent Messages provides a list messages you've sent. You can see to whom the message was sent, the subject and date it was sent.

From the Sent Messages list, you can:

- view a message's details. See "Viewing a Message" on page 393
- delete a sent message. See "Delete a Message" on page 396

Viewing a Message

To view a message's details, click the message's subject link. The details of a message include who the message is from, to whom it was sent, the subject, date sent, and body of the message.

Actions you can take from the message details screen include:

- compose a new message. See "Compose a New Message in the Workarea" on page 394

- reply to a message. See ”Reply to a Message” on page 394.
- forward a message. See ”Forward a Message” on page 395.
- Moving to the Next or Previous message. See ”Moving to the Next or Previous Message” on page 395
- print a message. See ”Print a Message in the Workarea” on page 396.
- delete the message. See ”Delete a Message” on page 396.

Compose a New Message in the Workarea

Clicking the Compose a Message launches the Send a Message screen. To compose a message, follow these steps:

1. In the Workarea, click **My Workspace** or expand the **Messaging** folder on the Smart Desktop.
2. Select either **Inbox** or **Sent Items**.
3. Click the Compose a Message button ().
4. The Send a Message screen appears.
5. Click the **Browse Users** link.
6. Select the people to which you want to send the message.
7. Add a subject to the Subject field.
8. Add text to the body of the message in the editor.
9. Click the Send button ().

Reply to a Message

When replying to a message, you reply only to the person who sent you the original message. A reply contains the details of the original message. The details of the original message can be edited or removed from the new message.

To reply to a message, follow these steps:

1. In the Workarea, click **My Workspace** > **Messaging** or expand the **Messaging** folder on the Smart Desktop.
2. Select either **Inbox** or **Sent Items**.
3. Find the message to which you want to reply and click the subject.

4. Click the Reply button ( ).
5. The message editor screen appears with the original message’s details in the body of the message.
6. Add your reply.
7. Click the Send button ( ).
8. The message is sent.

Forward a Message

When forwarding a message, you can select to whom the message is sent. A forwarded message contains the details of the original message. The details of the original message can be edited or removed from the new message.

To forward a message, follow these steps:

1. In the Workarea, click **My Workspace** or expand the **Messaging** folder on the Smart Desktop.
2. Select either **Inbox** or **Sent Items**.
3. Find the message you want to forward and click the subject.
4. Click the Forward button ( ).
5. The message editor screen appears with the original message’s details in the body of the message.
6. Add any additional information to the message.
7. Click the Send button ( ).
8. The message is sent.

Moving to the Next or Previous Message

Users in the Workarea can navigate through their messages by clicking the Next or Previous button ( ) located in the header of a message. Clicking the Next button ( ) opens the next newest message in the list. Clicking the Previous link ( ) opens the next oldest message in the list. Once you have reached the end of the list, that option’s link is unavailable. For example, when a user reaches the newest message in the list, the Next link is greyed out () and cannot be clicked.

Print a Message in the Workarea

To print a message, follow these steps:

1. In the Workarea, click **My Workspace** or expand the **Messaging** folder on the Smart Desktop.
2. Select either **Inbox** or **Sent Items**.
3. Find the message you want to print and click the subject.
4. Click the Print button ().
5. The Print dialog box appears.
6. Select a printer.
7. Click the **Print** button.

Delete a Message

Deleting a message permanently deletes it from **Ektron CMS400.NET**.

To delete a message, follow these steps:

1. In the Workarea, click **My Workspace** or expand the **Messaging** folder on the Smart Desktop.
2. Select either **Inbox** or **Sent Items**.
3. Find the message you want to delete and click the subject.

   or

   Find the message you want to delete and fill in the check box.
4. Click the Delete button ().
5. The message is deleted and you are returned to the Inbox or Sent Messages.

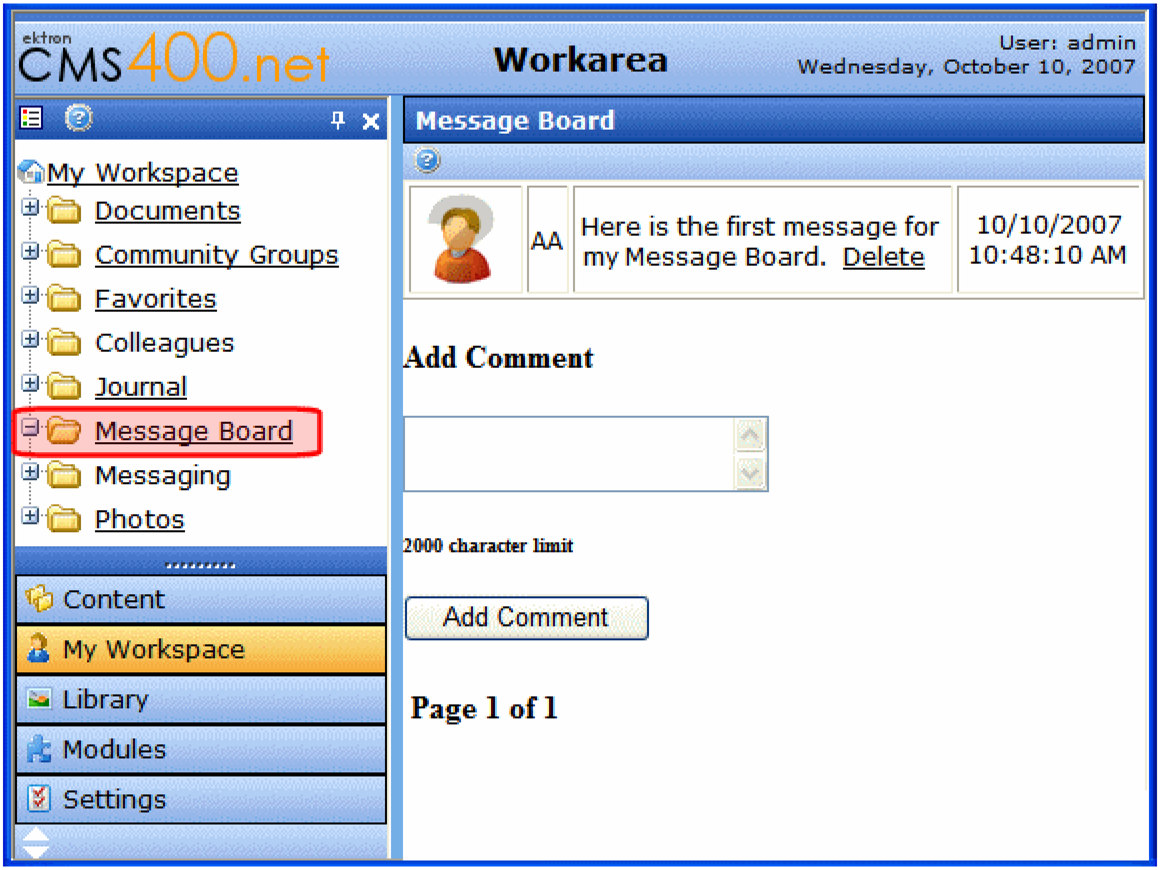
Message Board

The Message Board allows site visitors to leave a short message or comment on the site.

Message Board in My Workspace

The Message Board located in My Workspace allows a user to manage the comments on their board. From this area, a user can

- view comments - see "Viewing Your Message Board Comments" on page 398- See "Viewing Your Message Board Comments" on page 398
- add comments - see "Add a Comment to Your Message Board in the Workarea" on page 399- See "Add a Comment to Your Message Board in the Workarea" on page 399
- delete comments - see "Delete Comments on Your Message Board in the Workarea" on page 399- "Delete Comments on Your Message Board in the Workarea" on page 399



Viewing Your Message Board Comments

To view comments for a Message Board in the Workarea, click the My Workspace folder button. Then, click the Message Board link. A list of comments and a dialog that allows you to add a comment appear.

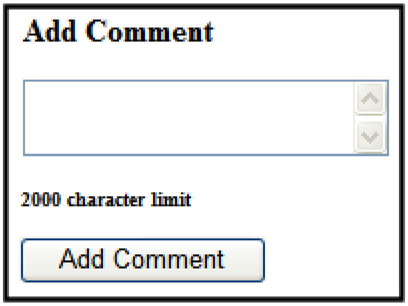
Each comment contains the following information:

- **Comment Text** - the message text that's been posted to the Message Board.
- **Delete Link** - click this link to delete the comment from the Message Board.

- **Avatar** - an image representing the user who made the comment.
- **Display Name** - the display name of the user who made the comment.
- **Date/Time** - The post date and time of the comment.

Add a Comment to Your Message Board in the Workarea

To add a comment to your Message Board in the Workarea, follow these steps.

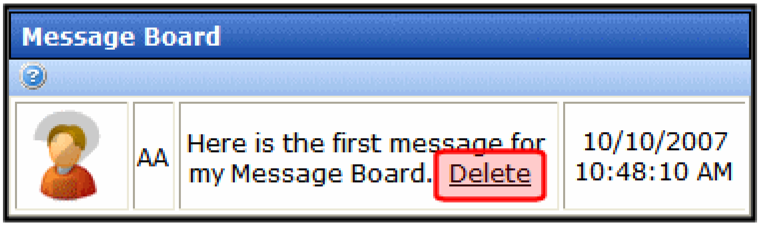


1. In the Workarea, click **My Workspace** > **Message Board**.
2. In the text box, enter a comment.
3. Click the **Add Comment** button.
4. The comment appears in the list of comments.

Delete Comments on Your Message Board in the Workarea

To delete a comment on your Message Board in the Workarea, follow these steps:

1. Click **My Workspace** > **Message Board**.
2. Click the **Delete** link next to comment you want to remove.



3. A dialog box asks if you are sure you want to delete the comment.
4. Click **OK**.
5. The comment is removed from the list.

Colleagues

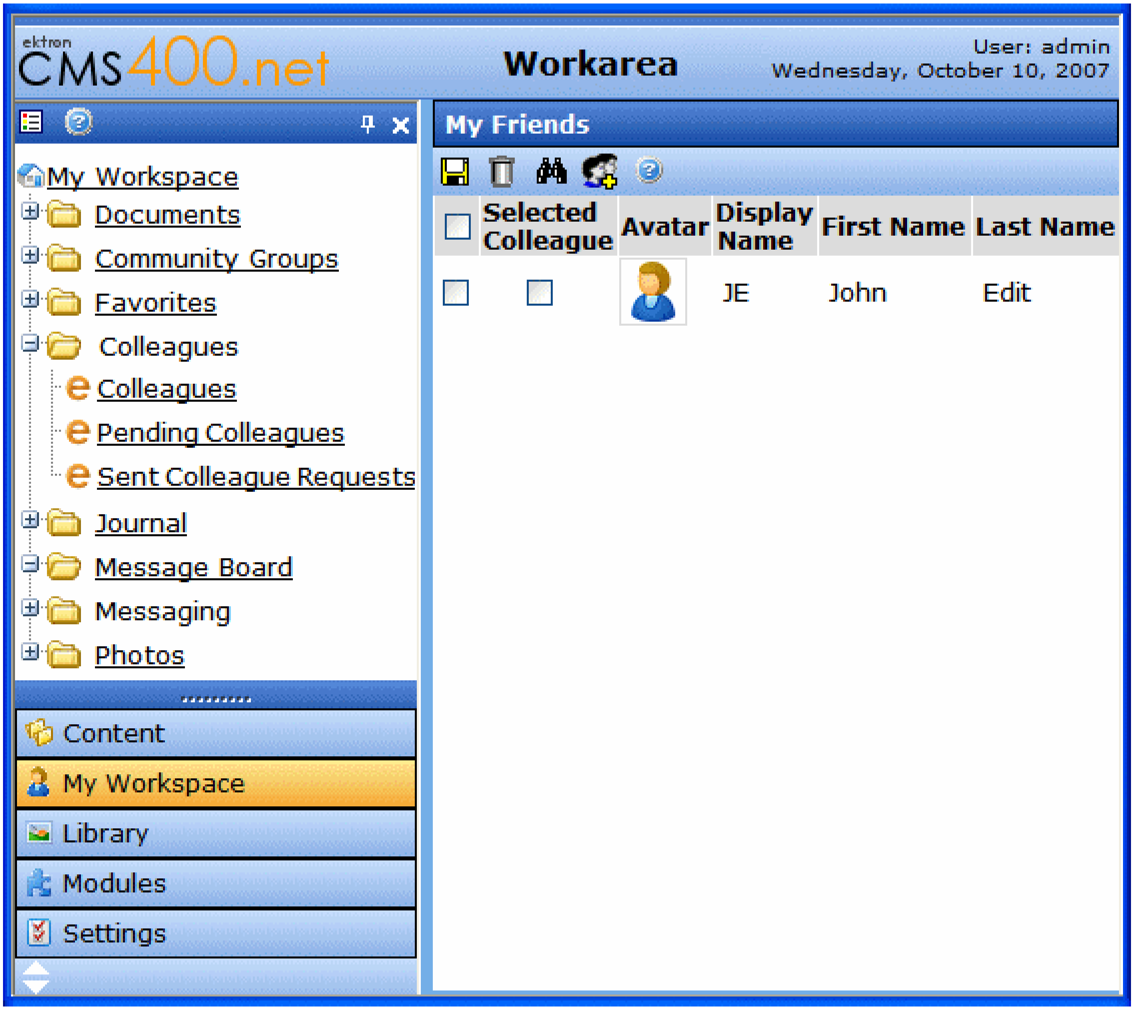
You can associate yourself with other people in the community by adding them as colleagues. This allows you to create a network of colleagues and share information with them. Once a colleague is added, you can visit their profile page and see all their details including their colleagues. You can then search through their colleagues list to find people you know and add them to your own colleagues list. Thus, growing your social network and facilitating additional information sharing.

- **Ektron CMS400.NET** users can manage colleagues from the Workarea or the Web site. Membership users can only manage colleagues through the Web site.”Managing Existing Colleagues” on page 401
- ”View Pending Colleagues” on page 410
- ”Viewing Sent Colleague Requests in the Workarea” on page 411

Colleagues in the Workarea

You can manage your colleagues in the Workarea by clicking the **My Workspace** folder button and expanding the **Colleagues** items. From this area you can work with:

- **Colleagues** - your colleagues. *See Also:* ”Managing Existing Colleagues” on page 401
- **Pending Colleagues** - users who have sent you a colleague request. *See Also:* ”View Pending Colleagues” on page 410
- **Sent Colleagues Requests** - colleagues’ requests you’ve sent that have not been accepted. *See Also:* ”Viewing Sent Colleague Requests in the Workarea” on page 411



Managing Existing Colleagues

To manage existing colleagues in the Workarea, click **My Workspace** > **Colleagues** > **Colleagues**.

From the Colleagues link, users can:

- view a list of colleagues - see "Viewing the Existing Colleagues List" on page 402

- invite non-site user to join to the site and become a colleague - see ”Inviting Non-Site Users to Become Colleagues and Join the Site” on page 402
- search for users - see ”Searching for Ektron CMS400.NET Users and Members” on page 403
- send a colleague request - see ”Send a Colleague Request” on page 408
- remove colleagues - see ”Removing Colleagues” on page 409
- choose whether a colleague is a Selected Colleague. see - ”Selected Colleagues” on page 410

Viewing the Existing Colleagues List

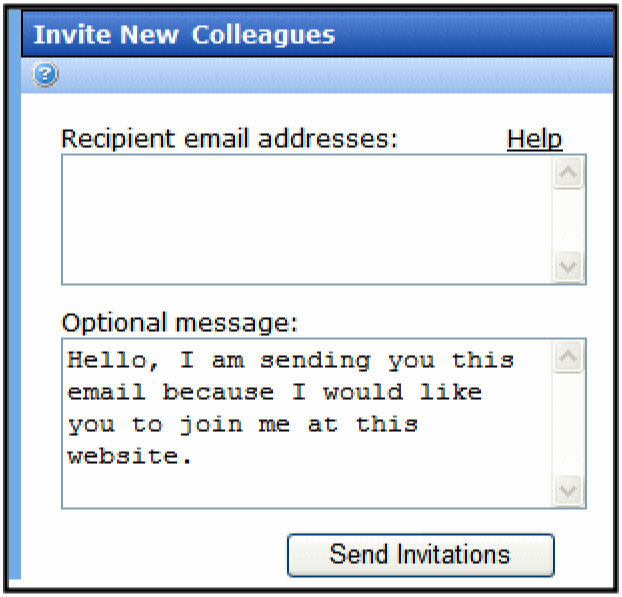
The Colleagues list provides a quick and easy way to view your colleagues in the Workarea. This list contains the following information.

Field	Description
Avatar	An image representing the user.
Display Name	The user’s display name as it appears in blogs, forums posts and message board comments.
First Name	The user’s first name.
Last Name	The user’s last name.

Inviting Non-Site Users to Become Colleagues and Join the Site

IMPORTANT! The default *From* email address used to send all invitations is invitation@example.com. Ektron, Inc. strongly recommends that your site administrator change this address for use with your site. *See Also:* The Setup Manual section “Managing the web.config File” > “Settings in the web.config File” > “ek_InvitationFromEmail”

You can invite people who are not part of CMS400 community to become your colleagues and members of the site.



To invite a non-site user to become your colleague, follow these steps.

1. In the Workarea, navigate to **My Workspace** > **Colleagues**.
2. Click on the **Colleagues** link.
3. Click the Invite button ( ).
4. The **Invite New Colleagues** screen appears.
5. In the **Recipient email addresses** box, enter emails for the people you wish to invite. Separate addresses using either commas, spaces, semicolons or new lines.
6. Enter a message to include with the invite in the **Optional message** box.
7. Click the **Send Invitations** button.

A confirmation appears stating that the invitation was sent. The person is added to your Sent Colleagues Request. *See Also:* "Viewing Sent Colleague Requests in the Workarea" on page 411.

Searching for Ektron CMS400.NET Users and Members

This Search lets you find users or community groups registered on the Web site. After seeing the search results, you can add a colleague or join a community group.

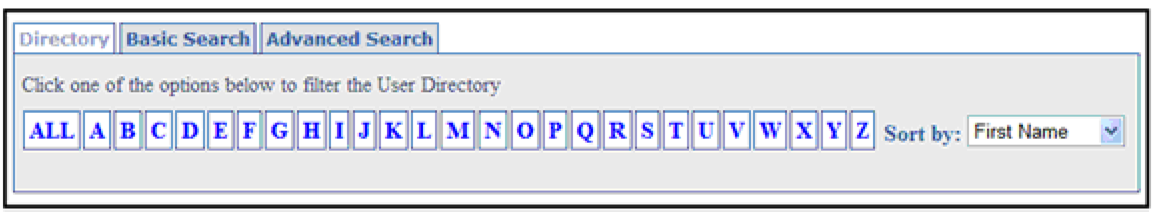
When you hover over a user or community group name link, profile information appears. How much information appears depends on your status and the profile settings of the user or group returned in the results. For an explanation of when additional information appears, see the Developer Manual section > “Community Platform server controls” > “CommunitySearch server control” > “Using Community Search Results” > “When is a User’s Profile Accessible in Search Results”

The Community Search provides two types of searches:

- **Directory -** filter users by a letter in the alphabet. A user can select whether to sort by first or last name. See
- **Basic Search** - Searches for users and groups on the site. See ”Performing a Basic User Search” on page 405
- **Advanced Search** - Searches based on individual or multiple criteria, such as Tags, Display Name or Email. See ”Advanced User Searching” on page 406

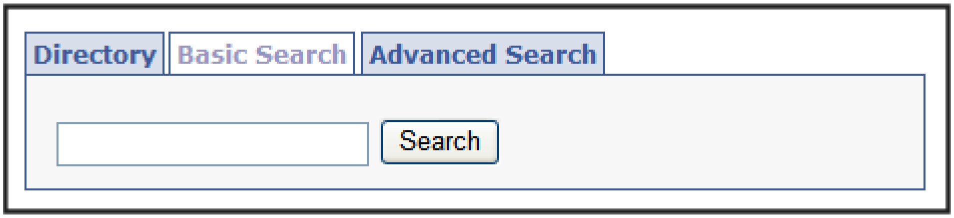
Performing a Directory Search

The Directory tab in a Community Search allows a user to filter the list of users based on the selection of a letter in the alphabet. For example, John wants to find all users whose first name begin with the letter S. John navigates to the CommunitySearch control on his site, clicks the Directory tab and selects First Name from the Sort By list. Then, he selects the letter S from list of letters. Next, the control displays a list of users who name begins with the letter S.



Performing a Basic User Search

A Basic search is the easiest to perform and returns the widest array of results.



A Basic search is based on the following criteria:

- **Email**
- **Display Name**
- **First Name**
- **Last Name**
- **Custom User Properties** - these properties define information about a user beyond the standard Ektron CMS400.NET user properties. *See Also:* The Administrator Manual section > "Custom User Properties"
- **Personal Tags** - tags are keywords that are associated with a user or community group in CMS400. *See Also:* The Administrator Manual section > "Community Management" > "Tags"
- **Group Name**
- **Group Description**
- **Group Tags** - tags are keywords that are associated with a user or community group in CMS400. *See Also:* The Developer Manual section > "Community Management" > "Tags"

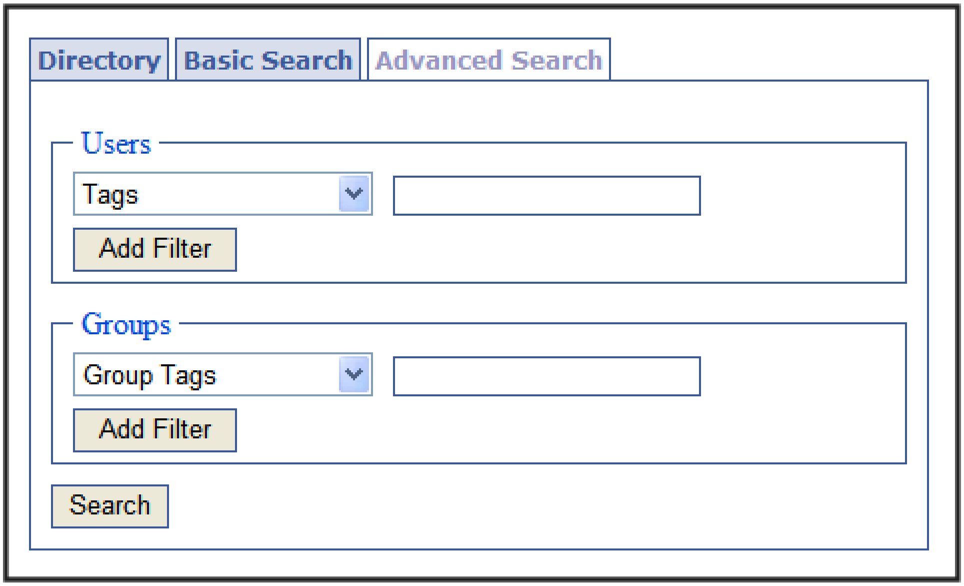
To use the basic search, enter a name, email, group name or tag into the text box. Then, click the **Search** button. Any matches appear in the results. *See Also:* "Using Community Search Results" on page 408

You can also perform wildcard searches, but the wildcard must appear after the first letter in the search. For example, you can search for **J***, but not ***J**. **J*** returns all users and community groups that start with the letter J, or have a word that starts with the letter J in their email, tags or description.

Advanced User Searching

The Advanced tab lets you filter search results for users and community groups based on selected criteria. The filters to select from are the same criteria as a basic search. But with advanced searching, you select which filters you apply to the search results. For example, you can select the Tag filter and the Display Name filter and you will only see results that have Tag and Display Name information that match the given criteria.

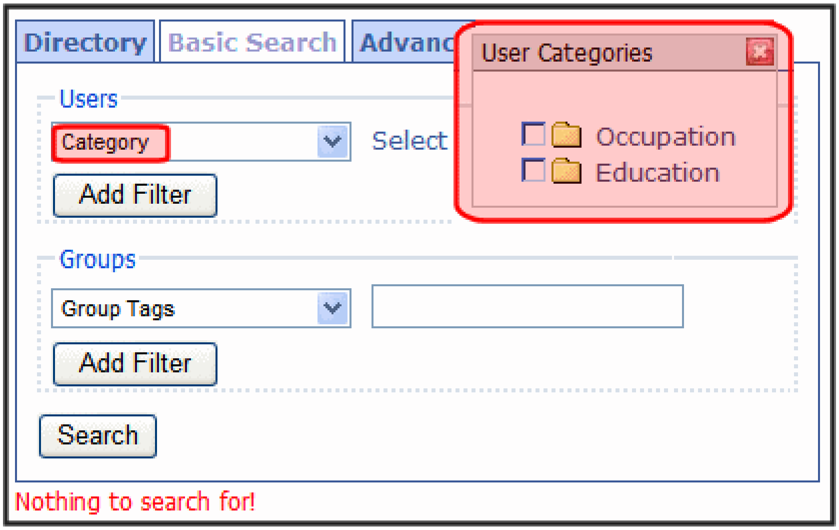
See Also: "Performing a Basic User Search" on page 405



If you apply several filters, they work in an "and" fashion, where results must match each filter. For example, if you select the Tags filter and the Display Name filter, results must match the criteria in both to appear in the results box. If a user or community group matches only one filter, it does not appear in the results. Here is a detailed example:

John is searching for another member named Jane who has tagged herself as a writer. John decides to add Jane as colleague and searches for her by selecting the Tags filter and First Name filter. In the tags filter, John enters "Writer." In the First Name filter, John enters "Jane." When the search is complete, Jane appears in the search results. If Jane did not match the criteria in both filters, she would not show up in the search results.

In addition to the criteria listed in a Basic Search, you can perform an advanced search based on a taxonomy category. If you do not see the Category filter in the drop down list, ask your administrator if your site has a taxonomy for its users. To use categories to find a user, select Category from the Users filter and place a check mark in the appropriate User Categories check boxes. Next, click the search button. Any users assigned to the categories appear.

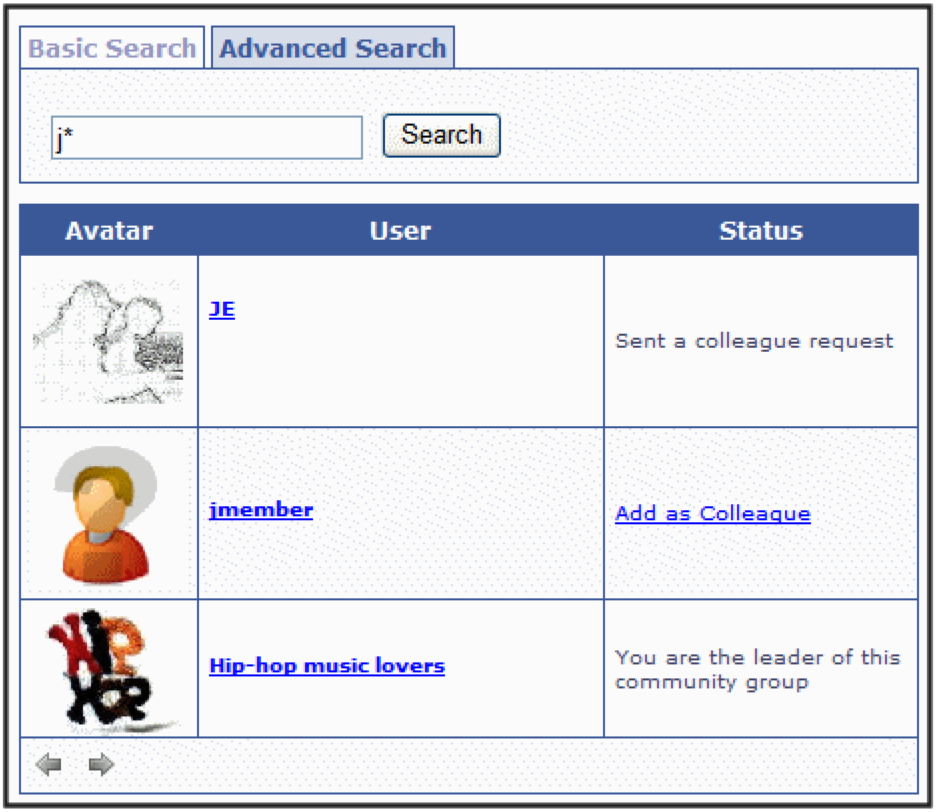


To search using the Advanced tab, follow these steps.

1. In the Workarea, navigate to **My Workspace** > **Colleagues** > **Colleagues**.
2. Click the Search button ().
3. Click the **Advanced Search** tab.
4. Select the criteria by which to filter the search results.
5. Click **Add Filter** to add additional filters.
6. Enter text in one of the text boxes.
7. Click the **Search** button.

Using Community Search Results

After you click the **Search** button, all users and groups who match the search term appear. This list shows an avatar, display name, and status for each user or group.



The **Status** column indicates whether the user is already a colleague or if you can add them as a colleague. It also lets you join a Community Group if you are not already a member.

Click the **Add as Colleague** link to send the colleague request, or the **Join this Group** link to join the community group.

Send a Colleague Request

To send a colleague request to another user in the Workarea, follow these steps.

1. Search for a user as described in "Searching for Ektron CMS400.NET Users and Members" on page 403.
2. Click the **Add as Colleagues** link.
3. A colleague request is sent to the user.
4. You are added to Pending Colleagues list of the user to whom the request was sent. *See Also:* "View Pending Colleagues" on page 410.

   Until the user accepts the colleague request, he appears on your Sent Colleagues Request List. *See Also:* "Viewing Sent Colleague Requests in the Workarea" on page 411.
5. Once a user accepts the colleague request, he is added to your colleagues list, and you are added to his Colleagues list.

Removing Colleagues

If you would like to end your association with another user, you can remove the colleague. To do that in the Workarea, follow these steps.

1. Navigate to **My Workspace** > **Colleagues** > **Colleagues**.
2. Click in the check box to the far left of each colleague you want to remove. Selecting the check box in the title row selects all colleagues.

3. Click the Remove button ( ).
4. A dialog box asks you to confirm that the colleague is to be removed.
5. Click **OK**.

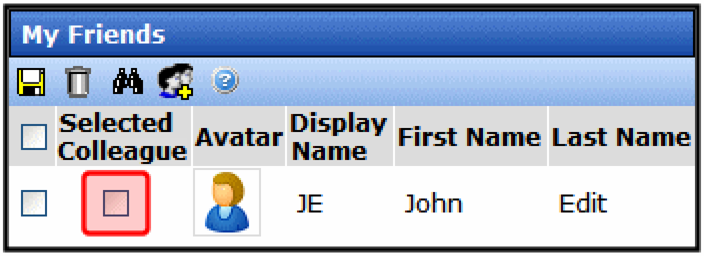
The page refreshes, and the user is removed from your colleagues list.

Selected Colleagues

You can designate any user as a Selected Colleague. This means he can view documents in your favorites that regular colleagues cannot view.

To make someone a Selected Colleague, follow these steps.

1. Navigate to **My Workspace** > **Colleagues** > **Colleagues**.
2. Place a check mark next to any user you want to make Selected.



3. Click the Update Selected Colleagues button ().

View Pending Colleagues

Pending Colleagues are users that have sent you a colleague request which you haven't accepted yet. To view pending colleagues in the Workarea, navigate to **My Workspace** > **Colleagues** > **Pending Colleagues**. From this area, you can accept and decline colleague requests. See "Accepting a Pending Colleague Request" on page 410 and "Declining a Pending Colleagues Request" on page 411

Accepting a Pending Colleague Request

Accepting a colleagues request adds the user to your colleagues list. This allows you to access additional information on their profile page. To accept a pending colleague request, follow these steps.

1. Navigate to **My Workspace** > **Colleagues** > **Pending Colleagues**.

2. Place a check mark in the check box next to each colleague whose request you want to accept.

3. Click the Approve New Colleague button ( ).

The page refreshes and the users are removed from the Pending Colleagues list and added to the Colleagues list. *See Also:* "Viewing the Existing Colleagues List" on page 402

Declining a Pending Colleagues Request

Declining a colleague request allows you cancel another users colleague request. Once you decline the request, it is removed from your Pending Colleagues list and the requester's Sent Colleagues Request list. *See Also:* "View Pending Colleagues" on page 410 and "Viewing Sent Colleague Requests in the Workarea" on page 411. To decline a colleague request, follow these steps.

1. Navigate to **My Workspace** > **Colleagues** > **Pending Colleagues**.
2. Place a check mark in the check box next to each colleague whose request you want to decline.
3. Click the Decline New Colleagues button ( ).
4. A dialog box appears asking you to confirm that you are declining the colleague.
5. Click **OK**.

The page refreshes and the users are removed from the Pending Colleagues list and requester's Sent Colleagues Request list.

Viewing Sent Colleague Requests in the Workarea

The Sent Colleague Requests list allows you to view a list of users to whom you've sent colleague requests. From this screen, you can also delete requests that have yet to be accepted. *See Also:* "Canceling a Colleague Request" on page 412

If a request goes stale and has not been acted upon the by the recipient, you can resend the invite and add another optional message. See "Resending an Invitation" on page 412

To view sent colleague requests, navigate to **My Workspace** > **Colleagues** > **Sent Colleague Requests**.

Canceling a Colleague Request

If you want to cancel a colleague request, follow these steps.

1. Navigate to **My Workspace** > **Colleagues** > **Sent Colleague Requests**.
2. Place a check mark in the checkbox next to each colleague whose request you want to cancel.
3. Click the Cancel Colleague Requests button ( ).
4. A dialog box appears asking you to confirm that you are canceling the colleague requests.
5. Click **OK**.

Resending an Invitation

To resend an invitation, follow these steps.

1. Navigate to **My Workspace** > **Colleagues** > **Sent Colleague Requests**.
2. If necessary, add a message to the **Optional Message** box.
3. Place a check mark in the boxes next to the users that you want to re-send an invitation.
4. Click the **Resend Invitation** button.

The pages refreshes and returns to the My Sent Invites screen.

Community Groups

Another aspect of a community site is the concept of Community Groups. Being a part of a group allows you meet people with a similar interest, for example, car racing.

You can access your community group information in **My Workspace > Community Groups**. This area allows you to:

- view community groups to which you belong - see "Viewing Your Community Groups" on page 413.
- remove yourself from a community group - see "Remove Yourself from a Community Group" on page 413.
- view the different community groups to which you have asked to join, but have yet to be accepted - see "Working with Pending Community Groups" on page 414.
- view and accept invitations for any groups you have been invited to join - see "Working with Community Group Invites" on page 414

Viewing Your Community Groups

You can see a list of community groups you belong to by navigating to **My Workspace** > **Community Groups** > **My Groups** in the **Workarea**. From this area, you can remove yourself from a community group.

Remove Yourself from a Community Group

To remove yourself from a community group in the Workarea, follow these steps:

1. In the Workarea, navigate to **My Workspace** > **Community Groups > My Groups**.
2. Place a check in the box next to the group from which you want to be removed. To remove yourself from all groups, place a check in the box next to the **Select All** box.

IMPORTANT! If you are the leader of a community group, a check box does not appear next the title of the group. You cannot remove yourself from community groups which you lead. You must either select a new leader for the community group and then remove yourself or remove the community group from the system. For the steps to select a new leader, see the Administrator Manual section "Community Groups" > "Community Groups in the Workarea" > "Managing Community Groups" > "Edit a Community Group's Information"

3. Click the Leave Group button ( ).

The screen refreshes and the group is removed.

Working with Pending Community Groups

Pending Groups show a list of groups which you have asked to join, but have yet to be accepted. To view this list, navigate to the **Workarea** > **My Workspace** > **Community Groups** > **Pending Groups**.

Deleting a Pending Community Group

If a community group has not accepted your request to join, you might want to delete the request. Follow these steps to delete a pending community group request.

1. In the Workarea, navigate to **My Workspace** > **Community Groups** > **Pending Groups.**
2. Place a check mark in the check box next to a community group.
3. Click the Cancel Request button ( ).
4. A dialog box appears asking you to confirm the cancellation of the pending request.
5. Click **OK.**

The page refreshes and the pending community group is removed from the list.

Working with Community Group Invites

Members of a community group can invite people to join the group. The Workarea allows you to view, accept and decline pending group invites. To view pending community group invites, navigate to the **Workarea** > **My Workspace** > **Community Groups** > **Group Invites**.

Accepting a Community Group Invite

To accept an invitation to a community group, follow these steps.

1. In the Workarea, navigate to **My Workspace** > **Community Groups** > **Group Invites**.
2. Place a check mark in the check box next to a community group.

3. Click the Accept Community Group Invite button ( ).
4. A dialog box appears asking you to confirm that you are accepting the invitation.
5. Click **OK**.

The page refreshes and community group is removed from the Group Invites page and now appears in **My Groups**. *See Also:* ”Viewing Your Community Groups” on page 413.

Declining a Community Group Invite

To decline an invitation to a community group, follow these steps.

1. In the Workarea, navigate to **My Workspace** > **Community Groups** > **Group Invites**.
2. Place a check mark in the check box next to a community group.
3. Click the Decline Invitation button ( ).
4. A dialog box appears asking you to confirm that you are declining the invitation.
5. Click **OK**.

The page refreshes and community group is removed from the Group Invites page.

Favorites

The Favorites area in My Workspace allows you to manage content you have designated as your favorite content. From this area you can:

- Add a Folder - see ”Adding a Favorites Folder” on page 416.
- Remove Favorites - see ”Remove Favorites” on page 416.
- Move a favorite from one folder to another. ”Moving Favorites to a Folder” on page 416

Adding a Favorites Folder

To add a favorites folder, follow these steps.

1. In the Workarea, navigate to **My Workspace** > **Favorites**.
2. Click the Add Folder button ().
3. Enter a Name and Description for the folder in the provided text boxes.
4. Click the **Add** link to add the folder.

The folder appears in the list of Favorites.

Remove Favorites

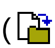
To remove a favorite, follow these steps.

1. In the Workarea, navigate to **My Workspace** > **Favorites**.
2. Place a check in the box next to the content you wish to remove.
3. Click the Remove button ().

Moving Favorites to a Folder

Moving favorite content to a folder allows you to group you favorites by a common theme. For example, you might group all content created by a certain author under a folder with that author’s name.

To move a Favorite to a folder, follow these steps.

1. In the Workarea, navigate to **My Workspace** > **Favorites**.
2. Mark a favorite item(s) to be moved.
3. Click the Move button ().
4. Select the folder where the content will be moved.

5. Click **OK** to move the favorites to the new folder.
6. The page refreshes and the content can now be found in the new folder.

Photos

The Photos area of My Workspace allows you to add images to CMS400 and associate them with your profile. You can create subfolders to separate images by category.

Images in the Photos area are separate from the Content folder structure and its files. Images in this list have the same properties and actions available to those found in the Content folder structure. For example, you view, edit, delete and copy Photos.

From the Photos area, you can:

- add a folder - see "Adding Folders to My Workspace >> Photos" on page 418
- edit a folder's name - see "Edit a Folder Name in My Workspace >> Photos" on page 418
- delete a folder - see "Deleting a Folder in My Workspace >> Photos" on page 419
- drag and drop an asset - see "Adding Assets to My Workspace >> Photos" on page 420
- move a content item to another folder - see "Moving and Copying Content in My Workspace >> Photos" on page 422

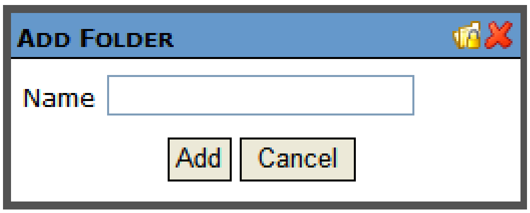
- select whether to share the folder with the Public, Colleagues, Selected Colleagues or keep the folder private. - see "Sharing Content in My Workspace >> Photos" on page 422

Photos can be displayed on the site when a developer adds the PhotoGallery server control to a Community Web site. For additional information on the PhotoGallery server control, see the Developer Manual section "Introduction to Ektron CMS400.NET Server Controls" > "Community Platform Server Controls" > "PhotoGallery Server Control."

Adding Folders to My Workspace >> Photos

You can add subfolders in the Photos area to help you sort images into categories. The subfolders represent a taxonomy of the items contained in the Photos area. To add subfolders, follow these steps.

1. In the Workarea, navigate to **My Workspace** > **Photos**.
2. Click the Manage Folder Button ( ).
3. The Add Folder box appears.



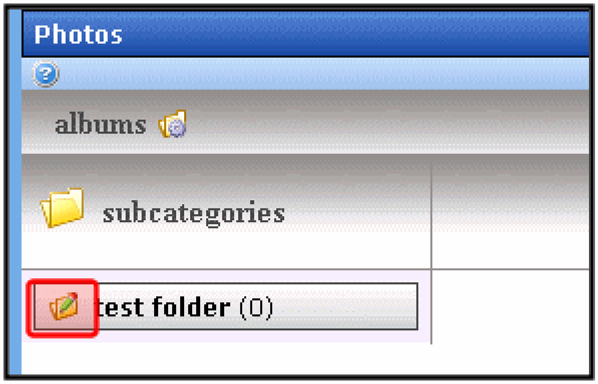
4. Enter a Name for the folder.
5. Click the Add button (Add).
6. When the page refreshes, it opens to the newly added folder.

Edit a Folder Name in My Workspace >> Photos

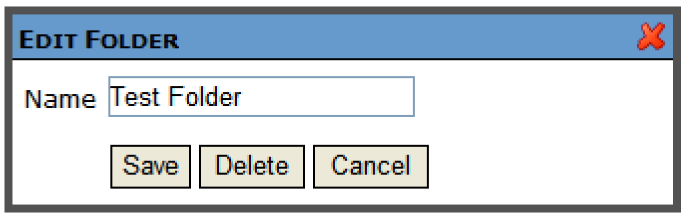
Sometimes it becomes necessary to change the name of folder in the My Workspace >> Photos area. To accomplish this, follow these steps.

1. In the Workarea, navigate to **My Workspace** >> **Photos**.

2. Click the folder's Edit button ( ). This button is located to the left of the folder's title.



3. The Edit Folder box appears.



4. Change the name of the folder.
5. Click the Save button (Save).
6. When the page refreshes, it opens to the folder with changed name.

Deleting a Folder in My Workspace >> Photos

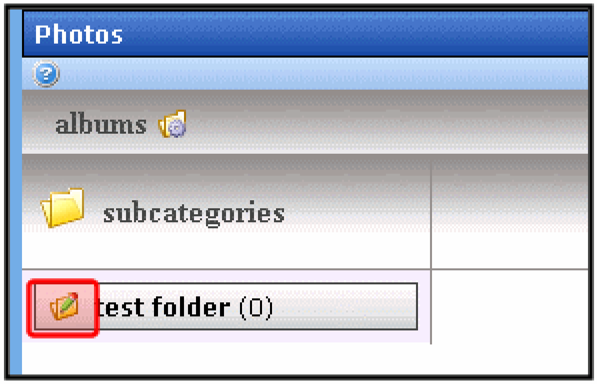
You can delete obsolete folders from My Workspace >> Photos. To delete a folder, follow these steps.

NOTE You can not delete the top-level folder, albums.

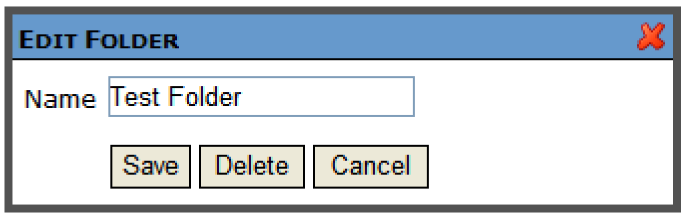
CAUTION! Deleting a folder permanently deletes all images, as well as its subfolders.

1. In the Workarea, navigate to **My Workspace** >> **Photos**.

2. Click the folder's Edit button ( ). This button is located to the left of the folder's title.



3. The Edit Folder box appears.



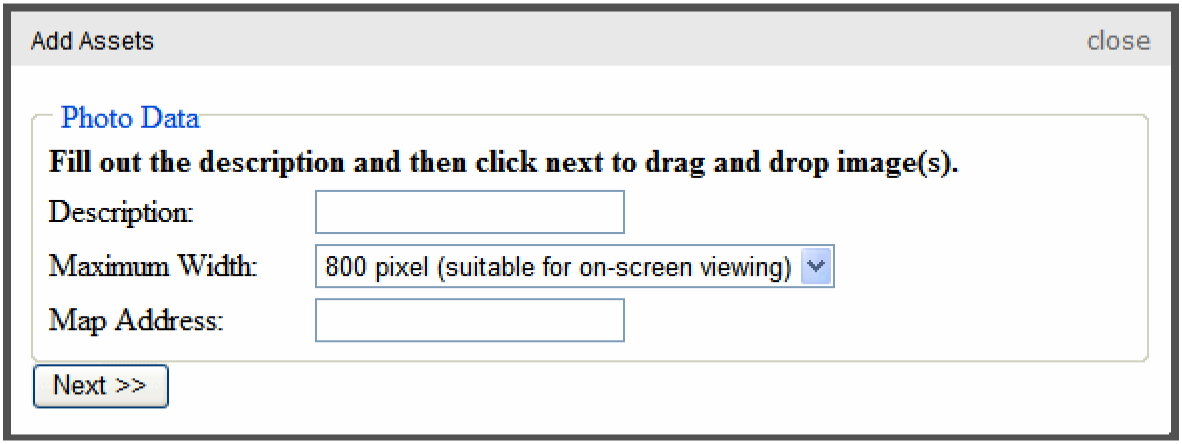
4. Click the Delete button (Delete).
5. A dialog box appears asking you to confirm deleting the folder.
6. Click **OK**.
7. The page refreshes and the folder is removed.

Adding Assets to My Workspace >> Photos

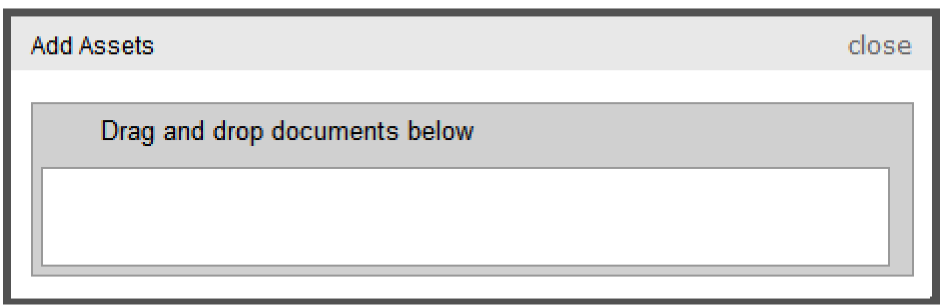
To add an image to My Workspace >> Photos, follow these steps.

1. In the Workarea, navigate to **My Workspace** >> **Photos**.
2. Select a folder where the image will be added. If you want to create a new folder, see "Adding Folders to My Workspace >> Photos" on page 418

3. Click the Add Image button ( ).
4. The Add Asset Photo Data box appears.



5. Fill in the description of the image (optional).
6. Select a Maximum Width. Choices are: 250, 800, 1000, 1400 or 1600 pixels.
7. Enter a map address associated with image. For example, 542 Amherst Street, Nashua, NH 03036.
8. Click **Next**.
9. The Drag and drop upload box appears.



10. Drag and drop an image in the box.
11. A status box appears and shows the file being uploaded.

12. Once the upload is complete, the page refreshes and the asset appears in the file list.

Moving and Copying Content in My Workspace >> Photos

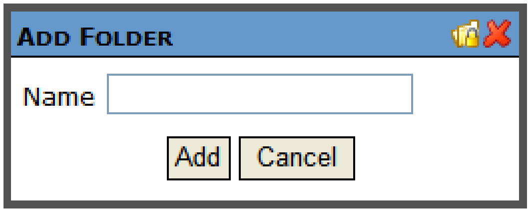
You can change the folder where images are stored in My Workspace >> Photos by moving the content from one folder to another. In addition to moving images, you can copy them to another folder. To accomplish either of these actions, follow these steps.

1. In the Workarea, navigate to **My Workspace** >> **Photos**.
2. Select the folder from which to move or copy the images.
3. Click the drop down triangle to the right of the image title.
4. From the drop down list, select **Copy to Buffer**.
5. Select the folder to which the content will be moved.
6. Click the **Manage** link.
7. Click the Move Items ( ) or Copy button ( ).
8. A dialog box appears asking you to confirm the move or copy action.
9. Click **OK**.
10. The page refreshes and the moved or copied image appears in the new folder.

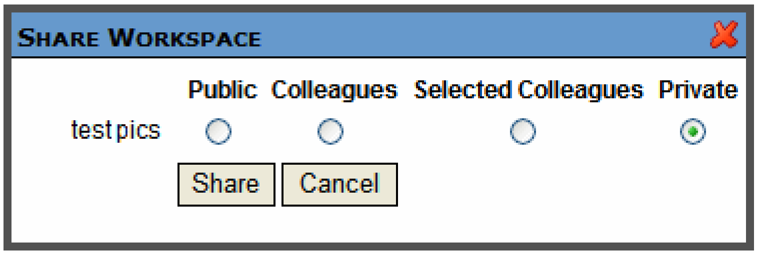
Sharing Content in My Workspace >> Photos

The Photos area of My Workspace allows you to add and remove images you want share with your colleagues. You can share content with the Public, Colleagues, Selected Colleagues or keep the content private. You apply sharing options to folders not to individual content. To share a folder, follow these steps.

1. In the Workarea, navigate to **My Workspace** >> **Photos**.
2. Click the Manage Folder Button ( ).
3. The Add Folder box appears.



4. Click the Share Folder button ( ).
5. The Share Workspace box appears.



6. Select with whom to share your folders. The table below describes each option.

Viewer Type	Description
Public	All people viewing your profile page can view your photos.
Colleagues	Only people who are your colleagues can view your photos. *See Also:* "Colleagues" on page 400.
Selected Colleagues	Only colleagues who are marked as selected colleagues can view your photos.
Private	You are the only one who can view your photos.

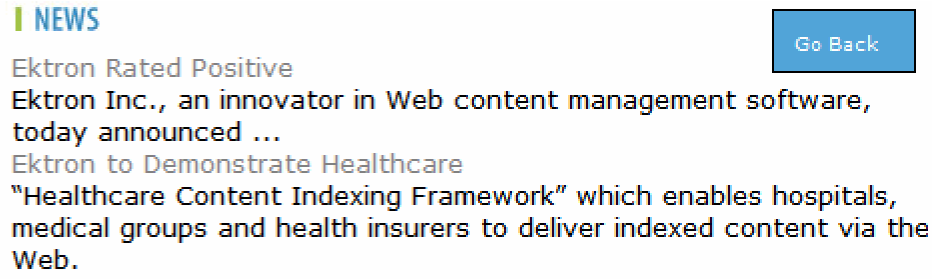
7. Click the Share button (Share).

Images in the folder are now available for viewing by the selected viewer type.

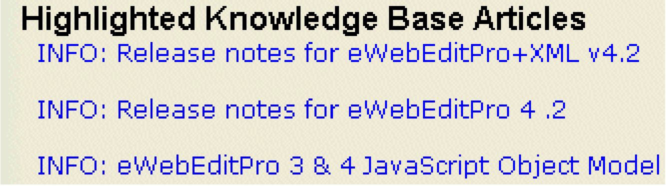
Web Site Navigation Aids

Working with Collections

A collection is a list of content links offered to the readers of a Web page. The following illustration shows a collection on a Web page.



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

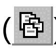


This section explains how to create collections. Your system administrator then creates or updates a Web page to display the collections using the Collection server control or ecmCollection function.

NOTE Your system administrator must assign to you permission to work with collections. For details, see the Collections chapter of the Ektron CMS400.NET Administrator Manual .

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

Finding Collections

Every collection is assigned to a folder. To find the collections assigned to any folder, navigate to it and click the Collection button (). For more information, see ”Finding a Collection by Navigating to its Content Folder” on page 425.

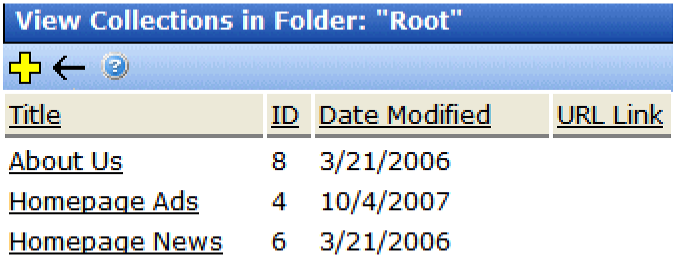
Since collections can be assigned to any content folder, the Modules folder provides a central Collections folder, which displays *all* collections, regardless of their content folder. For more information, see ”Finding a Collection Using the Collections Folder” on page 426.

Finding a Collection by Navigating to its Content Folder

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

1. Click the content folder that contains the collection.

2. If you are using **Ektron CMS400.NET**'s multi-language support features, select the language by clicking **View > Language**. *See Also:* "Working with Collections in a Multi-Language System" on page 440
3. Click **View > Collection**.
4. The View Collections screen appears.



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

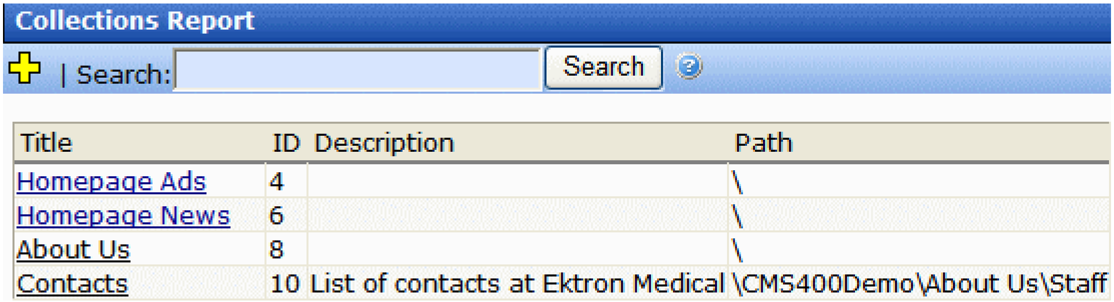
Column	Description
Title	The title assigned to the collection by the creator.
ID	The ID assigned to the collection by Ektron CMS400.NET. This number is used to store and retrieve the data to/from the database.
Date Modified	When the collection was last edited.
URL	The default template used to display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

To learn more about a collection and perform tasks on it, proceed to "Viewing a Collection" on page 428.

Finding a Collection Using the Collections Folder

To view *all* collections in *all* content folders, follow these steps.

1. From the Workarea, click **Modules** > **Collections**.
2. The Collections Report screen appears.



NOTE The `ek_PageSize` setting in the web.config file determines the maximum number of collections that appear on a page before it "breaks." When a page breaks, additional collections appear on another screen, and the following appears at the bottom of the list:
Page 1 of 2
[First Page] [Previous Page] [Next Page] [Last Page]

NOTE If you have a large number of collections, use the **Search** box to help find one.

3. The screen has four columns, described below.

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

You can click any collection to view information about it and perform tasks on it. See "Viewing a Collection" on page 428.

You can also add a new collection. See "Creating a Collection" on page 430.

And, if you have a large number of collections, you can use the **Search** box to help find collections of interest.

Viewing a Collection

To view a collection, follow these steps.

1. Select a collection using the procedure described in ”Finding a Collection by Navigating to its Content Folder” on page 425 or ”Finding a Collection Using the Collections Folder” on page 426.
2. The View Collection screen appears.

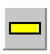
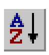
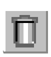
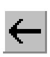
The screen displays each item in the collection. To learn more about a collection, click **More Info**. When you do, the lower section of the screen displays the following information about the collection.

- title
- description

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

Collections Toolbar

The following table describes the collection toolbar buttons.

Button	Name	Description	More Information
	Add	Add new collection or add items to a collection.	"Creating a Collection" on page 430
	Remove	Remove items from a collection.	"Removing Content from the Collection" on page 438
	Reorder	Reorder items in a collection.	"Reordering Collections List" on page 439
	Edit	Edit collection information.	"Editing Collection Information" on page 439
	Delete	Delete a collection.	"Deleting a Collection" on page 440
	Back	Return to previous screen.	

Creating a Collection

Creating a collection involves two steps:

- "Adding a Collection" on page 431
- "Assigning Content to the Collection" on page 434

The following sections explain each step.

Note: This section explains creating a collection in a site that does not support multiple languages. If you want to create collections in several languages, see "Working with Collections in a Multi-Language System" on page 440.

See Also: "Working with Collections" on page 424

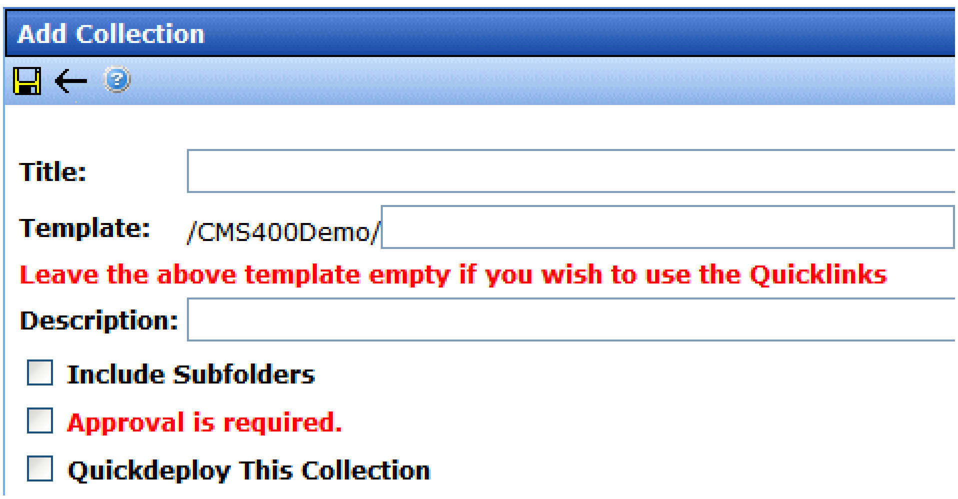
Adding a Collection

To add a new collection, follow these steps.

1. Navigate to the content folder in which you want to create the collection.
2. If you are using **Ektron CMS400.NET**'s multi-language support features, select the language. *See Also:* "Working with Collections in a Multi-Language System" on page 440
3. Click **New > Collection**.

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

4. The Add Collection screen appears.



5. Complete the screen using the following table.

Field	Description
Title	Assign a unique title to the collection.
Template	Enter the default template for the collection. This template is used to display the content of the links generated if no template is assigned in the custom function. If left blank, the links use their respective Quicklinks. *See Also:* "Default Template vs. Quicklinks" on page 432
Description	Add a more detailed description for the collection.
Include Subfolders	Check if you want to add to the collection content in subfolders of the content folder.
Approval is Required	See the **Ektron CMS400.NET** Administrator Manual section "Web Site Navigation Aids" > "Collections" > "Setting up Approval for Collections"

6. Click the Save button ().

You can now assign content to the collection. See "Assigning Content to the Collection" on page 434.

Default Template vs. Quicklinks

You can specify a template that determines the screen display for a collection when it is published on a Web page. (See your system administrator for information about **Ektron CMS400.NET** templates.) Or, you can disable the template and, instead, use Quicklinks to determine the page template. (*See Also:* "Quicklinks and Forms" on page 153)

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

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

Title	ID	URL Link
Home Page Content	1	/CMS400Demo/index.asp?id=1
Support Page	8	/CMS400Demo/index.asp?id=8
Plastic Molder #123	13	/CMS400Demo/hr.asp?id=13
RC Cheetah	5	/CMS400Demo/products.asp?id=5
RC Redstar	7	/CMS400Demo/products.asp?id=7
New Content Block	17	/CMS400Demo/index.asp?id=17
Contact Ektron	15	/CMS400Demo/index.asp?id=15

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

Title	ID	URL Link
Home Page Content	1	/CMS400Demo/index.asp?id=1
Support Page	8	/CMS400Demo/index.asp?id=8
Plastic Molder #123	13	/CMS400Demo/index.asp?id=13
RC Cheetah	5	/CMS400Demo/index.asp?id=5
RC Redstar	7	/CMS400Demo/index.asp?id=7
New Content Block	17	/CMS400Demo/index.asp?id=17
Contact Ektron	15	/CMS400Demo/index.asp?id=15

NOTE If a collection item is a form, **ekfrm** is used instead of **id** to denote form block .

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

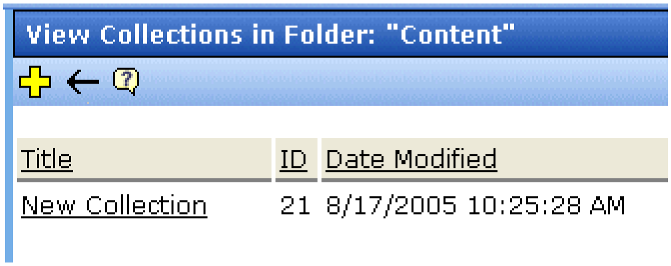
1. Access the Edit Collection screen for the collection you want to edit.
2. Modify the **Template** field.
3. Click the Save ( ) button.

Assigning Content to the Collection

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

NOTE When viewing a Collection on the Web site, the last published version of content appears. If the content has never been published, nothing appears.

1. Access the collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 425.
2. Access the View Collection Screen, as described in "Viewing a Collection" on page 428.
3. Click the collection to which you want to assign content.



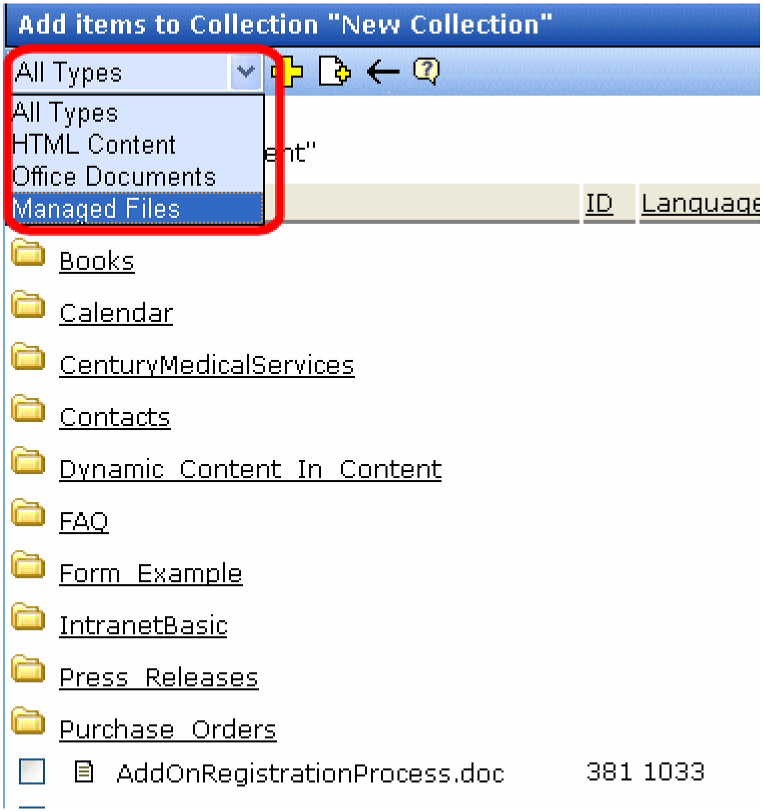
4. The View Collection screen appears.
5. Accept or change the language.

6. Click the Add button ( ).
7. The Add Items to Collection screen appears, displaying

- all subfolders within the selected folder (Subfolders are available if the **Include subfolders** checkbox was checked for the collection.)

- content in the selected folder that is not part of the collection.

  Note that the file types selection remembers your most recent choice and can filter which files appear. You can change the selection if desired.



8. Check boxes next to content to add to the collection. You can only add content from the selected folder or its subfolders.

   (Subfolders are available if the **Include subfolders** checkbox is checked for the collection.)

   Click a subfolder to view its content. To return to the parent folder, click the folder with the up arrow (..).

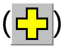
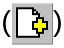
NOTE If you select content from a subfolder, click the Add button to add selected content to the collection. Navigating between subfolders deselects content.

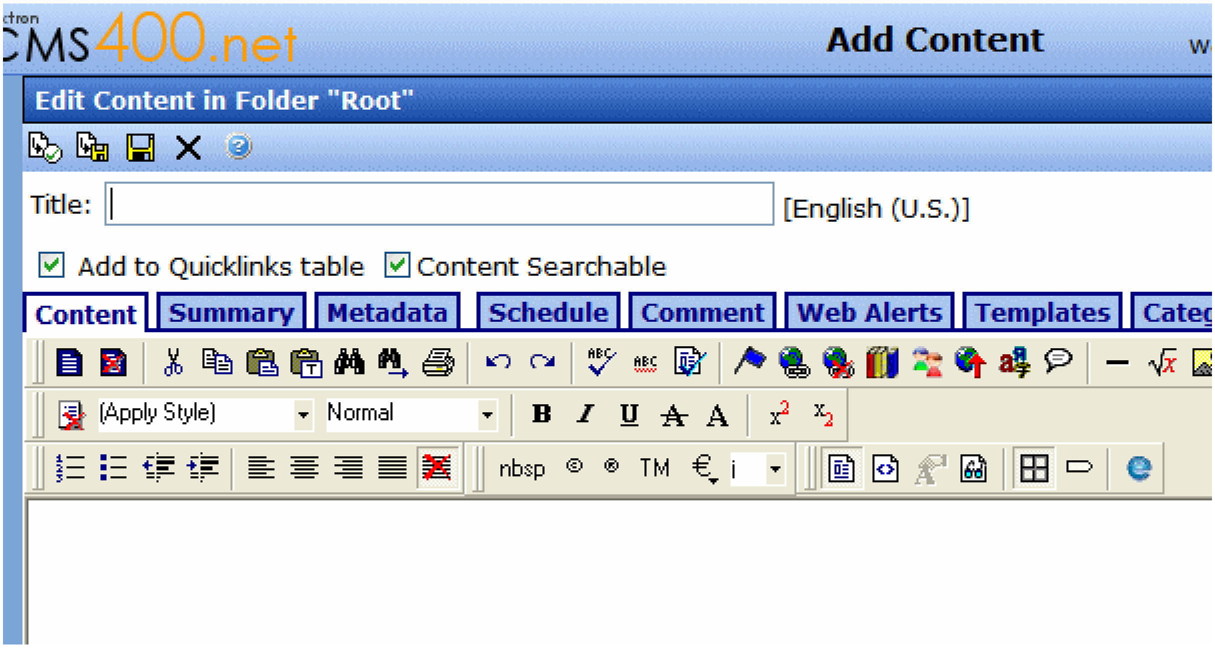
9. Click the Add button ( ).

See Also: "Creating a Collection" on page 430; "Working with Collections" on page 424

Creating New Content for a Collection

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

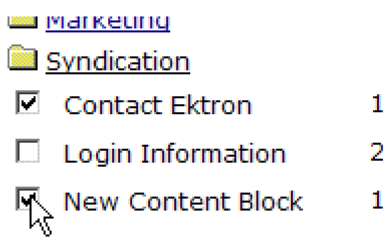
1. Access the View Collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 425.
2. Access the View Collection Screen for a collection, as described in "Viewing a Collection" on page 428.
3. If you are using **Ektron CMS400.NET**'s multi-language support, select the language of the collection.
4. Click the Add button ().
5. The Add Items to Collection screen appears.
6. If your collection includes subfolders and you want to add the content to one of them, navigate to that subfolder. Otherwise, proceed to the next step.
7. Click the Add Content button ().
8. The Add Content screen appears. If you are using **Ektron CMS400.NET**'s multi-language support, the content's language appears next to the title. The language is derived from the collection's language and cannot be changed.



9. Create the content.

NOTE Refer to "Adding HTML Content" on page 48 for additional information about creating new content.

10. Click a workflow option in the Add Content screen.
11. The Add Content screen closes, and the new content link appears in the list of links available to the collection.
12. Check off the content you created and other content.



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

Editing Content in a Collection

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

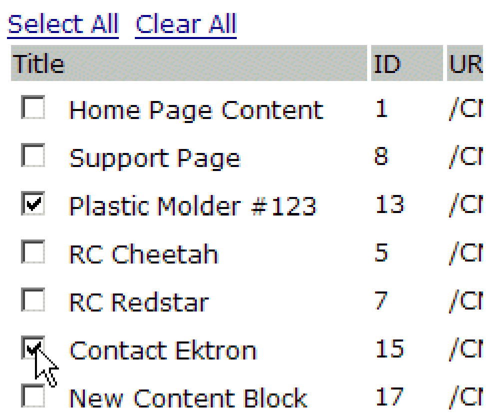
Adding Content to the Collection

For information about adding content links to a collection, see "Assigning Content to the Collection" on page 434.

Removing Content from the Collection

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

1. Access the collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 425.
2. Access the View Collection Screen, as described in "Viewing a Collection" on page 428.
3. Click the Remove button ( ).
4. The Delete Items from Collection screen appears.
5. Check boxes next to links that you want to delete.



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

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

6. Click the Delete button ( ).

Reordering Collections List

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

1. Access the collections screen for the content folder in which you want to add the collection, as described in ”Finding a Collection by Navigating to its Content Folder” on page 425.
2. Access the View Collection Screen, as described in ”Viewing a Collection” on page 428.
3. Click the Reorder button ( ).
4. The Reorder Collection screen appears.

5. Click the content whose order you want to change.
6. Click the up or down arrow to move the content in either direction.
7. Repeat steps five and six until you set the desired order.
8. Click the Update button ( ).

Editing Collection Information

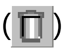
To edit information about a collection, follow these steps.

1. Access the collections screen for the content folder in which you want to add the collection, as described in ”Finding a Collection by Navigating to its Content Folder” on page 425.
2. Access the View Collection Screen, as described in ”Viewing a Collection” on page 428.
3. Click the collection whose information you want to change.

4. Change any of the field values. For documentation of the fields, see "Complete the screen using the following table." on page 431.

Deleting a Collection

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

1. Access the collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 425.
2. Access the View Collection Screen, as described in "Viewing a Collection" on page 428.
3. Click the Delete button ().
4. A confirmation message appears.
5. Click **OK** to proceed.

Working with Collections in a Multi-Language System

In a multi-language **Ektron CMS400.NET** system, you can create a language-specific edition of each collection. For example, prior to the 4.7 Release, the RC International sample site's products page had a collection in the default application language (English unless you change it). From 4.7 on, you can create an edition of a collection in every enabled language.

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

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

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

- a foreign edition of an existing collection, or
- a new collection in a foreign language

For example, if you want to provide several versions of a single page that change depending on the language selected by the user, see ”Creating a Language-Specific Collection if Another Edition Exists” on page 441.

On the other hand, if you are creating a collection to appear only on a foreign language page, and no other edition of the collection will appear on your site, see ”Creating a Language-Specific Collection if Another Edition Does Not Exist” on page 441.

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

Creating a Language-Specific Collection if Another Edition Exists

1. Click the content folder in which your collection exists. The folder’s contents are displayed.
2. Click **View > Collection**.
3. The View Collections screen is displayed.
4. Select the collection that you want to translate.
5. From the Add drop-down list, select the language of the new collection.
6. Using the Add button ( ), select the content to add to the collection. Navigate through the folders to the content you want to add. You can only add content in the selected language.

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

1. Navigate to the folder in which you will create the collection.
2. Click **View > Collections**. The View Collections screen is displayed.
3. Click the Add button ( ) and enter basic information about the collection. (This screen is described in ”Creating a Collection” on page 430.)

4. The View Collections in Folder screen appears. Click the collection you just created.
5. From the Add drop-down list, select the language of the new collection.
6. Using the Add button (), select the content to add to the collection. Navigate through the folders to the content you want to add. You can only add content in the selected language.

Comparison of Collections, Menus, Taxonomy, and the List Summary Features

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

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

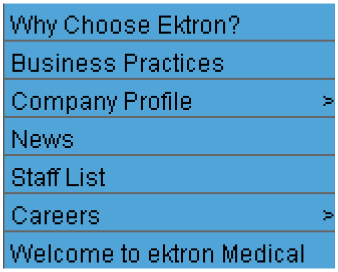
	Collection	Menu	List Summary	Taxonomy
Display *all* content in a folder. As folder's content changes, display changes.		**X** (folder items appear on a menu)	**X**	**X**
Can display all content in a folder's subfolders			**X**	
Display *selected* content	**X**	**X**		**X**
Display external hyperlinks & library assets		**X**		
Display content summary (optional)	**X**		**X**	**X**

	Collection	Menu	List Summary	Taxonomy
Display additional content information: • comment • last modified date • start date • end date • user who last edited it • ID number • path relative to your site's root	**X**			
Can be multi-leveled		**X**		**X**
Main purpose is navigation	**X**	**X**	**X**	
Main purpose is classification				**X**

For a detailed guide to **Ektron CMS400.NET** navigation, see the "Best Practice – Navigation for your Web site pamphlet," available from `http://dev.ektron.com/uploadedFiles/Resources/navigation%20best%20practice.pdf`.

Working with Menus

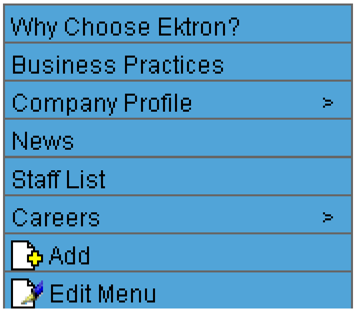
Ektron CMS400.NET's Menu feature lets users create and maintain a dropdown menu system for your Web site. The menu options can link to content, library assets, external hyperlinks, and submenus. Below is a sample menu.



In this example (delivered with **Ektron CMS400.NET**), the menu appears when a site visitor moves the cursor over **About Us** on the home page.

However, if a content contributor with permission to edit menus signs in to **Ektron CMS400.NET** then views the menu, it has additional options for editing the menu or adding content.

IMPORTANT! If you chooses to hide the border that appears around content when you are logged in, the Add and Edit options are also hidden. This allows you to view the page as it appears when you are not logged in. See Also: "Hiding and Showing the Content Border" on page 5. If the page is set to show borders and you still do not see the Add and Edit buttons, the feature may be turned off. Ask your Administrator or Web site Developer for additional information.



NOTE For more information on adding content, see "Adding HTML Content" on page 48. To learn more about Menu permissions, see the **Ektron CMS400.NET** Administrator Manual section "Web Site Navigation Aids" > "Menu Feature."

This chapter describes the following aspects of managing menus:

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

What's In This Chapter

The following topics explain Menus.

Ektron CMS400.NET Administrator Manual sections

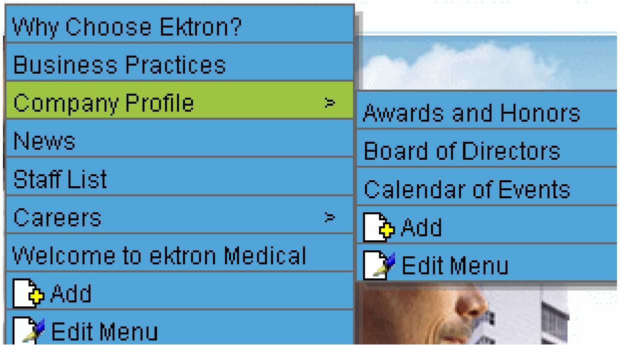
- Menu Feature > Permission to Use the Menus Feature
- Menu Feature > Implementation of the Menus Feature

The Structure of Menus and Menu Items

Menus have the following structure:

- **menu** - top level structure that is a placeholder for menu items and submenus. It is assigned to a content folder.

  A menu identifies a page template used to display menu options that are content.
- **menu item** - the individual options on a menu; can be any of the following
  - content of any type
  - library asset
  - external hyperlink (link to a page outside your Web site)
  - submenu (a link to another menu. In the illustration below, the menu on the right is a submenu. It appears when the user hovers the cursor over **Company Profile**. The right arrow indicates a submenu is available.)



Access to the Menus Feature

There are three ways to access the Menus feature:

- the Workarea, by choosing the associated content folder then clicking **View > Menus**

- the Workarea, by choosing **Modules > Menus**
- the **Edit Menu** option on the sample menu displayed above

If you choose the first or second option, you select a specific menu. Then, it appears on the View Menu screen. For the third option, the selected menu appears on the View Menu screen.

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

- Create a new menu
- Edit its information (for example, the URL and template link)
- Translate it
- Delete it
- Add or remove items
- Change the sequence of menu items
- Edit menu items
- For submenus
    - add /remove items
    - change sequence of menu items
    - edit menu information
    - edit menu items

Managing Menus

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

- ”Adding a New Menu” on page 448
- ”Adding a Menu Item” on page 453
- ”Adding New Content to a Menu via Navigation Link on a Web Page” on page 461
- ”Editing a Menu” on page 462
- ”Editing a Menu Item” on page 464
- ”Viewing a Menu” on page 467

- "Reordering Menu Items" on page 470
- "Deleting a Menu" on page 471
- "Deleting a Menu Item" on page 472
- "Working with Menus in a Multi-Language System" on page 473

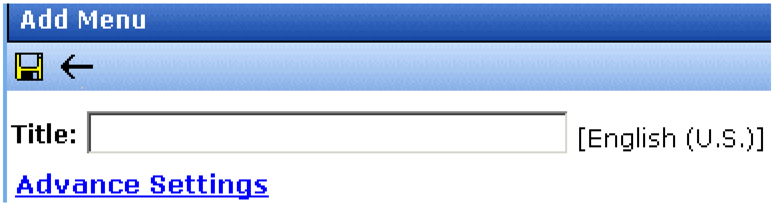
Adding a New Menu

You can create a menu by navigating to a folder or by choosing **Modules > Menus** from the left frame of the Workarea. If you choose **Modules > Menus,** you cannot select the menu's folder -- it is automatically assigned to the root folder. In contrast, if you create a menu after choosing a content folder, it is assigned to the selected folder.

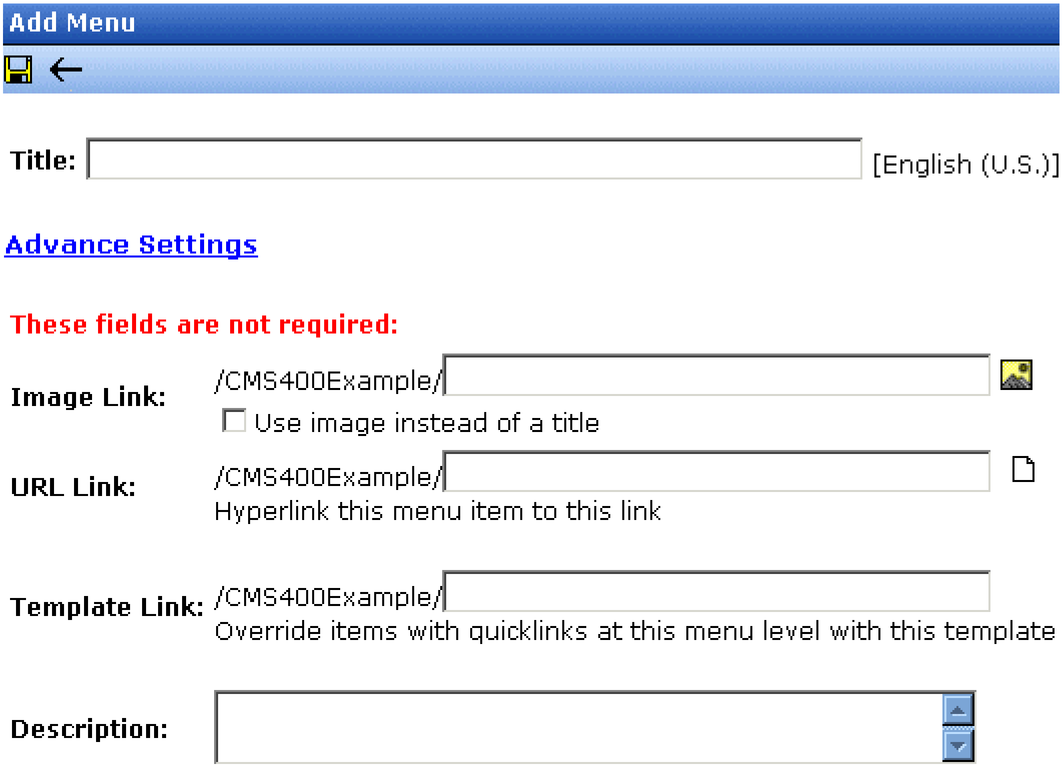
Adding a Menu via Content Folder

1. Navigate to a content folder.
2. The current language appears as a flag next to the screen title. To create the menu in this language, proceed to the next step.

   To change the language of the new menu, click **View > Language** and select the new language.
3. Click **New > Menu**.
4. The Add Menu screen appears.



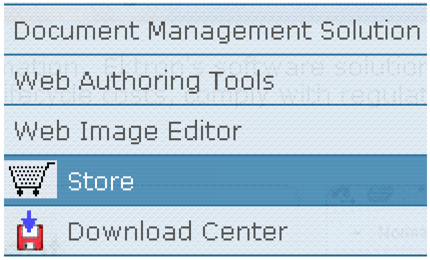
5. At minimum, a menu requires a title. If you want to add more information, click **Advance Settings**. When you do, the lower section of the screen appears as shown below.



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

Fields on the Add/Edit Menu Screen

Field	Description
Title	The name given to the menu by the creator. It appears on the Web page to indicate the kind of information on the menu.

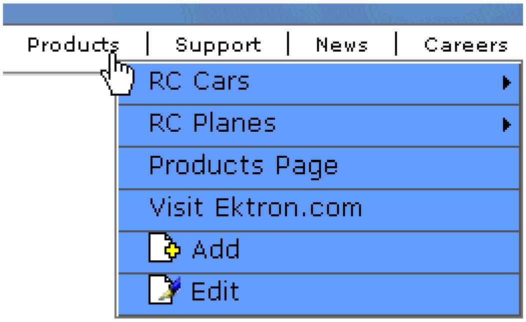
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Image Link</td><td>
You can have an image appear next to or instead of the menu title. For example:


To do this, follow these steps.
Note: Before beginning these steps, the image must reside in the library. if it does not, add it before proceeding. For more information, see ”Copying Files to the Library” on page 141.

Click the image icon ( ).
The library window opens.
Navigate to the folder that contains the image you want to use.
Click the Insert button ( ) to insert it.

Using Image to Replace Title Text
Alternatively, you can have the image replace the menu text, so that only the image appears to indicate the kind of information on the menu. To do this, check the Use image instead of a title checkbox.


</td></tr>
</table>

Field	Description
URL Link	After you create a menu, your developer links it to text or an image on a Web page by modifying a page template. When a site visitor reading that Web page moves the cursor over the text or image, the menu appears. In the illustration below, the menu appears when the site visitor moves the cursor over **Products**.  You can also assign a URL link to a menu, using this field. If you do, and the user *clicks* the link text or image, he jumps to the specified page. For example, in this field you assign the product landing page, `siteroot/products.aspx`. In the illustration above, if the user *moves the cursor* over **Products**, the assigned menu appears. However, if the user *clicks* **Products** (as indicated by the hand), he jumps to `siteroot/products.aspx`. **Entering the Path to the Landing Page** This path is relative to the site root. For example: `siteroot/jobs.aspx` This URL path can be a static template path (like the one mentioned above) or a dynamic path, such as `wellness.aspx?id=40&wellness=Hemophilia`

Field	Description
Template Link	Note: This field applies to content only. It has no effect on other types of menu items (such as images). Also, this field only affects content that dynamically references a content block, such as `/CMS400Min/therapies.aspx?id=84`. If the menu option is a template that includes content (for example, `/CMS400Min/news.aspx`), the template you identify here is ignored. If you want to apply a template to this menu, enter the template here. If you do, all content on this menu uses this template when selected from the menu. If you do not enter a template here, content on this menu uses the template specified in its Quicklink. **Overriding the Template Link** You can override the menu template for any content item on this menu and, instead, use the template specified in its Quicklink. To do so, follow these steps. 1. Add all items to the menu. (See ”Adding a Menu Item” on page 453) 2. Go to the View Menus option. 3. Click **More Info**. 4. Click the menu item you want to change. 5. At the **Link** field, change the value from **Menu Template** to **Quicklink**.  Important! If you created menus prior to upgrading to this version of **Ektron CMS400.NET**, those menu items are assigned as Quicklinks. You cannot change them to template links simply by entering a template link here. Instead, you must go to each menu item and change the **Link** field value from **QuickLink** to **Menu Template** (as illustrated above).
Description	Add a more detailed description for the menu.
Folder Associations	Seethe **Ektron CMS400.NET** Administrator Manual section “Menu Feature“ > “Implementation of the Menus Feature“> “Effect of Assigning a Folder to a Menu”
Template Associations	Seethe **Ektron CMS400.NET** Administrator Manual section “Menu Feature“ > “Implementation of the Menus Feature“> “Effect of Assigning a Template to a Menu”

6. Click the Save button ().

With the menu added, you may assign menu items to it. See ”Adding a Menu Item” on page 453.

Adding a Menu via the Menus Module

1. From the left frame of the Workarea, click **Modules > Menus**.
2. Click the Add Menu button ( ).
3. The Add Menu screen appears.

4. To complete the fields on the Add Menu screen, see ”Fields on the Add/Edit Menu Screen” on page 449.

With the menu added, you may assign menu items to it. See ”Adding a Menu Item” on page 453.

Adding a Menu Item

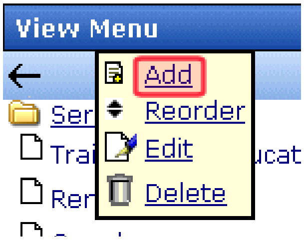
Similar to being able to add, edit, view or delete a menu, Ektron CMS400.NET also allows you to add, edit, view and delete a menu items. *See Also:* ”The Structure of Menus and Menu Items” on page 446

Adding a Menu Item via Content Folder

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

1. Navigate to the content folder that contains the menu to which you want to add items.
2. Click **View > Menus**.
3. Click the menu that you want to add items to.
4. In the View Language dropdown list, select the language of the menu. *See Also:* ”Working with Menus in a Multi-Language System” on page 473
5. The View Menu screen opens, displaying the items already on the menu. Submenus look like a folder with a plus sign to the left ( ).

6. To add a new item to the selected menu or any submenus on it, move the cursor over the menu item and click **Add** from the popup menu.



NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.

7. The Add New Item screen appears. Use the table below to select a type of menu item and follow the steps to add it.

Assign this type of content to the menu	For details, see
Content	”Adding Content as a Menu Item” on page 456
Any library asset: images, files, Quicklinks, hyperlinks to the menu	”Adding a Library Asset as a Menu Item” on page 458
External hyperlink	”Adding an External Hyperlink as a Menu Item” on page 458
Submenu to the main menu	”Adding a Submenu as a Menu Item” on page 459

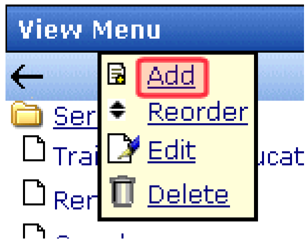
Adding a Menu Item via Menus Module

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

1. From the left frame of the Workarea, click **Modules > Menus**.
2. Click the menu that you want to add a menu item to.

3. In the View Language dropdown list, select the language of the menu.
4. To add a new item to the selected menu or any submenus on it, move the cursor over the menu item and click **Add** from the popup menu.

NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.



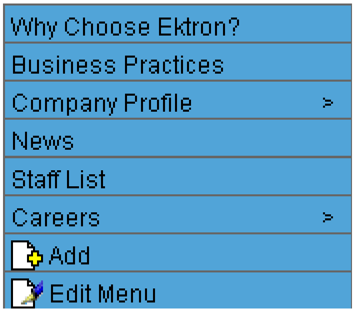
5. The Add New Item screen displays a list of items that you can add to the menu. Use to the table below to select the type of menu item and follow the steps to add it.

Menu item type	For more information, see
Content	”Adding Content as a Menu Item” on page 456
Any library assets: images, files, Quicklinks, hyperlinks to the menu	”Adding a Library Asset as a Menu Item” on page 458
External hyperlinks	”Adding an External Hyperlink as a Menu Item” on page 458
Submenu to the main menu	”Adding a Submenu as a Menu Item” on page 459

Adding a Menu Item via Navigation Link on a Web Page

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

3. Place the cursor on the hyperlink that causes the menu to appear.
4. The menu appears.



5. Click **Add**.
6. The Add Menu screen displays a list of items you can add to the menu.
7. Use the table below to select the type of menu item and follow the steps to add that menu item.

Assign this type of content to the menu	For details, see
Content	"Adding Content as a Menu Item" on page 456
Any library assets: images, files, Quicklinks, hyperlinks to the menu	"Adding a Library Asset as a Menu Item" on page 458
External hyperlinks	"Adding an External Hyperlink as a Menu Item" on page 458
Submenu to the main menu	"Adding a Submenu as a Menu Item" on page 459

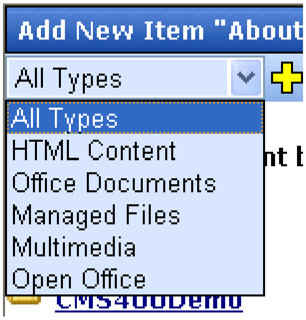
Adding Content as a Menu Item

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

1. Follow the directions in ”Adding a Menu Item via Content Folder” on page 453, ”Adding a Menu Item via Menus Module” on page 454, or ”Adding a Menu Item via Navigation Link on a Web Page” on page 455.

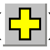
NOTE You can only add content that resides in the menu's content folder or its subfolders.

2. Click the radio button next to **Content Block**.
3. Click the **Next...** button.
4. The Add New item screen appears, listing all content in the folder (and its subfolders) in which you created the menu.
5. By default, all content is available. To limit your selection to a type of content (for example, Word documents), click the content types dropdown and select a type.



6. Content items in the selected folder appear below any subfolders. You can click any subfolder to display its content.
7. Check all content you want to add from any single screen to the menu.

WARNING! If you check items on a screen then proceed to another screen before clicking the Add button, the items on the first screen are not added to the menu.

8. Click the Add button ().
9. The View Menu screen reappears, showing the new content.
10. To access the Edit Menu Item screen for the new content, hover the cursor over the item, then click **Edit** from the popup menu.

NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.

11. The Edit Menu Item screen lets you assign additional information to the menu item, such as the target window. See ”Fields on the Add/Edit Menu Screen” on page 449.
12. Continue to add new items to the menu as needed.

Adding a Library Asset as a Menu Item

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

1. Follow the directions in ”Adding a Menu Item via Content Folder” on page 453, ”Adding a Menu Item via Menus Module” on page 454, or ”Adding a Menu Item via Navigation Link on a Web Page” on page 455.
2. Click the radio button next to **Library Asset**.
3. Click the **Next** button.
4. The Add New Item screen appears. Enter a title for the library asset that will be on the menu.
5. Click **Browse Library**.
6. The library screen opens.
7. In the right frame, select the type of asset to insert (image, hyperlink, etc.).

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

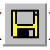
8. Select a library asset and click the Insert button ( ).
9. The Add New Item screen reappears.
10. Click the Save button ( ).

Adding an External Hyperlink as a Menu Item

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

1. Follow the directions in "Adding a Menu Item via Content Folder" on page 453, "Adding a Menu Item via Menus Module" on page 454, or "Adding a Menu Item via Navigation Link on a Web Page" on page 455.
2. Click the circle next to **External Hyperlink**.
3. Click the **Next** button.
4. The Add New Item screen is displayed.
5. Complete the fields as needed.

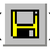
Field	Description
Title	Title of the new external hyperlink menu item.
URL Link	The URL of the external hyperlink. For example, `www.example.com`.

6. Click the Save button ().

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

Adding a Submenu as a Menu Item

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

1. Follow the directions in "Adding a Menu Item via Content Folder" on page 453, "Adding a Menu Item via Menus Module" on page 454, or "Adding a Menu Item via Navigation Link on a Web Page" on page 455.
2. Click the radio button next to **Submenu**.
3. The Add Menu screen is displayed.
4. Complete the fields using "Fields on the Add/Edit Menu Screen" on page 449 as a reference.
5. Click the Save button ().

Adding an Item to a Submenu

1. From the left frame of the Workarea, click **Modules > Menus**.
2. Select the menu.
3. Find the submenu to which you want to add items. (Submenus have a folder icon ( ) next to them.)

4. Move the cursor over the submenu and click **Add** from the popup menu.

NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.

5. The Add New Item screen opens, displaying items you can add.
6. Refer to the table below for selecting a menu item and follow the steps to add it.

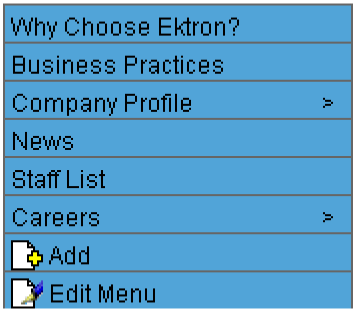
Assign this type of content to the menu	For details, see
Content	"Adding Content as a Menu Item" on page 456
Any library asset: images, files, Quicklinks, hyperlinks to the menu	"Adding a Library Asset as a Menu Item" on page 458
External hyperlink	"Adding an External Hyperlink as a Menu Item" on page 458
Submenu to the main menu	"Adding a Submenu as a Menu Item" on page 459

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

NOTE You can only use this feature after your Web developer has modified a page template to display the menu. This procedure is described in the **Ektron CMS400.NET** Developer Manual section "Custom ASP Functions" > "Menus."

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

1. Access the Web page that contains the link to display the menu.
2. Place the mouse on the hyperlink that causes the menu to appear.
3. The menu appears.



4. Click ( ) **Add**.
5. The Add Menu screen opens, displaying items you can add.
6. Refer to the table below for selecting a menu item and follow the steps to add it.

Assign this type of content to the menu	For details, see
Content	”Adding Content as a Menu Item” on page 456
Any library asset: images, files, Quicklinks, hyperlinks to the menu	”Adding a Library Asset as a Menu Item” on page 458
External hyperlink	”Adding an External Hyperlink as a Menu Item” on page 458
Submenu to the main menu	”Adding a Submenu as a Menu Item” on page 459

Editing a Menu

You can edit a menu via:

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

This section describes each option.

Editing a Menu via its Content Folder

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

1. Access the Workarea and navigate to the content folder that contains the menu.
2. Click **View > Menus**.
3. Click the menu you want to edit.
4. Move the cursor over the menu that you want to edit.

5. Click **Edit** from the popup menu.

NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.

6. The Edit Menu screen is displayed.
7. Change the fields in Edit Menu screen by referencing "Fields on the Add/Edit Menu Screen" on page 449.
8. Click the Save button ( ).

Editing a Menu via Menus Module

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

1. From the left frame of the Workarea, click **Modules** > **Menus**.
2. Click the menu you want to edit.
3. Move the cursor over the menu that you want to edit.
4. Click **Edit** from the popup menu.

NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.

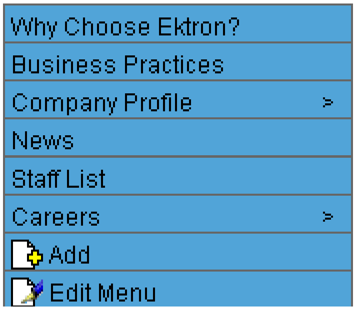
5. The Edit Menu screen is displayed.
6. As necessary, update the fields in Edit Menu screen by referencing "Fields on the Add/Edit Menu Screen" on page 449.
7. Click the Save button ( ).

Editing a Menu via Navigation Link on a Web Page

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

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

3. The menu appears.



4. Click **Edit Menu**.
5. The View Menu screen for the menu appears.
6. Move the cursor over the menu that you want to edit.
7. Click **Edit** from the popup menu.

NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.

8. The Edit Menu screen is displayed.
9. Update the fields by referencing "Fields on the Add/Edit Menu Screen" on page 449.
10. Click the Save button ( ).

Editing a Menu Item

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

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

You can edit a menu item via:

- its content folder
- menus module

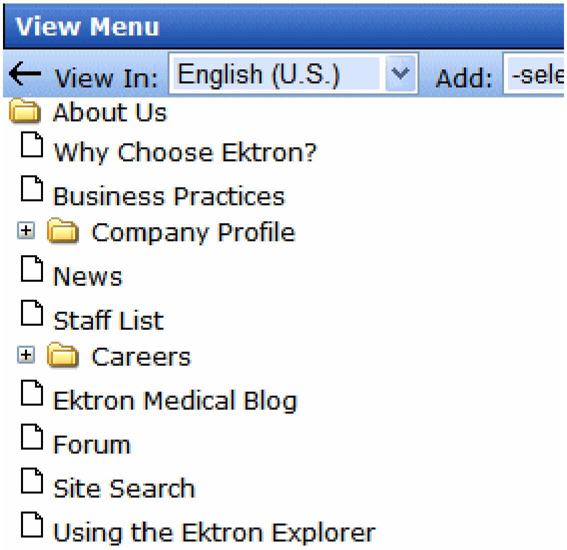
- navigation link on a Web page

See Also: "Working with Menus" on page 444

Editing a Menu Item via its Content Folder

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

1. Access the Workarea and navigate to the content folder that contains the menu.
2. Click **View > Menus**.
3. Click the menu you want to edit.
4. The View Menu screen for that menu appears, listing all menu items.



5. Move the cursor over the item you want to edit.
6. Click **Edit** from the popup menu.

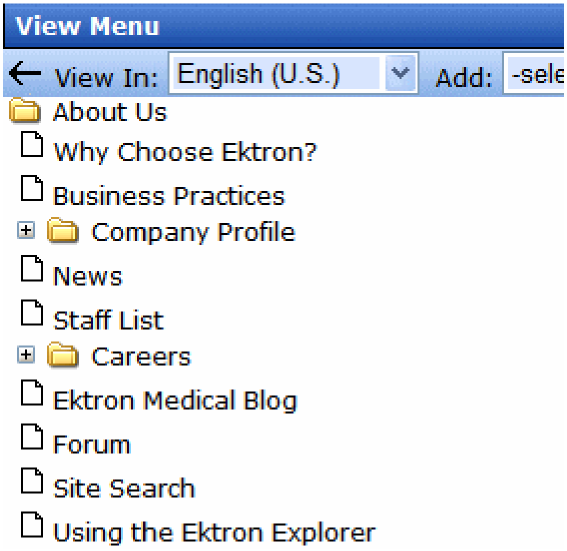
NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.

7. To learn about the fields on the screen, see "Fields on the Add/ Edit Menu Screen" on page 449.

Editing a Menu Item via Menus Module

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

1. Access the Menu Report screen, as described in "Viewing a Menu via the Menus Module" on page 468.
2. Click the menu you want to edit.
3. The View Menu screen for that menu appears, listing all items on the menu.



4. Move the cursor over the item you want to edit, and click **Edit** from the popup menu.

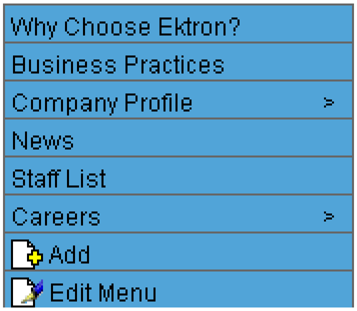
NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.

5. To learn about the fields on the screen, see "Fields on the Add/ Edit Menu Screen" on page 449.

Editing a Menu Item via Navigation Link on a Web Page

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

1. Access the template where you inserted the link to display the menu.
2. Click the **Menu Navigation link** title on the Web page.
3. A menu is displayed along with all menu items on the menu.



4. Click **Edit Menu**.
5. The View Menu screen appears.
6. Move the cursor over the item you want to edit, and click **<u>Edit</u>** from the popup menu.
7. To learn about the fields on the screen, see ”Fields on the Add/Edit Menu Screen” on page 449.

Viewing a Menu

Just like editing a menu, you can view a menu via

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

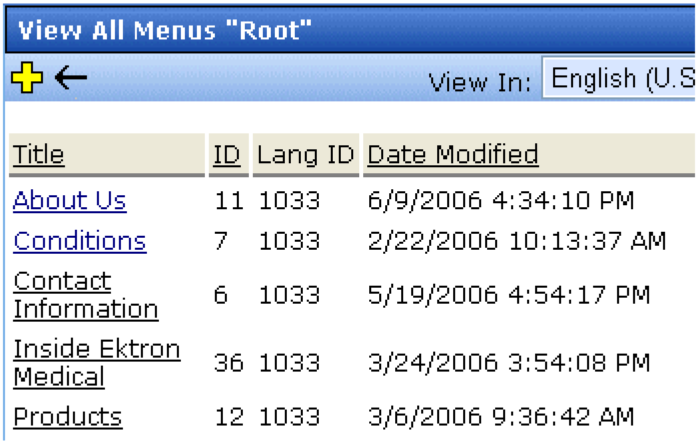
When viewing a menu via the content or menu folder, you get an *internal* view of information entered by menu creator. When viewing via a navigation link on a Web page, you get an *external* view of the menu, as seen by anyone navigating Web site.

View a Menu via its Content Folder

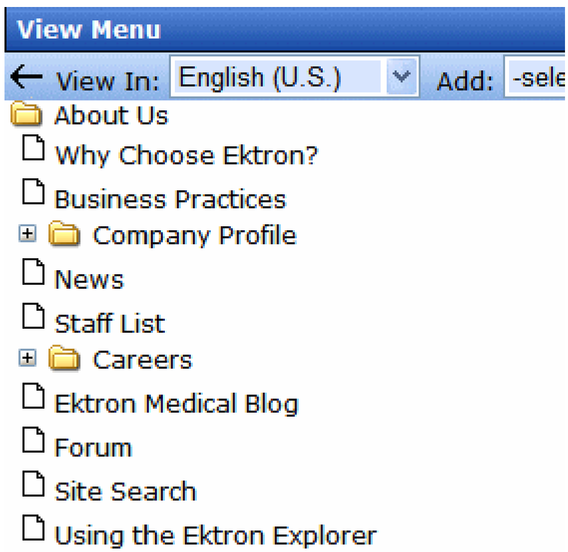
To access a menu via its content folder, follow these steps.

1. Access the Workarea and navigate to the content folder that contains the menu.
2. Click **View > Menus**.

3. The View All Menus screen displays all menus in the folder.



4. Click the menu you want to view.
5. The menu’s options appear.

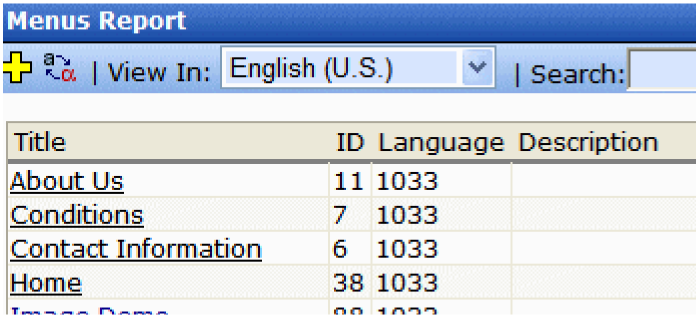


Viewing a Menu via the Menus Module

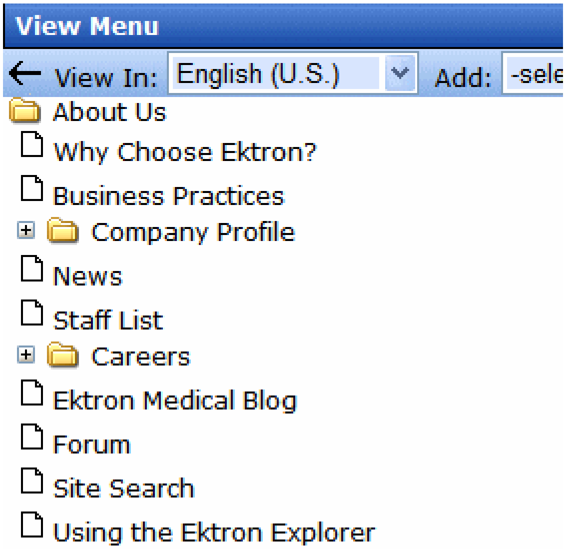
To access the menu via the Modules folder, follow these steps.

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

2. The Menus Report screen displays all menus.



3. Click the menu you want to view.
4. The menu's options appear.

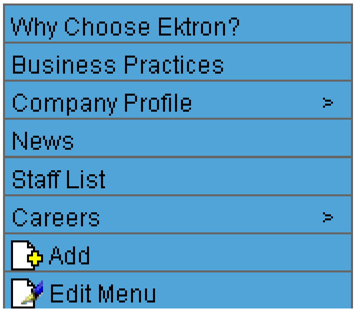


View Menus via Navigation Link on a Web Page

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

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

3. A menu is displayed.

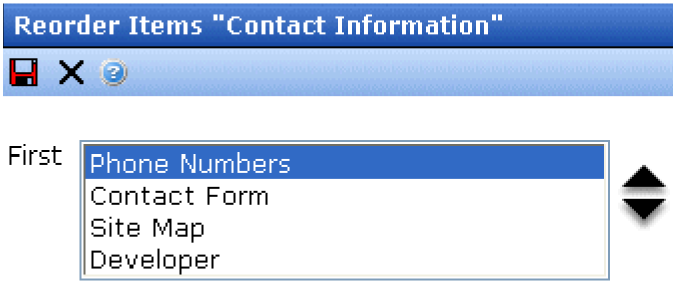


For information on how to display a menu on a Web page, refer to the section on menus in the Developers and Administrator Manuals.

Reordering Menu Items

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

1. Navigate to the View Menu screen for the menu that you want to rearrange. See "Viewing a Menu" on page 467.
2. Move the cursor over the menu, and click **Reorder**.
3. The Reorder Items screen appears.



4. Click the item you want to move.
5. Click the up arrow to move it up, or the down arrow to move it down.
6. When finished, click Save ( ).

Deleting a Menu

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

- its content folder
- menus module

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

Deleting a Menu via Content Folder

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

1. Access the View Menu screen, as described in ”View a Menu via its Content Folder” on page 467.
2. Move the cursor over the menu, and click **Delete**.

NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.

3. A confirmation message is displayed.
4. Click **OK** to delete the menu.

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

Deleting a Menu via Menus Module

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

1. Access the View Menu screen, as described in ”Viewing a Menu via the Menus Module” on page 468.
2. Move the cursor over the menu, and click **Delete**.

NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.

3. A confirmation message is displayed.
4. Click **OK**.

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

Deleting a Submenu

1. Access the View Menu page, as described in "Viewing a Menu via the Menus Module" on page 468.
2. Select the submenu.
3. Move the cursor over the menu, and click **Delete**.

Deleting a Menu Item

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

- its content folder
- its menu folder

Removing a Menu Item via its Content Folder

1. Access the View Menu screen, as described in "View a Menu via its Content Folder" on page 467.
2. Move the cursor over the item.

NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.

3. Click **Delete**.

Removing a Menu Item via Menus Module

1. Access the View Menu screen, as described in "View a Menu via its Content Folder" on page 467.
2. Move the cursor over the item.
3. Click **Delete**.

NOTE When moving the cursor to the popup menu, avoid moving across other menus or options. When you move across another menu or option, it may become selected instead of the item you want to work with.

Working with Menus in a Multi-Language System

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

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.

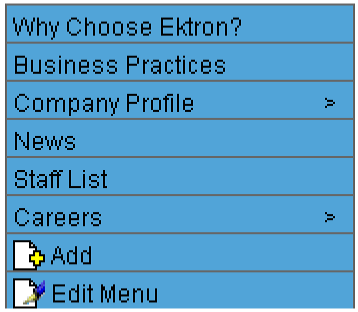
Before creating or translating a menu, it's a good idea to create or translate all content that will be on the menu. In this way, you can link this content to the new menu. However, after creating a menu, you can add new items to it.

Translating a Menu

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

By Navigating the Site

1. Sign on to **Ektron CMS400.NET**
2. Select the menu's current language.
3. Navigate to the page that has the menu you want to translate.
4. Click the menu and the **Edit Menu** option.



5. The View Menu screen appears for the selected menu.
6. From the Add drop-down list, select the language into which you want to translate the menu.

7. The Add Menu screen appears. Complete the screen for the menu in the selected language. See "Fields on the Add/Edit Menu Screen" on page 449.
8. Click the Save button ( ).
9. The View Menu screen reappears. Now, the **View In** drop-down list displays the menu's new language.

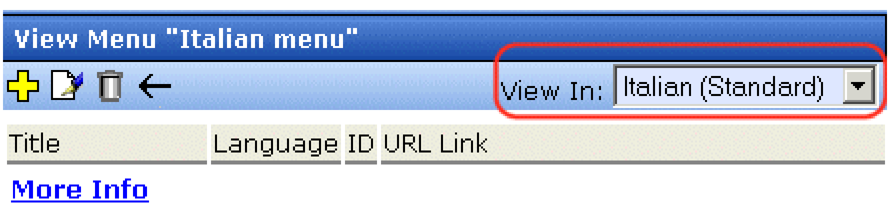
10. Add items to the menu. See "Adding a Menu Item" on page 453. If adding content, you can only insert an item in the selected language.
11. Later, you can add more menu items, edit them, delete them, view them, etc.

These capabilities are described in this chapter.

By Accessing the Menus Report Screen

1. From the Workarea screen, click **Modules > Menus**.
2. Click the menu you want to translate.
3. The View Menu screen appears for the selected menu.
4. From the Add drop-down list, select the language into which you want to translate the menu.

5. The Add Menu screen appears. Complete the screen for the menu in the selected language. See ”Fields on the Add/Edit Menu Screen” on page 449.
6. Click the Save button ( ).
7. The View Menu screen reappears. Now, the **View In** drop-down list displays the menu’s new language.



8. Add items to the menu. See ”Adding a Menu Item” on page 453. If adding content, you can only insert an item in the selected language.

Later, you can add more menu items, edit them, delete them, view them, etc.

Creating a Menu in Any Language

To create a menu in any language, follow these steps.

1. Form the Workarea screen, click **Modules > Menus**.
2. From the language drop-down list, select the new menu's language.

3. Create the menu. See "Adding a Menu via the Menus Module" on page 453.

Ektron CMS400.NET System Management

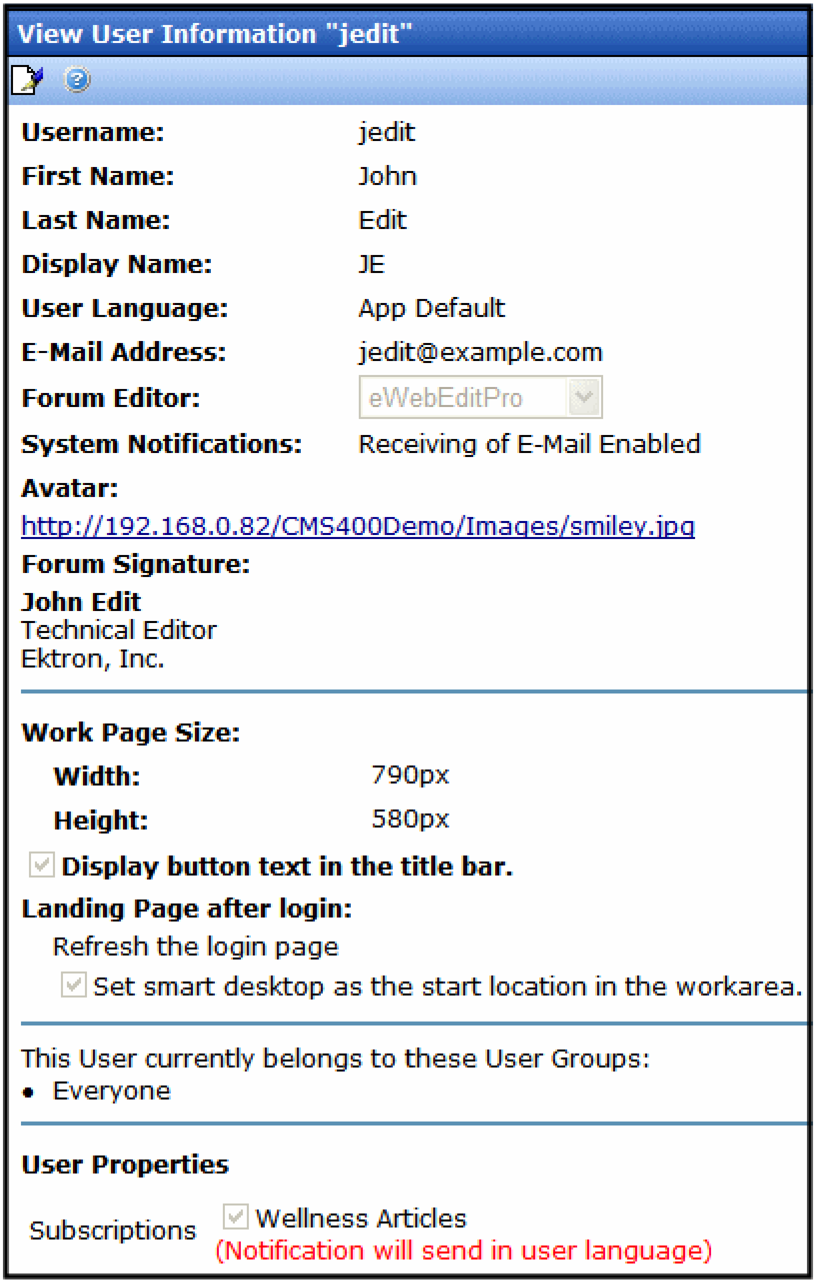
Updating Your User Profile

When a new user is added to an Ektron CMS400.NET Web site, the administrator sets up a personal profile for him. It contains information such as password and email address. You can update some personal profile information when needed. This section explains how to modify your personal profile.

Viewing Your Profile

Before changing your personal profile, you must view it. To do so, follow these steps.

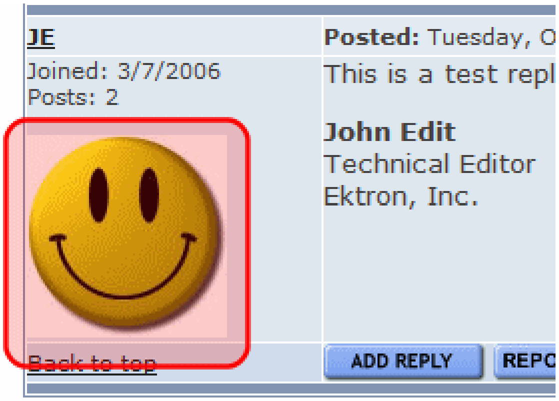
1. Access your Workarea.
2. From the lower left frame, click **Settings** > **User Profile**.
3. Your user profile appears.

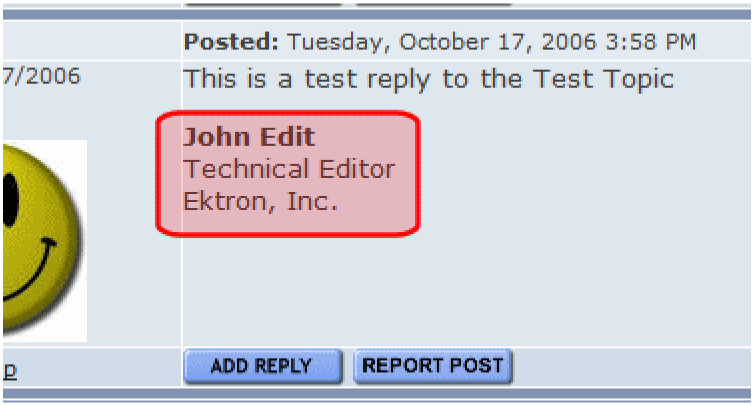


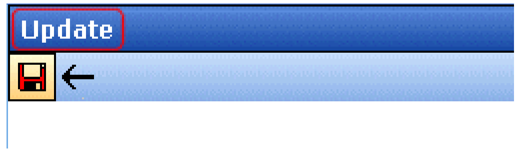
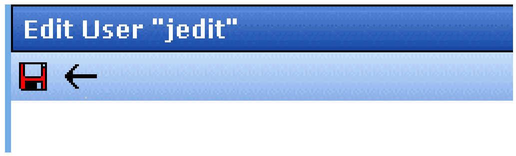
4. Click the Edit button ( ) in the top left corner.
5. The Edit User Information screen appears.

The following table explains fields you can edit.

Field	**Description**
Display Name	The name that is used to identify you on the Web site. This can be different from your Username, which is the name you use to log into the Ektron CMS400.NET Web site. **Important:** This name needs to be unique inside Ektron CMS400.NET and it cannot be blank.
Password	If desired, enter a new password into this field. If you change your password, you do not need to log out then log back in. However, the next time you log in, you must use the new password.
Confirm Pwd	Confirm your new password by retyping it into this field.
User Language	Select a language in which to view Ektron CMS400.NET. Click the black down arrow on the right (circled below) to see a list of choices. 
Email Address	Enter a new valid email address. Notification email is sent to this address unless the **Disable E-mail Notification** field is checked. To understand how email notification operates within the content workflow, see "Example of an Approval Chain" on page 91. Also, this address identifies the user sending Instant email. *See Also:* "Sending Instant Email" on page 25
Forum Editor	Determines which editor will be used when this user replies to a Discussion Board. *See Also:* **Ektron CMS400.NET** Administrator Manual section "Discussion Boards" > "Using Discussion Boards on your Web Site"

Field	Description
Avatar	An image or icon to represent you on the Web site. Type in a web path to image. For example: `http://www.example.com/smileyface.gif` 
Address	The address used to find your location when a user is performing a search based on location.
Latitude	The latitude used to find your location when a user is performing a search based on location. Google maps provides a service that takes the address of user and returns its latitude and longitude. **Note**: You don't need to use Google's automatic retrieval of latitude and longitude. Instead, you can enter the values manually.
Longitude	The longitude used to find your location when a user is performing a search based on location. Google maps provides a service that takes the address of content and returns its latitude and longitude. **Note**: You don't need to use Google's automatic retrieval of latitude and longitude. Instead, you can enter the values manually.

Field	Description
Forum Signature	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 **Post** button. 
Tags	Select from a predefined list of Tags that describe yourself. Or, create a new tag by clicking the **Click To Add A New Tag** link. Placing a check mark in the check box next to a tag activates it for your profile.
Disable Email Notification	Check this box if you do not want to receive notification email.
Work Page Size Your system administrator may let you change the work page values. If he does, the following fields are editable. Otherwise, you can only view the fields.	
Width	If desired, change the width of the screen in which **Ektron CMS400.NET** appears. The width in pixels must be between 400 and 2400. This field accommodates users who have larger monitors and/or prefer a smaller resolution, such as 1280 x 1024.
Height	If desired, you can change the height of the screen in which **Ektron CMS400.NET** appears. The height in pixels must be between 300 and 1800. This field accommodates users who have larger monitors and/or prefer a smaller resolution, such as 1280 x 1024.

Field	Description
Display button text in the title bar	Check this box if you want any button's caption text to appear in the screen title's bar whenever a user moves the mouse over the button. Note the word **Update**, describing the button, in the illustration below.  If you do not check this box, the screen's title remains in the title bar when the user moves the mouse over the button, as illustrated below. 
Landing Page after login	If you want one page in your Web site to appear after sign in, enter the URL to that page. You might select a page that leads to a group of pages that you maintain. If you don't know the URL, navigate to the page, go to the browser address bar and select the text following the directory in which **Ektron CMS400.NET** resides. For example, if the browser address bar says `http://www.example.com/customers.aspx?id=945`, you would enter **customers.aspx?id=945** here.
Set smart desktop as the start location in the Workarea	If you want the Smart Desktop to appear as soon as you enter the Workarea, click inside this check box. *See Also:* "Understanding the Smart Desktop" on page 17 If you leave this check box blank, when you enter the Workarea, you go to the folder of the content specified at the **Landing Page after login** field.
Inherit Task Permissions From User Groups	This area indicates your task permissions and whether you inherit them from user groups to which you belong. For more information, see the **Ektron CMS400.NET** Administrator Manual chapter "Managing Tasks," section "Task Permissions."
User Properties	See "Custom User Properties" in the **Ektron CMS400.NET** Administrator Manual.

Online Help

Online help provides access to important and useful information about using Ektron CMS400.NET. Help is provided in two formats:

- **online help** - accessible from most screens by clicking the help button ( ), it provides information about the screen you are currently viewing. Online help is in HTML format, so it opens in the browser you use to surf the internet.

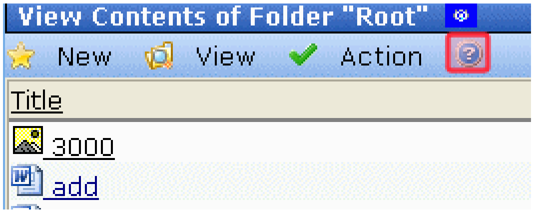
  After viewing a help topic, you can browse to related topics as well as access a table of contents, index, and search to expand your quest for information. *See Also:* ”Accessing Online Help” on page 483

- **online manuals** - can be viewed, searched, and printed like a paper manual. Online manuals are in a PDF format, which makes it easy to navigate online and print. *See Also:* ”Accessing Online Manuals” on page 484

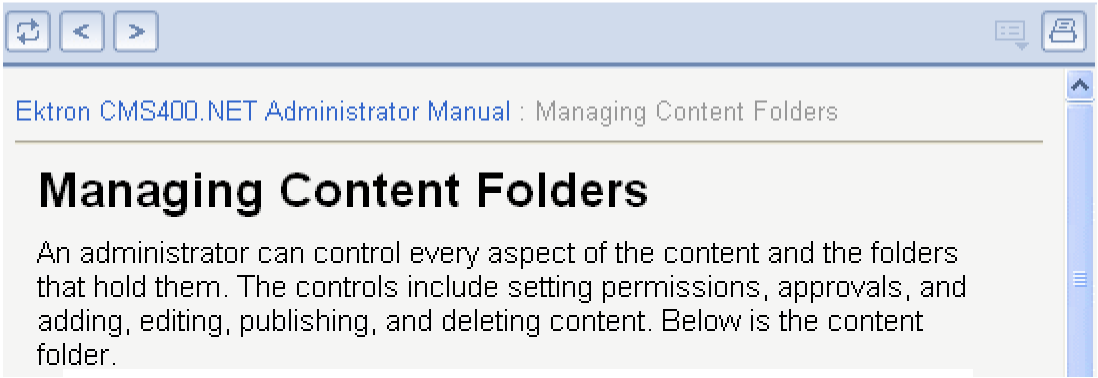
Both formats provide the same information. Choose the format that best suits your needs.

Accessing Online Help

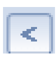
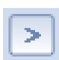
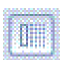
To access online help for any screen, click the help icon (illustrated below).



When you do, an online help screen appears.



The following table describes the buttons available on every help screen.

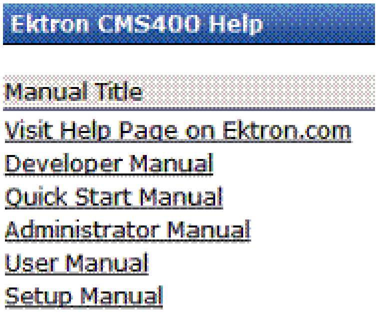
Button	Description
	Moves to prior topic in the help. This refers to the topic sequence arranged by the help's author.
	Moves to next topic in the help. This refers to the topic sequence arranged by the help's author.
	Divides the help into two panels. • The left panel displays the table of contents. It also provides buttons for accessing the index and full-text search. • The right panel continues to display help topics.
	Highlight the current help topic's location within the table of contents.
	Prints current topic

Accessing Online Manuals

To access the help folder, follow these steps.

1. Access the Workarea.
2. From the lower left frame, click **Settings**.
3. From the top left frame, click **Help**.

4. The help screen appears in the right frame.



5. Click any link to open the documentation or Web page.

NOTE Your computer requires an internet connection to access the help page on Ektron.com.

Introduction to Ektron CMS400.NET Editors

Ektron CMS400.NET has two choices for a main content editor, depending on your computer's operating system.

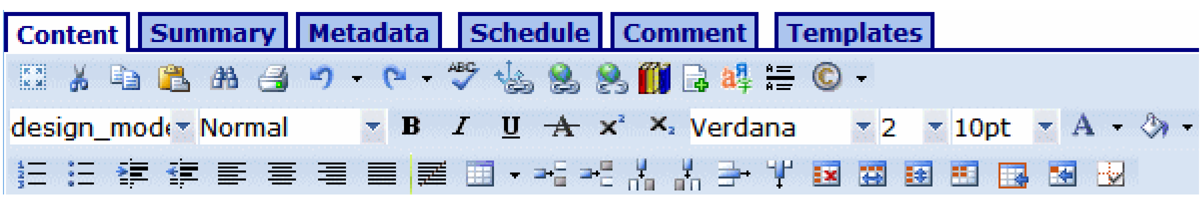
Operating System	Possible editors
Windows	• **eWebEditPro+XML** • **eWebEdit400**
Macintosh	• **eWebEdit400**

TECHNICAL NOTES

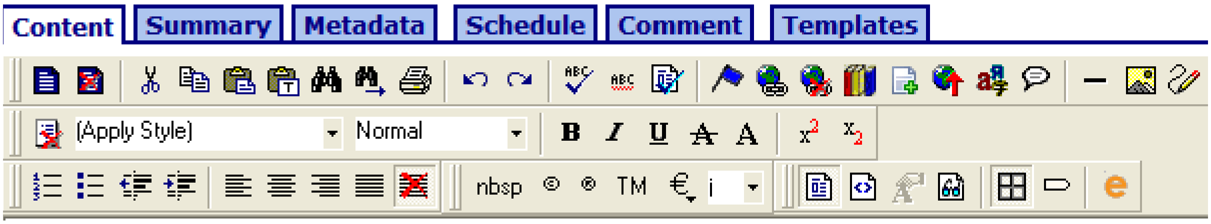
eWebEdit400 does not require installation of an ActiveX control to each client computer.
But, even if you choose eWebEdit400, if a user begins to create or edit an XML Smart Form configuration, the client computer installs eWebEditPro+XML. Ektron CMS400.NET requires that editor to create XML Smart Forms.

Each editor's toolbar is illustrated below.

eWebEdit400 Toolbar



eWebEditPro+XML Toolbar



NOTE Your choice of editors only affects the main HTML content editor. It does not affect other screens which use eWebEdit400, such as the Task Description.

Setting the Editor for Ektron CMS400.NET Users

Each Web server that hosts **Ektron CMS400.NET** has two editor options: one for clients that run Windows and another for clients using MacIntosh. Your system administrator determines the editor options in the site's web.config file, using the following settings.

```
<appSettings>
.
.
<!-- EditControlWin may be either "ContentDesigner" or "eWebEditPro" -->
<add key="ek_EditControlWin" value="eWebEditPro"/>

<add key="ek_EditControlMac" value="ContentDesigner"/>
</appSettings>
```

The table below contains information about both editors.

Operating System	Web.Config file key	Possible editor key values
Windows	`ek_EditControlWin`	• `eWebEditPro` • `ContentDesigner` (use to load **eWebEdit400**)
Macintosh	`ek_EditControlMac`	• `ContentDesigner` (use to load **eWebEdit400**)

The following sections explain how to use the eWebEditPro+XML and **eWebEdit400** editors.

Introduction to eWebEdit400

eWebEdit400 is a browser-based, Web content editor designed for dynamic Web sites. It lets you create and publish your own Web content in any language supported by the operating system and your Web site.

NOTE To learn how to enable **eWebEdit400** for all clients that connect to your server, see "Setting the Editor for Ektron CMS400.NET Users" on page 487.

More specifically, **eWebEdit400** lets you perform Web page editing functions, such as

- copy content from any Windows-based application
- cut, copy, and paste
- find and replace text
- check spelling
- change font style, size, attributes (bold, italics, underline), and color
- begin lines with bullets or numbers
- adjust indentation
- right, center, or left justify text and images
- add a bookmark, hyperlink, image, or table
- view your text as WYSIWYG or HTML code
- insert or clean HTML source code

You gain access to these functions from the toolbar at the top of the editor, or from a menu that appears when you right click the mouse inside the editor.

Also, if you create and maintain HTML forms, this chapter describes how to do that using **eWebEdit400**.

Using eWebEdit400

eWebEdit400 is like many other word processing applications. You type text and then use toolbar buttons (illustrated below) and menu options to change the text's appearance or perform functions on it, such as spell checking.

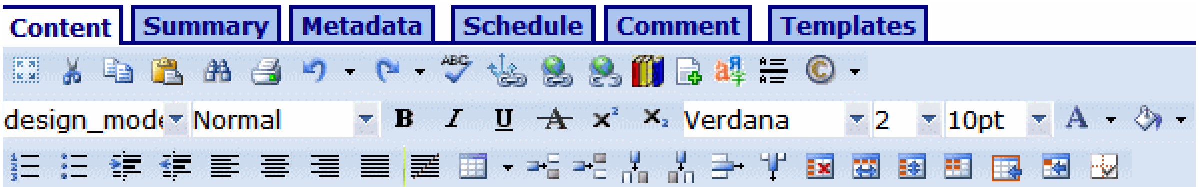
To learn more about using **eWebEdit400**, see these topics.

- "Toolbar Buttons" on page 490
- "Copying from Other Applications" on page 497
- "Finding and Replacing Text" on page 498
- "Checking Spelling" on page 503
- "Working with Images" on page 506
- "Using Bookmarks" on page 517
- "Using Hyperlinks" on page 521
- "Inserting email Links" on page 527
- "Working with HTML" on page 529
- "Working with Tables" on page 531
- "Working with HTML Forms" on page 574

NOTE You cannot use **eWebEdit400** to create or edit Smart Form configurations. If you try to, Ektron CMS400.NET begins to install eWebEditPro+XML. If you complete the installation, you will use eWebEditPro+XML to create and edit Smart Form configurations, but use **eWebEdit400** to perform other editing.

Toolbar Buttons

This section explains how to use the buttons and drop-down lists on the toolbar. (The toolbar is the row of buttons across the top of the editor window, illustrated below.)



The buttons let you perform functions such as cutting and pasting text, inserting images, and creating tables.

All buttons may not appear. Your Webmaster determines which buttons appear on your toolbar.

TECHNICAL NOTE The following Ektron Knowledge Base article explains how a Webmaster adds a custom toolbar button to eWebEdit400: http://dev.ektron.com/kb_article.aspx?id=16550.

See Also:

- ”Selecting Text” on page 632
- ”Applying Formatting Attributes to Text” on page 633
- ”Table of Toolbar Buttons” on page 490
- ”Form Elements Toolbar” on page 496

Table of Toolbar Buttons

eWebEdit400’s toolbar buttons are explained below.

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Select All	Ctrl+A	Select all content	
Cut	Ctrl+X	Remove selected text and graphics. Place that data into temporary memory, also known as the “clipboard.” (If you later cut or copy more information onto the clipboard, the new information overwrites the original information.)	
Copy	Ctrl+C	Copy selected text and graphics into temporary memory. Leave selected data where it is. (If you later cut or copy more information into memory, the original information is lost.)	”Copying from Other Applications” on page 497
Paste	Ctrl+V	Insert the most recently cut or copied text and graphics at the current cursor location.	
Find and Replace		Launch the Search and Replace dialog box. The dialog searches for (and lets you optionally replace) text that you specify.	”Finding and Replacing Text” on page 498
Print	Ctrl+P	Print the editor content.	
Undo	Ctrl+Z	Reverse the most recent action, as if it never occurred. You can undo as many actions as you wish.	
Redo	Ctrl+Y	Reverse the undo action.	
Spell Check		Begin spell checker.	”Checking Spelling” on page 503
Anchor Tag		Insert a bookmark anchor.	”Using Bookmarks” on page 517

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Add/edit Hyperlink		Change information about a hyperlink.	"Using Hyperlinks" on page 521
Remove Hyperlink		Remove a hyperlink.	"Removing a Hyperlink" on page 525
Library		Insert a library file.	"Adding a Library File to Content" on page 148
Add Wiki Link		Create a wiki link.	"Using Ektron CMS400.NET's Wiki Feature" on page 778
Translate		Translate content into another language	"Translating Content to Another Language" on page 55
Horizontal Line		Insert a horizontal line.	
Insert Symbol		Insert symbols and special characters.	
Apply CSS Class		Display a list of style sheet classes. Users can select from the list to apply a class to selected text. The list can change depending on the selected text. Your Webmaster determines which styles are available.	
Paragraph Style		Display a list of paragraph styles. Users can select from the list to apply a style to selected text. The list can change depending on the selected text. Your Webmaster determines which styles are available.	
B Bold	Ctrl+B	Make selected text **bold**.	

Button	**Equivalent Keystroke** (Internet Explorer only)	**Function**	**For more information, see**
Italic	Ctrl+I	Make selected text *italic*.	
Underscore	Ctrl+U	Make selected text underlined.	
Strikethrough		Apply strikethrough to selected text. For example: ~~Here is some text~~	
Superscript		Make selected text appear smaller and above text line.	
Subscript		Make selected text appear smaller and below text line.	
Relative Font Size 2		Change the relative font size. Your Webmaster determines which relative font sizes are available.	
Verdana Font Style		Change the font style. Your Webmaster determines which fonts are available. Note: If more than one font appears in a selection, the browser on the reader's PC tries to display text using the first font. If the browser cannot find that font, it tries to use the second, etc.	
10pt Font Size		Change the font size in points. Your Webmaster determines which font sizes in points are available.	
Font Color		Change the font color.	
Background Color		Change the background color of the selected content.	

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Number		Begin the line on which the cursor rests with a number. If the line above this line is • not numbered, assign this line 1 • numbered, assign a number one more than the line above Note: The Number toolbar button applies a number to each paragraph. If you want to switch to regular (that is, non-numbered) paragraphs, click the button a second time.	
Bullet		Begin the line on which the cursor rests (or all selected lines) with a bullet (•). Note: The Bullet toolbar button applies a bullet to each paragraph. If you want to switch to regular (that is, non-bulleted) paragraphs, click the button a second time.	
Indent		Increase or decrease the current line's distance from the left margin.	
Left, Center, and Right Justify		Align paragraph so that it is arranged • evenly on the left side (uneven on the right) • in the center of each line • evenly on the right side (uneven on the left) • evenly on right and left side Use the last button to remove justification.	
Insert table		Insert a table.	"Working with Tables" on page 531

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Insert row above		Insert a new row above current one (that is, the one in which the cursor currently resides).	
Insert row below		Insert a new row below current one (that is, the one in which the cursor currently resides).	
Insert column left		Insert a new column to the left of the current one.	
Insert column right		Insert a new column to the right of the current one.	
Delete row		Delete current row.	
Delete column		Delete current column.	
Delete cell		Delete current cell.	”Deleting a Cell” on page 559
Merge cells horizontally		Merge current cell with cell to its right.	”Merging Two Cells” on page 566
Merge cells vertically		Merge current cell with cell below it.	”Merging Two Cells” on page 566
Split cell		Divide a cell into two. After you split, each cell occupies one half the size of the original cell.	”Splitting a Cell” on page 565
Table properties		Adjust a table’s properties	”Modifying Table Properties” on page 535
Cell properties		Adjust properties of current cell	”Working with Table Cells” on page 556

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Show/hide border		Display/suppress internal table border	”Setting Table Borders” on page 551

Form Elements Toolbar

These toolbar options appear when you are working with an HTML form, poll, or survey.

See ”The Form Toolbar Options” on page 587.

Copying from Other Applications

You can copy information from most other Windows applications into **eWebEdit400** and retain most or all of the original application's formatting. In general, copying from another application involves these steps.

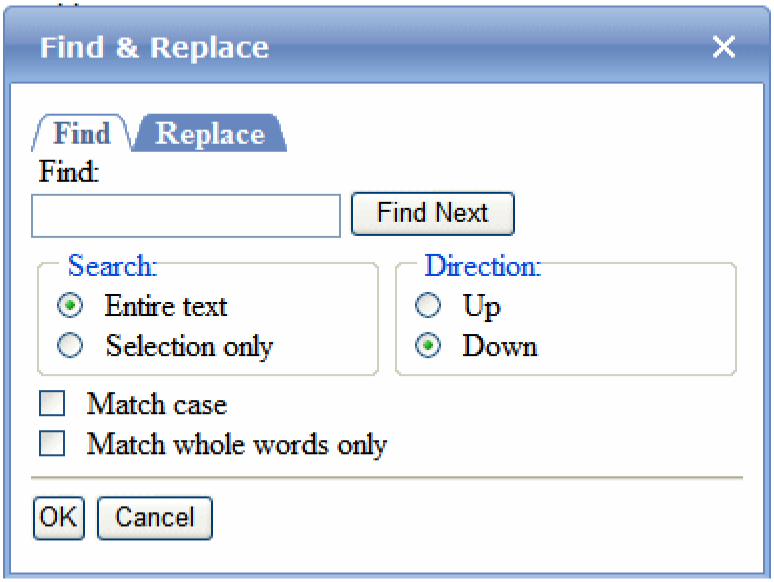
1. Sign on to the application that contains the information.
2. Select the text to be copied.
3. Press <Ctrl>+<C>.
4. Go to **eWebEdit400**.
5. Press <Ctrl>+<V> to paste the selected information.

Note that you can only copy content, not background information that generates content. So, for example, you can copy the values in a spreadsheet but not the formulas used to generate them. Also, copying dynamic fields from Microsoft Word retrieves the current value of the fields but not the variables that generate the values.

It's a good idea to experiment with copying from different sources to test the results.

Finding and Replacing Text

To find (and optionally replace) text on your Web page, click the Find and Replace button ( ). When you do, the Find and Replace dialog box appears.



You can use this dialog to simply find text, or to find text then replace it with other text. Each option is explained below.

TIP! You can also use this dialog to delete text that appears repeatedly. To do so, follow the directions in ”Finding and Replacing Text” on page 499 and enter nothing in the **Replace With** field.

See Also:

- “Finding Text” on page 499
- “Finding and Replacing Text” on page 499
- “Additional Options on the Dialog Box” on page 499

Finding Text

1. In the **Find** field, type the text you want to find.
2. Set dialog box options (see ”Additional Options on the Dialog Box” on page 499).
3. Click **Find Next** to find the next occurrence of the “find” text.

Finding and Replacing Text

1. In the **Find** field, type the text you want to find.
2. Click the **Replace** tab.
3. In the **Replace With** field, type the text to replace the “find” text.
4. Set dialog box options (see ”Additional Options on the Dialog Box” on page 499).
5. If you want to
   - replace all occurrences of the “find” text with the “replace” text, click **Replace All**.

NOTE You can undo replacements one at a time using the Undo button ( ).

   - replace only the highlighted term with the “replace” text, click **Replace**.
   - find the next occurrence of the “find” text (and optionally replace it with the “replace” text), click **Find Next**.
   - change the highlighted term using the editor, exit the Find and Replace dialog, move to the term and edit as needed. To restart the search, press the Find button ().
6. Continue to find and optionally replace or edit until you reach the end of the text.

Additional Options on the Dialog Box

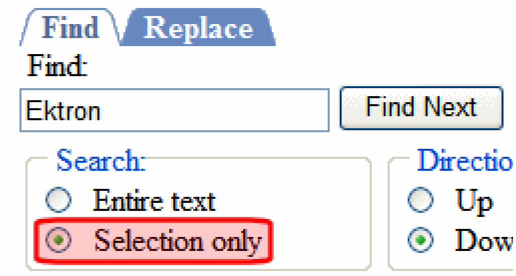
The dialog box also lets you do the following.

- ”Specifying a Search Direction” on page 500
- ”Considering the Case of a Search Term” on page 501
- ”Whole Word Match” on page 501
- ”Searching Selected Text” on page 500

Searching Selected Text

You can search and replace text in a selected portion of content. To do so, follow these steps.

1. Select text that you want to search and replace by dragging the cursor over it.
2. Click the Find and Replace button ().
3. In the Find & Replace dialog, enter the search string.
4. If desired, click the **Replace** tab and enter a replacement string.
5. Under **Search**, click **Selection only**.

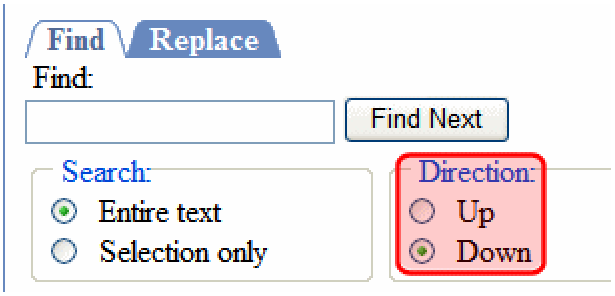


6. Click **Find Next**.
7. The search runs but is limited to text you selected in Step 1.

Specifying a Search Direction

The search begins where the cursor is when you click **Find Next**. To make sure you find every occurrence of a term, place the cursor at the top of the content before beginning the search.

If you begin the search somewhere other than the top of the page, use the **Direction** field to search from the current location to the top or bottom of the content.

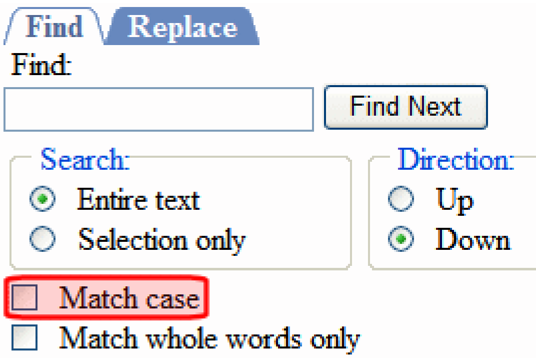


To search from the cursor location to the	Click this option in the Direction field
end of the page	**Down**
top of the page	**Up**

Considering the Case of a Search Term

By default, the search ignores the case (upper or lower) of a search term. In other words, if you enter **Bob** in the **Find** field, the search finds bob, Bob, BOB, etc.

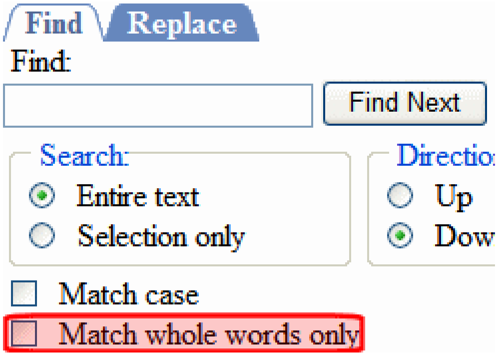
If you want the search to be case sensitive, use the **Match case** check box. If you enter **Bob** in the **Find** field and place a check in the **Match case** box, the search only stops at Bob, not bob or BOB.



Whole Word Match

By default, the search finds any occurrence of the text that you type into the **Find** field. For example, if you enter **the**, the search finds the word **the**, as well as those letters embedded in other words, such as o***the***rs and ***the***ater.

If you want the search to find only whole word occurrences of the text in the **Find** field, click the **Match whole words only** box.

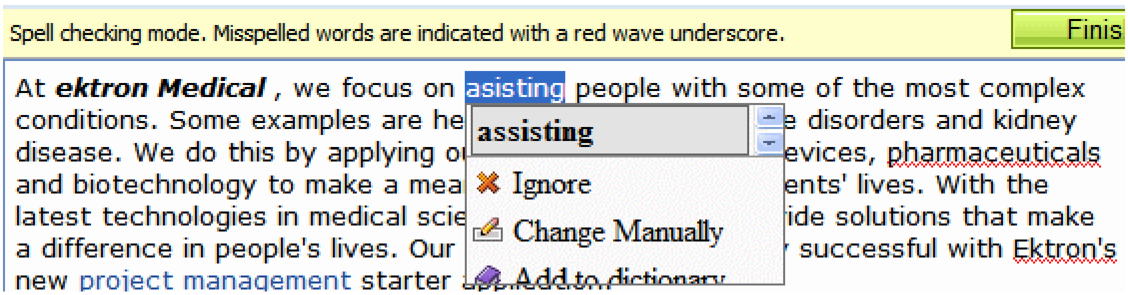


Checking Spelling

> **NOTE** This section describes the spell check software installed with eWebEdit400. If you use the FireFox browser, it has its own spell check software. To eliminate confusion between eWebEdit400's and Firefox's spell checker, Ektron suggests disabling Firefox's. This is set on Firefox's Tools > Options dialog > General Tab > **Check my spelling as I type** check box.

To begin spell checking, click the spell check button ( ).

When you do, **eWebEdit400** underscores in red each word that's not in the dictionary. Then, it stops at the first misspelled word and displays your options for fixing the problem.



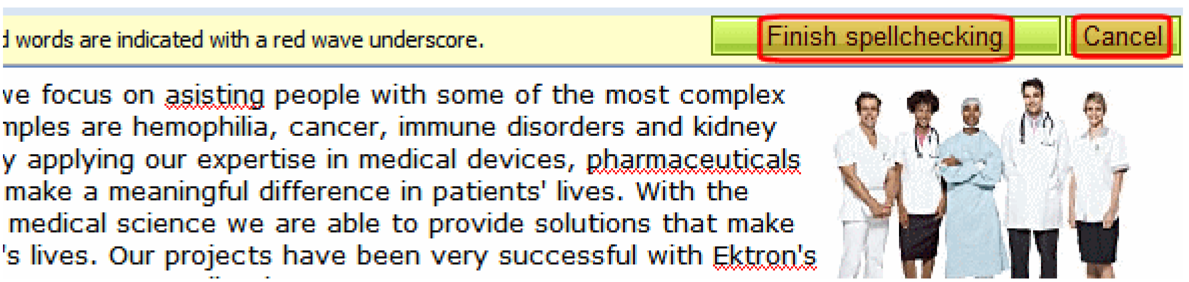
The Spelling Options

Option	Use this option if you want to...
One or more similar, correctly-spelled words	Replace highlighted word with one from the list. To do this, click the correct word.
Ignore, Ignore All	Don't want to change the highlighted word, nor do you want to add it to the dictionary. If the word appears repeatedly in the content, **Ignore All** also appears. Use this to skip all occurrences of the word in this spell check session.

Option	Use this option if you want to...
Change Manually	Retype the highlighted word. If the word appears repeatedly in the content, the following message asks if you want to change *all* occurrences to the fixed version. **This word occurs more than once in the text. Would you like to replace all instances?**
Add to Dictionary	Add the selected word to the “dictionary.” Do this if it is correctly spelled, and you expect to use the word in the future. Once you add a word to the dictionary, it will no longer be highlighted by the spell checker. The word can also now appear on the correctly-spelled words list. Technical note: Words added using this option are placed in a .txt file located in the host server’s `site root/Workarea/Foundation/RadControls/Spell/TDF` folder. The file’s name begins with the selected language, and ends with `custom.txt`. For example, if the language is U.S. English, the file is en-US-custom.txt.

Using the Spell Checker

- As soon as you select an option, the spell checker moves to the next misspelled word and displays its options.
- If you finish spell checking all words, you return to edit mode.
- Instead of stopping at every misspelled word, you can place the cursor on any highlighted word. When you do, its spelling options appear.
- If you are done before fixing every misspelled word, click **Finish spell checking** from the toolbar (circled below). If you do, your changes are saved, and you return to edit mode.



- If you want to exit the spell checker and ignore all changes you have made since beginning it, click **Cancel** (circled above) at any time.

Working with Images

eWebEdit400 makes it easy to insert images in to your content.

First, you import the image into library or as a **Ektron CMS400.NET** asset. Then, add it to the content. Next, you can edit its properties, such as border width and color, spacing, width and height, etc.

For more information, see

- ”Inserting an Image” on page 506
- ”Inserting an Image Thumbnail” on page 508
- ”Editing an Image’s Properties” on page 508
- ”Deleting an Image from Content” on page 516

Inserting an Image

Prerequisite

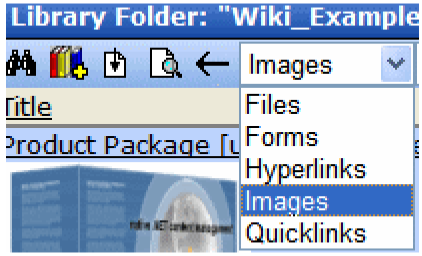
Before you can insert an image into **eWebEdit400**, it must be either uploaded to the Library or imported as an asset.

- ”Copying Files to the Library” on page 141 explains how to upload an image to the Library
- ”Importing Managed Files” on page 255 explains how to import an asset

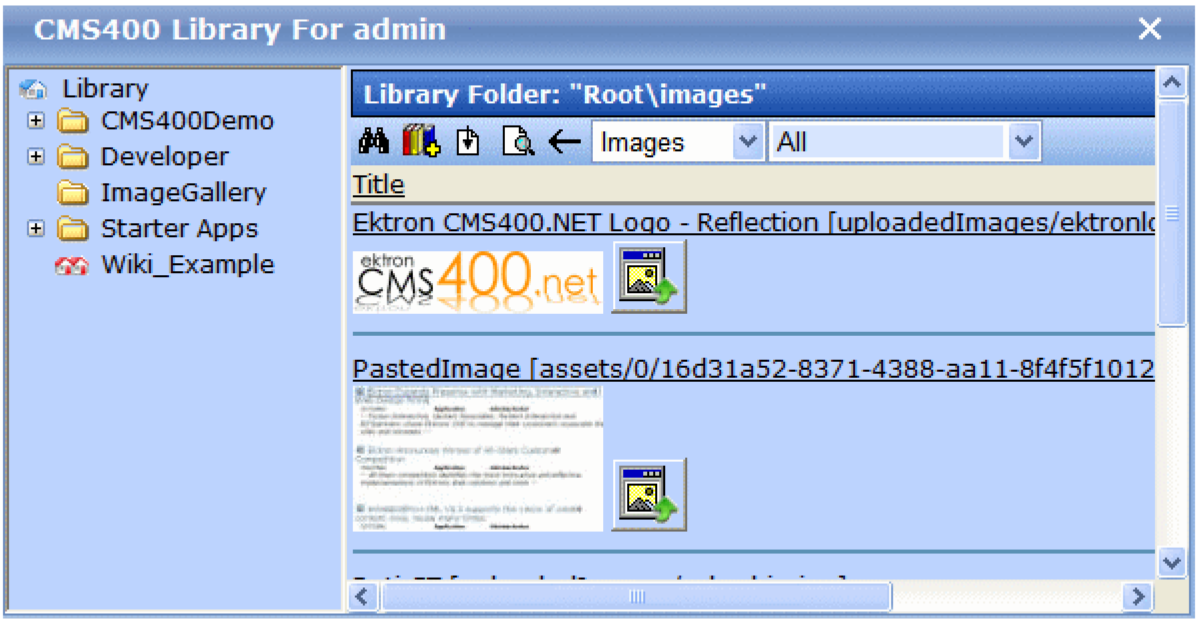
Procedure for Inserting an Image

To insert an image into the editor, follow these steps.

1. Place the cursor where you want the image to appear
2. Click the library button ().
3. Make sure **Images** is selected in the content type dropdown (circled below).



4. From the folder display in the left panel, select the folder that contains the image you want to insert.

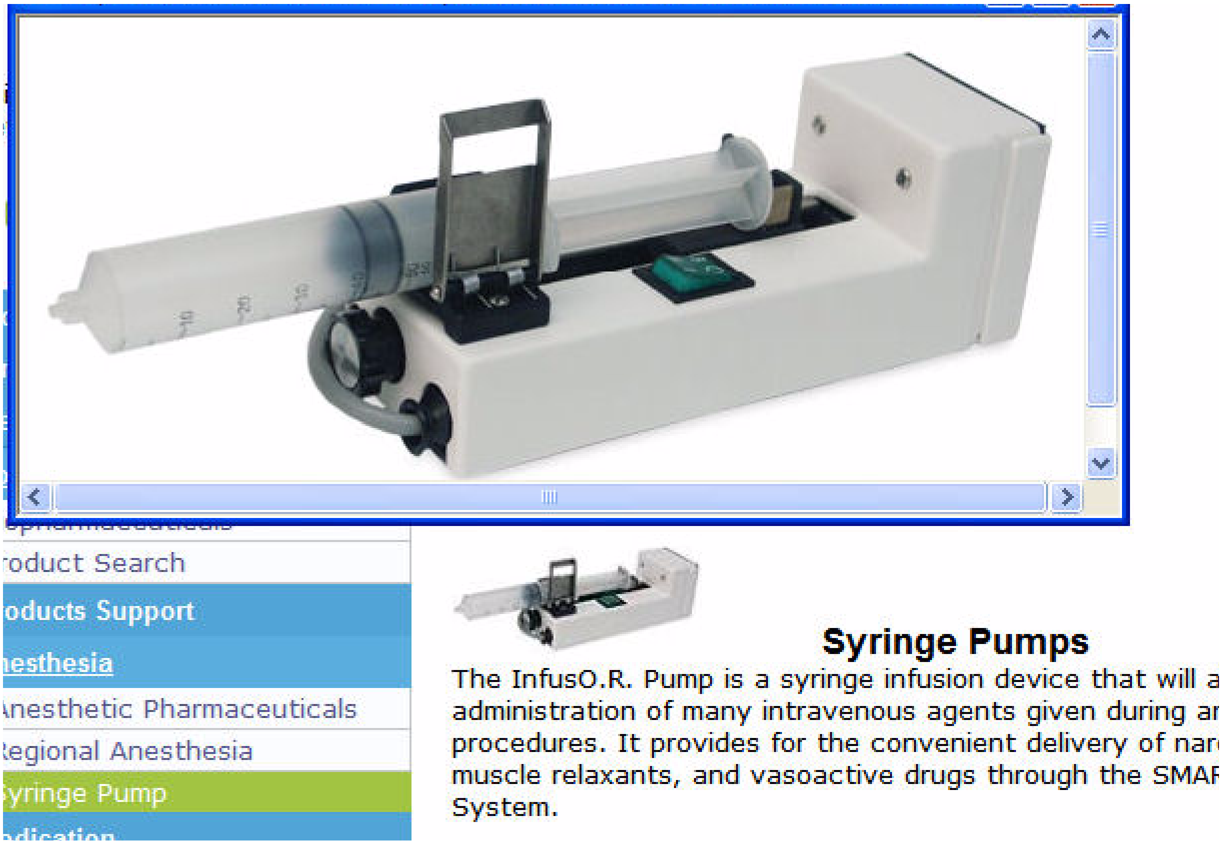


If you don't know the image's folder, use the search button ( ) to find the image by title, description, or internal file name.

5. Select the image you want to insert.
6. Click the insert button ( ).
7. The image is inserted into the content.

Inserting an Image Thumbnail

As an alternative to inserting an image, you can insert a *thumbnail*, a miniature version of the image. When the thumbnail appears on a Web page, a site visitor can click it to see a full-sized version of the image. See an example of both below.

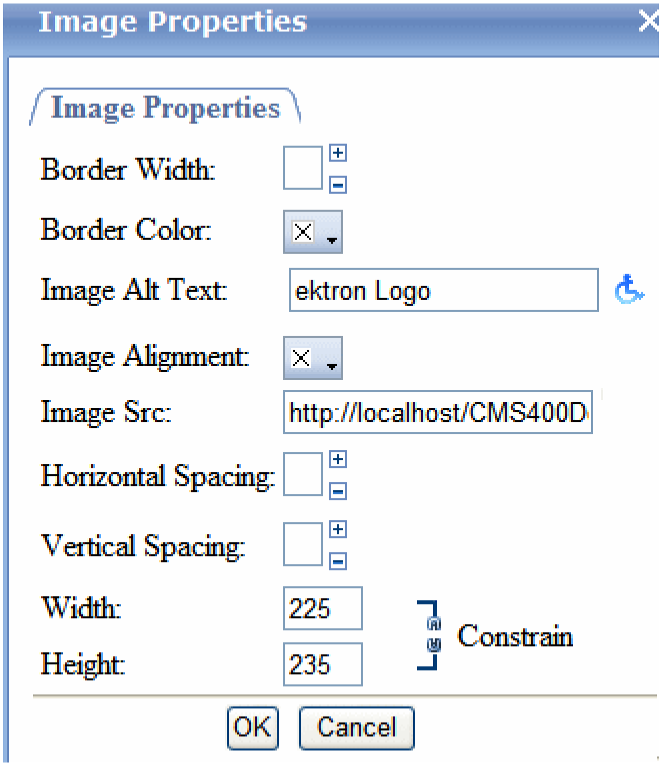


To insert an image thumbnail, follow the steps in "Procedure for Inserting an Image" on page 506, but when you get to Step 5, click the image's thumbnail button ().

Editing an Image's Properties

After an image in inserted, you can adjust the following properties for it.

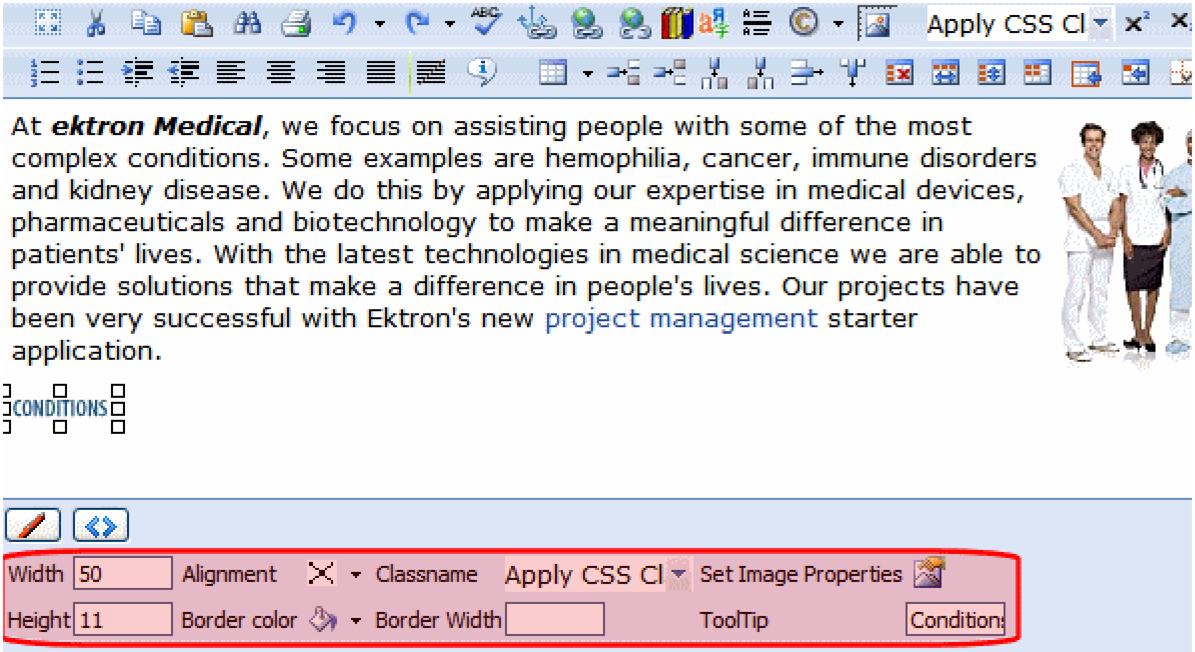
- border width
- border color
- alt text
- description
- alignment
- the image itself
- horizontal and vertical spacing
- width and height



To access the Image Properties dialog, follow these steps.

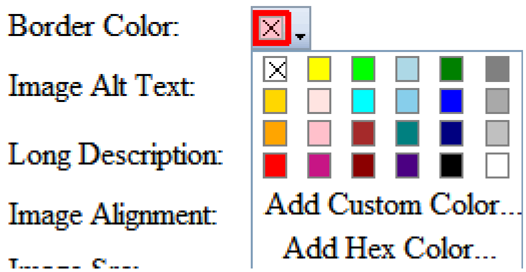
1. Select the image.
2. Right click the mouse.
3. Click **Set Image Properties**.

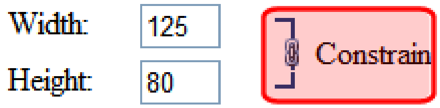
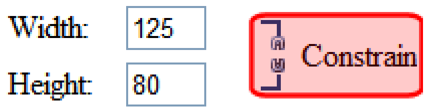
NOTE You can also view and adjust some image properties at the bottom of the Edit Content screen, as shown below.



The following explains the fields on the Image Properties dialog.

Field	Description
Border Width	Set the width of the image's border in pixels. *See Also:* "Setting a Border" on page 513

Field	Description
Border Color	To set the color of the image's border, click the **X** circled below. When you do, a palette of colors appears. Click the border color from the palette.  If a color has already been assigned, it appears next to this field label. To change it, click down arrow next to the color to display the color palette.
Image Alt Text	The image's title is used as the default `alt` text. Change if desired. The `alt` text appears in place of the image on the Web page if the image does not display. Examples of when an image does not display include: • a speech browser (for example, a visually impaired person) • a text-only browser (for example, browsing from a mobile phone) • a graphical browser with images turned off
Image Alignment	The alignment of the image relative to adjacent text and images. If you choose left or right alignment, the text wraps around the image. For more information, see "Aligning the Picture" on page 514
Image Src	The path to the image. If you want to change the image, click the ellipsis () button to open the library. From there, select a replacement image.
Horizontal Spacing, Vertical Spacing	The amount of horizontal and vertical space around the picture. *See Also:* "Adding Space around the Picture" on page 515
Width	The width of the picture in pixels. *See Also:* "Pixels" on page 512
Height	The height of the picture in pixels. *See Also:* "Pixels" on page 512

Field	Description
Constrain	The constrain feature lets you determine if an image’s height and width can be adjusted independently. Typically, you want Constrain on, as shown below.  In this state, if one dimension is adjusted, the other is automatically adjusted in proportion to it. For example, if you change the height from 100 to 200, the width is also doubled. To turn Constrain off, click it. When you do, it looks like this.  When Constrain is off, the adjusted picture can be disproportionate, as shown below. 

WARNING! If you substantially adjust the picture’s height and/or width, the picture may be distorted when users view your Web page.

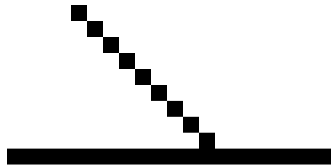
Pixels

A pixel is a single point in a graphic image.

Computer monitors display pictures by dividing the screen into thousands of pixels, arranged in rows and columns. The pixels are so close together that they appear connected.

Below is an image shown at regular size and then enlarged so you can see the pixels that make up the picture.

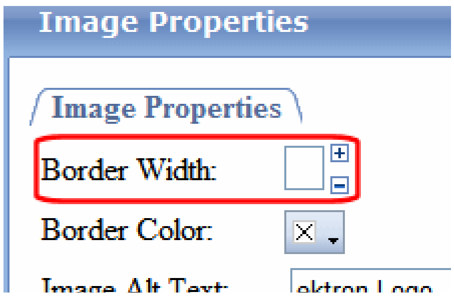
regular size



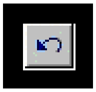
enlarged to show pixels

Setting a Border

To add a border around a picture, enter the border's thickness in pixels in the **Border Width** field on the Image Properties dialog.
See Also: "Pixels" on page 512



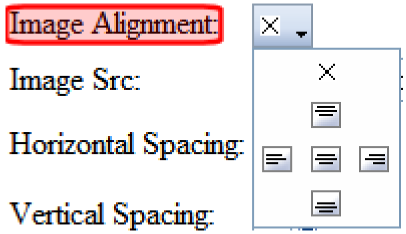
Here is a picture with a 1 pixel border. 

Here is the same picture with a 10 pixel border. 

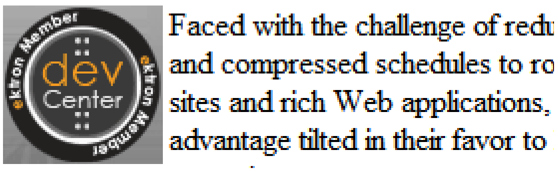
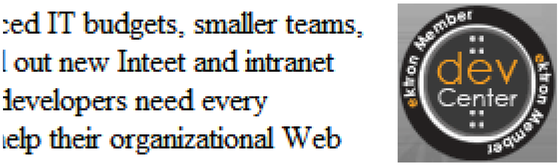
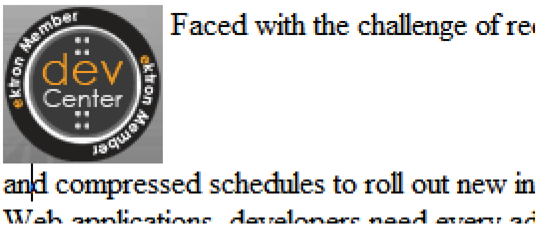
If the picture is not a hyperlink, its border is black. If the picture is also a hyperlink, the border is the same color as a hyperlink (for example, blue or purple if visited).

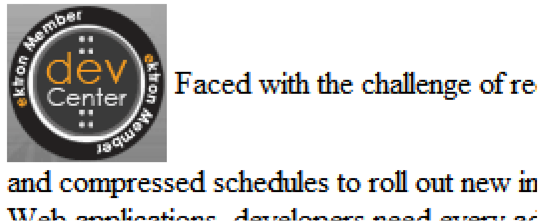
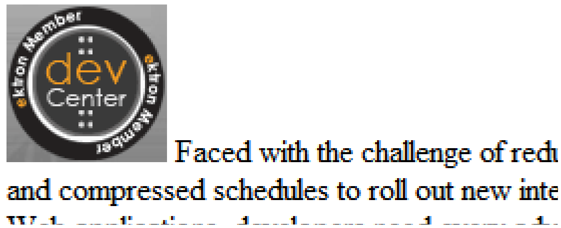
Aligning the Picture

To align a picture, use the **Image Alignment** field on the Image Properties dialog.



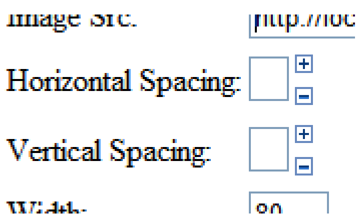
The following table lists your alignment choices.

To align	Click this Alignment option	Illustration
The picture on the left margin, allowing subsequent text to wrap around it		
The picture on the right margin, allowing subsequent text to wrap around it		
The top of the picture with the first line of text		

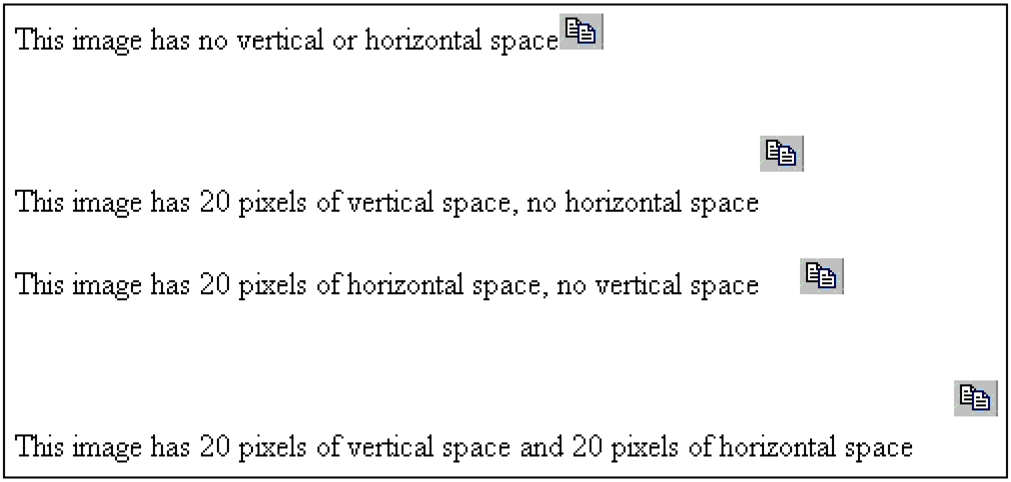
To align	Click this Alignment option	Illustration
The vertical center of the picture with the first line of text		
The bottom of the picture with the first line of text		

Adding Space around the Picture

On the Image Properties dialog box, you can use the **Spacing** fields (**Horizontal** and **Vertical)** to add space around the picture. You enter a number of pixels to determine spacing value.



The following graphic illustrates the effect of adding spacing to a picture.



Deleting an Image from Content

If you want to delete a picture, follow these steps.

1. Move the cursor over the picture.
2. Click the mouse to select the picture.
3. Click the Cut button ( ).

NOTE If you want to remove an image from content created from an XML Smart Form and eWebEdit400 is your editor, click the image icon ( ), open the Image Properties dialog, and delete the image path (circled below).

Using Bookmarks

Use a bookmark to let a user “jump” from any word or phrase to another place in the same content block. On your Web page, text appears in a different color to indicate the bookmark.

Bookmarks are particularly helpful if your page is very long. For example, if your Web page contains minutes from several meetings, the top of the page could list the meeting dates. You could then assign a hyperlink to each date and a bookmark to each set of minutes. The user sees that a date is in a different color, so clicks it to “jump” (using the bookmark) to the correct minutes.

“Creating a Bookmark” on page 517 describes how to set up a bookmark within a file. You can also set up hyperlink to

- another Web page. This procedure is described in “Using Hyperlinks” on page 768.
- a bookmark within another Web page. This procedure is described in “Creating a Hyperlink to a Location Within a Web Page” on page 771.

Creating a Bookmark

When creating a bookmark, you must specify a

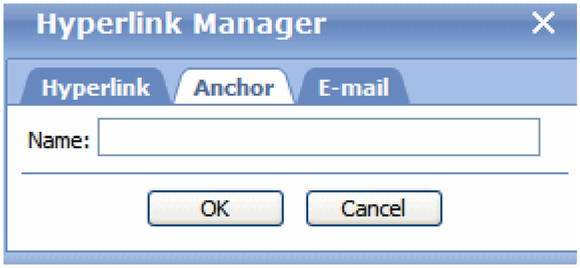
- *source,* the text a user clicks to move to the bookmark
- *bookmark*, the destination to which the cursor jumps when a user clicks the source

To continue with the above example, a meeting date is the source, and the meeting minutes are the bookmark.

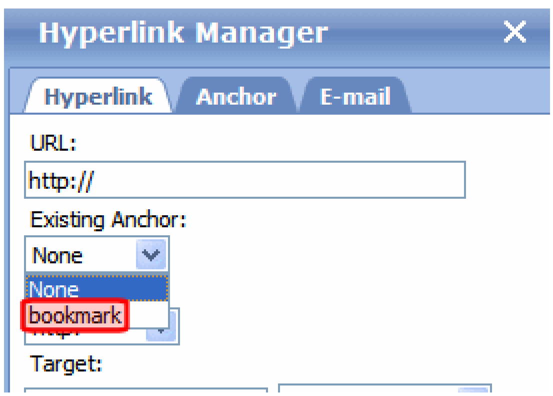
To create a bookmark, follow these steps.

1. Select the bookmark text.

2. Click the Insert Anchor button ( ).
3. The Hyperlink Manager dialog appears with the **Anchor** tab selected.



4. Enter a name for the bookmark.
5. Click **OK**.
6. The editor screen redisplays. (The bookmark does not appear on the page.)
7. Select the source text.
8. Click the Hyperlink Manager button ( ).
9. The Hyperlink Manager dialog appears with the **Hyperlink** tab selected.
10. Click the down arrow below the **Existing Anchor** field and click the bookmark you created in Step 4.



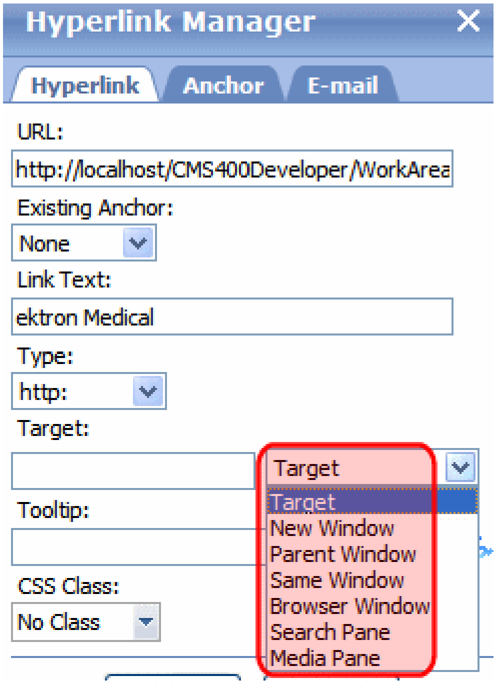
11. If desired, use the **Target** dropdown to change the destination text ‘s window. For details, see “Changing the Destination Window” on page 519.

If you leave the **Target Frame** field blank, the new window replaces the current window.

12. Click **OK**.

Changing the Destination Window

Use the **Target Frame** field on the Hyperlink Manager dialog to change the window that displays the destination page.



The values you can enter into the **Target Frame** field are explained below.

If you want the destination page to appear	Click this in the Target Frame field
In a new browser window, on top of the current browser.	**New Window**

If you want the destination page to appear	Click this in the Target Frame field
In the same position within the browser window. The new window replaces the current one.	**Same Window** Note: this is the default.
If your page contains frames, in the frame that contains the frame with the hyperlink.	**Parent Window**
If your page contains frames, in the full display area, replacing the frames.	**Browser Window**

Using Hyperlinks

Use hyperlinks to let a user "jump" from any word or phrase to another Web page. The page can be within your network (that is, on an intranet) or anywhere on the internet.

NOTE If you want to create jumps within a content block, see "Using Bookmarks" on page 517.

For example, if your Web page should include a link to the Ektron Web site, you would enter the text to indicate the jump (for example **Ektron Web Site**), then create a hyperlink to `www.ektron.com`. When users see **Ektron Web Site** in a different color, they can click the text to "jump" to the site.

Although most jumps go to the top of another Web page, you can also jump to a bookmark within a Web page.

This section explains

Creating a Hyperlink

When creating a hyperlink, you must specify a

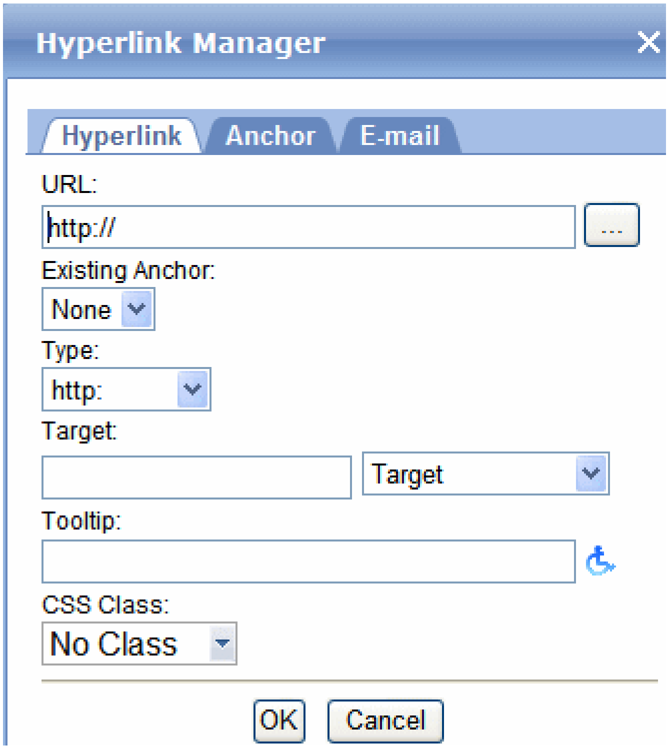
- *source,* the text the user clicks to move to the destination
- *destination*, the Web page that appears when someone clicks the source

To continue with the above example, **Ektron Web Site** is the source, and `www.ektron.com` is the destination.

Entering a Hyperlink

To create a hyperlink, follow these steps.

1. Select the source text.
2. Click the Hyperlink Manager button ( ). The Hyperlink dialog appears.



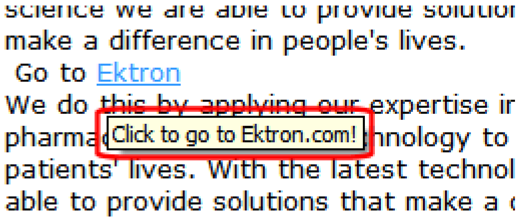
3. Click in the **URL** field after `http://`. Then, enter the address of the destination Web page. For example, `www.ektron.com`.

   If your version of **Ektron CMS400.NET** has URLs that have been entered into the library as hyperlinks, click the ellipsis button (...) to browse the library and insert a hyperlink. *See Also:* "Hyperlinks" on page 150

4. If desired, use the **Target Frame** field to change the window in which the destination text appears. For details, see "Changing the Destination Window" on page 767.

   If you leave the **Target Frame** field blank, the new window replaces the current window.

5. You can enter text to appear in a small window when someone hovers his cursor over this link. For example:



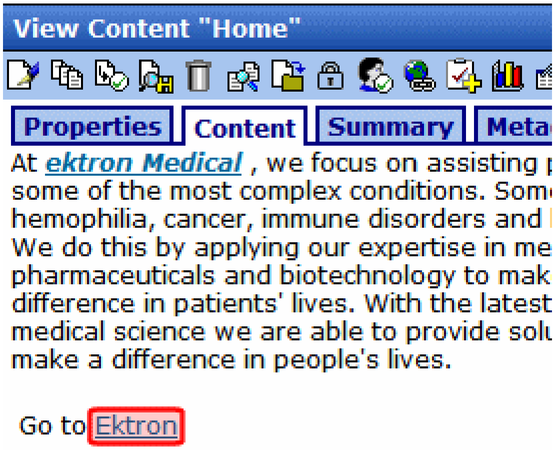
   To add such text, use the **Tooltip** field.

6. The style of this hyperlink is normally determined by the style sheet assigned to the content's page template. However, if you want to apply a special style sheet class to this link, select it from the **CSS Class** dropdown.

7. Click **OK**.

Testing a Hyperlink

To test a hyperlink, save the content. Then, under the View screen's **Content** tab, click the link to verify that it opens the correct Web page.

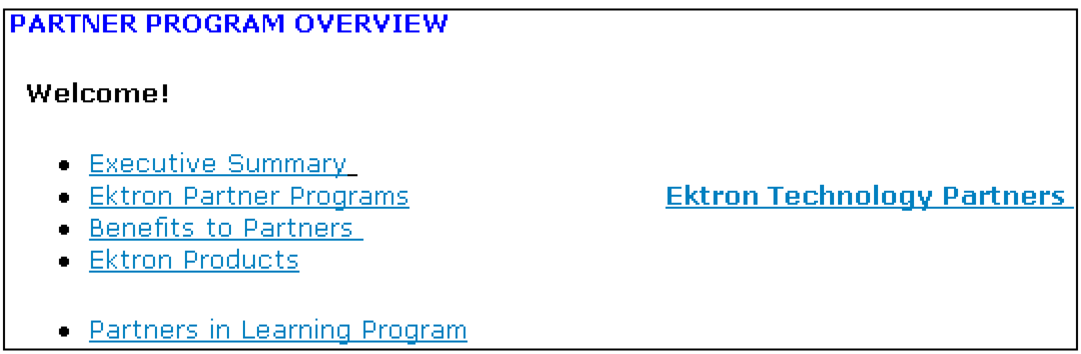


Creating a Hyperlink to a Location Within a Web Page

Sometimes, the destination Web page contains bookmarks, and you want to jump from your page to a bookmark on another page. (Bookmarks are described in "Using Bookmarks" on page 517.)

To create a hyperlink that jumps to another page's bookmark, follow these steps.

1. Open a browser and your Web site.
2. Go to the Web page that contains the bookmark link.
3. Click the bookmark that you want to jump to. For example, on the illustration below, the text **Benefits to Partners** jumps to a bookmark further down the page.



4. When you click the bookmark, its full address appears in the browser address bar. This bookmark's address looks like this.

```
http://www.example.com/single.aspx?id=35#Benefits2
```

5. Click the address bar. The address is selected.
6. Press <Ctrl>+<C> to copy the address into the Windows clipboard.
7. Go to **eWebEdit400**.
8. Select the text or image from which you want to jump to the bookmark.
9. Click the Hyperlink button ( ). The hyperlink dialog box appears.
10. Move the cursor to the **Link** field.
11. Press <Ctrl>+<V> to paste the address you copied in Step 4 into the **Link** field.
12. Click **OK**.

Editing a Hyperlink

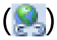
If you need to change a hyperlink's destination Web page or target frame, follow these steps.

1. Select the hyperlinked text.
2. Right click your mouse.
3. Click **Set Link Properties**.
4. The Hyperlink Manager dialog appears.
5. Edit the fields as needed. Several fields are explained in ”Entering a Hyperlink” on page 522
6. Press **OK**.

Removing a Hyperlink

If you want to remove a hyperlink from text, select the text and press the Remove Link button ( ).

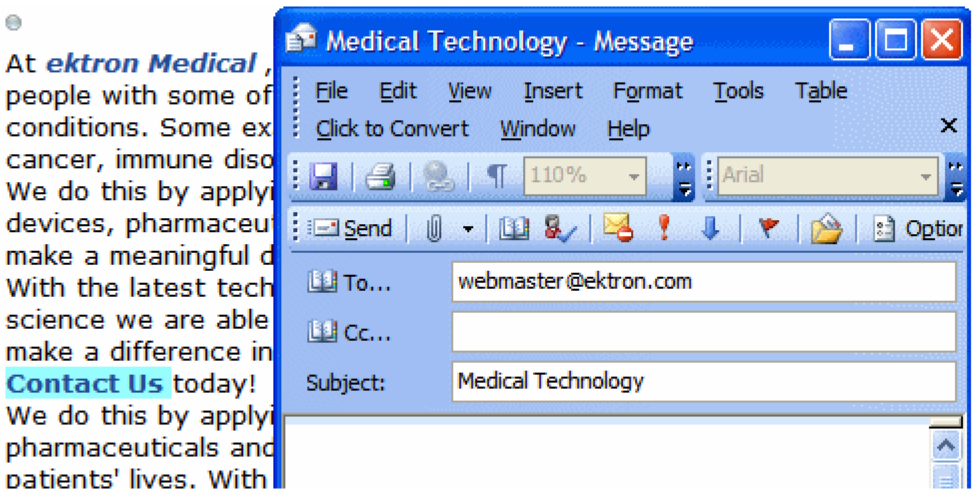
Preventing a URL from Becoming a Hyperlink

If you enter a URL or an email address into **eWebEdit400**, it automatically becomes a hyperlink. To avoid this, select the text and click the Remove Link toolbar button ().

Inserting email Links

You can easily insert email links into your content. Such links provide an easy way for your site visitors to communicate with your organization.

An email link resembles a hyperlink. But, when a site visitor clicks the link, instead of opening a different Web page, his email application is launched.



The address and subject are retrieved from the mail link and inserted into the user’s email screen, as shown above.

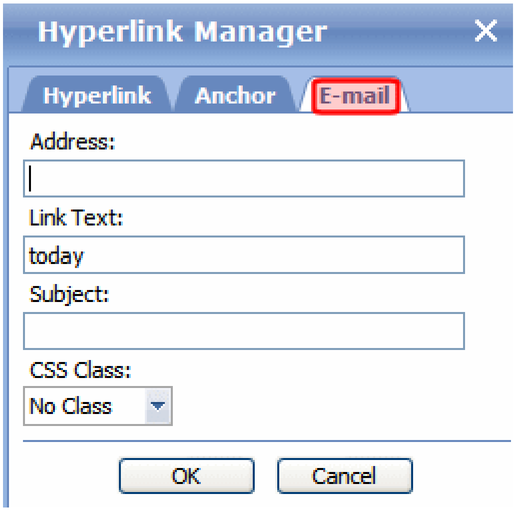
To insert an email link, follow these steps.

1. Within **eWebEdit400** content, insert text that a site visitor will click to open the email link. For example: **Contact us today!**

   If the text does not exist yet, insert it.

2. Select the text.

3. Click the Hyperlink Manager button (). The Hyperlink dialog appears.
4. Click the **E-mail** tab.



5. Note that the selected text appears in the **Link Text** field.
6. In the **Address** field, enter the email address to which the message will be sent.
7. In the **Subject** field, enter default text for the email's Subject line if desired. The user sending the mail can edit this text if desired.
8. Press **OK**.

Working with HTML

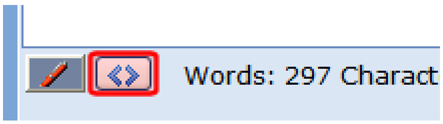
eWebEdit400 creates pages for display on the internet or an intranet. These pages use HTML (hypertext markup language) to format text and images for display in a browser. You do not need to know HTML to use **eWebEdit400**.

However, if you know HTML, you can view, insert or edit your Web page's HTML code.

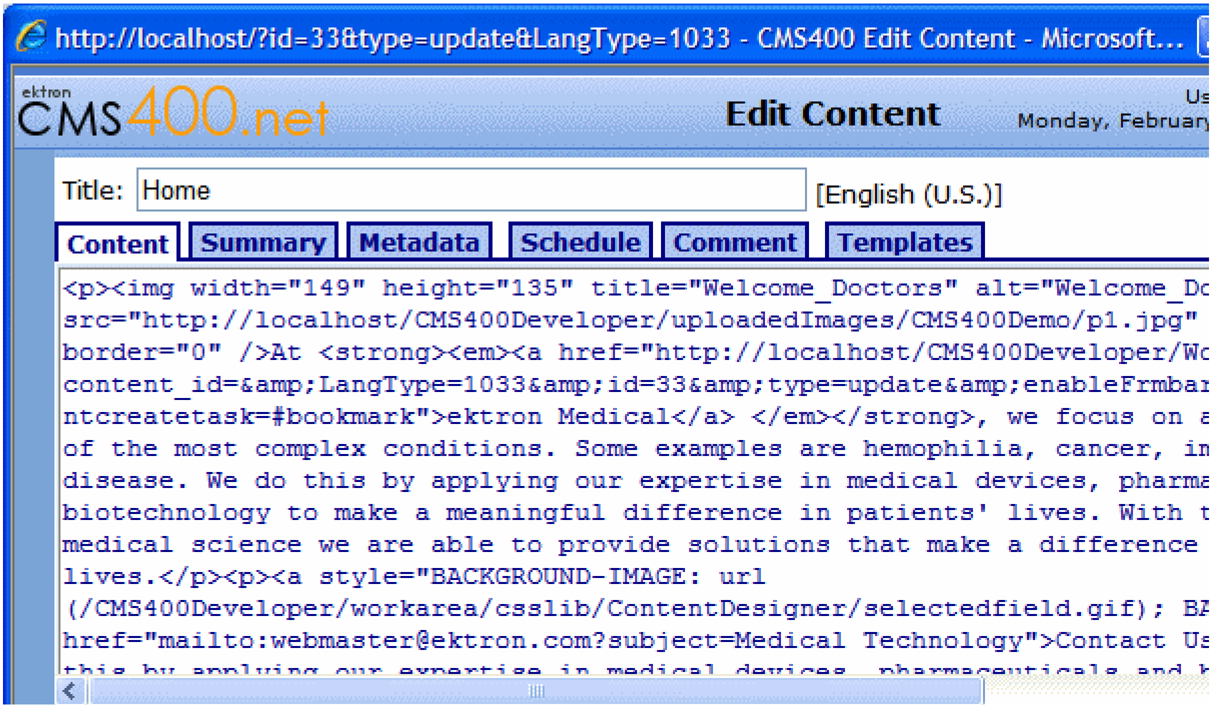
Viewing and Editing HTML

To view your page's HTML, follow these steps.

1. Scroll to the bottom of the screen.
2. Click the HTML button (circled below).



3. The HTML code appears, as shown below.



4. You can edit the HTML using functions like Cut, Copy, Paste and Delete. To access these functions, right click the mouse.
5. To return to normal view, click the Design button (circled below).

Working with Tables

Sometimes, the information on your Web page looks better when displayed on a table. Here is an example.

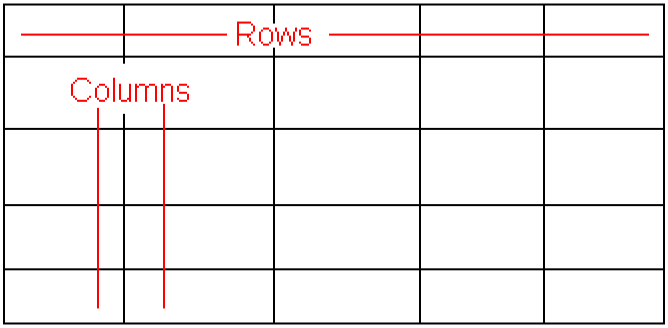
City	Baseball Team	Hockey Team
Boston	Red Sox	Bruins
New York	Yankees / Mets	Rangers
Chicago	White Sox / Cubs	Black Hawks

This chapter explains everything you need to about working with tables. It explains

- ”Creating a Table” on page 531
- ”Deleting a Table” on page 537
- ”Inserting a Table within a Table” on page 537
- ”Modifying Table Properties” on page 535
- ”Working with Table Cells” on page 556
- “Section 508 Tables” on page 570

Creating a Table

When creating a table, you need to specify a number of rows and columns. A row is a horizontal series of cells, while a column is a vertical series.



If you know how many rows and columns the table will be, enter those numbers. If you don't know the exact number when you create the table, estimate how many you need. You can easily add or remove rows and columns later.

There are two ways to create a table. If your table will be six rows by six columns or less, use the Table Builder. *See Also:* "Creating a Table Using the Table Builder" on page 532

If it will exceed 6 x 6, use the Table Wizard. *See Also:* "Creating a Table Using the Table Wizard" on page 533

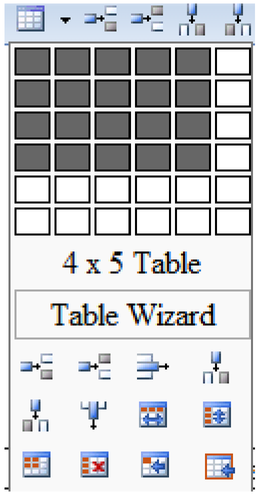
Either way, once the table is created, you use the features described in "Modifying Table Properties" on page 535 to add borders, background color, set width and height, etc.

Creating a Table Using the Table Builder

To create a table, follow these steps.

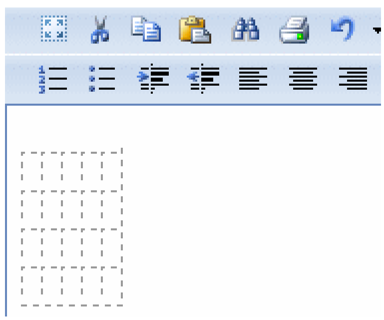
1. Click the table button ( ).
2. Drag the cursor over rows and column to indicate the size of the table.

The following example shows a table that is 4 rows by 5 columns.



3. Click the mouse.

At this point, the table looks like this.

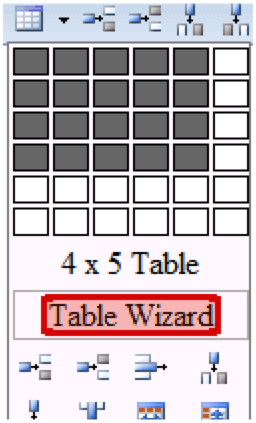


4. Begin entering text and images into the table cells. To further modify the table, see "Modifying Table Properties" on page 535.

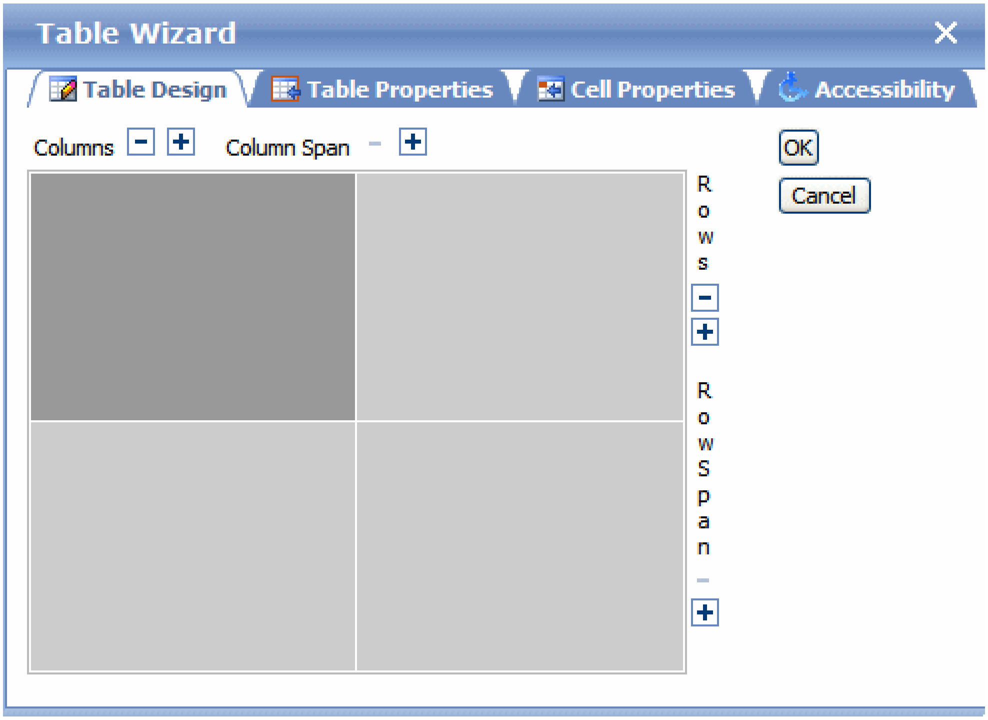
You can also select the table and drag its right border to the right and/or down to enlarge it for ease of use.

Creating a Table Using the Table Wizard

1. Click the table button ().
2. Click **Table Wizard** (circled below).



3. The Table Wizard dialog appears.



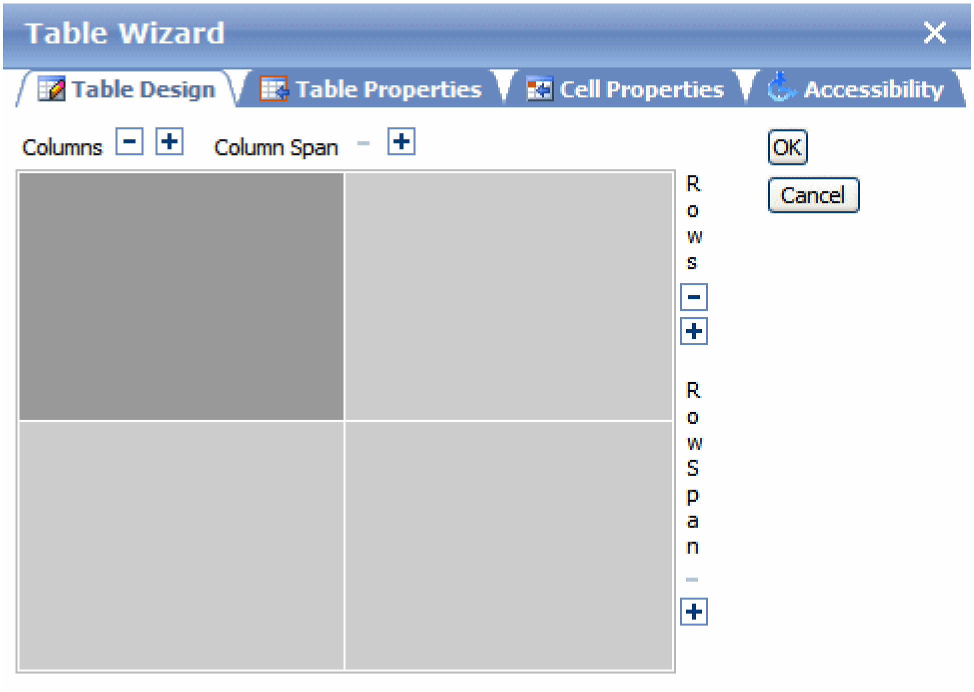
4. To change the number of columns or rows, click the plus or minus signs (**+ -**) next to **Columns** and **Rows**.
5. The image adjusts to show the number of rows and columns.
6. Press **OK**.

7. Begin entering text and images into the table cells. To further modify the table, see "Modifying Table Properties" on page 535.

Modifying Table Properties

To modify a table's properties, follow these steps.

1. Click inside the table.
2. Right click the mouse.
3. Click **Set Table Properties**.
4. The Table Wizard dialog appears.



The dialog has four tabs, described below.

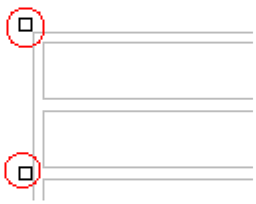
Tab	Description	For more information, see
Table Design	Lets you • adjust the number or row and columns • *span* rows or columns (that is, two or more adjacent cells are merged)	“Choosing the Number of Rows and Columns” on page 538 ”Spanning Rows or Columns” on page 562
Table Properties	Lets you set the table’s • width • height • background color • background image • alignment • cell spacing and padding • Id • css class • border	”Specifying Table Width” on page 540 ”Table Backgrounds” on page 546 ”Specifying Horizontal Alignment” on page 544 ”Setting Cell Padding and Spacing” on page 568 ”Setting Table Borders” on page 551
Cell Properties	Lets you set the selected cells’ • alignment • background color • background image • height and width • ID • css class • abbreviation • categories	”Aligning Text Within a Cell” on page 564 ”Specifying a Cell’s Background Color” on page 560 ”Specifying a Background Image for a Cell” on page 561 ”Specifying a Cell’s Background Color” on page 560 “Spanning More than One Row or Column” on page 563

Tab	Description	For more information, see
Accessibility	Lets you assign accessibility information for the table. • heading rows caption • heading columns caption • caption alignment • caption • summary	"Section 508 Tables" on page 570

Deleting a Table

To delete a table, follow these steps

1. Move the cursor over the table until the cursor becomes a four-headed arrow (✣).
2. Click the mouse button. The table becomes selected (small squares appear around it).



3. Press <Delete>.

Inserting a Table within a Table

You can insert a table within a table. You might want to do this to arrange text in columns.

Horizontal Alignment	Right	Left	Center
	text	text	text

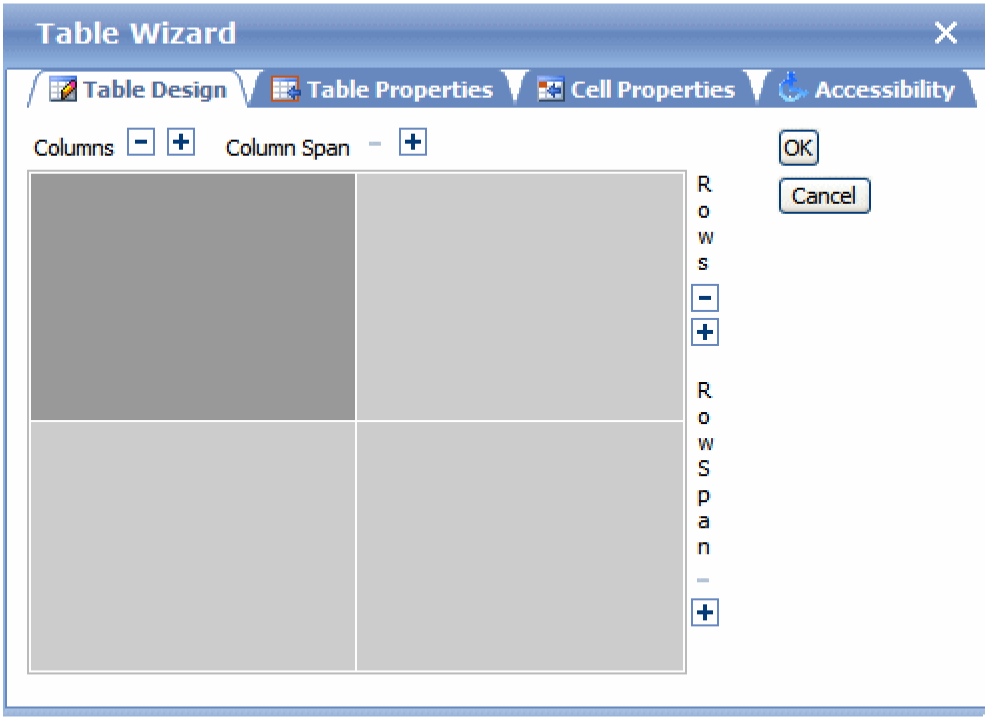
NOTE HTML does not let you use tabs or spaces to align text in columns. You must use a table to align columns. You can remove the table's border, so that no lines appear between the columns and rows.

To insert a table within a table, follow these steps.

1. Place the cursor in the cell into which you want to insert a table.
2. Click the Insert Table button ( ).
3. Drag the cursor over rows and column to indicate the size of the table.
4. Click the mouse.

Choosing the Number of Rows and Columns

Use the **Table Design** tab of the Table Properties box to change the number of rows or columns in a table.



Alternatively, place the cursor within the table then add or remove columns relative to that cell. See "Adding or Removing Rows and Columns" on page 539.

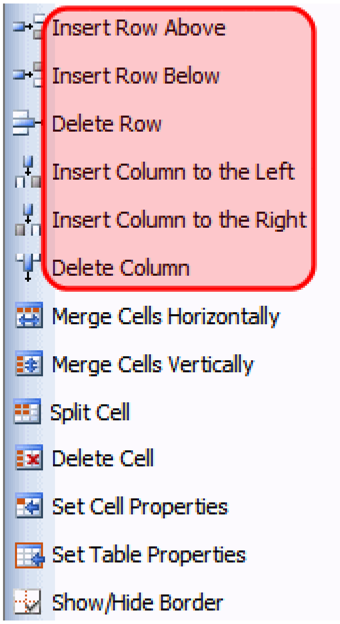
Adding or Removing Rows and Columns

To add or remove table rows and columns, follow these steps.

NOTE You can also adjust the number of rows and columns using the Table Wizard. *See Also:* "Creating a Table Using the Table Wizard" on page 533.

1. Place the cursor in the cell from which you want to add or delete rows or columns.
2. Right click the mouse. A menu appears.

Menu options relating to adding/removing rows or columns are highlighted below.



3. Click the appropriate menu option. For example, to add a row above the current cursor location, click **Insert Row Above**.

NOTE These options are also available on the toolbar.

Specifying Table Width

After you create a table, you can set its width by specifying one of the following:

- *percentage* of the window: the table's width varies as a user adjusts the browser size
- *fixed number of pixels,* the table's width stays the same as a user adjusts the browser size

You can also *not* set a width but instead let information you enter into the table's cells determine its width.

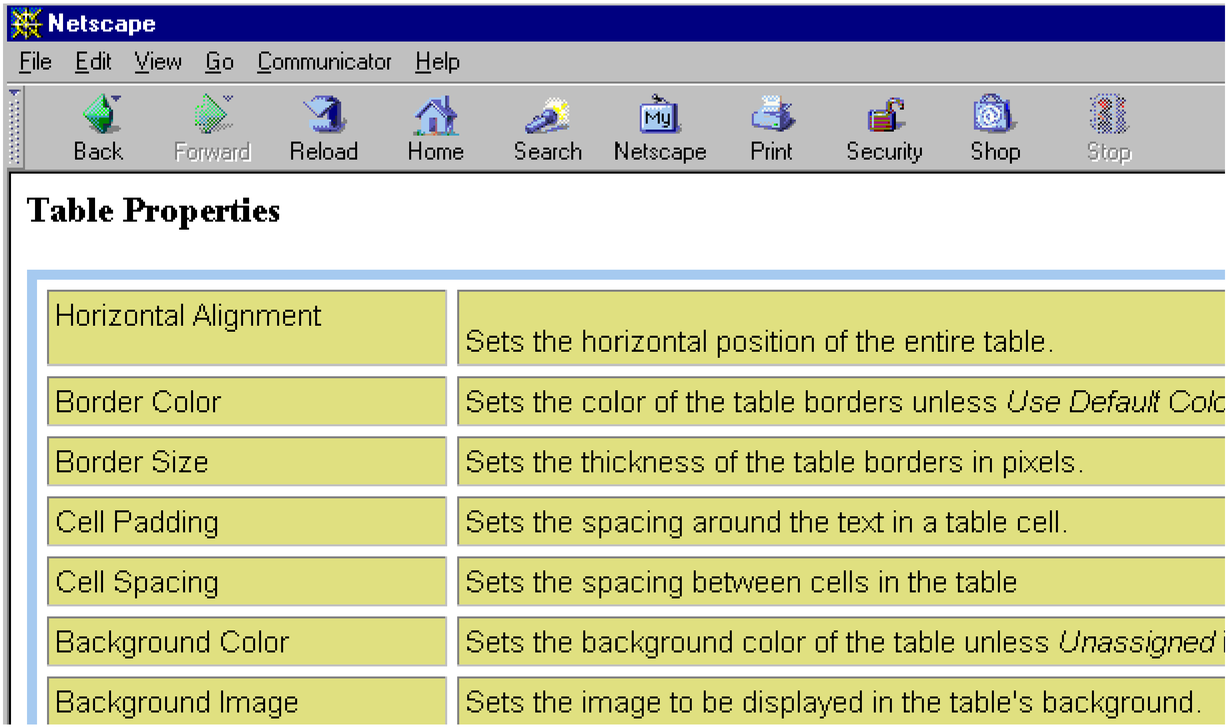
NOTE To set the width of a column, adjust the width of one of the cells within the column (as described in "Specifying the Height and Width of a Cell" on page 558). Usually, this change affects the other cells in the column.

Specifying Table Width by Percentage

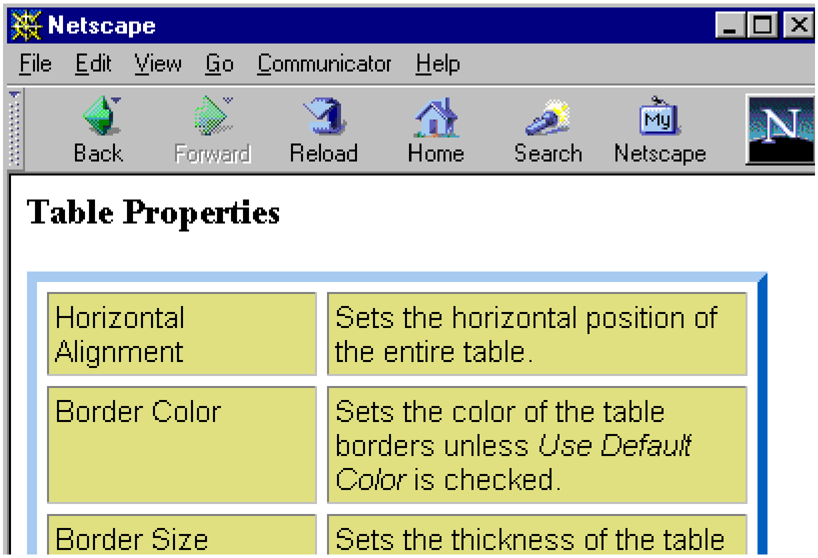
Specify table width and height by percentage if you want the table to be resized as the user resizes the browser.

NOTE In order for the table to resize with the browser, the Word Wrap attribute must be turned on in all table cells. For details, see "Word Wrap" on page 567.

For example, if you specify that a table is 100% wide and high, and your browser displays 14 inches across when it is maximized, the table fills the screen (except for the browser border).



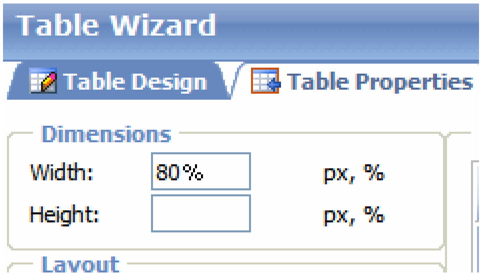
If you resize the browser to half the screen, the table will be about 7" wide. You still see both columns, but some of the data is moved down.



Setting Table Width or Height by Percentage

To specify table width by percentage, follow these steps.

1. Place the cursor within the table.
2. Right click the mouse.
3. Select **Set Table Properties**.
4. Click the **Table Properties** tab.
5. In the **Dimensions** section of the **Table Properties** tab, specify the percentage at the **Width** or **Height** field. Follow the number with the percent sign (**%**), as shown below.

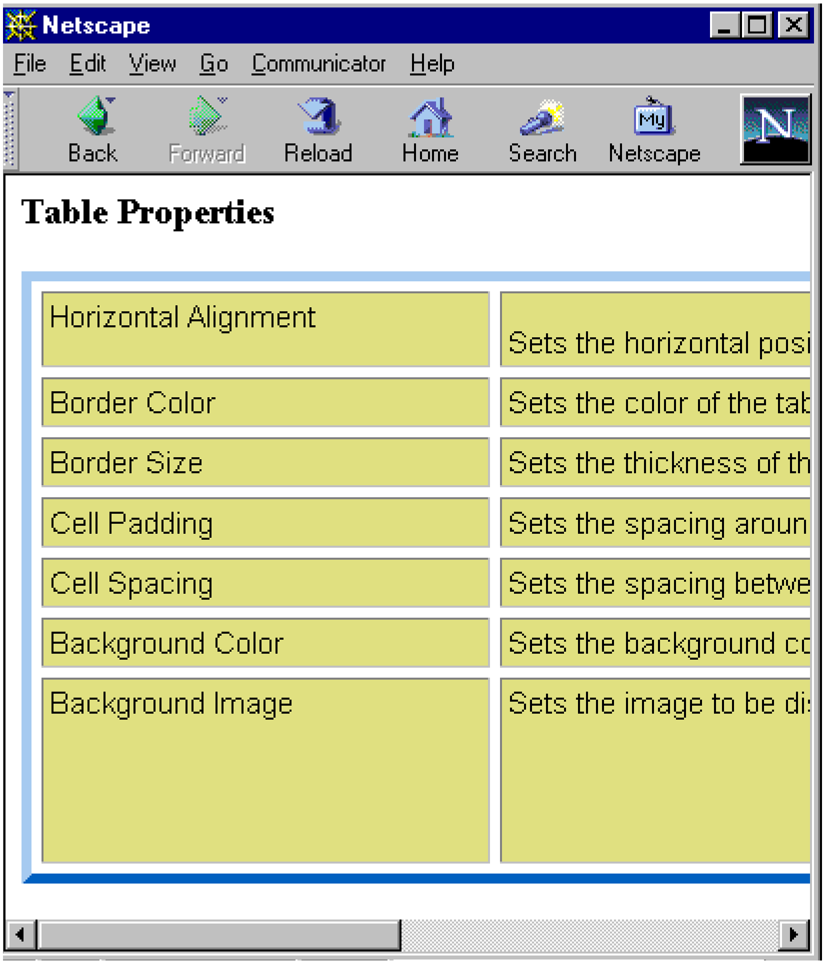


Specifying Table Width or Height by Pixels

Specify table width or height by pixels if you want the table size to remain the same when a user resizes the browser.

For example, if you specify that a table is 610 pixels wide, and the user's browser is set to low resolution (640 x 480 pixels), the table occupies the full width of the browser when it is maximized.

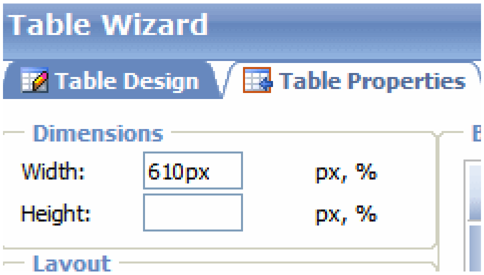
If the user resizes the browser so that it only occupies the left half of the screen, only the left half of the table appears. A scroll bar appears at the bottom of the browser. The user must move the scroll bar to see the rest of the table.



Setting Table Width by Pixels

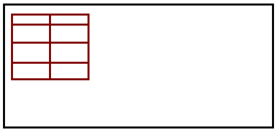
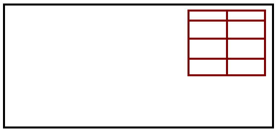
To specify table width or height by pixels, follow these steps.

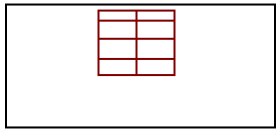
1. Place the cursor within the table.
2. Right click the mouse.
3. Select **Set Table Properties**.
4. Click the **Table Properties** tab.
5. In the **Dimensions** section of the **Table Properties** tab, enter the number of pixels at the **Width** or **Height** field.



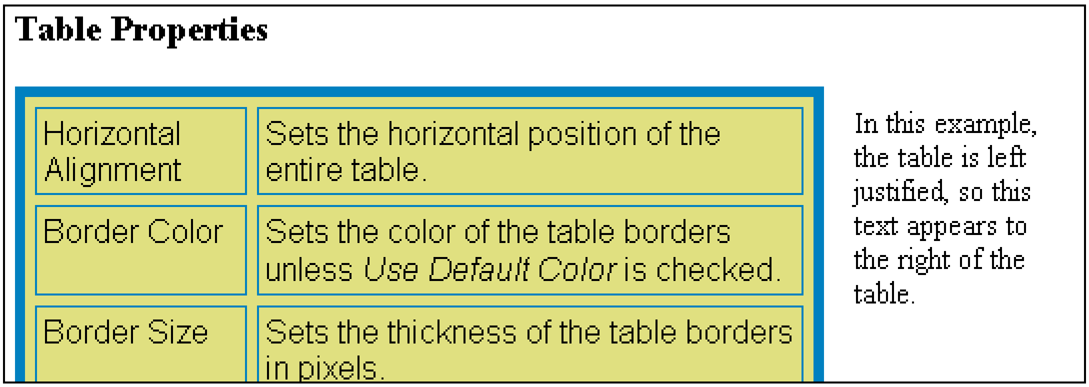
Specifying Horizontal Alignment

You can specify your table's horizontal alignment (left, right, or center) within the browser.

Alignment	**Example**
left	
right	

Alignment	Example
center	

If you specify right or left justify, you can wrap text around the table. To do this, move the cursor to the right or left of the table and begin typing.



To specify table alignment, follow these steps.

1. Place the cursor within the table.
2. Right click the mouse.
3. Select **Set Table Properties**.
4. Click the **Table Properties** tab.
5. Specify table alignment at the **Alignment** field.

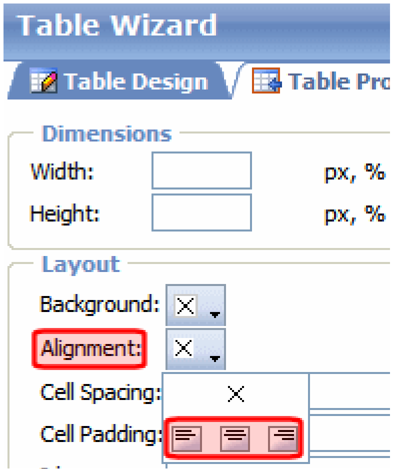


Table Backgrounds

You can specify a background color or image for your table.

- "Deleting a Table's Background Color" on page 548
- "Specifying a Table's Background Image" on page 549

Specifying a Table's Background Color

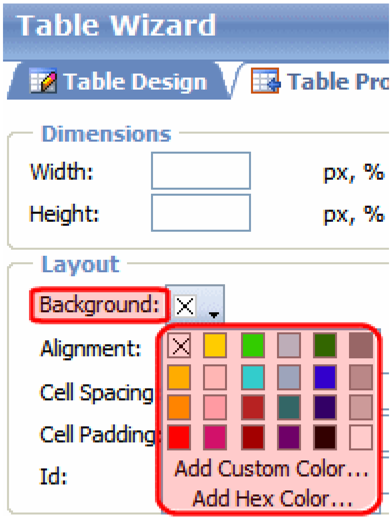
You can assign a background color to a table to give it more visual appeal. Here is an example.

Width	Sets the width of the table on the page in terms of a percentage or by pixel width.
Horizontal Alignment	Sets the horizontal position of the entire table. For example, left, center, right.
Border Color	Sets the color of the table borders unless *Use Default Color* is checked.

To assign a background color to your table, follow these steps.

1. Place the cursor within the table.
2. Right click the mouse.

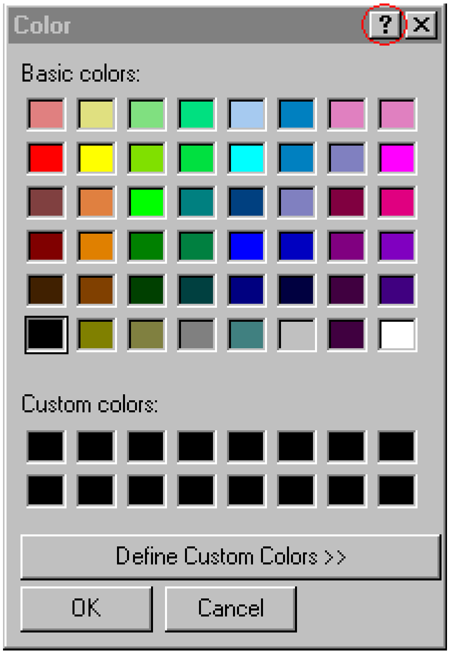
3. Select **Set Table Properties**.
4. Click the **Table Properties** tab.
5. Click the **Background** dropdown list.



6. A selection of colors appears. Click a color for the table's background.

From the dropdown, you can add custom colors by selecting a color patch or entering a color's hex value. Follow these steps to get help on how to use the color box.

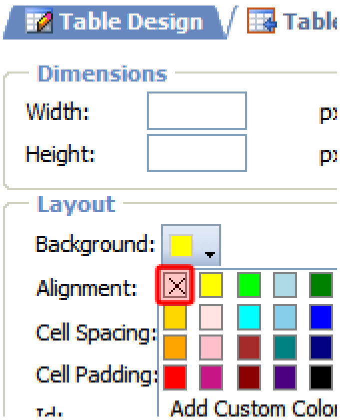
1. Click the question mark in the top right corner.



2. A large question mark appears next to your cursor.
3. Drag the question mark to the area of the dialog box that you want to learn about.
4. Click the mouse button. A box appears with instructions for that area.

Deleting a Table’s Background Color

To delete a table’s background color, click the **Background** dropdown list on the **Table Properties** tab of the Table Wizard.



Then, click the top left choice (circled above).

Specifying a Table's Background Image

You can specify a background image for your table. Here is an example.

Team	Wins	Losses
Red Sox	94	68
Yankees	92	70

Note that when you apply a background image to a table

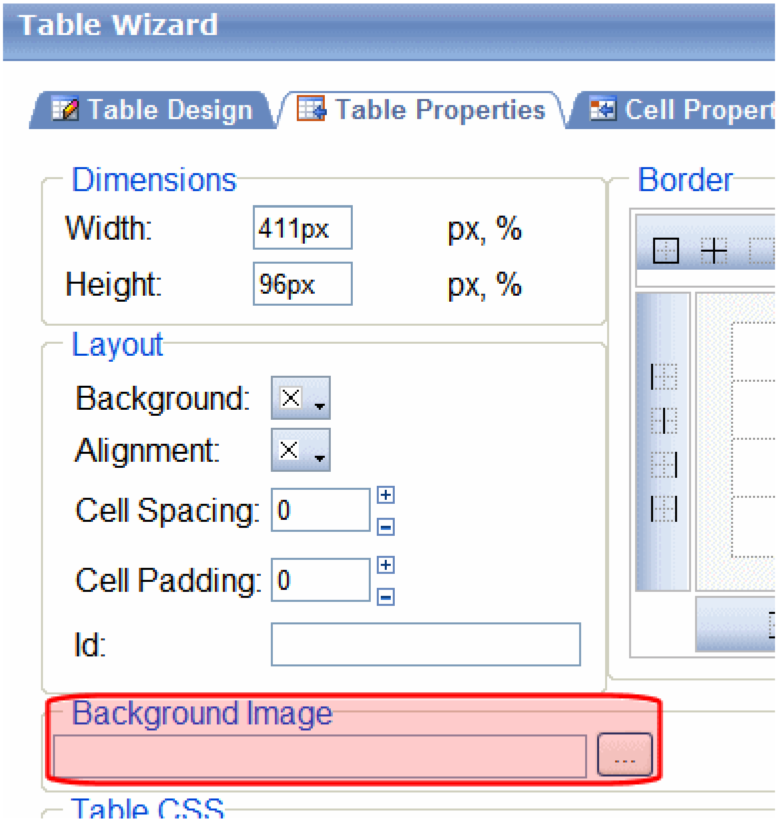
- if the table is larger than the image, the image repeats until it fills the table.
- if the image is larger than the table, the top left corner of the image aligns with the top left corner of the table. The rest of the image fills as much of the table as possible.
- you can also apply an image to individual cells (see "Specifying a Background Image for a Cell" on page 752).
- make sure the image does not obscure the table's legibility

See Steps for Inserting a Table's Background Image

To insert a table background image, follow these steps.

1. Place the cursor within the table.

2. Right click the mouse.
3. Select **Set Table Properties**.
4. Click the **Table Properties** tab.
5. In the **Background Image** field, click the ellipsis button (...) to open the Library. From there, select an image for the table's background. *See Also:* "Library Folder" on page 131



6. Click **Update**.

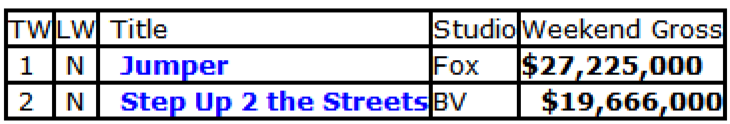
Deleting a Background Image

1. Place the cursor within the table.
2. Right click the mouse.
3. Select **Set Table Properties**.
4. Click the **Table Properties** tab.

5. Select the value in the **Background Image** field.
6. Press <Delete>.
7. Click **OK**.

Setting Table Borders

A table border consists of the lines that separate a table's cells form each other, and the table from the rest of your Web page. There are two types of table borders.

<table>
<tr><th>Border type</th><th>Used by this type of user</th><th>Illustration</th></tr>
<tr><td>internal</td><td>content author</td><td>
<table>
<tr><td>TW</td><td>LW</td><td>Title</td><td>Studio</td><td>Weekend Gross</td></tr>
<tr><td>1</td><td>N</td><td>Jumper</td><td>Fox</td><td>$27,225,000</td></tr>
<tr><td>2</td><td>N</td><td>Step Up 2 the Streets</td><td>BV</td><td>$19,666,000</td></tr>
</table></td></tr>
<tr><td>external</td><td>site visitor</td><td>
<table>
<tr><td>TW</td><td>LW</td><td>Title</td><td>Studio</td><td>Weekend Gross</td></tr>
<tr><td>1</td><td>N</td><td>Jumper</td><td>Fox</td><td>$27,225,000</td></tr>
<tr><td>2</td><td>N</td><td>Step Up 2 the Streets</td><td>BV</td><td>$19,666,000</td></tr>
</table></td></tr>
</table>

Assigning an Internal Table Border

A table's internal border is either on or off. You cannot specify other attributes.

To turn a table's internal border off or on, follow these steps.

NOTE If the table's border is on, these steps turn it off. If it is off, they turn it on.

1. Place the cursor inside the table.
2. Right click the mouse.
3. Click **Show/Hide border**.

Assigning External Table Border Attributes

You can modify these external border attributes

- color - see "Assigning Table Border Color" on page 552
- size (thickness) - see "Assigning Border Size" on page 553
- line selection - see "Determining Which Table Border Lines Appear" on page 554

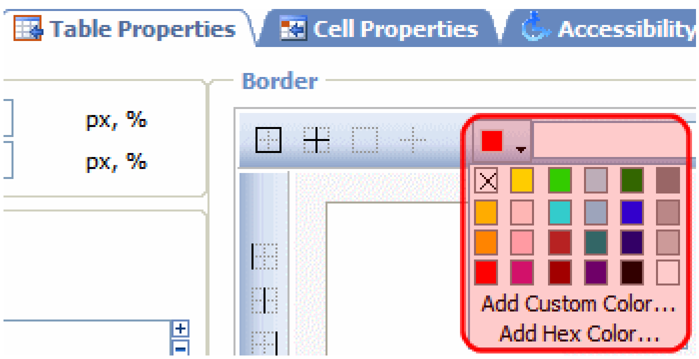
Assigning Table Border Color

This section explains how to change the color of a table's border (see example below).

Excursion	Cost ($USD)	Number of Days
Costa Rica	$3450	14
Bermuda	$1835	7

To assign the color of your table's border, follow these steps.

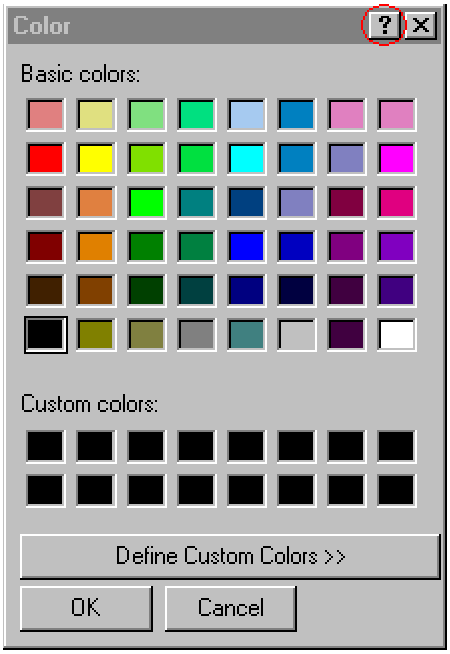
1. Place the cursor within the table.
2. Right click the mouse.
3. Select **Set Table Properties**.
4. Click the **Table Properties** tab.
5. Click the **Border Color** drop down (circled below).



6. A color selection box appears. Click a color to apply to the table's border.

Follow these steps to get help on how to use the color box.

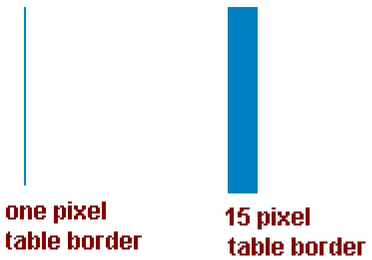
1. Click the question mark in the top right corner.



2. A large question mark appears next to your cursor.
3. Drag the question mark to the area of the dialog box that you want to learn about.
4. Click the mouse button. A box appears with instructions for that area.

Assigning Border Size

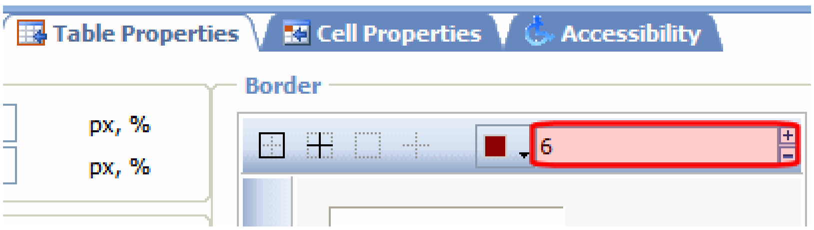
You can also adjust the size of a table border. Size is measured in pixels.



The border size only adjusts a table’s exterior border - it has no effect on the border between cells.

To assign a border size to your table, follow these steps.

1. Place the cursor within the table.
2. Right click the mouse.
3. Select **Set Table Properties**.
4. Click the **Table Properties** tab.
5. Enter a number of pixels into the **Border** field (circled below).



If you set a table’s border size to zero (0) but wish to view boundary lines while editing, see ”Assigning an Internal Table Border” on page 551.

Determining Which Table Border Lines Appear

You may want to suppress some table borders. For example, the table below only shows horizontal lines.

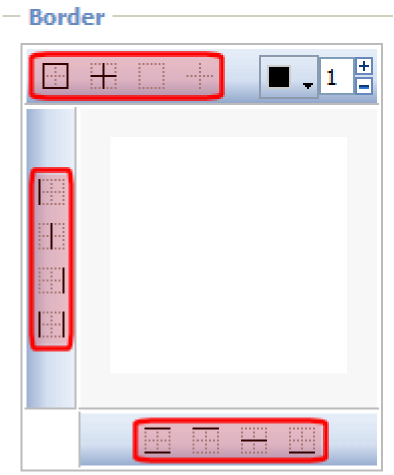
TW	LW	Title	Studio	Weekend Gross
1	N	**Jumper**	Fox	**$27,225,000**
2	N	**Step Up 2 the Streets**	BV	**$ 19,666,000**

To modify which border lines appear, follow these steps.

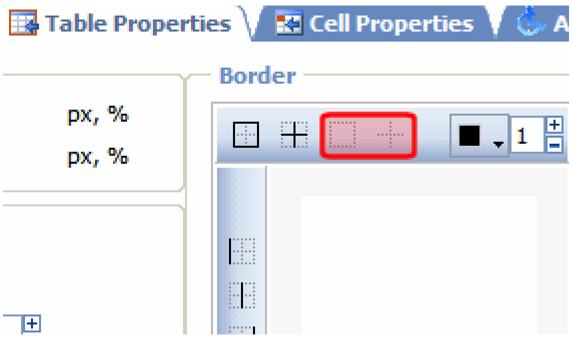
1. Place the cursor within the table.
2. Right click the mouse.
3. Select **Set Table Properties**.
4. Click the **Table Properties** tab.

5. Use the icons within the Border area to indicate which border lines should appear. Each icon has tooltip text that explains its function.

NOTE In order to view the selected borders on the dialog, a border color must be assigned. See "Assigning Table Border Color" on page 552.



Note that if a table already has border lines but you want to start "fresh," it is a good idea to remove all borders using the icons indicated below. Then, you can begin adding new ones.



Working with Table Cells

Along with functions for managing tables (described in “Introduction to Tables” on page 719 and “Manipulating Your Table’s Format” on page 730), eWebEdit400 also lets you perform actions on individual cells within a table.

You can perform the following actions on individual table cells.

NOTE HTML does not allow you to adjust the width of a cell’s border.

You can also select several cells or a row of cells and change them as described above. However, you cannot select and change a column of cells.

Selecting Cells to Modify

Modifying a Single Cell

If you want to make any of the modifications described in this section to a single cell, follow these steps.

1. Place the cursor in that cell.
2. Right click the mouse.
3. Select **Set Cell Properties** from the menu.
4. Make the changes on the Cell Properties dialog.
5. Click **Update**.

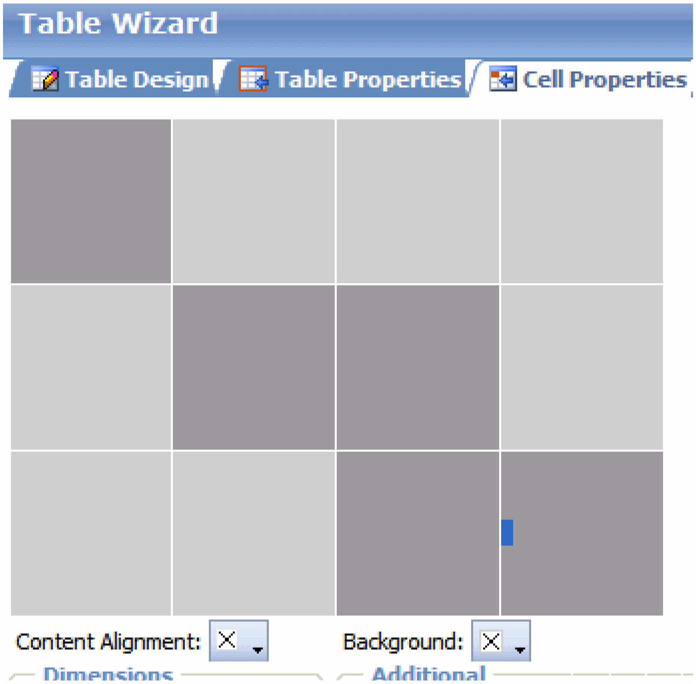
Modifying Several Cells

If you want to make any of the modifications described in this section to several cells, follow these steps.

NOTE Most procedures in this section tell you to select **Cell Properties** from the right click menu. To perform an action on several cells, select **Set Table Properties** from the right click menu, then click the **Cell Properties** tab.

1. Place the cursor anywhere in the table.
2. Right click the mouse.
3. Select **Set Table Properties** from the menu.
4. Click the Cell Properties tab.
5. Select the cells that you want to change. Hold down the <Ctrl> key while selecting.

   As you select a cell, its color changes from light to dark gray.



6. Make changes to fields on the lower part of the Cell Properties tab. The fields are described later in this section.
7. Click **OK**.

Specifying the Height and Width of a Cell

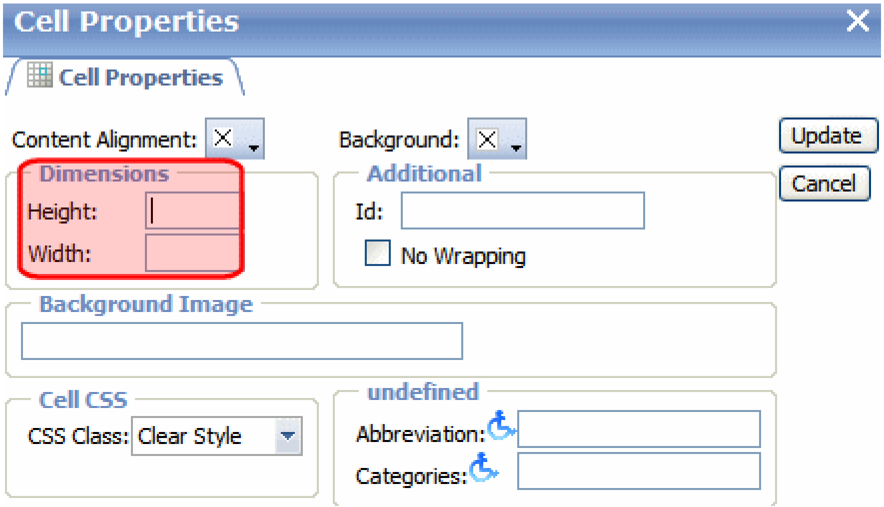
As described in “Specifying Table Width” on page 732, there are several ways to set the width of a table. Within a table, you can also specify the height and width of an individual cell.

When you set a cell width, there is no guarantee that the cell will occupy that width when displayed in a browser. This is because the cell is part of a column, and changes to other cells in the column can affect the cell whose width you set. Setting cell width only guarantees that the cell will not be *less than* the width you specify.

If you want to ensure that a cell’s size does not change, set all cells in a column to that width.

To specify a cell’s height and width, follow these steps.

1. Place the cursor in the cell whose height or width you want to set.
2. Right click the mouse.
3. Click **Set Cell Properties** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog appears.



6. Enter the cell width and height in the fields circled above. You can enter the width in pixels or percentage. These choices are explained in “Specifying Table Width” on page 540.
7. Click **Update**.

Deleting a Cell

To delete one or more cells, follow these steps.

1. Move the cursor to the cell you want to delete.
2. Right click the mouse.
3. Click **Delete Cell** from the menu.

Cells to the right of the deleted cell shift left to occupy the vacant space. In this example, the cursor was in cell “b” when the user clicked on **Delete Cells**.

Before

a	b *cursor*	c
d	e	f

After

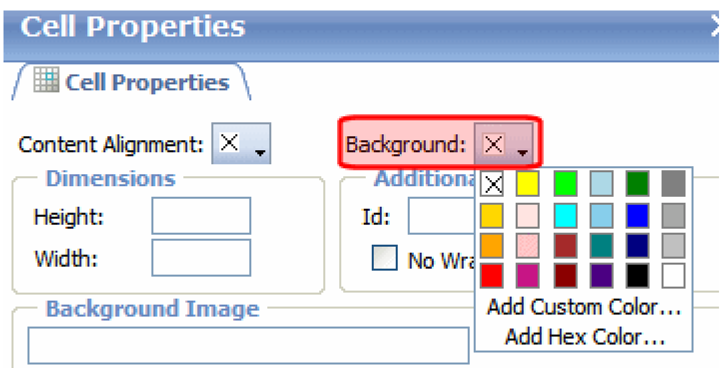
a	c	
d	e	f

Specifying a Cell's Background Color

"Specifying a Table's Background Color" on page 739 explains how to apply a background color to a table. You can also apply a background color to a cell.

To apply a background color to a cell, follow these steps.

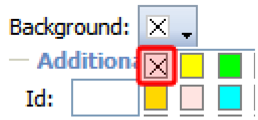
1. Move the cursor to the cell.
2. Right click the mouse.
3. Click **Set Cell Properties**.
4. Click the **Background** dropdown.



5. A color selection box appears.
6. Click a color to apply to the cell's background.

Deleting a Cell's Background Color

To delete a cell's background color, click the square in the top left corner of the **Background** area (circled below).



Specifying a Background Image for a Cell

"Specifying a Table's Background Image" on page 549 explains how to apply a background image to a table. You can also apply a background image to a cell.

To insert an image into a cell, follow these steps.

1. Place the cursor within the table.
2. Right click the mouse.
3. Select **Set Cell Properties**.
4. In the **Background Image** field, click the ellipsis button ( ) to open the Library. From there, select an image for the cell's background. *See Also:* "Library Folder" on page 131
5. Click **Update**.

Note that when you apply a background image to a cell

- If the cell is larger than the image, the image repeats until it fills the cell.
- If the cell is smaller than the image, the top left corner of the image appears in the top left corner of the cell. The rest of the image fills as much of the cell as possible.
- Make sure the image does not obscure a user's ability to read the cell text (if any exists).

Deleting a Background Image

1. Place the cursor within the table.
2. Right click the mouse.
3. Select **Set Cell Properties**.
4. Delete the value in the **Background Image** field.
5. Click **Update**.

Spanning Rows or Columns

You can create a table cell that stretches across more than one row or column. In the following table, notice how the “Sports Teams” row spans three columns.

Sports Teams		
City	**Baseball Team**	**Hockey Team**
Boston	Red Sox	Bruins
New York	Yankees	Rangers
Chicago	White Sox	Black Hawks

You can also create a column that spans several rows, as illustrated below. Notice that Boston spans three rows.

Colleges	
City	**Name**
Boston	Boston College
	Northeastern University
	Boston University

Colleges	
City	**Name**
New York	Columbia University

Spanning More than One Row or Column

To have a table cell span more than one row or column, follow these steps.

1. Place the cursor in the cell that will span rows or columns.
2. Right click the mouse.
3. Click **Merge Cells Horizontally** or **Merge Cells Vertically** from the menu.

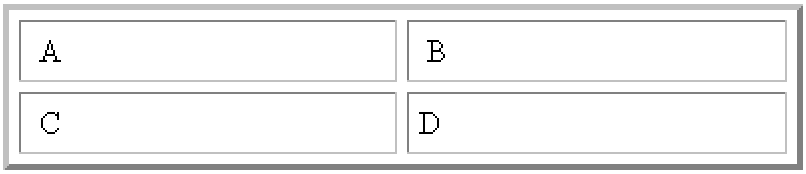
- **Merge Cells Horizontally** merges the cell in which the cursor resides with the cell to its right.
- **Merge Cells Vertically** merges the cell in which the cursor resides with the cell below.

NOTE You can also merge cells on the Table Design tab of the Table Wizard.

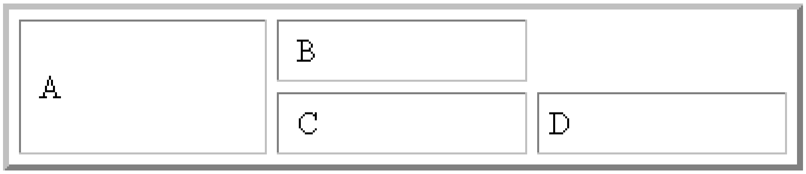
Effect of Spanning a Cell

When you set a cell to span rows or columns, **eWebEdit400** does not remove the cells that are in the way. Instead, it moves those cells across or down to the next available position.

For example, the following table has two rows and two columns.



If you set cell A to span two rows, note that cell C moves across to make room for cell A. This action pushes cell D to the next column.



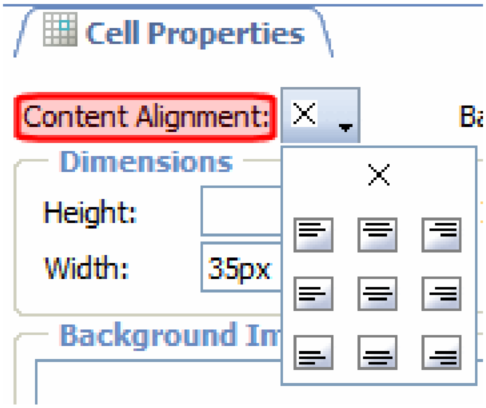
Aligning Text Within a Cell

Within a cell, you can specify how your text aligns horizontally and vertically.

You have nine choices for specifying the horizontal and vertical alignment of a cell, illustrated below.

To set cell alignment, follow these steps.

1. Place the cursor in the cell that you want to edit.
2. Right click the mouse.
3. Click **Set Cell Properties**.
4. The Cell Properties dialog appears.
5. Click the down arrow to the right of **Content Alignment**.



6. Click your alignment choice.
7. Click **Update**.

Splitting a Cell

You can divide a cell into two. If you split a cell, each cell occupies one half the size of the original cell.

Row before split

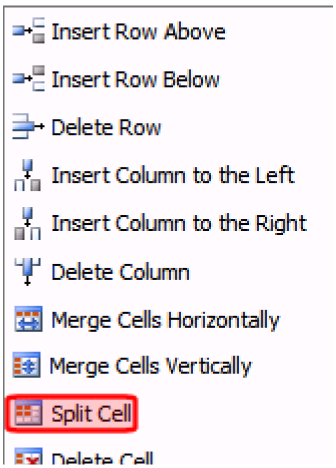
A	**B**

Row after split

A1	A2	B

To split a table cell into two cells, follow these steps.

1. Place the cursor in the cell that you want to split.
2. Right click the mouse.
3. Click **Split Cell** from the menu.



4. Two cells now appear where only one appeared before.

Merging Two Cells

You can merge two cells into one. If you merge two cells, the new cell contains all of the information from both. The new cell's width or height equals the sum of the two cells that were merged.

Cells Before Merge

A	B

Cell After Merge

AB

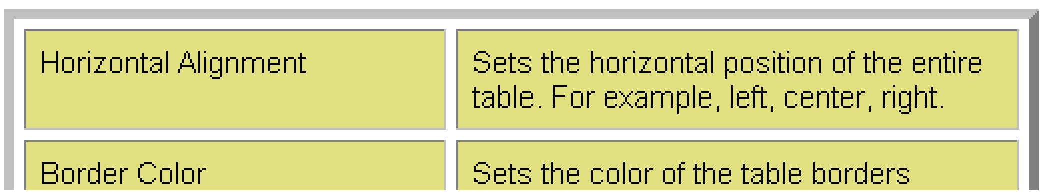
The above example shows a horizontal merge. You can also merge cells vertically.

To merge two or more cells, follow these steps.

1. Place the cursor in the left or upper cell.
2. Right click the mouse.
3. Click **Merge Cells Horizontally** or **Merge Cells Vertically**.

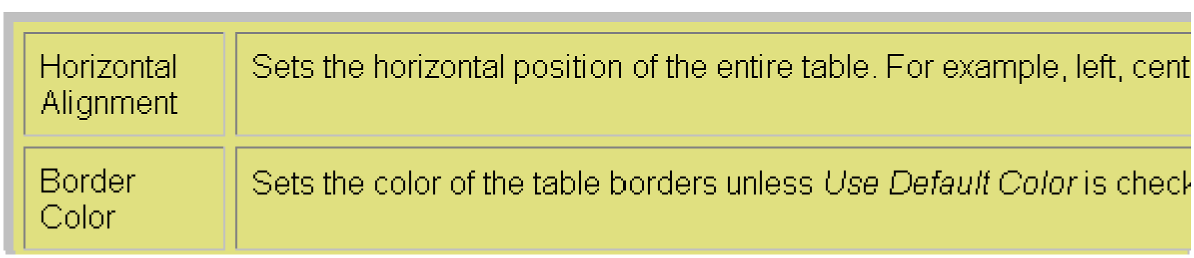
Word Wrap

Word Wrap is a text formatting feature of cells. It causes text to move down to the next line when the width of the characters on a line equals the column width. For example, if you set column width to 50%, with word wrap turned on, a table looks like this.



Horizontal Alignment	Sets the horizontal position of the entire table. For example, left, center, right.
Border Color	Sets the color of the table borders

If you turn Word Wrap off for the same table, you get this result.



Horizontal Alignment	Sets the horizontal position of the entire table. For example, left, cent
Border Color	Sets the color of the table borders unless *Use Default Color* is check

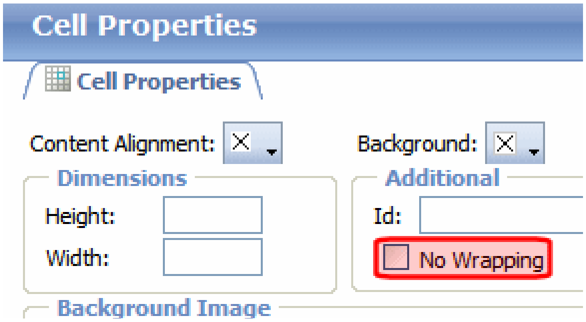
If Word Wrap is turned off, text stays on one line until the user entering table text presses <Enter>. That keystroke causes text to move down to the next line.

By default, all cells have the Word Wrap feature turned on.

Turning Word Wrap On and Off

To turn Word Wrap on or off for a cell, follow these steps.

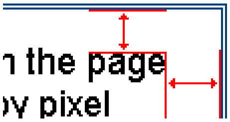
1. Place the cursor in the cell that you want to edit.
2. Right click the mouse.
3. Click **Set Cell Properties**.
4. The Cell Properties dialog box appears.
5. To turn off Word Wrap, click the **No Wrapping** checkbox.



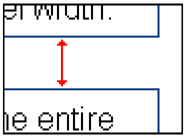
6. Click **Update**.

Setting Cell Padding and Spacing

Cell *padding* is the space between a cell's data and its border.



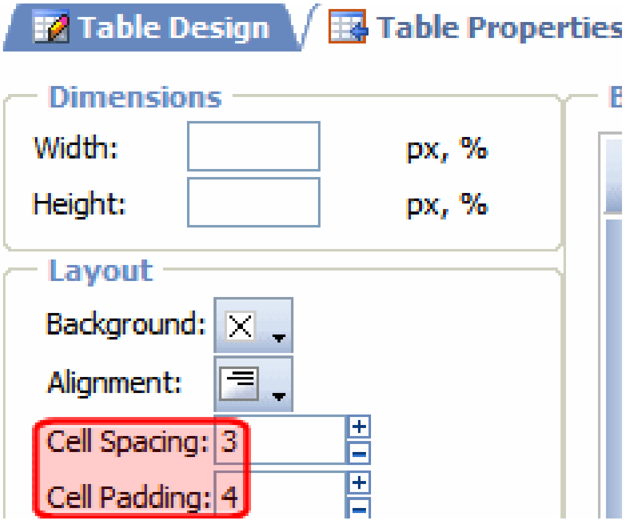
Cell *spacing* is the space between a cell and surrounding cells.



Assigning Cell Padding and Spacing

To assign cell padding and spacing to your table, follow these steps.

1. Place the cursor in the table.
2. Right click the mouse.
3. Click **Set Table Properties**.
4. The Table Properties dialog appears.
5. Click the **Table Properties** tab.
6. In the **Cell Padding** and **Cell Spacing** fields, enter the number of pixels.



7. Click **Update**.

Section 508 Tables

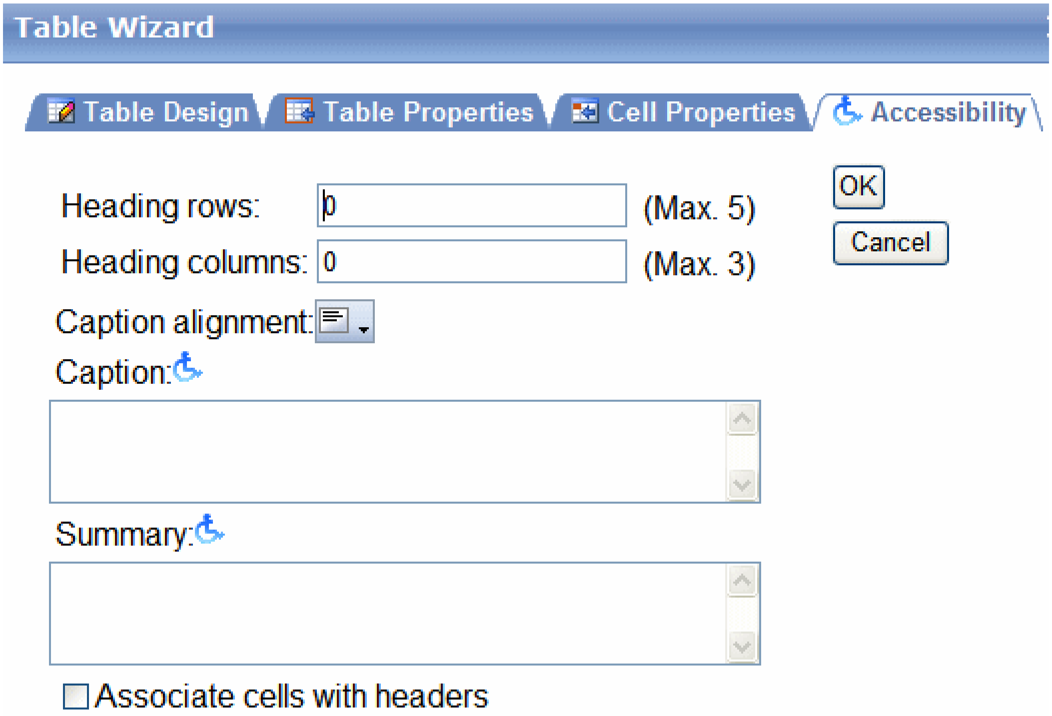
You can apply the following information to any table to make it 508 compliant. Narrative software uses the information from the Accessibility table fields (heading rows, columns, caption alignment and summary) to produce a Tooltip message for each table cell. Users with impaired vision can see those Tooltips as they hover over the cells.

Information	Where applied	For more information, see
Heading Rows	Accessibility dialog	"Accessibility Dialog" on page 571
Heading Columns	Accessibility dialog	"Accessibility Dialog" on page 571
Summary	Accessibility dialog	"Accessibility Dialog" on page 571
Caption	Accessibility dialog	"Accessibility Dialog" on page 571
Horizontal Caption Alignment	Accessibility dialog	"Accessibility Dialog" on page 571
Vertical Caption Alignment	Accessibility dialog	"Accessibility Dialog" on page 571
Abbreviation	Cell properties dialog	"Accessibility Fields on Cell Properties Dialog" on page 573
Categories	Cell properties dialog	"Accessibility Fields on Cell Properties Dialog" on page 573

To create a 508 compliant table, follow these steps.

1. Create a new table or edit an existing one, as explained in "Creating a Table" on page 531.
2. Place the cursor inside the table.
3. Right click the mouse.

4. Click **Set Table Properties**.
5. The Table Properties dialog appears.
6. Click the **Accessibility** tab.

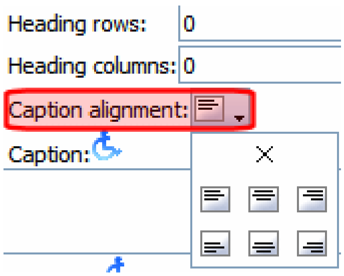


- "Accessibility Dialog" on page 571
- "Setting Abbreviation and Category Attributes" on page 572

Accessibility Dialog

The fields on the tab are described below.

Field	Description
Heading Rows	If you want your table to have a horizontal header, enter the number of rows that it should occupy. The number cannot exceed five. Beginning with the top, all cells in the specified number of rows are designated as table headers.

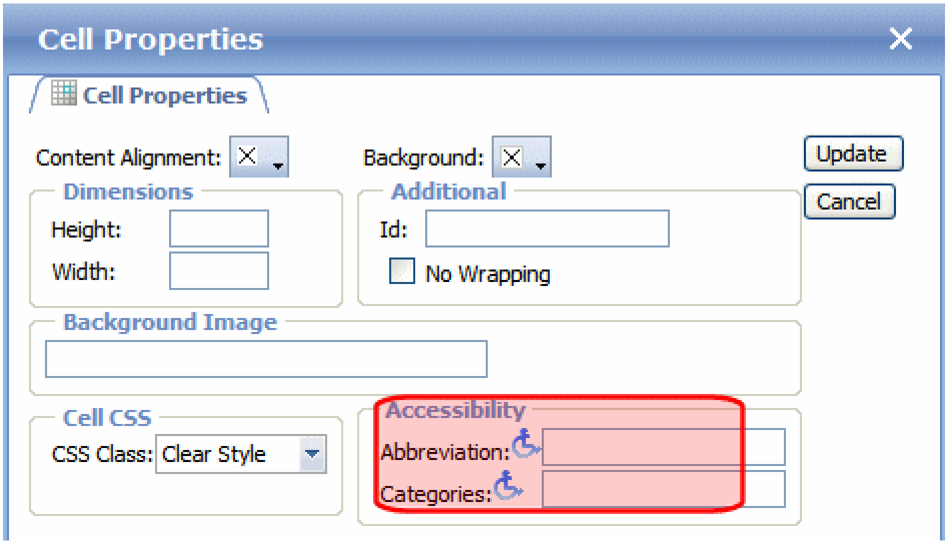
Field	Description
Heading Columns	If you want your table to have a header, enter the number of columns that it should occupy. The number cannot exceed three. Beginning with the left column, all cells in the specified number of columns are designated as table headers.
Caption Alignment	To choose the caption’s alignment, click the down arrow next to this field as shown below.  Select the box that represents the alignment style you want.
Caption	If desired, enter the table caption. The caption appears below the table when viewed.
Summary	If desired, enter the table summary. Non-visual browsers use the summary to explain the table’s contents. From http://www.w3.org/TR/WCAG10-HTML-TECHS/#data-tables “A summary of the relationships among cells is especially important for tables with nested headings, cells that span multiple columns or rows, or other relationships that may not be obvious from analyzing the structure of the table but that may be apparent in a visual rendering of the table. A summary may also describe how the table fits into the context of the current document. If no caption is provided, it is even more critical to provide a summary.”
Associate Cells with Headers	Check this box if you want to associate the table’s data cells with the appropriate headers. *See Also:* http://www.w3.org/TR/WCAG20-TECHS/H43.html

After you complete the Table Properties dialog, click **OK** to make the table Section 508 compliant.

Setting Abbreviation and Category Attributes

You can modify abbreviation (ABBR) and category (AXIS) attributes within a table. To do so, follow these steps.

1. Select one or more cells.
2. RIght click the mouse.
3. Select **Set Cell Properties**.
4. The Cell Properties dialog appears. It includes the **Abbreviation** and **Categories** fields (see illustration below).



The following explains how to respond to these fields.

Accessibility Fields on Cell Properties Dialog

Field	Description
Abbreviation	Sets or retrieves abbreviated text for the content in the tag. Can be used to render non-visual media, such as speech or Braille. For more information, see http://msdn2.microsoft.com/en-us/library/ms533058.aspx
Categories	Sets or retrieves a comma-delimited list of conceptual categories associated with that tag. Can be used to render non-visual media, such as speech or Braille. For more information, see http://msdn2.microsoft.com/en-us/library/ms533489.aspx

Working with HTML Forms

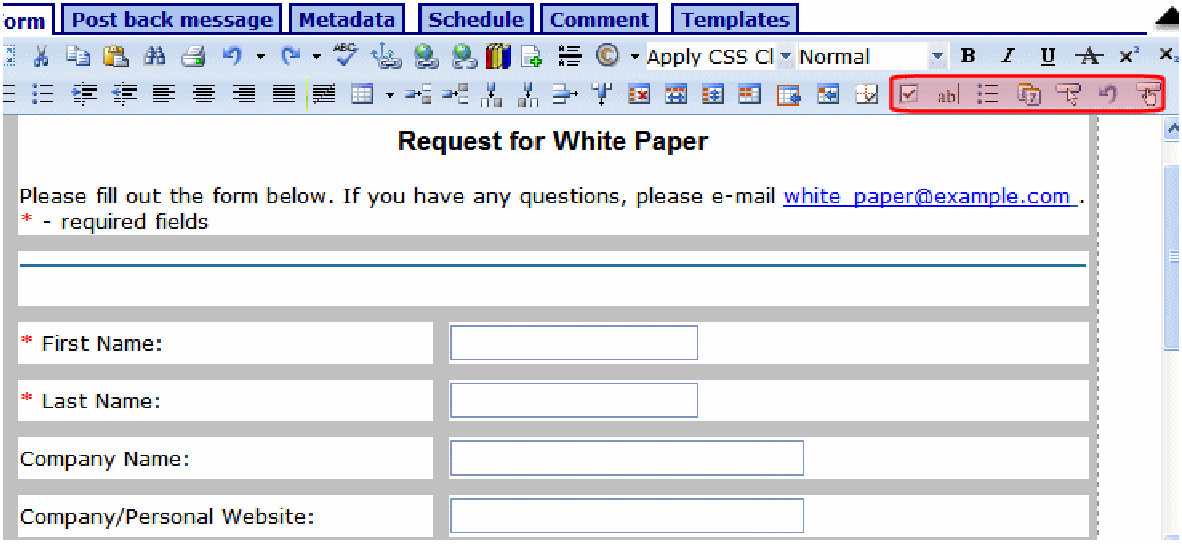
NOTE This section explains how to create/edit HTML forms using eWebEdit400. If your editor is eWebEditPro+XML, see "Working with HTML Forms" on page 156.

Ektron CMS400.NET provides powerful online form capabilities, allowing you to create an online dialog with visitors. Now anyone in your organization – not just a developer or Webmaster– can create and deploy Web forms to capture visitor information. Support marketing strategies by getting feedback on their needs. Follow up on their interest in your products and services. Register people for events.

Form capabilities include

- Creating a form and its postback message
- Creating polls and surveys
- Adding validation criteria to form fields
- Automatically assigning tasks for follow-up activities to form submissions
- Reporting on form information
- Exporting results to Microsoft Excel

A sample form appears below. Toolbar buttons for working with forms are circled.



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

Overview of Form Processing

Step	For more information, see
1. Create a form	”Creating a New Form” on page 576
2. Assign it to a Web page	”Implementing a Form on a Web Page” on page 615
3. Site visitor goes to your Web site and completes form. Form is mailed to an email address, saved to a database, or both.	
4. View submitted form data and download it to a spreadsheet.	”Viewing Form Reports” on page 618

The Structure of Form Data

A form has the following components.

- **Form** (title, ID number, whether the form data is sent as email, and/or saved to a database, etc.)
- **Content** information (title, start and/or end date, status, postback message, etc.)
- **Form fields** (text field, password field, text area, hidden text, choices, checkbox, select list, calendar, submit button, etc.)

Creating a New Form

The screen you use to create a form follows five simple steps. After completing the steps, you have a new form that’s ready to collect the information you need. To make the task easier, **Ektron CMS400.NET** provides sample forms that you can start with then customize.

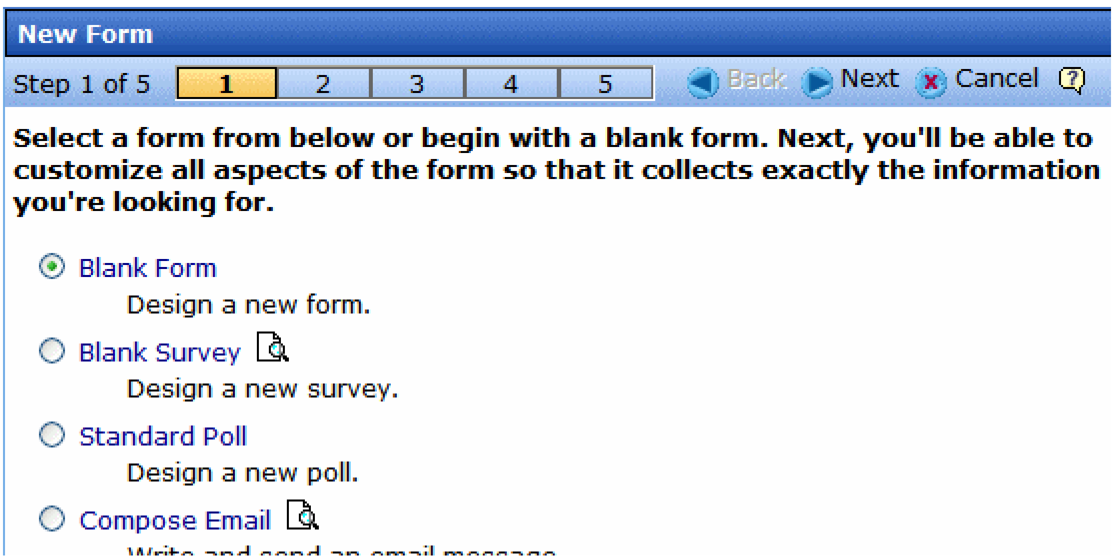
As explained in ”Mailto or Database Form” on page 211, form data can be emailed and/or saved to a database. Forms created using the procedure described below are saved to a database by default, but not emailed. To change either setting, use the Edit Properties screen. See "Viewing and Editing a Form's Properties" on page 205.

To create a new form, follow these steps.

NOTE You can also create a new edition of a form in another language by copying an existing form and translating it. For more information, see "Translating Content" on page 818.

NOTE For the steps to create a new poll, see "Working With Polls" on page 619. For the steps to create a new survey, see "Creating a Survey" on page 624.

1. Consult with your **Ektron CMS400.NET** administrator about the folders in which you should create forms. *See Also:* **Ektron CMS400.NET** Administrator Manual section "Managing HTML Forms" > "Forms Must Use Template with FormBlock Server Control"
2. From the **View** menu, click **Language**, and select the language in which to create the form.
3. Click the **New** menu > **HTML Form/Survey**.
4. The New Form screen appears.



NOTE When you choose Standard Poll or Blank Survey, the number of steps in the Forms Wizard changes from five to four. This happens because the Assign Tasks step is removed. *See Also:* "Working With Polls" on page 619 and "Creating a Survey" on page 624.

5. Choose the form that you want to begin with. You can click the preview icon ( ) next to any sample form to see it before choosing it.

   Select a sample that most closely matches the form you want to create. After you create it, you can add fields, remove fields, modify possible responses, etc.

6. Click **Next**.

7. Enter or edit the form's **Title** and **Description**.

   - **Title** - used to reference the form within the Workarea (required)

   - **Description** - an extended description of the form

8. The next screen lets you assign a task to a user or user group. If you do, a task will be created every time a site visitor submits this form. *See Also:* ”Assigning a Task to a Form” on page 615

9. A new screen lets you determine what happens after the site visitor completes the form. The choices are:

   - **Display a message** - See ”Composing the Postback Message” on page 579

   - **Redirect to a file or page** - Identify a file or a page on your Web site that is launched when the visitor completes the form.

     - An example of a file is a white paper (a common file format is .PDF) that a visitor requested

     - An example of a page is one that prompts the visitor to download your product

   - **Redirect to form data to an action page** - See ”Redirect to an Action Page and Forwarding Form Data” on page 580

   - **Report on the form** - See ”Making Form Results Available to Site Users” on page 582

10. Now that you have completed information about the form, you can enter the form's content. This procedure is described in ”Creating a Form's Content” on page 585.

Composing the Postback Message

The postback message can contain text or graphics, just like any other HTML content. Typically, it acknowledges a site visitor's completion of the form.

For most sample forms provided, sample text appears in the editor. Modify it as you wish, using **Ektron CMS400.NET**'s editor to change the style sheet class, insert library items, etc.

Inserting Fields into the Postback Message

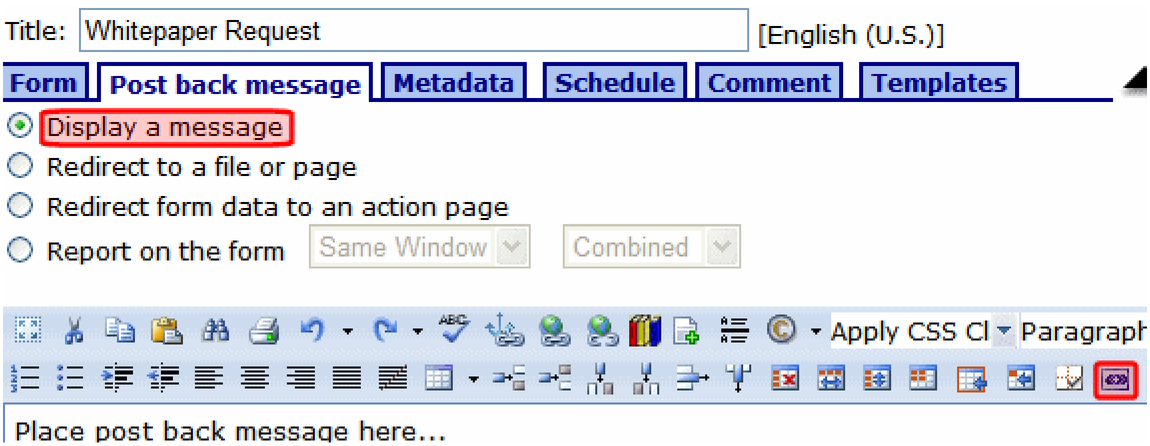
You can also insert fields into the Postback Message that retrieve form information.For example, your postback message may be

`Thank you` **`«Full Name»`** `for completing the` **`«[Form Title]»`**`.`

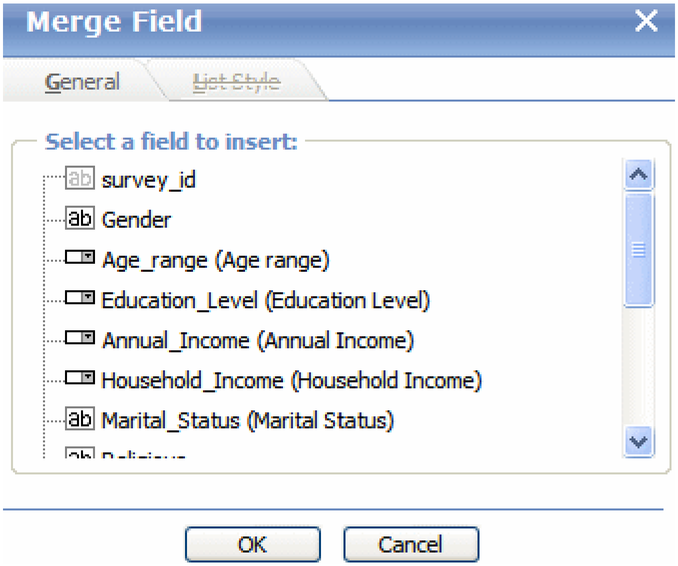
When the postback message appears, it looks like this.

`Thank you` **`Jay Kohler`** `for completing the` **`breakroom survey`**`.`

When you click the **Post back message** tab and select **Display a message**, the **Merge Field** button ( ) appears on the toolbar.



When you click that button, a dialog like the one below appears.



All form fields appear on the list. In addition, the list includes the following fields, which can retrieve form information into the postback message.

- Form title
- Form description
- Date submitted

Redirect to an Action Page and Forwarding Form Data

The following section of the **Ektron CMS400.NET** Administrator Manual explains how your administrator sets up the action page: “Working with HTML Forms“> “Redirecting Submitted Form Data”.

After your administrator follows that procedure, he identifies a folder and hyperlink that you use to select an action page.

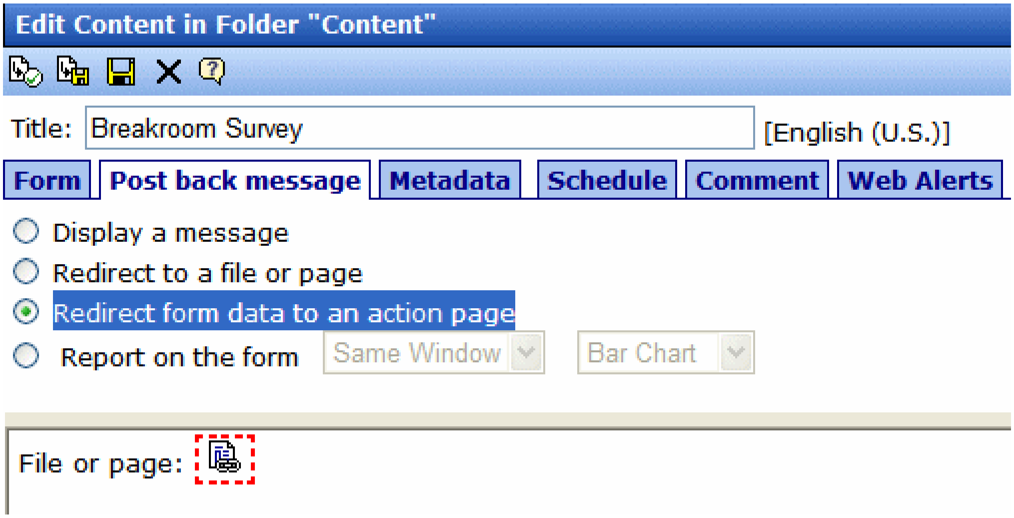
WARNING! You must have the folder and hyperlink name from your administrator to complete this procedure.

To redirect submitted form data to an action page, follow these steps.

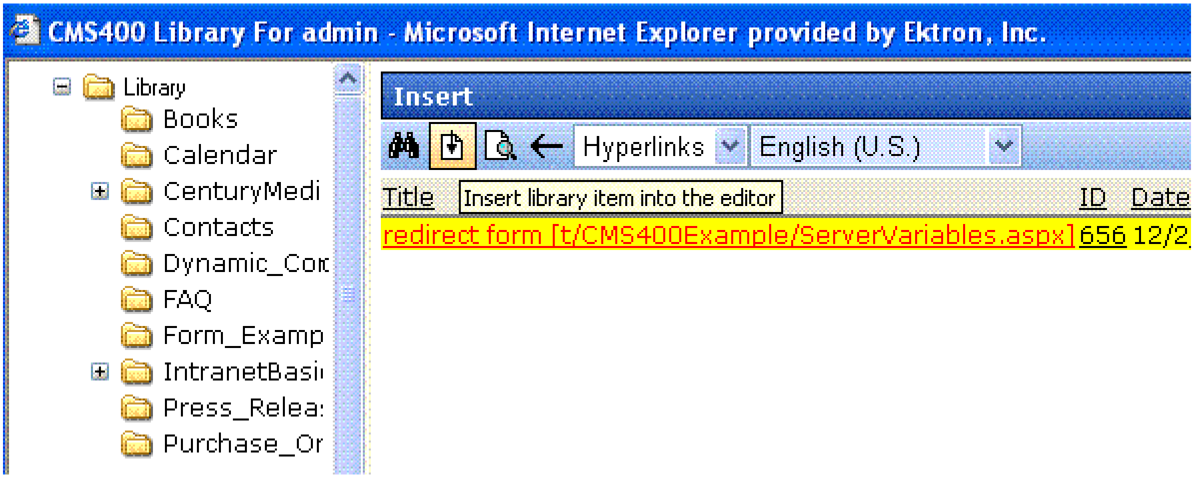
1. Go to the page on which you determine the form’s response. If this is a new form, it is page 3 of the Forms Wizard.

To modify an existing form, select the form's folder, then the form. Next, select Edit and click the **Post back message** tab.

2. Select **Redirect form data to an action page**.



3. Click the icon next to **File or page**.
4. The Hyperlink Manager dialog appears. Click the **URL** button.
5. The library appears. In the left panel, select the folder that contains the hyperlink.
6. In the right panel, select **Hyperlinks** from the file type dropdown.
7. Select the hyperlink whose name was given to you by your system administrator.



8. Click the insert button ( ).

Making Form Results Available to Site Users

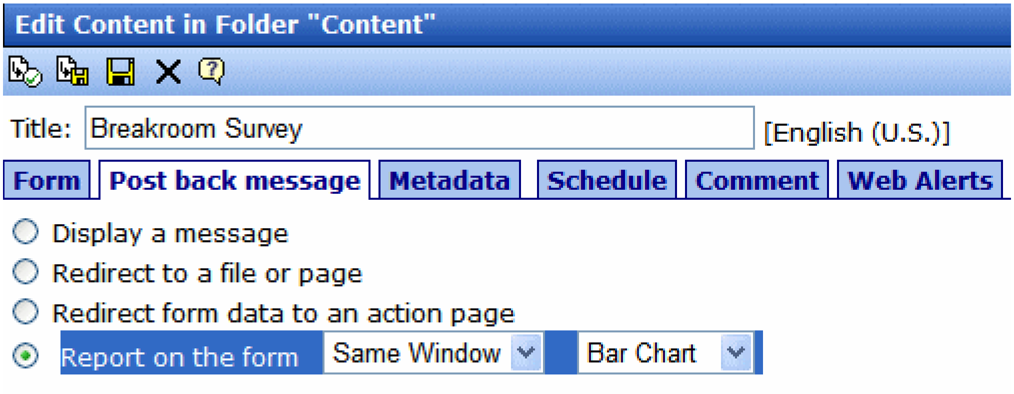
When you create polls and surveys, you can choose to display the results after a site visitors completes the form. The results can display in the same window or a new window. In addition, you can choose how to chart the data. For a description of chart types, see "Chart Types" on page 584.

To show site visitors poll/survey results, follow these steps.

1. Go to the page on which you determine the form's response. If this is a new form, it is page 4 of the Forms Wizard.

   To modify an existing form, select the form's folder, then the form. Next, select Edit and click the **Post Back Message** tab.

2. Select **Report on the form**.



3. Choose whether you want the results to appear in the **Same Window** or a **New Window**.
4. Choose the style of the report.

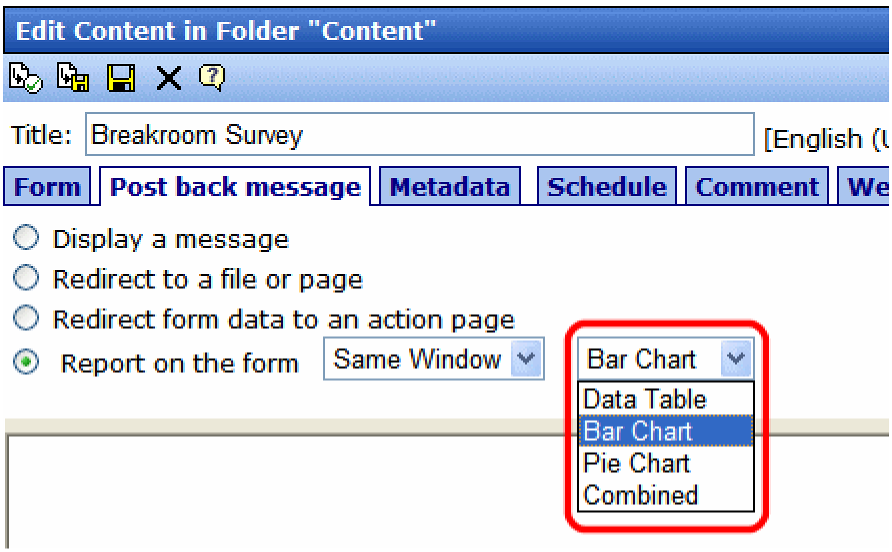


Chart Types

The following table describes the types of charts available.

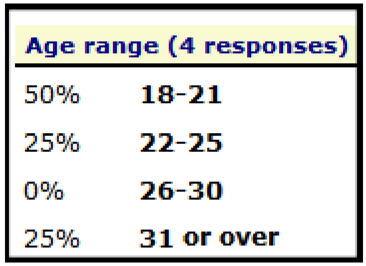
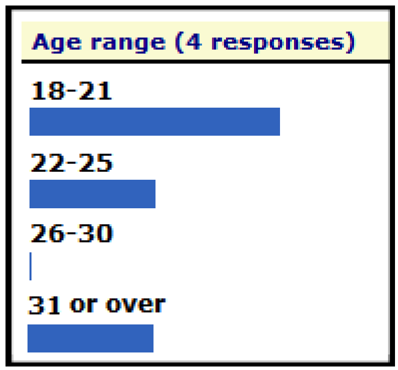
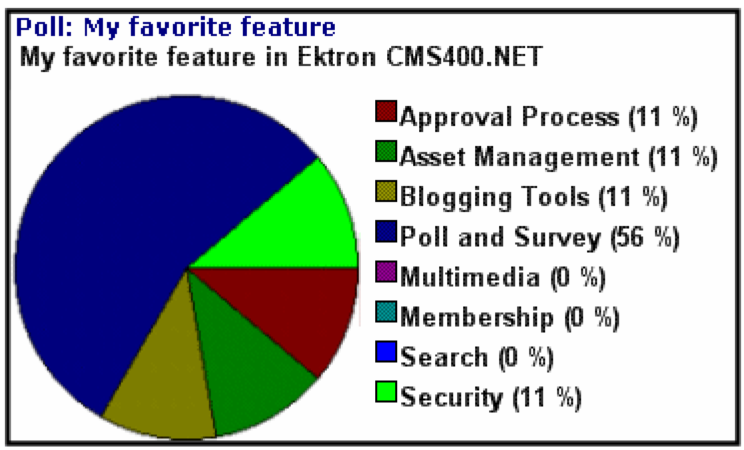
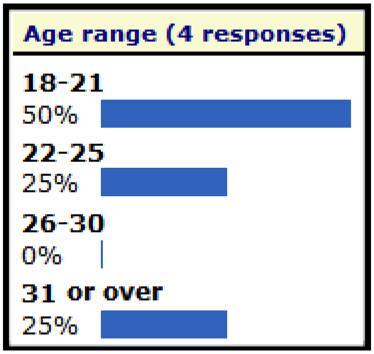
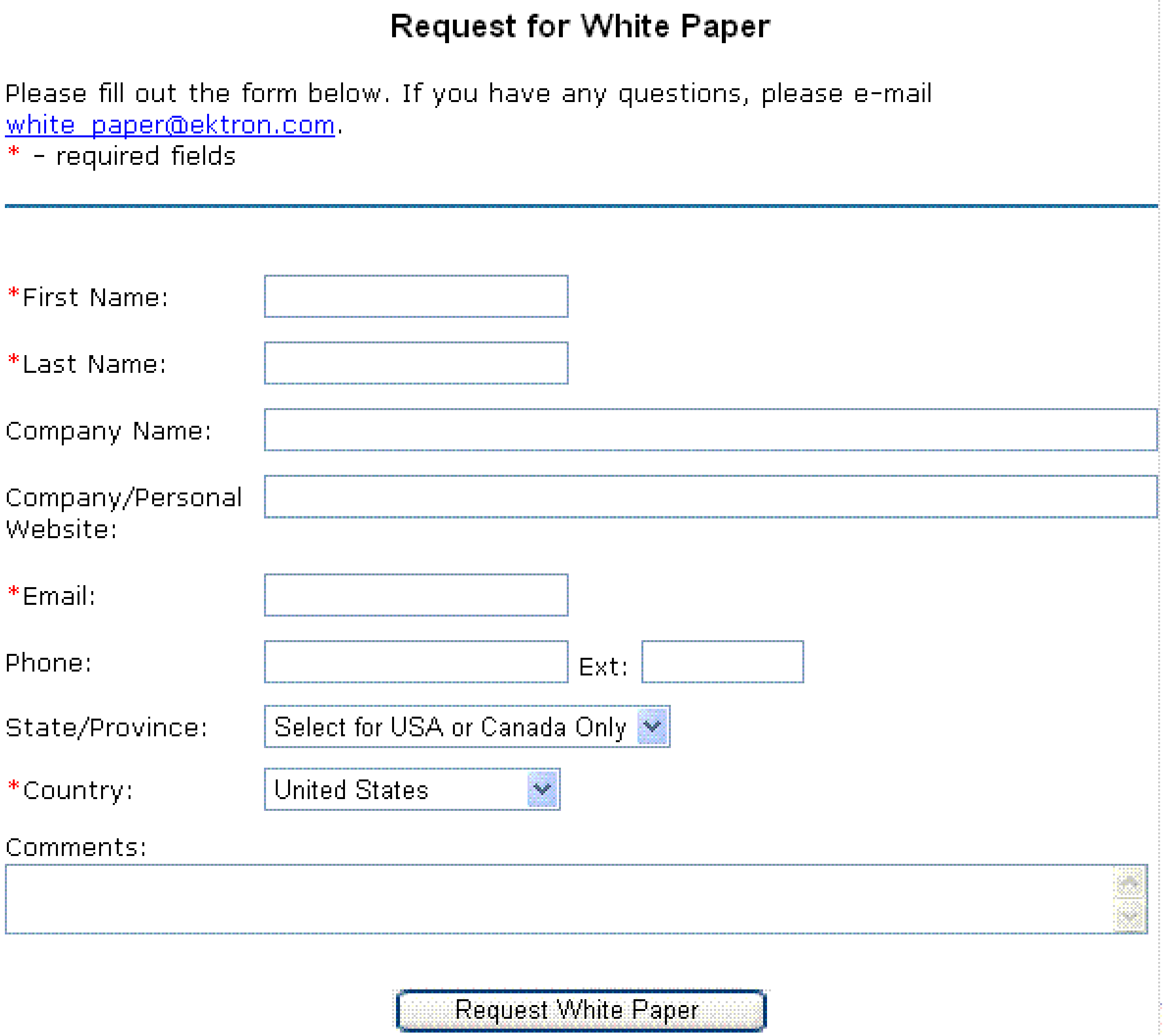
Chart Type	Description	Sample
Data Table	The poll or survey answers are displayed with the percentage of users who responded to each item.	
Bar Chart	The poll or survey answers are displayed with a bar graph. Use this chart type when you want a quick visual representation of the responses.	
Pie Chart	Displays a standard pie chart. Poll or survey answers are color coded, and the percentage of people who chose each answer is shown.	

Chart Type	Description	Sample
Combined	Combines the Data Table and the Bar Chart.	

IMPORTANT! You cannot chart data entered into a text box. For example, if one choice in a poll is **Other**, and the survey has a text box for site users to enter additional information, the text in the box is not charted. However, the fact that a user chose **Other** is charted.

Creating a Form's Content

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



Request for White Paper

Please fill out the form below. If you have any questions, please e-mail
white_paper@ektron.com.
* - required fields

*First Name:

*Last Name:

Company Name:

Company/Personal Website:

*Email:

Phone: Ext:

State/Province: Select for USA or Canada Only

*Country: United States

Comments:

Request White Paper

Note that some fields are required, and some provide a dropdown list of choices. You can learn how to create such a form by following the directions below.

The following topics explain how to create a form.

- ”The Form Toolbar Options” on page 587
- ”Form Validation” on page 590

The Form Toolbar Options

Creating form content is similar to creating standard content. (See "Adding HTML Content" on page 74). The big difference is a form toolbar (illustrated below), which lets you insert form elements.

When using the form toolbar, place the cursor where you want field. Then, click the appropriate toolbar button.

Adding a Field to the Screen

The final screen of the Forms setup lets you arrange a form that collects exactly the information you want. To create the form, insert *fields* that prompt a site visitor to enter information. Then, add a *button* that enables the user to submit data.

If you chose a sample form at the beginning of the Forms Wizard, the form includes fields. If you did not, the screen has only a **Submit** button.

TIP! In addition to inserting fields, you can add explanatory text, lines, images, etc. to the form. To lay out fields in columns, insert a table and place the fields within table cells.

The table below explains each field type you can enter.

Button	Inserts this kind of field	Description	For more information, see
	Checkbox	User's response is either checked or unchecked	"Inserting a Checkbox Field" on page 591
	Text	Free text field; user cannot format text	"Inserting a Text Field" on page 592
	Choices	Several choices appear on screen. User checks any number of appropriate responses.	"Inserting a Choices Field" on page 605
	Calendar	Lets user insert a date by clicking a calendar	"Inserting a Calendar Field" on page 609

Button	Inserts this kind of field	Description	For more information, see
	Insert Button	Button with no text. You can easily add text to it. When a site visitor completing the form presses this button, the data on the screen is submitted to your Web server.	”Inserting or Editing Buttons on the Form” on page 612
	Insert Reset	Button with **Reset** as its text. When a site visitor completing the form presses this button, the form’s field values are set to their state when the form first loaded.	”Inserting or Editing Buttons on the Form” on page 612
	Insert Submit	Button with **Submit** as its text. When a site visitor completing the form presses this button, the data on this screen is submitted to your Web server.	”Inserting or Editing Buttons on the Form” on page 612

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

Button or Tab	Description
Postback Message	See ”Composing the Postback Message” on page 579
Metadata	Edit the metadata for the form. *See Also:* ”Adding or Editing Metadata” on page 77
Schedule	Assign start or end dates, or both, for when the form is published to Web site *See Also:* ”Scheduling Content to Begin and End” on page 65
Comment	Enter history comment to indicate changes made to the form
Templates	The template assigned to the form. Technical note: HTML forms must reside in a folder whose template uses the FormBlock server control. *See Also:* **Ektron CMS400.NET** Administrator Manual section “Creating/Updating Templates”

Button or Tab	Description
Category	Any taxonomy categories assigned to the content. *See Also:* **Ektron CMS400.NET** Administrator Manual section “Taxonomy”
Web Alerts	Assign or update Web Alert information for the form. See the **Ektron CMS400.NET** Administrator Manual chapter “Web Alert Feature””Web Alert Feature” on page 931.
Submit	Submit content into approval process.
Publish	Publish content to Web 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. Note: Only the last approver in the approval chain sees this button.
Check In	Save and check-in content. This button does not submit the content into the approval process, but rather lets other users change it.
Save	Save the content without submitting it into the approval process. If a user clicks save and then closes the editor, other users cannot edit the content.
Decline	This button appears if you are the next approver in the approval list. Click it to decline the changes made to the content. Note: If 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.
Cancel	Close the editor without saving changes.

Next, click the Save and Submit or Publish button ( ). The form only appears on your Web site after it is published.

After you complete and save the form, it may need to go through the approval process. When that is complete, add it to the site by assigning it to a page template. See ”Implementing a Form on a Web Page” on page 615.

Form Validation

You can apply validation rules to text or calendar field types. Validation rules ensure that the information entered by site visitors meets your criteria. For example, a validation rule specifies that a response to the **Telephone** field is 10 digits. If the response does not conform, an error message indicates the problem. The input must conform before the form can be submitted.

For a list of validation rule types, see "Validation Options" on page 596.

When Validation Rules are Applied

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

The site visitor must change his response to conform to the validation rule. When he does, the next field is checked and, if that is invalid, its error message appears, etc.

TIP! If you apply validation rules to more than one field, include the field name in the error message. For example, enter **The name field only allows text**.

This is good practice because error messages only appear *after* a form is submitted. If the message does not identify the field, the user may not know which field needs correction.

Form Fields

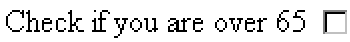
You can insert the following types of fields onto an HTML form.

- "Inserting a Checkbox Field" on page 591
- "Inserting a Text Field" on page 592
- "Inserting a Choices Field" on page 605
- "Inserting a Calendar Field" on page 609

See Also: "Inserting or Editing Buttons on the Form" on page 612

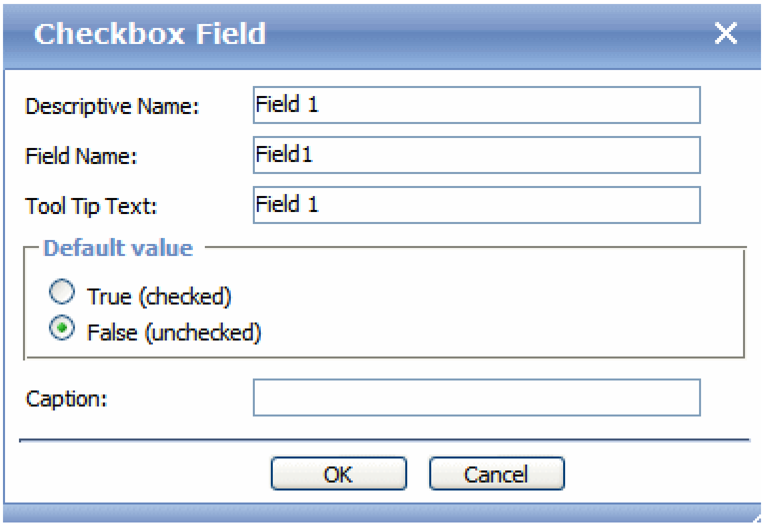
Inserting a Checkbox Field

A Checkbox field is one character wide and accepts one of two possible values: checked or unchecked. For example



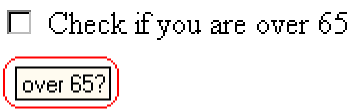
To insert a checkbox field, follow these steps.

1. Place the cursor where you want the check box field to appear.
2. Click the Checkbox field button ( ).
3. The following dialog appears.



Fields on the Checkbox Dialog

Field	Description
Descriptive Name	Enter a descriptive name for this checkbox.

Field	**Description**
Field Name	Enter a name for this checkbox. This text identifies the field in the database and in email (if the form is mailed). Note: You cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|'~) into this field. If you do, they are replaced by underscores.
Tool Tip Text	Enter text that appears when a site visitor hovers the cursor over this field (circled in red below). 
Default value	If you want this field to be checked when the screen first appears, click **True**. Otherwise, click **False**. A site visitor can change the default value while completing the screen.
Caption	Enter text to guide the user's response to this field. The caption appears on the screen to the right of the checkbox. To continue the above example, the caption would be **Check if you are over 65**.

Inserting a Text Field

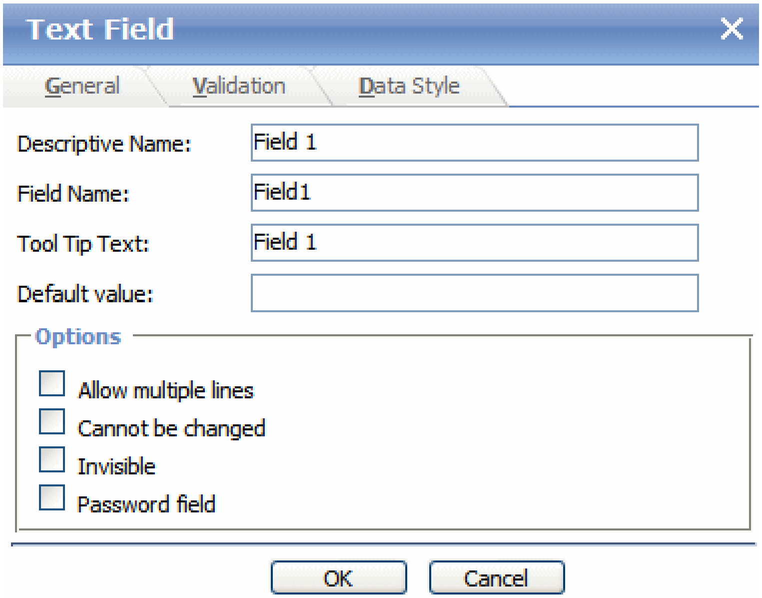
Use a text field when you want the user to enter a free text response, or to display text on the screen. There are many variations you can apply to such a field, such as

- a default value
- text can be read-only or hidden
- the field can expand to accommodate user input
- *validation*, requiring user input to meet criteria such as a non-negative whole number or a zip code

To insert a text field, follow these steps.

1. Enter a field label. For example, **Name**.
2. Place the cursor where you want the text field to appear.

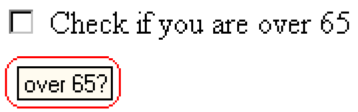
3. Click the Text field button (ab|).
4. The following dialog appears.



Fields on the Text Field Dialog - General Tab

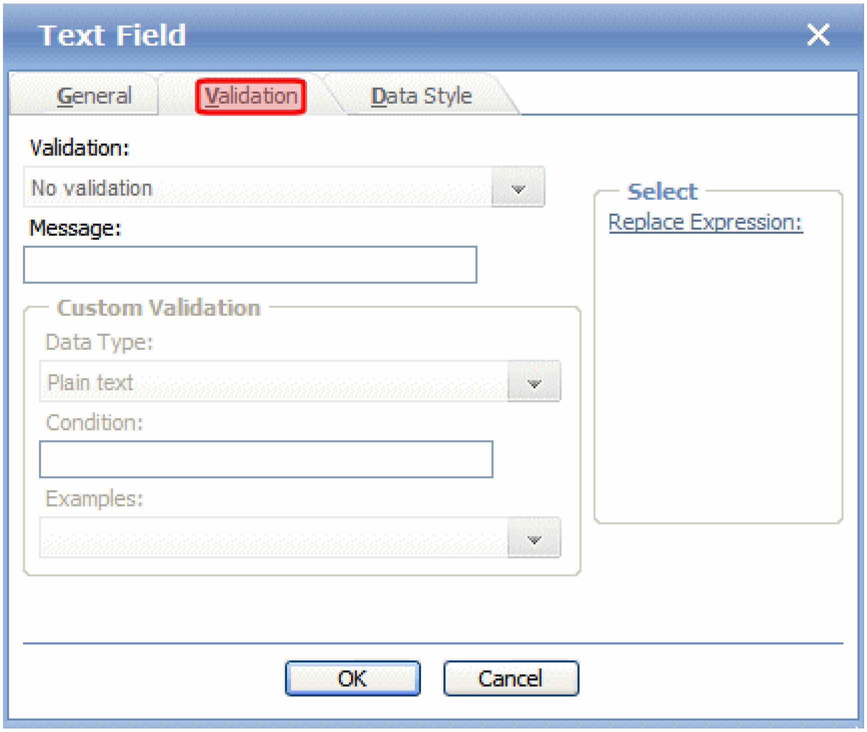
NOTE If you are using FireFox, you cannot enter text into a text field while creating or editing the form. If you need to prefill a text field with text, use the field's **Default Value** property.

Field	Description
Descriptive Name	Enter a description of the field. This text describes the field on form reports. See "Viewing Form Reports" on page 618.
Field Name	Enter a name for this field. This text identifies the field in the database and in email if the form is mailed. Note: You cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|'~) into this field. If you do, they are replaced by underscores.

Field	Description
Tool Tip Text	Enter text that appears if a site visitor hovers the cursor over this field (circled in red below). 
Default value	If you want to set a default value for this field, enter it here. For example, if this field collects a city, and most users enter New York, enter **New York** as the value. A site visitor can change the default value while completing the screen.
Allow multiple lines	Check this box if you want this field to scroll vertically to allow the person completing the form to enter as much text as needed. Note: This setting cannot be applied if this is a **Password field**.
Cannot be changed	Check this box to prevent the person completing this field from changing its content. For example, you want to display a license agreement. Below this field, you might place a check box prompting the site visitor to check it to indicate he has read the agreement. As another example, you could provide instructions for completing the screen.
Invisible	Check to make this field hidden. This option lets you store unseen information in each document. An example might be putting a version number on the form. If you apply this property to a form, the **Allow multiple lines** and **Cannot be changed** fields are automatically checked and cannot be unchecked. Also, the **Validation** tab is disabled.
Password field	Use a password field when you want the user to enter a password. A password is like a text field but the user's entry is disguised. This prevents an onlooker from seeing the password.  Passwords cannot exceed 18 characters.

Learn About Fields on the Text Field Dialog - Validation Tab

Fields on the Text Field Dialog - Validation Tab



Field	Description
Validation	Select the kind of validation to apply to this field. See "Validation Options" on page 596 Your system administrator determines whether a user can save an invalid document.
Message	Enter text that appears on the screen if a site visitor's response violates the validation criterion. For example, if the validation criterion is telephone number, the error message could be **Please enter 7 or 10 digits**. It would appear if the user entered, for example, S061882. By default, the error message matches the selected validation criterion. Use this field to customize the text. Note: You can only enter double-byte characters if your Windows settings include that language. If you enter characters that are not in a language defined in your Windows settings, question marks (?) appear instead of the characters.

Field	Description
Custom Validation	See "Custom Validation" on page 599

Validation Options

NOTE Your Web developer can customize validation options. For details, see the **Ektron CMS400.NET** Developer's Guide section "Customizing Validation." However, the file that maintains custom validation is different for HTML forms: it is *siteroot/workarea*/ContentDesigner/ValidateSpace.xml.

Option	Characteristics of Valid Response	Used with text field	Used with calendar field
No validation	Response is not checked.	✓	✓
Cannot be blank	Response is required. The format of the response is not checked.	✓	✓
Allow Maximum of 1000 characters	Response cannot exceed 1000 characters. (Only available if text field is set to **Allow Multiple lines**.)	✓	
Minimum of 8 characters with at least one digit	Site visitor's entry must be at least 8 characters and include one digit. (Only available if text field is set to **Password field**.)	✓	
Non-negative whole number or blank	A positive whole number *or* no response.	✓	
Non-negative whole number (required)	A positive whole number must be entered.	✓	

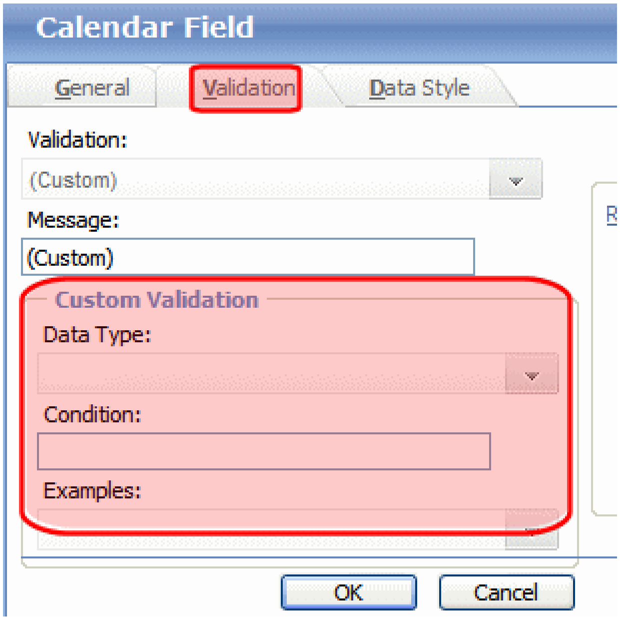
Option	Characteristics of Valid Response	Used with text field	Used with calendar field
Decimal number or blank	A decimal number (for example, 12.345 or 12) or blank. A leading minus sign “-” is allowed. The decimal point must be a period (.), even in locales that normally use a comma (,). Note: Decimal numbers include whole numbers because the decimal point is implied. That is, 12 is 12.0000.	✓	
Decimal number required	A decimal number (it cannot be blank) of none, one, or two decimal places. A leading minus sign “-” is allowed. The decimal point must be period (.), even in locales that normally use a comma (,). Note: Decimal numbers include whole numbers because the decimal point is implied. That is, 12 is 12.0000.	✓	
Percent: (0-100) required	A whole number from 0 to 100. A response is required.	✓	
email address	*a@a*, where a is one or more characters.	✓	
email address required	*a@a*, where a is one or more characters. A response is required.	✓	
email address list	Several email addresses. Each address’s format is *a@a*, where *a* is one or more characters. The user must separate each address with a semicolon (;).	✓	
email address list required	Several email addresses. Each address’s format is *a@a*, where a is one or more characters. The user must separate each address with a semicolon (;). A response is required.	✓	
Zip code (US)	5 (*nnnnn*) or 9 digits. If 9, a dash appears after the fifth (*nnnnn-nnnn*).	✓	
Zip code (US) required	5 (*nnnnn*) or 9 digits. If 9, a dash appears after the fifth (*nnnnn-nnnn*). A response is required.	✓	

Option	**Characteristics of Valid Response**	**Used with text field**	**Used with calendar field**
Social Security (US)	Nine digits in this pattern: *nnn-nn-nnnn.*	✓	
Social Security (US) required	Nine digits in this pattern: *nnn-nn-nnnn.* A response is required.	✓	
Postal Code (Canada)	*ana nan*, where *a* is an alphabetic character and *n* is numeric.	✓	
Postal Code (Canada) - (required)	*ana nan*, where a is an alphabetic character and n is numeric. A response is required.	✓	
Social Insurance Number (Canada)	A nine digit number in the format: *nnnnnnnnn.*	✓	
Social Insurance Number (Canada) Required	A nine digit number in the format: *nnnnnnnnn.* A response is required.	✓	
Telephone number (US and Canada)	A seven or 10 digit number in the format *nnnnnnn* or *nnnnnnnnnn*. The site visitor can insert separator characters, such as dashes (-), between numbers.	✓	
Telephone number (US and Canada) (required)	A seven or 10 digit number in the format *nnnnnnn* or *nnnnnnnnnn*. The site visitor can insert separator characters, such as dashes (-), between numbers. A response is required.	✓	
URL	A web site address.	✓	

Option	Characteristics of Valid Response	Used with text field	Used with calendar field
ISBN	The International Standard Book Number (ISBN) is a 10-digit number that uniquely identifies books and book-like products published internationally. Every ISBN consists of ten digits. When printed, the ISBN number is preceded by the letters ISBN. The ten-digit number is divided into four parts of variable length, each part separated by a hyphen. The four parts of an ISBN are: • **Group or country identifier** - identifies a national or geographic grouping of publishers • **Publisher identifier** - identifies a particular publisher within a group • **Title identifier** - identifies a particular title or edition of a title • **Check digit** - the single digit at the end of the ISBN which validates it *(Above copied from www.isbn.org.)*	✓	
ISSN	The ISSN (International Standard Serial Number) is an eight-digit number which identifies periodical publications as such, including electronic serials. The ISSN takes the form of the acronym ISSN followed by two groups of four digits, separated by a hyphen. The eighth character is a control digit calculated according to a modulo 11 algorithm on the basis of the 7 preceding digits; this eighth control character may be an “X” if the result of the computing is equal to “10”, in order to avoid ambiguity. *(Above copied from www.issn.org.)*	✓	

Custom Validation

The Text and Calendar field dialog’s **Validation** tab features a validation area (illustrated below).



The validation feature can ensure the following aspects user input.

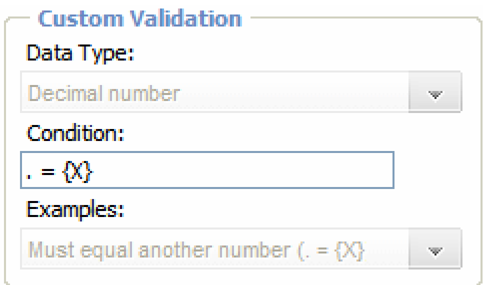
- The data type - the default types are
  - text
  - URL
  - whole number
  - decimal number
  - floating point number (Floating point includes scientific notation, so is appropriate for scientific numbers. Decimals usually suffice for business numbers.)
  - date (calendars only)
- The field value has 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 Web developer can customize validation options. For details, see the Ektron CMS400.NET Developer's Guide section "Customizing Validation." However, the file that maintains custom validation is different for HTML forms: it is siteroot/ workarea/ContentDesigner/ValidateSpace.xml.

Your system administrator determines if a user can save the invalid data.

When the **Custom Validation** option is selected from the **Validation** field, the Custom Validation screen area becomes active.



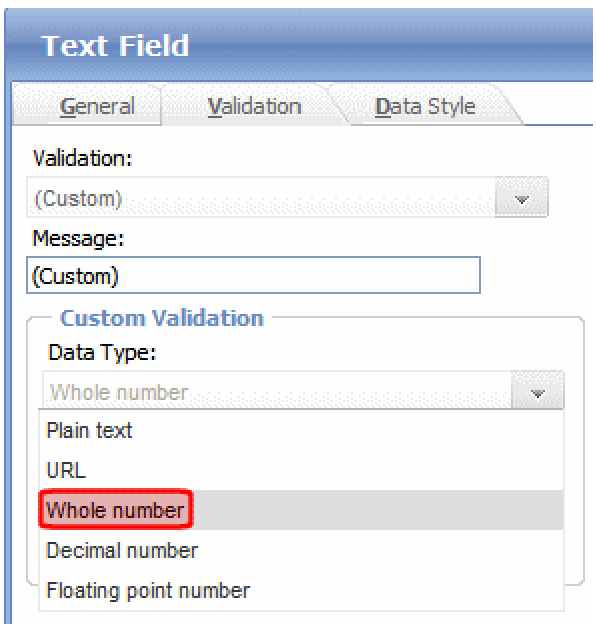
- The **Data Type** field is the value's basic type, for example, text, number, or URL.
- The **Condition** field displays the validation logic.
- The **Examples** drop-down list shows validation expressions that you can apply to the field.

Example of Creating Custom Validation

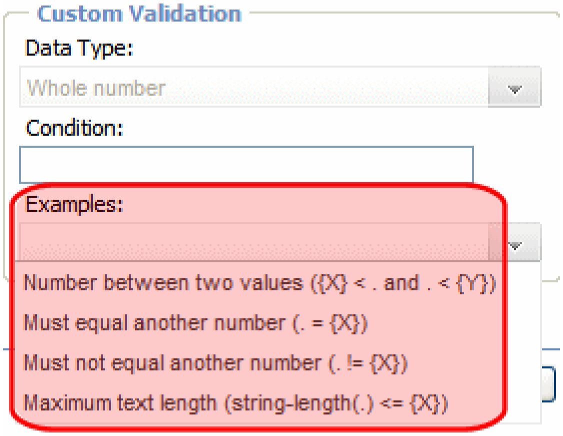
As an example of custom validation, assume that a field collects telephone numbers, and you want to make sure the user enters 10 digits. To accomplish this, follow these steps.

1. Insert a Text Field.
2. Complete the Text Field dialog's **General** tab.
3. Click the **Validation** tab.
4. In the **Validation** dropdown list, select **(Custom)**.

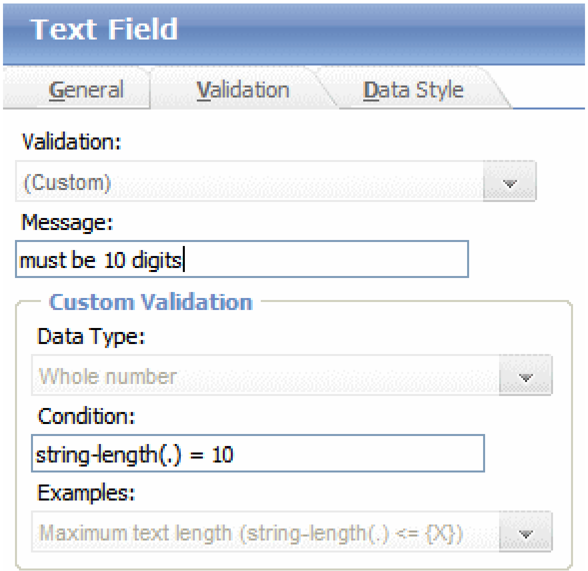
5. In the **Data Type** field, select **Whole Number** from the drop down list. This ensures that the user can only enter digits.



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



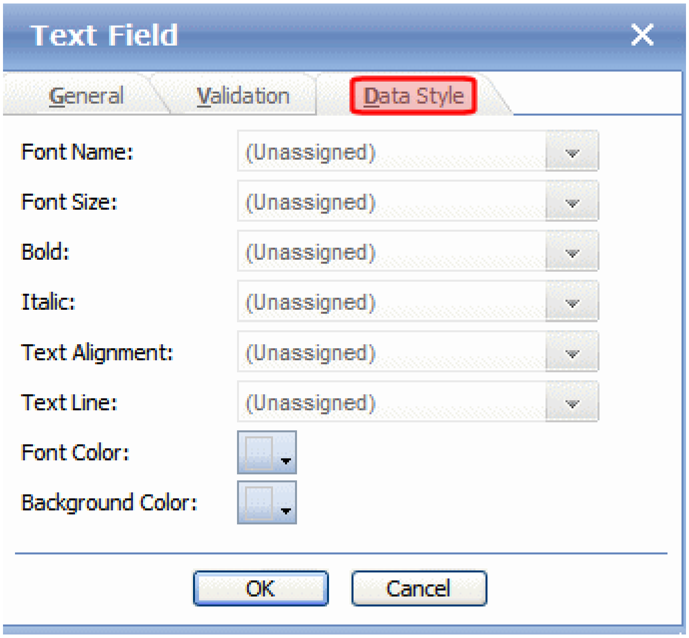
7. Click **Maximum text length...** . This option lets you specify the length of the user's response.
8. `string-length(.) <= {X}` appears in the **Condition** field.
9. Since you want the user's input to equal 10, remove the less than sign (<) from the calculation. Now it looks like this: `string-length(.) = {X}`.
10. Replace the `{X}` with 10. Now, it looks like this: `string-length(.) = 10`.
11. Move the cursor up to the **Message** field and compose a relevant error message. For example: `must be 10 digits`.
12. Your screen should look like this.



13. Press **OK**.

Fields on the Text Field Dialog - Data Style Tab

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



Use the tab to assign the following formatting attributes to a 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

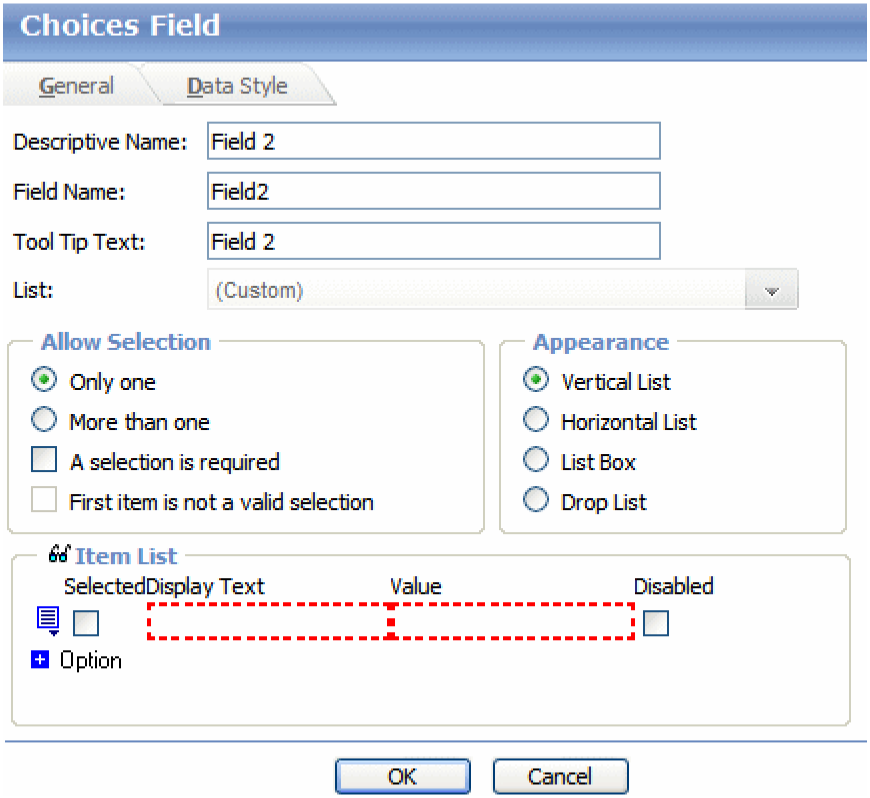
Inserting a Choices Field

Use a Choices field when you want a site visitor to select from a predetermined list. You can allow a site visitor to select only one or more than one choice. You can also determine the list's items and appearance.

To insert a choices field, follow these steps.

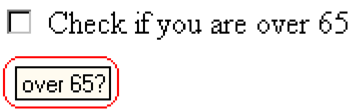
1. Enter a field label. For example, **Country**.

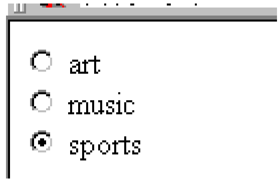
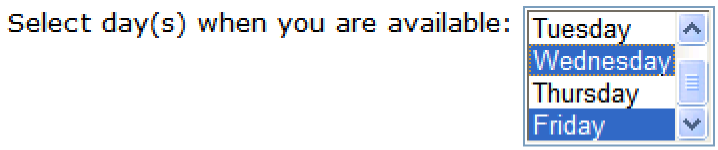
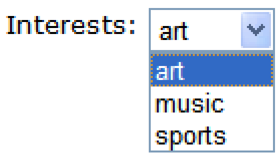
2. Click the Choices field button . *See Also:* "Adding a Field to the Screen" on page 587
3. The following dialog appears.

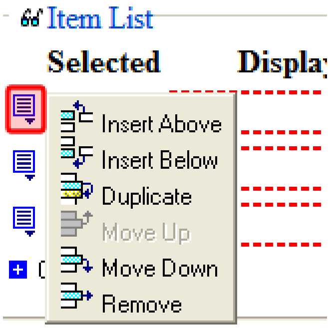


Fields on the Choices Dialog

Field	Description
Descriptive Name	Enter a description of the field. This text describes the field on form reports. See "Viewing Form Reports" on page 618.
Field Name	Enter a name for this field. This text identifies the field in the database and in email if the form is mailed. Note: You cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|‘~) into this field. If you do, they are replaced by underscores.

Field	Description
Tool Tip Text	Enter text that appears when a site visitor hovers the cursor over this field (circled in red below). 
List	**Custom** - You create your own set of choices. Use the **Item List** area to do this. *See Also:* ”Item List” on page 609 **Languages** - A standard list of languages **Countries** - A standard list of countries **U.S States and Territories** - A standard list of United States of America states and territories **Canadian Provinces** - A standard list of Canadian provinces **Age Ranges** - A standard list of age ranges **Numeric Ranges** - A standard list of numeric ranges **Years** - A standard list of years **Gender** - Male or female **Marital Status** - A standard list marital statuses
Allow Selection	Click **More than one** to let a site visitor select more than one item for this field. Otherwise, click **Only one** to limit the user to one choice. **A selection is required -** Check this box if the user must select at least one item. **First item is not a valid selection** - 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 item may say **Select from the list**. To do so, check this box. If you do, the site visitor must choose any selection except the first item. If he tries to file the screen without choosing a different item, this error message appears: **First item is not a valid selection.** Note: This option is only available if **Appearance** is set to **Drop List**.

Field	Description
Appearance	Click **Vertical List** to arrange the choices vertically.  Click **Horizontal List** to arrange the choices horizontally.  Click **List Box** to display all choices in a box. If more than four choices are available, the user scrolls to see additional options.  Click **Drop List** to display all choices in a dropdown list. When the user clicks the down arrow, all entries appear. 

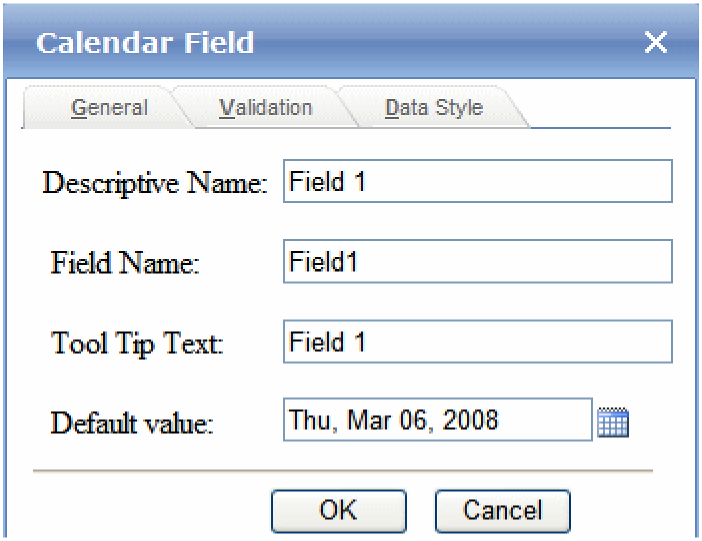
Field	Description
Item List	This section of the screen displays the list items. It is only editable if the list type is Custom. **The Context-Sensitive Menu** Buttons to the left of each item (circled below) display a menu. The menu lets you remove items, rearrange them, and insert additional items anywhere on the list.  **The Selected Box** Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox. Note that if **Only One** is selected under **Allow selection** (above), only one item can be selected. If the **Appearance** is set to Drop-Down list, this value is ignored. **Display Text** Enter text to describe this item on the data entry screen. **Value** Enter the value that is collected when the site visitor selects this item. For example, if **Interests** appears in the Name field, and you want `music` to be collected when the data entry user selects this item and saves the page, enter **music** here. **The Disabled Checkbox** Check the box next to any selection that you want to disable. If you do, the option appears on the form but the user cannot select it. **Option** Click this button to add a row to the bottom of the list.

Inserting a Calendar Field

To insert a field that lets a site visitor select a date, use a Calendar Field. To do that, follow these steps.

1. Enter a field label. For example, **Expiration Date**.

2. Click the Calendar field button ( ). *See Also:* "Adding a Field to the Screen" on page 587
3. The following dialog appears.



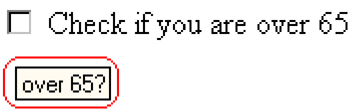
Respond to the fields on the screen.

See Also:

- "Fields on the Calendar Field Dialog - General Tab" on page 610
- "Fields on the Calendar Field Dialog - Validation Tab" on page 611
- "Fields on the Calendar Field Dialog - Data Style Tab" on page 612

Fields on the Calendar Field Dialog - General Tab

Field	Description
Descriptive Name	Enter a description of the field. This text describes the field on form reports. See "Viewing Form Reports" on page 618.

Field	Description
Field Name	Enter a name for this field. This text identifies the field in the database and in email if the form is mailed. Note: You cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|‘~) into this field. If you do, they are replaced by underscores.
Tool Tip Text	Enter text that appears when a site visitor hovers the cursor over this field (circled in red below). 
Default value	If you want to set a default date, enter it here. The site visitor can change the default value while completing the screen.
Validation	Select the kind of validation to apply to this field. The choices are: • **No validation** - response is not checked • **Cannot be blank** - Response is required. The format of the response is not checked. If you assign **Cannot be blank**, the field is surrounded by red dashes when it appears on your Web site. • **Custom** - See "Custom Validation" on page 599
Error Message	Enter text that appears if a site visitor's response does not satisfy the validation criterion. For example, if the validation criterion is **Cannot be blank**, the error message could be **Please enter a response**. By default, the error message is the same as the validation criterion. Use this field to customize its text. Note: You can only enter double-byte characters if your Windows settings include that language. If you enter characters that are not in a language defined in your Windows settings, question marks (?) appear instead of the characters.

Fields on the Calendar Field Dialog - Validation Tab

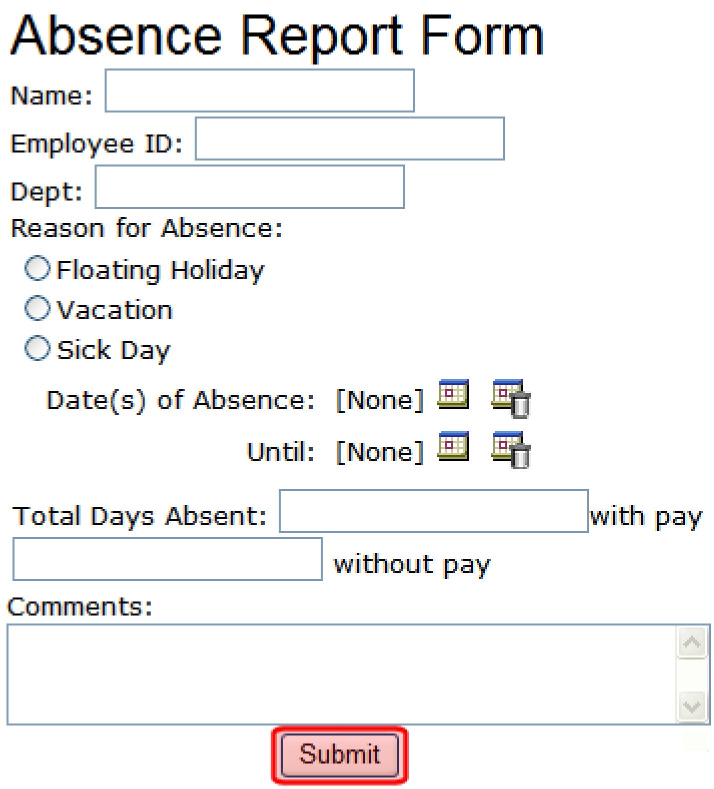
Field	Description
Descriptive Name	Enter a description of the field. This text describes the field on form reports. See "Viewing Form Reports" on page 618.
Validation	Select the kind of validation to apply to this field. The choices are: • **No validation** - response is not checked • **Cannot be blank** - Response is required. The format of the response is not checked. If you assign **Cannot be blank**, the field is surrounded by red dashes when it appears on your Web site. • **Custom** - See "Custom Validation" on page 599
Message	Enter text that appears on the screen if the site visitor's response does not satisfy the validation criterion. For example, if the validation criterion is **Cannot be blank**, the error message could be **Please enter a response**. By default, the error message is the same as the validation criterion. Use this field to customize it. Note: You can only enter double-byte characters if your Windows settings include that language. If you enter characters that are not in a language defined in your Windows settings, question marks (?) appear instead of the characters.

Fields on the Calendar Field Dialog - Data Style Tab

See "Fields on the Text Field Dialog - Data Style Tab" on page 604

Inserting or Editing Buttons on the Form

A form typically includes one or more *buttons*, which let a site visitor submit a completed form.



eWebEdit400’s form toolbar has three buttons that you can place on a form (circled below.) The buttons are described below.

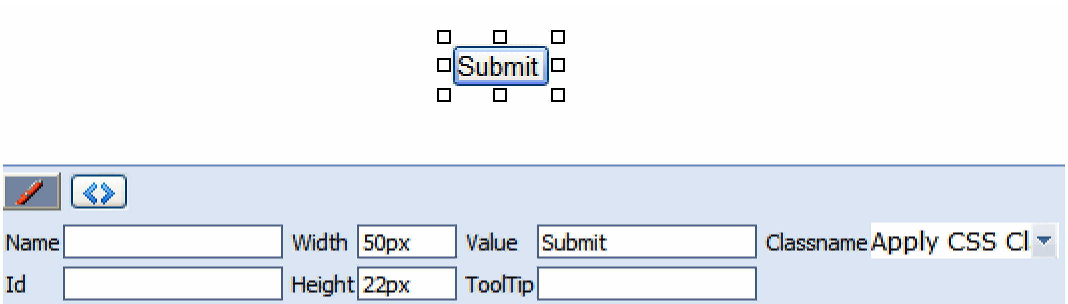
Toolbar Button	Name	Description
	Insert	Submits form information to your Web server. By default, it has no text. To learn how to add button text, see ”Editing a Button’s Properties” on page 614.

Toolbar Button	Name	Description
	Reset	Changes a form’s field values back to their state when the form first loaded.
	Submit	Submits form information to your Web server. Its default text is **Submit**.

Editing a Button’s Properties

After you insert a button, you may want to enter or change its properties, such as its text, height, and width. To edit a button’s properties, follow these steps.

1. Click the button so that it is selected. A selected button is surrounded by small squares, as shown below.
2. Below the editor screen, several fields appear, as shown below.



3. Update the button fields as needed.

Field	Description
Name	Give the button a unique name.
Id	If needed, give the button a unique ID.
Width	Enter or change the button’s width in pixels.
Height	Enter or change the button’s height in pixels.
Value	Enter or change the button text.

Field	Description
Tooltip	Enter or change the button's *tooltip* (that is, text that appears in a small window when someone hovers the mouse over the button).
Classname	Enter or change the style sheet class assigned to the button.

Implementing a Form on a Web Page

After you create the form, you need to link it to another page on your Web site. You would insert the link as you would any form link. See "Adding a Library File to Content" on page 148

Next, open your Web Site, navigate to the host page, and click the hyperlink to access the form. Now, you can test the form and make sure it works as you expected. If needed, you can return to edit mode, change the form, and test it again until you are happy with it.

Assigning a Task to a Form

While tasks typically help **Ektron CMS400.NET** users track content activities, you can also assign a task to users or user groups whenever a form is submitted.

For example, your Web site offers a free product demonstration to anyone who completes a form. Whenever a site visitor submits the form, a task is assigned to your sales department's administrative assistant. He uses the information on the form to schedule a demonstration. The sales manager can review the task history to audit sales leads and ensure demonstration requests are being handled in a timely manner.

To set up a task that it is assigned to users or groups whenever a site visitor completes the form, follow these steps.

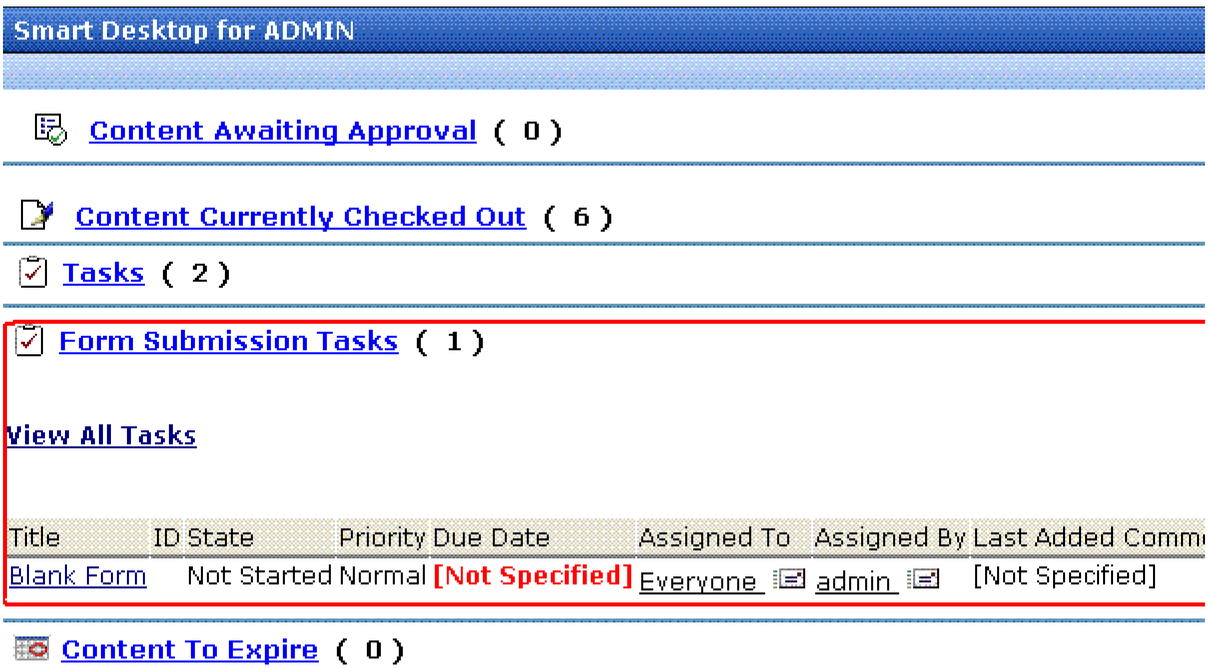
Note: You should be familiar with tasks before beginning this procedure. *See Also:* "Managing Tasks" on page 286

1. If you are creating a new form, assign the task at Step 3 of the Forms Wizard.

If you are editing a form, assign the task on the form's Edit Properties screen.

In both cases, you identify only users and groups to whom the task will be assigned whenever a site visitor completes the form. **Ektron CMS400.NET** assigns the remaining task information.

2. You complete the form and make it available on your Web site.
3. A visitor to your site fills out and submits the form.
4. A task is created and assigned to users and groups you identified in Step 1.
5. Any **Ektron CMS400.NET** user can view all tasks created via form submission in the Smart Desktop. See illustration below. *See Also:* "Understanding the Smart Desktop" on page 17



Ektron CMS400.NET users and administrators can also view and update tasks assigned to them via the Task screens on the Smart Desktop. See "Viewing a Task" on page 300 and "Viewing a Task's History" on page 310.

Task Information

The task created upon form submission has the following information.

Field	Value
Title	Form title, as entered by the author
Assigned to	As set up by the user who created or edited the form
Assigned by	User who created or last edited form
Priority	Normal
Task Category	Form Submission Task Category
Task type	Form Submission Task
Created by	User who created or last edited form
State	Not started
Due date	Not specified
Start date	Not specified
Description	Data from form "*form name*" was received on *date time*. *form description* *Name of every field on the form: value submitted by user into that field*

email Automatically Generated Upon Form Submission

An email is automatically sent to every user named in Step 1 above who has a valid email address in the User Information Screen. The email's subject line is the form name. The body of the email contains the following information for each field on the form.

- name
- value submitted by user

Viewing Form Reports

See ”Viewing Form Reports” on page 197

Viewing Form Information

See ”Viewing Form Information” on page 204

Editing a Form

See ”Editing a Form” on page 210

Deleting a Form

See ”Deleting a Form” on page 212

View Form Toolbar

See ”View Form Toolbar” on page 212

Creating Polls and Surveys

Polls and surveys are a type of form. All of the same functionality is available and applies.

WARNING! For complete understanding of forms, polls, and surveys, you should read the entire chapter ”Working with HTML Forms” on page 574.

- A *poll* is generally one question and appears on a site for a very short time: an hour or a day.
- *A survey* is usually multiple questions and appears on your site for a longer time than a poll.

NOTE For information on scheduling when your polls and surveys appear on the site, see "Scheduling Content to Begin and End" on page 65.

With polls and surveys, you can show ongoing results to site visitors after they submit their answers.

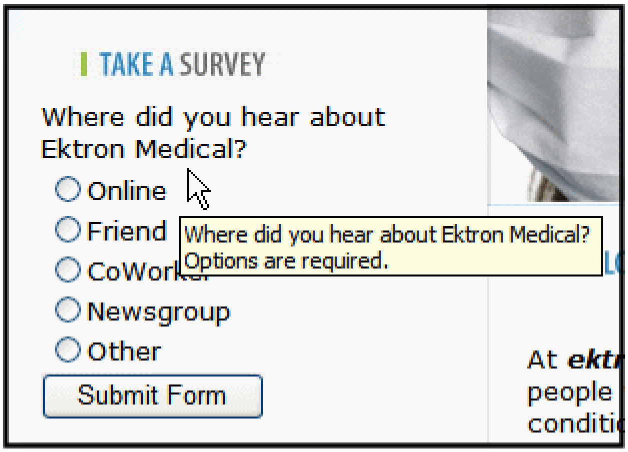
The following sections provide information about creating a poll or survey beyond the normal form information.

- "Working With Polls" on page 619
- "Creating a Survey" on page 624
- "Making Form Results Available to Site Users" on page 582
- "Viewing Form Information" on page 618

For information on how to display a poll or survey on a Web site, see the Developer Reference Manual section "Introduction to Ektron CMS400.NET Server Controls" > "Poll Server Control".

Working With Polls

Below is an example of a poll. Note that when a site visitor hovers over the poll, the question also appears as ToolTip text.



This subsection contains the following:

- "Creating a New Poll in the Workarea" on page 620
- "Replacing a Poll from the Web Site" on page 621

- ”Editing a Poll from the Web Site” on page 623

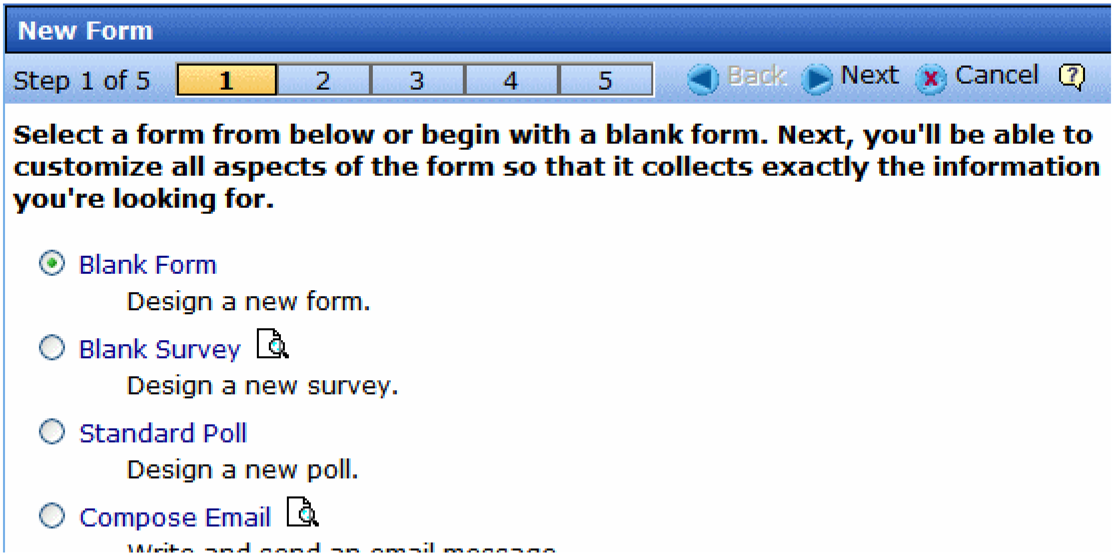
Creating a New Poll in the Workarea

To create a new poll, follow these steps.

NOTE You can also create a new edition of a poll in another language by copying an existing poll and translating it. For more information, see ”Translating Content” on page 818.

NOTE For the steps to create a new form, see ”Creating a New Form” on page 576. For the steps to create a new survey, see ”Creating a Survey” on page 624.

1. From the **View** menu, click **Language**, and select the language in which to create the poll.
2. Click **New** > **HTML Form/Survey**.
3. The New Form screen appears.



NOTE If you choose Standard Poll or Blank Survey, the number of steps in the Forms Wizard changes from five to four. This happens because the Assign Tasks step is removed.

4. Choose **Standard Poll**. You can click the preview icon ( ) next to any sample form to preview it before choosing it.
5. Click the **Next** button.
6. Enter or edit the form’s **Title** and **Description**.

- **Title** - used to reference the poll within the Workarea (required)
- **Description** - an extended description of the poll.

7. Click the **Next** button.
8. This screen lets you add a poll question and possible replies.

NOTE This screen allows you to add up to eight replies. If you have more than eight replies, you can add them in the forms editor after clicking the **Done** button.

9. Click the **Next** button.
10. This screen indicates that you have entered the basic poll information and should click the **Done** button to further edit and view the form's fields.
11. After clicking the **Done** button, the form editor launches so you can edit existing fields and properties. In addition, you can set post back and schedule information, add metadata and comments, change the title, and submit the poll for publication.

NOTE From this screen, you can add more replies to your poll by right clicking on the choices field and clicking properties. *See Also:* "Inserting a Choices Field" on page 605.

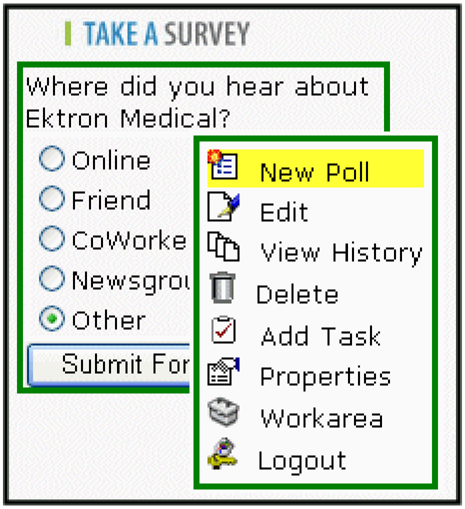
Replacing a Poll from the Web Site

When logged into **Ektron CMS400.NET**, you can right click on a poll and choose **New Poll** to replace the current one. The title of the poll, its ID, and properties stay the same. Only the questions and answers change.

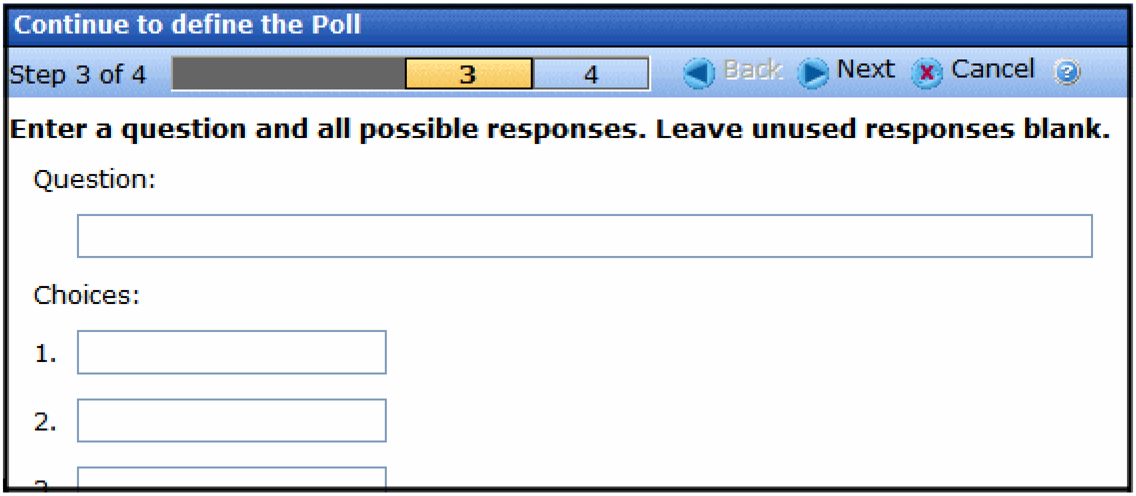
To replace a poll, follow these steps.

1. Log into **Ektron CMS400.NET**.
2. Navigate to the Web page that hosts the poll.

3. Right click the poll and choose **New Poll**.



4. The Workarea opens, indicating you are at step three of the Poll Wizard.



5. Add a new question to the **Question** text box.
6. Add possible responses to the **Choices** text boxes.
7. Click **Next**.
8. Click **Done**.
9. The form editor launches, allowing you to edit the fields and properties. In addition, you can set post back and schedule information, add metadata and comments, change the title and submit the poll for publication.

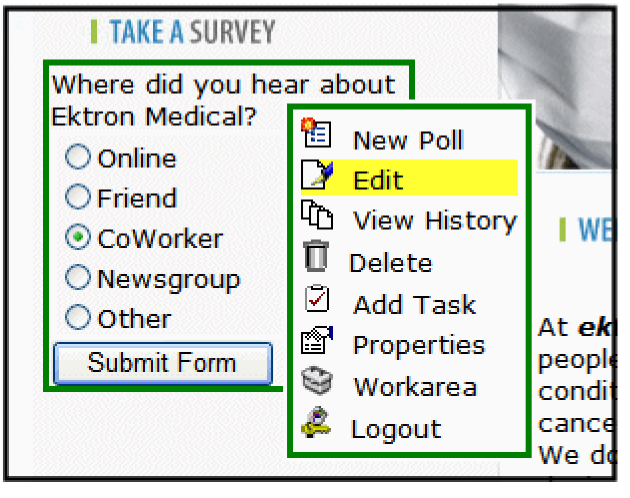
10. Once published, the updated poll appears on the site.

Editing a Poll from the Web Site

To edit an poll on a Web site, follow these steps.

WARNING! If you are logged into the site and create a new poll by right clicking on a poll selecting **New**, the existing poll is replaced by the new one.

1. Log on to the **Ektron CMS400.NET** Web site.
2. Right click the poll you want to change and click **Edit**.



3. Make changes to the poll using the Forms editor.
4. Submit the poll to the Approval Process.

Creating a Survey

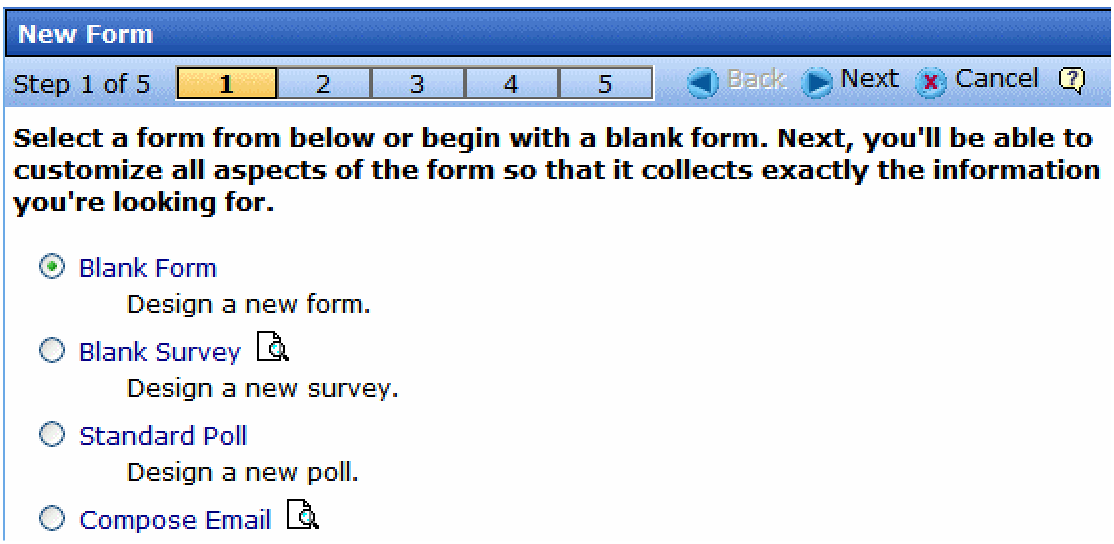
To create a new survey, follow these steps.

NOTE You can also create a new edition of a survey in another language by copying an existing form and translating it. For more information, see "Translating Content" on page 818.

NOTE For the steps to create a new poll, see "Working With Polls" on page 619. For the steps to create a new form, see "Creating a New Form" on page 576.

1. Consult with your **Ektron CMS400.NET** administrator about the folders in which you should create polls. *See Also:* **Ektron CMS400.NET** Administrator Manual section "Managing HTML Forms" > "Forms Must Use Template with FormBlock Server Control"
2. From the **View** menu, click **Language**, and select the language in which to create the form.
3. Click the **New** > **HTML Form/Survey**.
4. The New Form screen appears.

.



NOTE When you choose Standard Poll or Blank Survey, the number of steps in the Forms Wizard changes from five steps to four steps. This happens because the Assign Tasks step is removed.

5. Choose **Blank Survey**. You can click the preview icon ( ) next to any sample form to preview it before choosing it.
6. Click the **Next** button.
7. Enter or edit the form's **Title** and **Description**.
   - **Title** - used to reference the survey within the Workarea (required)
   - **Description** - an extended description of the survey.
8. Click the **Next** button.
9. This screen lets you determine what happens after the site visitor completes the survey. The choices are:
   - **Display a message** - See "Composing the Postback Message" on page 579
   - **Redirect to a file or page** - **Use the Library** Identify a file or a page on your Web site that is launched when the visitor completes the form
     - An example of a file is a white paper (a common file format is .PDF) that the visitor requested
     - An example of a page is one that lets the visitor download your product
   - **Redirect to an action page and forward form data** - See "Redirect to an Action Page and Forwarding Form Data" on page 580
   - **Report on the form** - See "Making Form Results Available to Site Users" on page 582
10. Click the **Next** button.
11. A screen indicates that you have entered basic information about the survey and should click the **Done** button to enter the survey's content. This procedure is described in "Creating a Form's Content" on page 585.

Introduction to eWebEditPro+XML

eWebEditPro+XML is a browser-based, Web content editor designed for dynamic Web sites. It lets you create and publish your own Web content in any language supported by the operating system and your Web site.

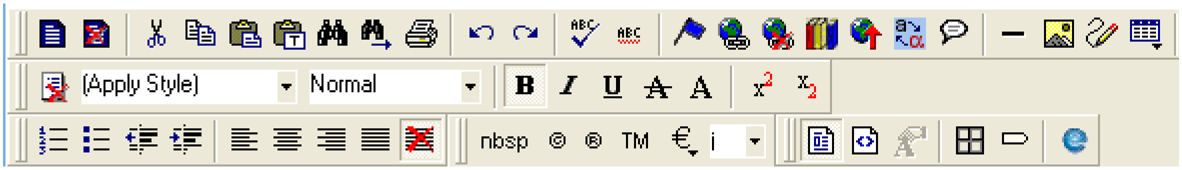
More specifically, eWebEditPro+XML lets you perform Web page editing functions, such as

- copy content from any Windows-based application
- use Microsoft Word to edit Web content
- cut, copy, and paste
- find and replace text
- check spelling
- edit an image
- change font style, size, attributes (bold, italics, underline), and color
- begin lines with bullets or numbers
- adjust indentation
- right, center, or left justify text and images
- add a bookmark, hyperlink, image, or table
- view your text as WYSIWYG or HTML code
- insert or clean HTML source code

You gain access to these functions either from the toolbar at the top of the editor window or from a menu that appears when you right click the mouse inside the editor.

Using eWebEditPro+XML

eWebEditPro+XML is like many other word processing applications. You type text and then use toolbar buttons (illustrated below) and menu options to change the text's appearance or perform functions on it, such as spell checking.



To learn more about using eWebEditPro+XML, see these topics.

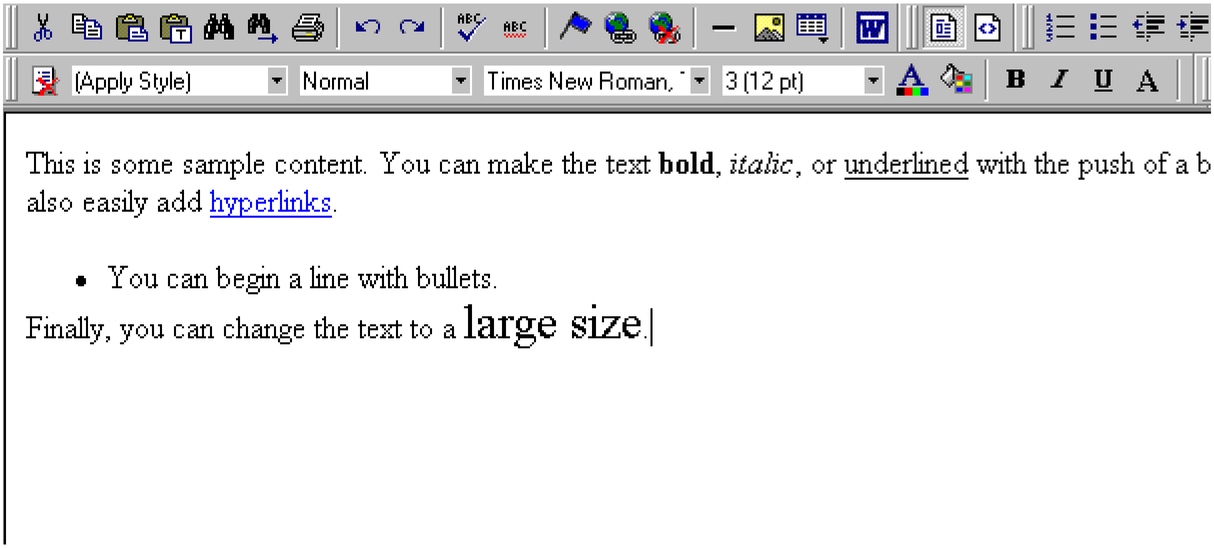
- "Creating a Simple Web Page" on page 628
- "Toolbar Buttons" on page 632
- "Customizing Your Toolbar" on page 645
- "The Context Sensitive Menu" on page 654
- "Using eWebEditPro+XML's Advanced Features" on page 657

Creating a Simple Web Page

This section walks you through the process of creating a simple Web page, using only a few of the many features available. Later sections explain all of the features and how to use them.

Your Finished Web Page

When you finish this exercise, your simple Web page will look like this.



Notice that this page has the following elements.

- The second sentence includes bold, italic and underlined text.
- The third sentence includes a *hyperlink*, text that will jump to another Web page when the user clicks on it.
- The fourth sentence begins with a bullet.
- The last sentence has some very large (18 point) text.

Creating a Sample Web Page

To create this page, follow these steps.

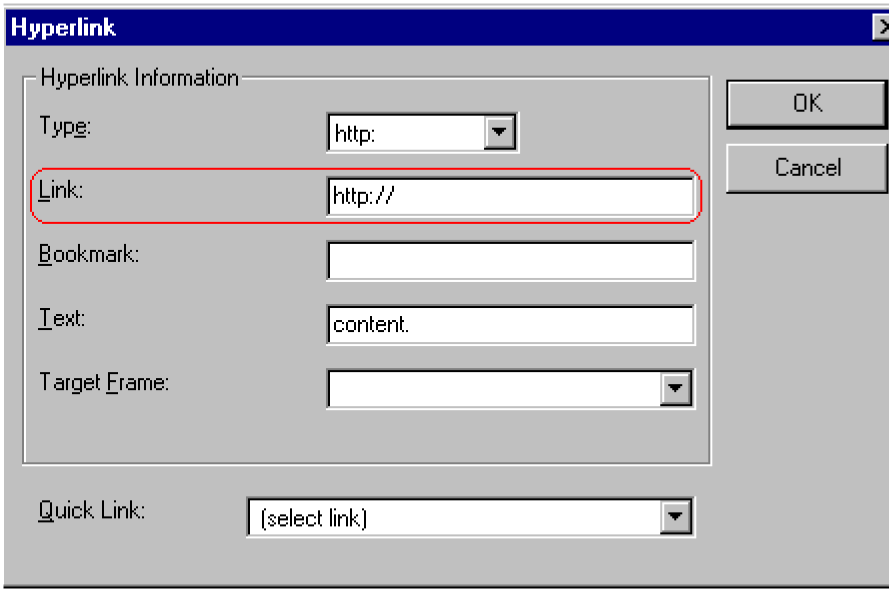
Enter the First Two Sentences

1. Open eWebEditPro+XML. (Your Webmaster installs eWebEditPro+XML on your computer and determines which fonts and sizes are available. Your system may not match the example below.)
2. Type the first two sentences.

   This is some sample content. You can make text bold, italic and underlined with the push of a button.
3. Double click the word “bold” to select it. Then, click the Bold button (B) to apply bold to the word.
4. Double click the word “italic.” Then, click the Italic button (I) to apply italic to the word.
5. Double click the word “underlined.” Then, click the underline button (U) to underline the word.

Create a Hyperlink

1. Type **You can also easily add hyperlinks**.
2. Double click the word **hyperlinks** so that it becomes selected.
3. Click the Hyperlink button ().
4. The hyperlink dialog box appears.



5. In the **Link** field, after **http://**, enter **www.ektron.com**.
6. Click **OK**.

Notice that the word **hyperlink** now appears in a different color. When you save this Web page and a user views it, if the user clicks **hyperlink**, a new Web page will display Ektron's home page.

NOTE If your computer has an internet connection, you can double click the hyperlink to test it.

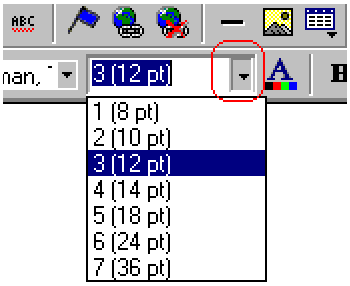
Applying a Bullet to a Line of Text

1. Press <Enter> to move the cursor down to the next line.
2. Type **You can begin a line with bullets.**
3. Click the bullet button ( ).
4. Notice that the line is indented and now begins with a bullet.

- You can begin a line with bullets.

Changing the Size of Text

1. Press <Enter> to move the cursor down to the next line.
2. Type **Finally, you can change the font to a large size.**
3. Select the words **large size**.
4. Click the down arrow to the right of the font size list. When you do, the list of available fonts appears.



5. Click **5 (18 pt)**.
6. Notice that **large size** is now much larger than the other text.

Congratulations! You have just created your first Web page with eWebEditPro+XML. You have learned how to apply bold, italic, and underlining, create a hyperlink, add a bullet to a line, and change the size of the text.

This sample used only a few of the many features available. The following sections explain the rest of the details about using the product.

Toolbar Buttons

This section explains how to use the buttons and drop-down lists on the toolbar. (The toolbar is the row of buttons across the top of the editor window, illustrated below.)

The buttons let you perform functions such as cutting and pasting text, inserting images, and creating tables.

All buttons may not appear. Your Webmaster determines which buttons appear on your toolbar. Also, you can customize your toolbar so that it contains only the buttons you use (See “Customizing Your Toolbar” on page 645).

This section explains

- ”Selecting Text” on page 632
- ”Applying Formatting Attributes to Text” on page 633
- ”Table of Toolbar Buttons and Drop-Down Lists” on page 633

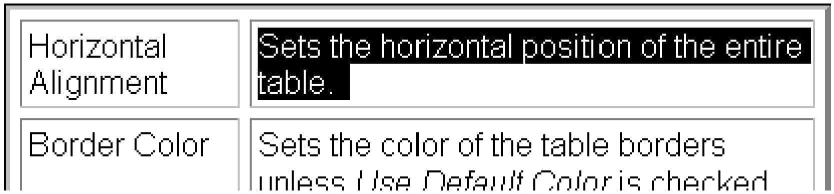
Selecting Text

You select text before performing an action on it, such as copying it.

- To select *all* information on a page, press Ctrl+A.
- To select *a portion* of the information on a page, you have two choices.
  - Hold down the left mouse button and drag the cursor across the data you want to select.
  - Hold down the Shift key and the right arrow key () until the desired data is selected.

- To select *a single word*, place the cursor on the word and double click the mouse.

Selected text has different background and foreground colors, as illustrated below.



Applying Formatting Attributes to Text

Several buttons apply formatting attributes to text, such as bold and italics. There are two ways to apply these attributes.

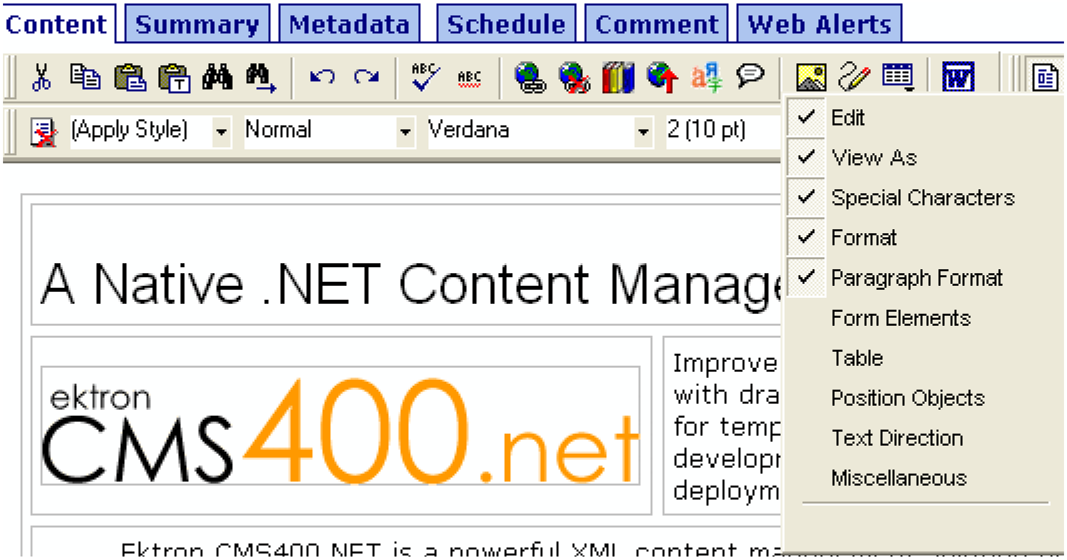
- Enter the text. Then, select the text and press the toolbar button. The button is now in a “pressed in” condition, and the text has the formatting attribute.
- Press the toolbar button. Then, begin typing the text. As you type, the formatting is applied.

To stop applying the formatting, press the button again. This action changes the button to a “pressed out” condition and terminates the formatting.

Table of Toolbar Buttons and Drop-Down Lists

The toolbar buttons and drop-down lists on the default toolbar are explained below.

Five optional toolbars are also available. To display one, place the cursor on the standard toolbar, right click the mouse, and select it.



The optional toolbars are explained in these sections.

- ”Form Elements Toolbar” on page 641
- ”Table Elements Toolbar” on page 642
- ”Position Objects Options” on page 640
- ”Text Direction Options” on page 641
- ”Miscellaneous Toolbar” on page 643

Button	**Equivalent Keystroke** (Internet Explorer only)	**Function**	**For more information, see**
Cut	Ctrl+X	Remove selected text and graphics. Place that data into temporary memory, also known as the “clipboard.” (If you later cut or copy more information onto the clipboard, the new information overwrites the original information.)	

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Copy	Ctrl+C	Copy selected text and graphics into temporary memory. Leave selected data where it is. (If you later cut or copy more information into memory, the original information is lost.)	"Copying from Other Applications" on page 658
Paste	Ctrl+V	Insert the most recently cut or copied text and graphics at the current cursor location.	
Paste Text		Paste the contents of the clipboard as plain text. That is, all HTML tags (including images) are not pasted. This button is helpful when you want to eliminate the HTML formatting of the text being copied.	
Replace		Launches the Search and Replace dialog box. The dialog searches for (and lets you optionally replace) text that you specify.	"Finding and Replacing Text" on page 659
Find Next		Find next occurrence of the string entered into the Find What field of the Search and Replace dialog box.	"Finding and Replacing Text" on page 659
Undo	Ctrl+Z	Reverse the most recent action, as if it never occurred. You can undo as many actions as you wish.	
Redo	Ctrl+Y	Reverse the undo action.	
Spell Check (manual)		Begin spell checker.	"Checking Spelling Upon Demand" on page 664
Spell Check (automatic)		Turn on or off spell check as-you-type feature.	"Checking Spelling as You Type" on page 663

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Edit Hyperlink		Change information about a hyperlink.	"Using Hyperlinks" on page 768
Remove Hyperlink		Remove a hyperlink.	"Removing a Hyperlink" on page 773
Library		Insert a library file	"Adding a Library File to Content" on page 148
Upload Files		Upload any external files (such as images) to the server.	"Moving an Image to the Server" on page 685
Translate		Translate content into another language	**Ektron CMS400.NET** Administrator Manual section "Multi-Language Support" > "Working with Multi-Language Content" > "Translating Content" > "Using Machine Translation"
Add Comment		Insert a comment into the content	"Adding Comments to Content" on page 795
Picture		Insert a picture.	"Inserting Images" on page 671
Image Editor		Edit an image.	"Editing Images" on page 687
Table		Insert or edit a table.	"Introduction to Tables" on page 719
Edit in Microsoft Word		Edit content in Microsoft Word.	"Editing in Microsoft Word" on page 668

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Data Design Mode		Switches to Data Design Mode. Button only appears when **eWebEditPro+XML** configuration enables the Data Designer feature.	**Ektron CMS400.NET** Administrator Manual section “Using the Data Designer”
Data Entry Mode		Switches to Data Entry Mode. Button only appears when **eWebEditPro+XML** configuration enables the Data Designer feature.	**Ektron CMS400.NET** Administrator Manual section “Using the Data Designer”
View as WYSIWYG		Display the page content as WYSIWYG (What You See Is What You Get). WYSIWYG is the ability to see in the editor what will appear when user views the Web page.	
View as HTML		Display the page content as HTML.	“Viewing and Editing HTML” on page 774
nbsp		Insert a blank space character. Although you can add spaces in the editor using the <space> bar on the keyboard, those spaces are ignored when the content is displayed by a browser.	
Copyright		Insert copyright symbol.	
Registered Trademark		Insert registered trademark symbol.	
TM		Insert trademark symbol.	

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
and Special Characters		Insert special characters (such as £ µ Ñ) from a drop down list. To view the list, click the black down arrow.	

Remove Style		Remove all style information applied to selected text. (You apply styles using the Style dropdown list.) For example
		Before
		`<P class=note>This is initial content. </P>`
		After
		`<P>This is initial content.</P>`	

Style		Display a list of styles. Users can select from the list to apply a style to selected text. Note that the list can change depending on the formatting of the selected line. Your Webmaster determines which styles are available.	
Heading Size		Change the heading size. Your Webmaster determines which heading sizes are available.	
Font Style		Change the font style. Your Webmaster determines which fonts are available. Note: If more than one font appears in a selection, the browser on the reader's PC tries to display text using the first font. If the browser cannot find that font, it tries to use the second, etc.	
Font Size		Change the font size. Your Webmaster determines which font sizes are available.	
Font Color		Change the font color.	

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Background Color		Change the background color of the text. Note: To remove background color from selected text, click the Normal button (A).	
Bold	Ctrl+B	Make the text **bold**.	
Italic	Ctrl+I	Make the text *italic*.	
Strikethrough		Apply strikethrough to selected text. For example: ~~Here is some text~~	
Normal		Remove all formatting from selected text.	
Superscript		Make selected text appear smaller and above text line	
Subscript		Make selected text appear smaller and below text line	
Number		Begin the line on which the cursor rests with a number. If the line above this line is • not numbered, assign this line 1 • numbered, assign a number one more than the line above	
Bullet		Begin the line on which the cursor rests (or all selected lines) with a bullet (•).	
Indent		Increase or decrease the current line’s distance from the left margin.	

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Left, Center, and Right Justify		Align paragraph so that it is arranged • evenly on the left side (uneven on the right) • in the center of each line • evenly on the right side (uneven on the left) • evenly on right and left side	
About **eWebEditPro+XML**		Display a dialog box that shows your version of **eWebEditPro+XML** and your license keys.	

Position Objects Options

These buttons let you absolutely position elements (pictures, tables, etc.) anywhere on a page.

WARNING! Some older browsers (for example, Netscape 4) do not display absolutely positioned elements. Absolute position uses the style attribute. If you use this feature, the content is not compatible with all browsers.

Button	Function
Position	Lets you move selected table or image anywhere on the screen.
Lock	“Locks” selected table or image at its current screen position. Nothing can move a locked object. To move the object, unlock it by clicking this button again.
Move to Front	If two or more images overlay each other, moves the selected image in front of the others.
Move to Back	If two or more images overlay each other, moves the selected image behind the others.
Above Text	If text overlays an image, move the image in front of the text.

Button	Function
Below Text	If an image overlays text, move the text in front of the image.

Text Direction Options

The text direction menu options ( ) allow bi-directional editing of text, which is useful for Arabic, Farsi and Hebrew. The client computer must also support the language.

The text buttons determine the editing direction, while the edit buttons determine the side of the editor that displays the scroll bar.

For right-to left languages, such as Arabic, Farsi and Hebrew, the text editing would be "right to left", and the scroll bar would be on the left side.

For western European languages, the text editing would be "left to right", and the scroll bar would be on the right side.

Button	Function
Left-Right Text	Text is entered left to right.
Right-Left Text	Text is entered right to left.
Left-Right Edit	The vertical scroll bar appears on the right side of the window.
Right-Left Edit	The vertical scroll bar appears on the left side of the window.

Form Elements Toolbar

See "Inserting Form Fields" on page 169

Table Elements Toolbar

Toolbar button	Description	For more information, see
	Insert table	”Introduction to Tables” on page 719
	Add row	Inserts a new row below the last one
	Add column	Inserts a new column to the right or the right column
	Insert row	Inserts a new row above the current one
	Insert column	Inserts a new column to the left of the current one
	Insert new cell	Inserts a new cell to the left of the current one
	Delete row	Deletes current row
	Delete column	Deletes current column
	Delete cells	”Deleting a Cell” on page 748
	Merge cells	”Merging Two Cells” on page 760
	Split cell	”Splitting a Cell” on page 759
	Table properties	”Manipulating Your Table’s Format” on page 730
	Cell properties	”Working with Table Cells” on page 746

Miscellaneous Toolbar

Button	Equivalent Keystroke (Internet Explorer only)	Function
Open File		Open local file and copy it into CMS content. While you can open any file type, **Ektron CMS400.NET**’s editor only works with .htm and .xml files. When you open a file into a content block, the new file replaces any content currently in the block.
Save File		Save CMS content as file on your computer or network. Since **Ektron CMS400.NET**’s editor only works with .htm and .xml files, you should save the file using one of those extensions.
Display/hide Borders		Display or suppress table and cell borders
Display/hide Invisible Elements		Display or suppress formatting characters that do not appear when content is published
View Preferences		Display a dialog that lets you change the appearance of the HTML source code
About **eWebEditPro+XML**		Display a dialog box that shows your version of **eWebEditPro+XML** and your license keys.
Delete		Delete selected content
Underline	Ctrl+U	Make the text underlined
Remove alignment		Remove alignment settings applied to selected content
Bookmark		Create a bookmark. *See Also:* “Using Bookmarks” on page 764
Horizontal Line		Insert a horizontal line.

Button	Equivalent Keystroke (Internet Explorer only)	Function
 Print	Ctrl+P	Print the editor content.
 Select All	Ctrl+A	Select all content
 Select None		Deselect all selected content

Customizing Your Toolbar

The **eWebEditPro+XML** toolbar consists of one or more *menus*. Each menu has one or more buttons.

You can recognize the beginning of a menu by the double vertical bars (circled in the illustration).

This sample toolbar has four menus.

Your Webmaster determines

- which menus are available to you
- which buttons appear on each menu, and the sequence in which they appear initially
- whether or not you are authorized to customize your toolbar. If you are not authorized, your edits are not saved when you leave the **eWebEditPro+XML** screen.

If you are authorized to customize your toolbar, there are several ways to do so.

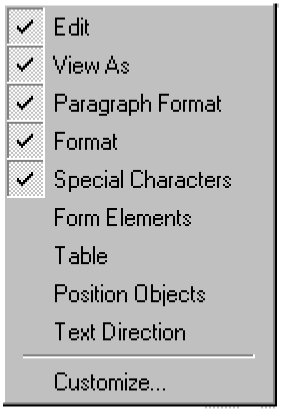
- ”Removing Or Adding Menus” on page 646
- ”Removing or Adding Menu Items” on page 647
- ”Restoring Toolbars” on page 650
- ”Rearranging the Menus on a Toolbar” on page 650
- ”Creating a New Menu” on page 650
- ”Moving a Menu Off the Toolbar” on page 652
- ”Changing the Menu’s Orientation” on page 653

Each procedure is explained below.

Removing Or Adding Menus

To remove or add a menu, follow these steps.

1. Place the cursor on the toolbar.
2. Right click the mouse.
3. A dropdown list appears. It displays all menus available to you and the **Customize** option.



NOTE If **Customize** does not appear on the menu, you are not authorized to customize the toolbar.

Menus that are checked appear on your toolbar.

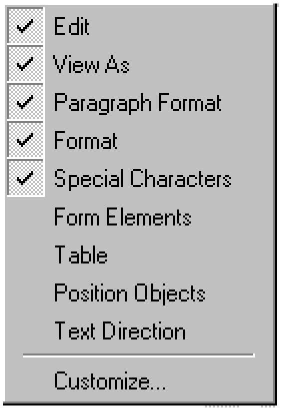
In the above example, the **Special Characters**, **View As**, **Format,** and **Paragraph Format** menus appear. The **Table, Position Objects** and **Text Directions** menus, which are not checked, are available but do not currently appear on the toolbar.

4. To *add* a menu to your toolbar that appears on the list but is not currently checked, place the cursor on the menu name and click the mouse. A check mark appears, and the menu appears on the toolbar.

   To *remove* a menu from your toolbar, place the cursor on the menu name and click the mouse. The check mark disappears, and the menu no longer appears on the toolbar.

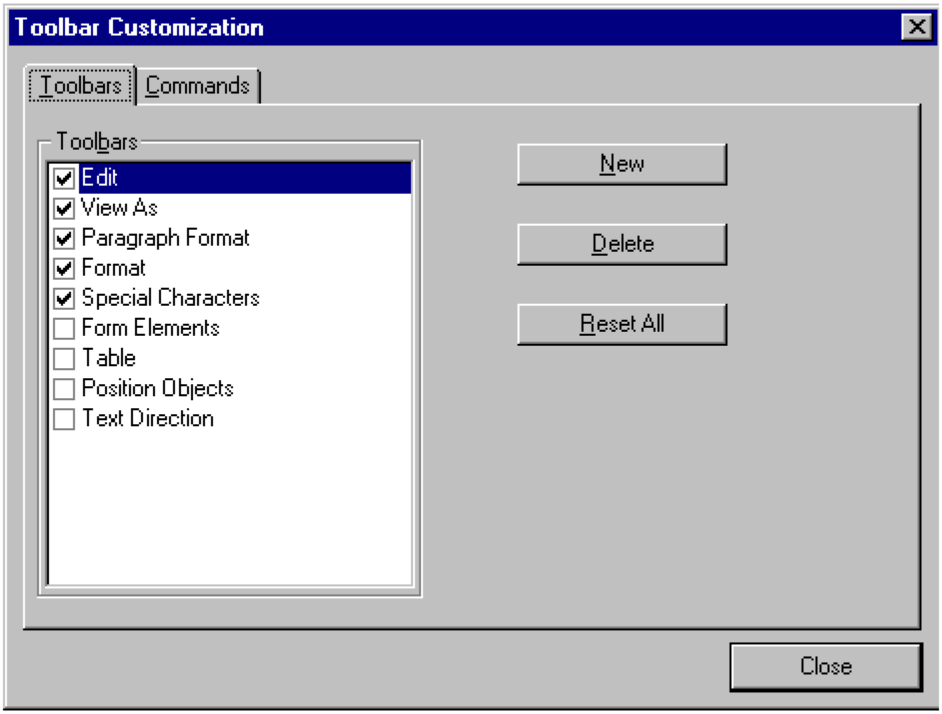
Removing or Adding Menu Items

1. Place the cursor on the toolbar.
2. Right click the mouse.
3. A dropdown list appears. Click **Customize**.

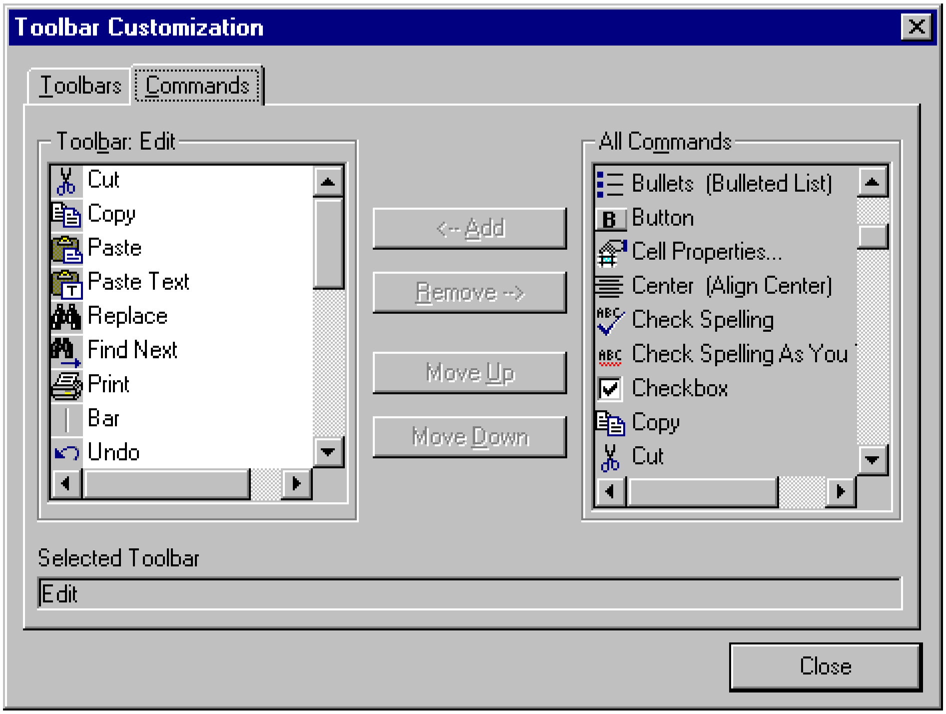


NOTE If **Customize** does not appear on the menu, you are not authorized to customize the toolbar.

4. The Toolbar Customization dialog box appears.



5. Click the menu that you want to edit.
6. Click the **Commands** tab. A new screen appears.



Using the Customize Toolbar Dialog Box

The left half of the **Commands** screen lists the buttons in the sequence in which they appear on the menu.

The right half of the screen lists available buttons that do not currently appear on the menu.

To *add* a button to the toolbar, drag it from the right side of the screen to the location on the left side where you want it to appear. (You can also click a button then click **<--Add**. This action places the button at the bottom of the list.)

To *remove* a button from the toolbar, drag it from the left side of the screen to the right. (You can also click a button then click **Remove-->**.)

The **Move Up** and **Move Down** buttons let you to move any button up or down one slot within the list of buttons.

Rearranging the Items on a Menu

1. Click the button you want to move
2. Click **Move Up** and **Move Down** to move the button up or down one slot for each click.

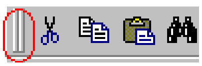
Restoring Toolbars

If you remove all toolbars from your menu, and then want to restore the menus but do not have the **Customize** menu option, follow these steps.

1. Place the cursor in the editor.
2. Right click the mouse.
3. A menu appears with a **Redisplay toolbars** option.
4. Click this option to restore all menus.

Rearranging the Menus on a Toolbar

To move a menu to a different toolbar location, follow these steps.

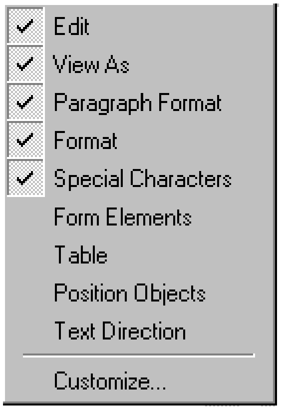
1. Place the cursor on the double vertical bars that indicate the beginning of the menu. 
2. Click the mouse.
3. Hold down the mouse button and drag the menu to the new location. You can move the menu anywhere else on the toolbar.

   Note that your Webmaster can define a menu so that it cannot reside on the same row with another menu. If you move such a menu, it will not remain on a row with another menu. Instead, it will move down to the next row.
4. After you place the menu where you want it, release the mouse button.

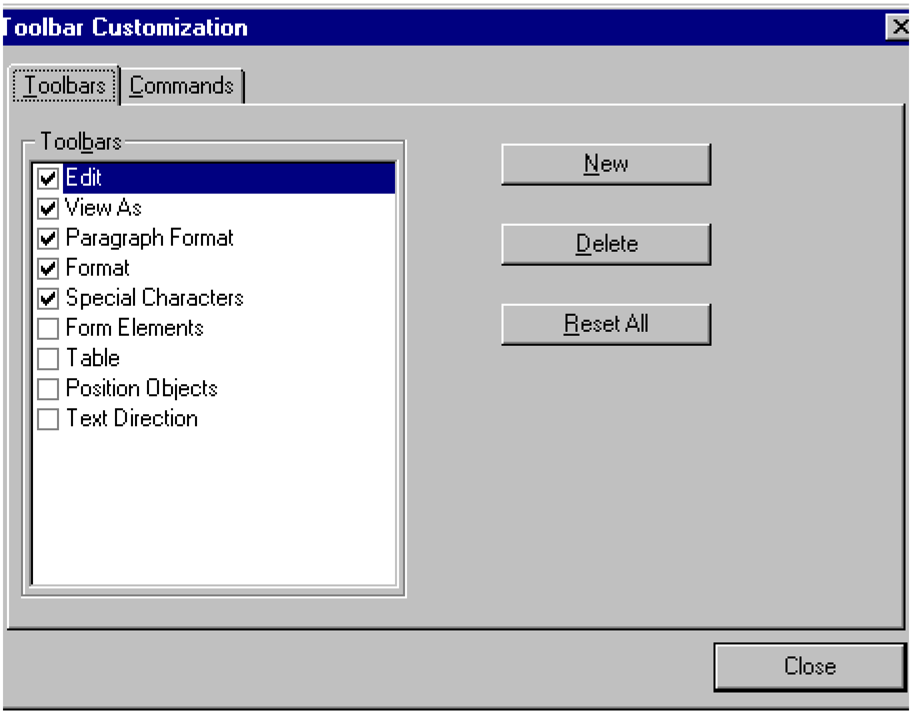
Creating a New Menu

1. Place the cursor on the toolbar.

2. Right click the mouse.
3. A dropdown list appears. Click **Customize.**



4. The Toolbar Customization dialog box appears.



5. Click **New**.

6. A new menu appears on the left side of the window, above the existing menus. The default name of the new menu is **Custom 0**.

7. To rename the menu, place the cursor in the field that displays the new menu and enter the new name.

NOTE If you click outside the toolbar name field, you cannot later change the menu's name.

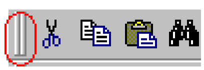
8. To have the menu appear on your toolbar, click in the small box to the left of the menu name.
9. Click the **Commands** tab.
10. Add buttons to the menu, following the procedure described in "Using the Customize Toolbar Dialog Box" on page 649.

Moving a Menu Off the Toolbar

You can move a menu from the toolbar to anywhere else on the screen, even if **eWebEditPro+XML** does not occupy the entire screen.

You can also change the orientation of a menu that is not on the toolbar from a horizontal to vertical.

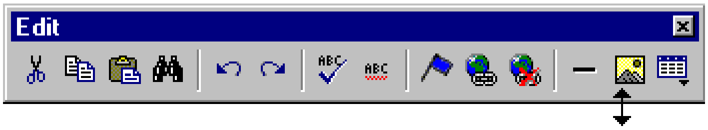
To move a menu, follow these steps.

1. Place the cursor on the double vertical bars that indicate the beginning of the menu. 
2. Click the mouse.
3. Hold down the mouse button and drag the menu to the new location. You can move the menu anywhere on the screen.
4. After you place the menu where you want it, release the mouse button.

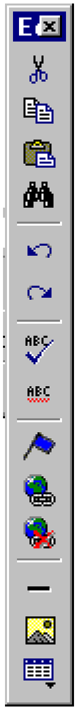
Changing the Menu's Orientation

To change the menu's orientation, follow these steps.

1. Drag the menu from the toolbar.
2. Move the cursor to the bottom of the menu until it becomes a double-headed arrow (illustrated below).



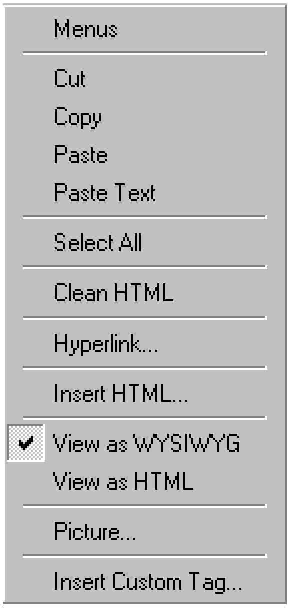
3. Drag the cursor to the lower left. As you do, the menu's orientation changes from horizontal to vertical (illustrated below).



The Context Sensitive Menu

This section explains the functions available on the menu that appears when you right click the mouse within the **eWebEditPro+XML** editor. You can also access this menu by pressing the application key ().

Because this menu can change depending on what you are doing, it is called a *context-sensitive* menu.



NOTE A different context-sensitive menu is available when your cursor is within a table. That menu is described in “The Table Context Sensitive Menu” on page 728.

The following table lists the menu options and where to get more information on each.

Menu Option	Lets you	For more information, see
Menus	View all toolbar menus.	"Using eWebEditPro+XML without a Mouse" on page 785
Cut	Remove selected text and graphics. Place that data into temporary memory. If you later cut or copy more information into memory, the information in memory is lost.	
Copy	Copy selected text and graphics into temporary memory. Leave selected data where it is. (If you later cut or copy more information into memory, the original information is lost.)	"Copying from Other Applications" on page 658
Paste	Insert the most recently cut or copied text and graphics at the current cursor location.	
Paste Text	Paste the contents of the clipboard as plain text. That is, all HTML tags (including images) are not pasted. This button is helpful when you want to eliminate the HTML formatting of the text being copied.	
Select All	Select all information on your page. After you select it, you can cut it, copy it, etc.	
Clean Source	Remove unnecessary HTML tags	"Cleaning Source Code" on page 776
Hyperlink	Create a link to another Web page or a spot within the current page	"Using Hyperlinks" on page 768
Edit Source	Edit your page's HTML source	"Editing a Section of a Page" on page 775
Insert Source	Insert HTML source onto the page at the cursor location.	"Inserting Source" on page 775

Menu Option	Lets you	For more information, see
Check Spelling	Compare words in the editor to Microsoft WORD spelling list.	“Checking Spelling” on page 663
View as WYSIWYG/HTML	View and edit your page’s HTML	“Viewing and Editing HTML” on page 774
Picture	Insert a picture	“Inserting Images” on page 671

Using eWebEditPro+XML's Advanced Features

Most of **eWebEditPro+XML**'s features are easy to learn. For example, to make your text bold, you select the text, and click the bold button ().

However, some of **eWebEditPro+XML**'s features are more complex. For example, when creating a table, you must make several decisions: the number of rows and columns, the size of the border, the spacing between cells, etc. The following sections explain **eWebEditPro+XML**'s more advanced features.

Copying from Other Applications

You can copy information from most other Windows applications into **eWebEditPro+XML** and retain the formatting from the original application. In general, copying from another application involves these steps.

1. Sign on to the application in which the information resides.
2. Select the information to be copied.
3. Press <Ctrl>+<C>.
4. Go to **eWebEditPro+XML**.
5. Press <Ctrl>+<V> to paste the selected information.

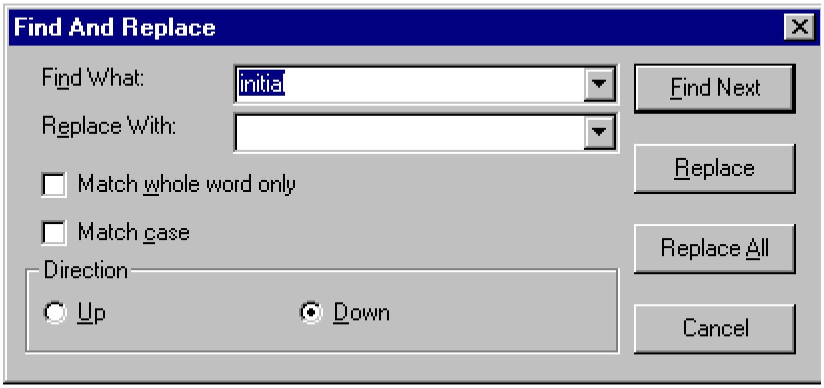
Note that you can only copy content, not background information that generates content.

So, for example, you can copy the values in a spreadsheet but not the formulas used to generate those values. Also, copying dynamic fields from Microsoft WORD would retrieve the current value of the fields but not the variables that generate those values.

It's a good idea to experiment with copying from different sources to test the results.

Finding and Replacing Text

To find (and optionally replace) text on your Web page, click the Replace button (). When you do, the Find and Replace dialog box appears.



You can use this dialog box to simply find text, or to find text and replace it with other text. Each option is explained below.

NOTE You can also use this dialog to delete text that appears repeatedly. To do so, follow the directions in "Finding and Replacing Text" on page 660 and enter nothing in the **Replace With** field.

See Also:

- "Finding Text" on page 659
- "Finding and Replacing Text" on page 660
- "Additional Options on the Dialog Box" on page 660

Finding Text

1. In the **Find What** field, type the text that you want to find in the content.
2. Set dialog box options (see "Additional Options on the Dialog Box" on page 660).
3. Click **Find Next** to find the next occurrence of the "find" text.

Finding and Replacing Text

1. In the **Find What** field, type the text that you want to find.
2. In the **Replace With** field, type the text to replace the "find" text.
3. Set dialog box options (see "Additional Options on the Dialog Box" on page 660).
4. If you want to
   - replace all occurrences of the "find" text with the "replace" text, click **Replace All**.

NOTE You can undo replacements one at a time using the Undo button ( ).

   - replace only the highlighted term with the "replace" text, click **Replace**.
   - find the next occurrence of the "find" text (and optionally replace it with the "replace" text), click **Find Next**.
   - change the highlighted term using the editor, exit the Find and Replace dialog, move to the term and edit as needed.

     To restart the search, press the Find Next button ( ).
5. Continue to find and optionally replace or edit until you reach the end of the text.

Additional Options on the Dialog Box

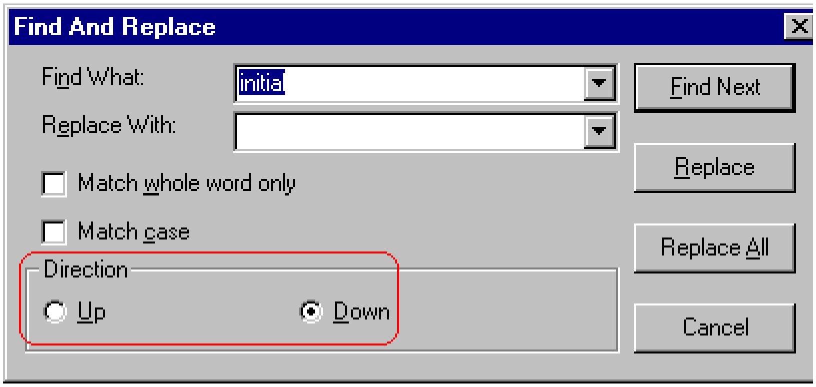
The dialog box also lets you do the following.

- "Specifying a Search Direction" on page 660
- "Considering the Case of a Search Term" on page 661
- "Whole Word Match" on page 662

Specifying a Search Direction

The search begins where the cursor is when you click **Find Next**. To make sure you locate every occurrence of a term, place the cursor at the top of the content before beginning the search.

If you begin the search from somewhere other than the top of the page, use the **Direction** field to search from the current location to the top or bottom of the file.

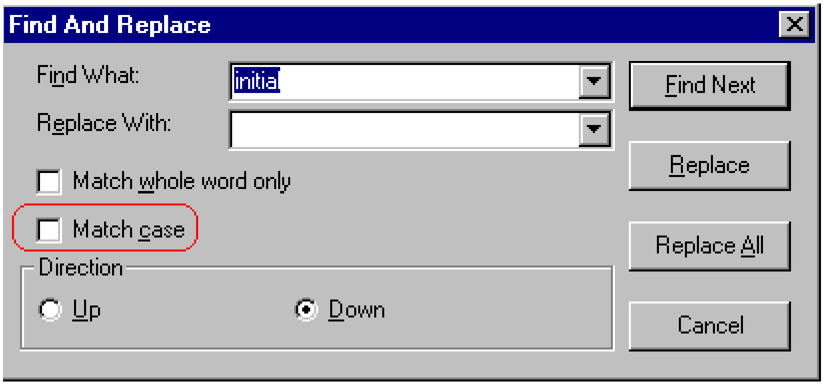


To search from the cursor location to the	Click this option in the Direction field
end of the page	**Down**
top of the page	**Up**

Considering the Case of a Search Term

By default, the search ignores the case (upper or lower) of a search term. In other words, if you enter **Bob** in the **Find What** field, the search finds bob, Bob, BOB, etc.

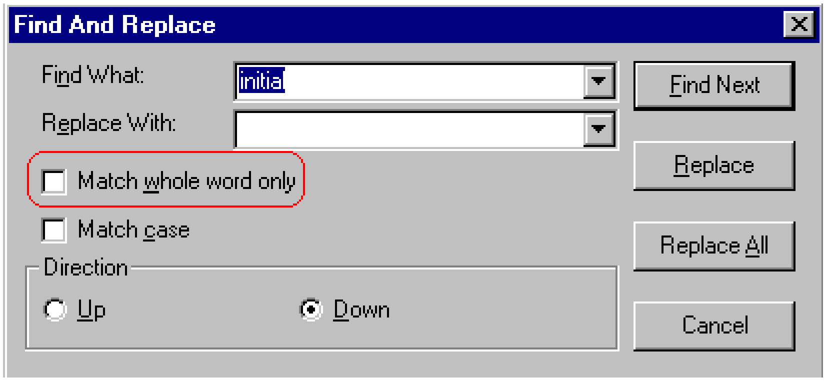
If you want the search to be case sensitive, use the **Match case** check box on the Find window. If you enter **Bob** in the **Find What** field and place a check in the **Match case** box, the search only stops at Bob, not bob or BOB.



Whole Word Match

By default, the search finds any occurrence of the text that you type into the **Find what** field. For example, if you enter **the**, the search finds the word **the**, as well as those letters embedded in other words, such as o***the***rs and ***the***ater.

If you want the search to find only whole word occurrences of the text you type into the **Find what** field, click the **Match whole words only** box in the Find dialog box.



Checking Spelling

The **eWebEditPro+XML** editor can check your spelling as you type or whenever you want to check it.

The rest of this section explains

- "Disabling Script Blocking" on page 663
- "Checking Spelling as You Type" on page 663
- "Checking Spelling Upon Demand" on page 664
- "Spell Checking Selected Text" on page 665
- "Setting Spell Check Options" on page 666

Disabling Script Blocking

If Norton Antivirus ™ 2001 is installed on your computer, you need to disable script blocking in order to use the spell checker. If you do not disable script blocking, an error message will appear whenever you check spelling.

To do this, follow these steps.

1. Launch Norton Antivirus ™ 2001.
2. From the first window, click **Options**.
3. On the next window, click **Script Blocking**.
4. On the script blocking window, uncheck **Enable Script Blocking**.
5. Press **OK**.

Checking Spelling as You Type

You can have the editor check spelling as you type. To turn on the spell-check-as-you-type feature, click the automatic spell check button().

When you click the button, the spell checker reviews every word in the file. A wavy red line ( ) appears under any word whose spelling is not found in the system's dictionary.

The spell checker continues to review each word as you type it, marking any words not in the dictionary.

NOTE Depending on the speed of your computer, there may be a short delay between the time you type an incorrect word and when the wavy red line appears. Also, the spell check does not check a word until you enter a space character after the word.

Fixing Spelling Errors

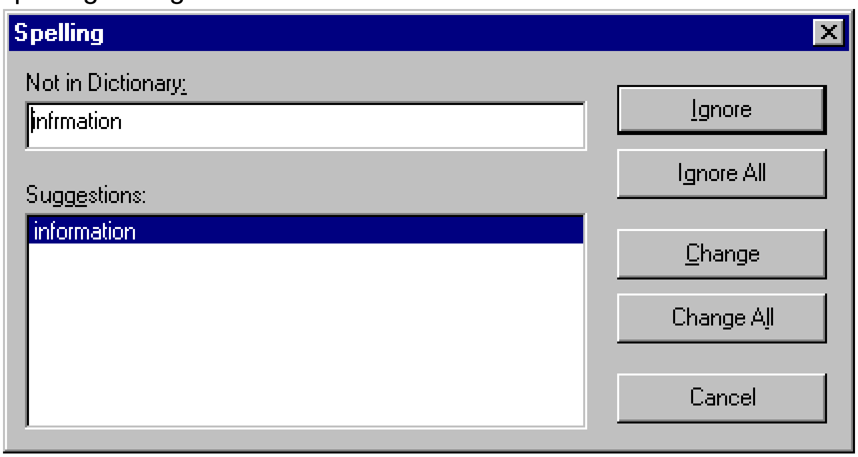
There are two ways to fix a spelling error (indicated by a wavy red line).

- Click the misspelled word and then right click. A menu displays words that are similar to the misspelled word. Click the correct word.
- If you know the correct spelling, type the correction.

Checking Spelling Upon Demand

If you do not want to use the spell-check-as-you-type feature, you can begin spell checking whenever you wish. To do this, click the spell check button ( ).

When you do, the system checks each word in the file. If the spell check finds a word in none of the dictionaries, it displays the Spelling dialog box.



The Spelling Dialog Box

The Spelling dialog box displays

- the word not in the dictionary (in the **Not in Dictionary** field).
- suggested spellings for the word (in the **Suggestions** field). The most likely replacement is selected at the top of the list.
- buttons that let you ignore the word, change the word, or exit.

If you want to	Do this
Replace the word with one of the suggestions and continue spell checking the page.	1. Click the suggested word. 2. Click **Change.**
Replace *every occurrence* of the word with one of the suggestions and continue spell checking the page.	1. Click the suggested word. 2. Click **Change All.**
Correct the spelling of the word by typing it and continue spell checking the page.	1. Click in the **Not In Dictionary** field. 2. Correct the spelling. 3. Click **Change**.
Leave the word as is; continue spell checking the page. You would normally do this if a word (such as a company name) is spelled correctly even though it is not in the dictionary.	Click **Ignore**.
Leave the word as is; continue spell checking the page, ignoring all other occurrences of the word.	Click **Ignore All**.
Stop spell checking.	Click **Cancel**.

Spell Checking Selected Text

To check the spelling for a single word or a group of words, follow these steps.

1. Select the text that you want to spell check.
2. Press the manual spell check button ().

3. The spell checker reviews the words in the selected text and stops at any word not in the dictionary. For documentation of options when a misspelled word is found, see “The Spelling Dialog Box” on page 665.
4. When the spell checker finishes reviewing the words in the selected text, it displays the following message

   Finished checking selection. Do you want to check the rest of the document?

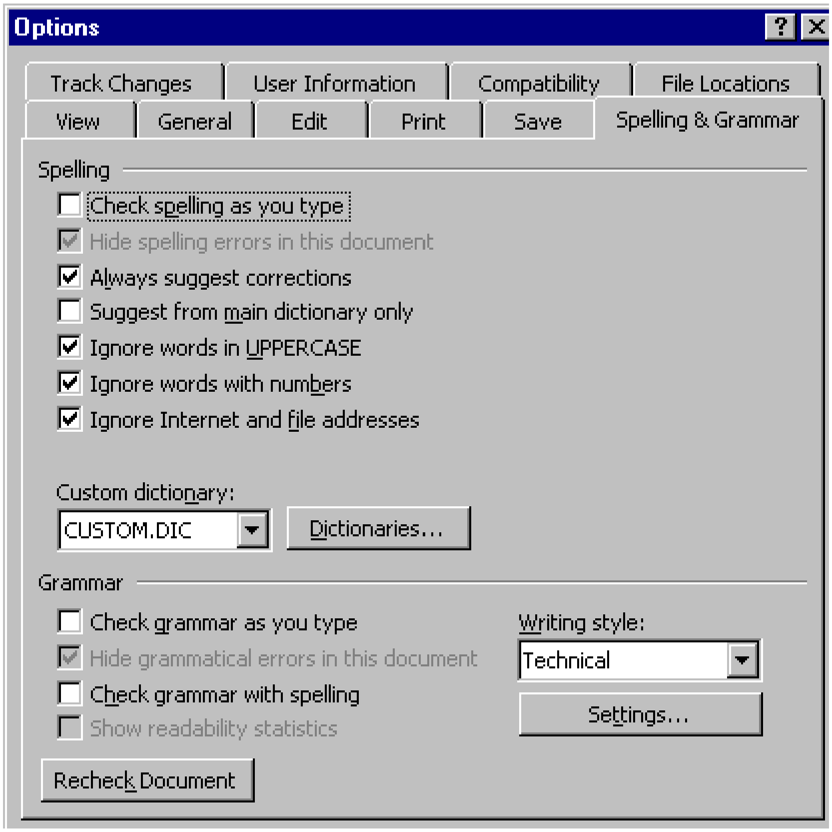
   Click **Yes** to spell check the rest of the document (including text above the selected text).

   Click **No** to stop the spell checker.

Setting Spell Check Options

eWebEditPro+XML can use Microsoft Word’s spell checking feature (your Webmaster makes this decision).

If your installation uses Word, Word’s Spelling & Grammar window (available from the **Tools - > Options** menu) has settings that affect the operation of the spell check.



Specifically, you can set the spell check feature to check or ignore

- words in UPPERCASE (for example, XYLOGIC)
- words with numbers (for example, mp3)
- Internet and file addresses (for example, `http://www.example.com/`)

As an example, if you check the box to the left of **Ignore Words in UPPERCASE**, **eWebEditPro+XML**'s spell check does not consider words in all uppercase characters.

You also use the custom dictionary section of the screen to identify custom dictionaries for the spell check to reference.

The spell check feature does not use the other fields on this screen.

Editing in Microsoft Word

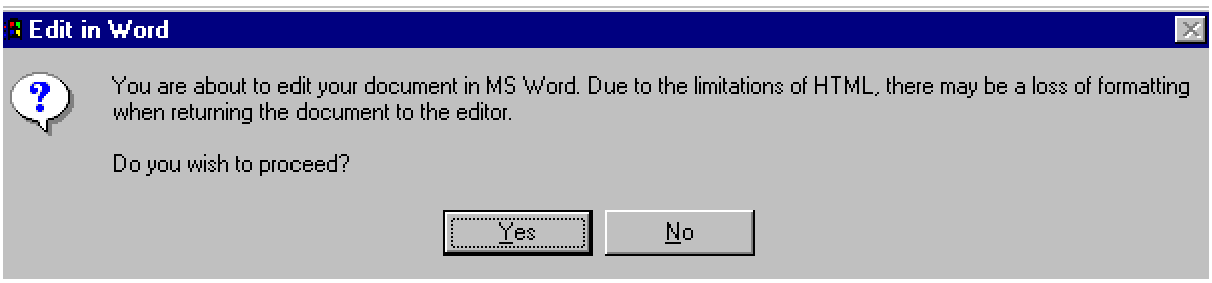
If your computer has Microsoft Word 2000 or greater, you can edit content within Word. You may prefer to do this because of familiarity with Word's user interface, and to use additional functionality available in Word.

See Also: "Working with Microsoft Office Documents" on page 227

NOTE Some Word formatting may not be compatible with HTML and, as a result, not be transferred to eWebEditPro+XML.

To edit with Word, follow these steps.

1. Open **eWebEditPro+XML**.
2. Press the Word toolbar button ( ).
3. The following dialog may appear, warning you that some Word formatting may not be transferred back to **eWebEditPro+XML**. Press **Yes** if you still want to edit in Word.



4. Microsoft Word opens. Any content that was in **eWebEditPro+XML** when you pressed the Word button is copied to Word.
5. Edit content as desired.
6. Press **File -> Close**.
7. Another warning like the one in Step 3 may appear. Press **Yes** to copy the edited content back to **eWebEditPro+XML**.

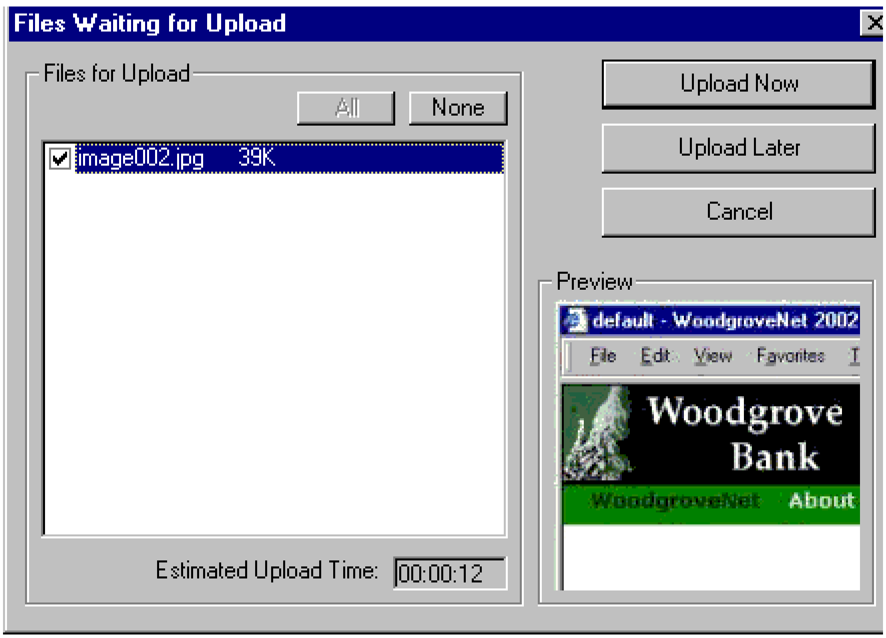
8. When done, return to **eWebEditPro+XML** and press the Word toolbar button again.

9. If you change your mind and decide to restore the content to the way it was before you edited it in Word, press the undo button ( ).

   If you want to restore the Word changes after pressing Undo, press the redo button ( ).

Uploading an Image in a Microsoft Word Document

If you insert an image into the Word content and then paste that content or save it, the following dialog box appears. The box lists all images in the content and asks if you want to copy them from your computer to your organization's Web server.



If you are ready to publish your Web content and want to display the image, click **Update Now**. If you plan to add more content later, you can click **Upload Later** and upload all images at that time.

Editing XML Documents

If your organization has implemented **eWebEditPro+XML**, you cannot edit XML documents using Microsoft Word. This is because

Word does not support XML editing. If a full XML document is loaded, the Word button () is disabled.

If a Word document includes *some* custom/XML tags, the following dialog appears, warning you about the problem.

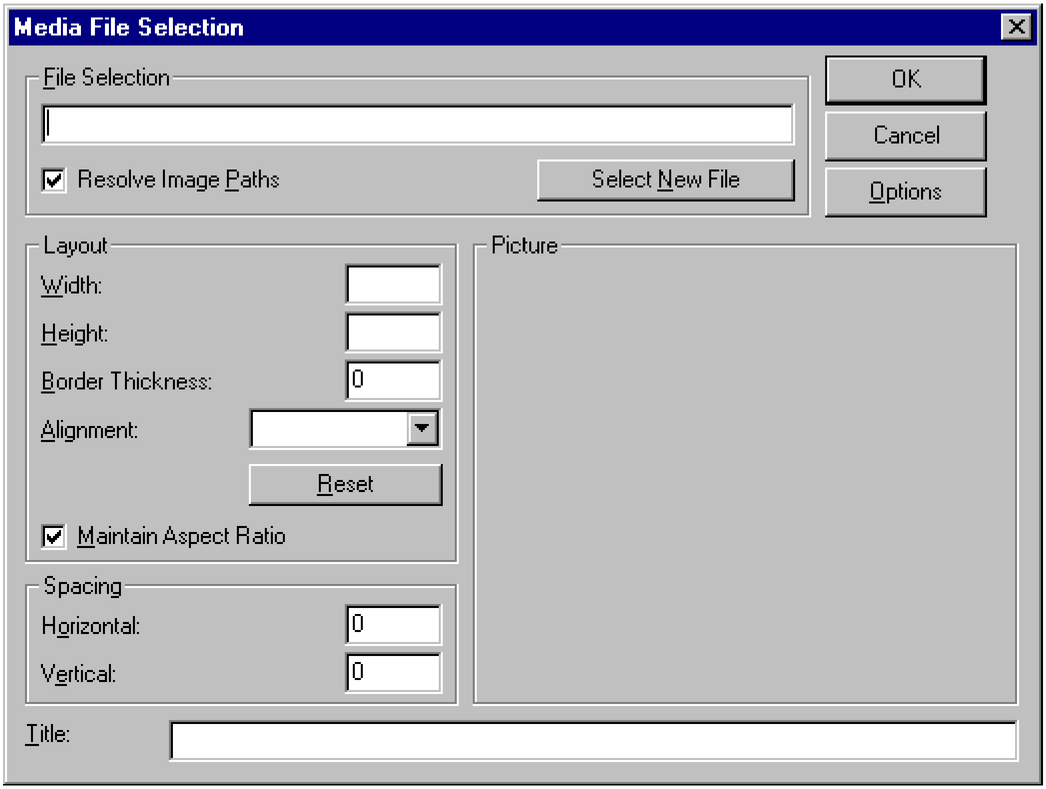
You can proceed and edit using Word or decide not to edit using Word.

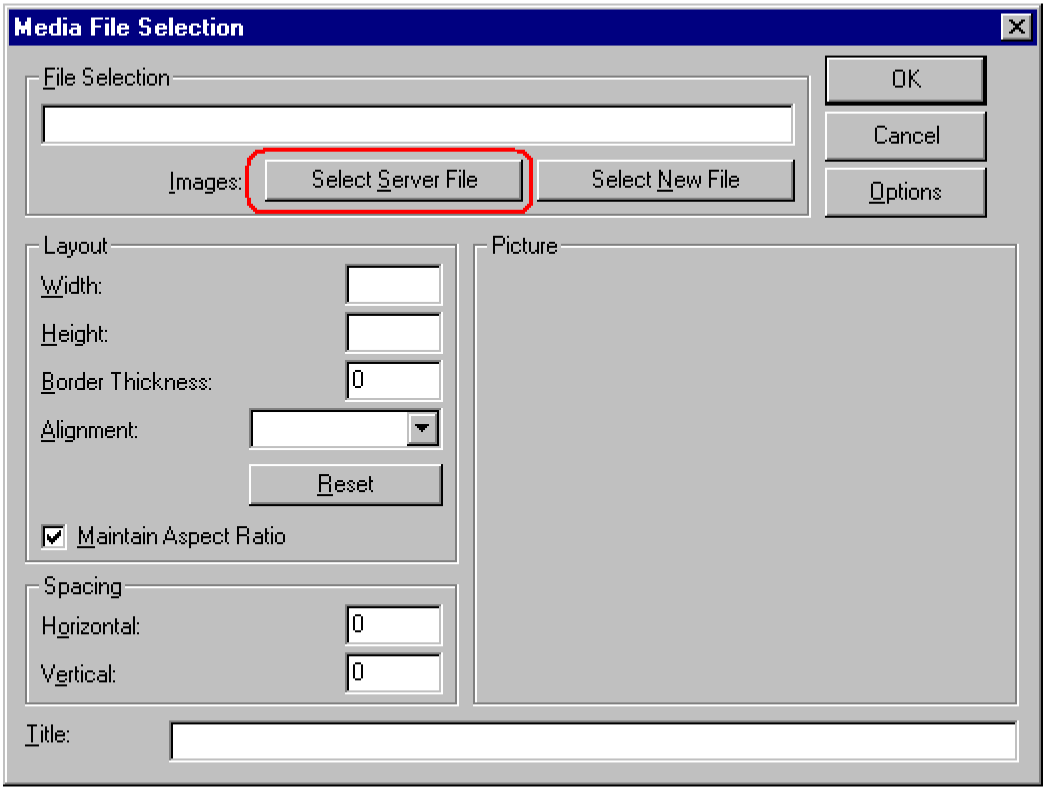
Inserting Images

To insert a picture into the editor, place the cursor where you want the image to appear and click the Insert Picture button (). When you click the button, one of the two Picture Properties dialog boxes illustrated below appears, depending on how your Webmaster has set up your system.

The dialog boxes are very similar, with the only difference being that the **Select Server File** button only appears on the second dialog box.

The **Select Server File** button appears if your upload mechanism is set to FTP. It does not appear if the mechanism is HTTP. For more information, see the **eWebEditPro+XML** Administrator Manual section "Managing Image Selection" > "Examples of Implementing Image Selection" > "Selecting Files from the Server."


Media File Selection
File Selection
Resolve Image Paths
Select New File
OK
Cancel
Options
Layout
Width:
Height:
Border Thickness:
0
Alignment:
Reset
Maintain Aspect Ratio
Picture
Spacing
Horizontal:
0
Vertical:
0
Title:



You can also access this dialog box to modify a picture after you insert it. To do this, follow these steps.

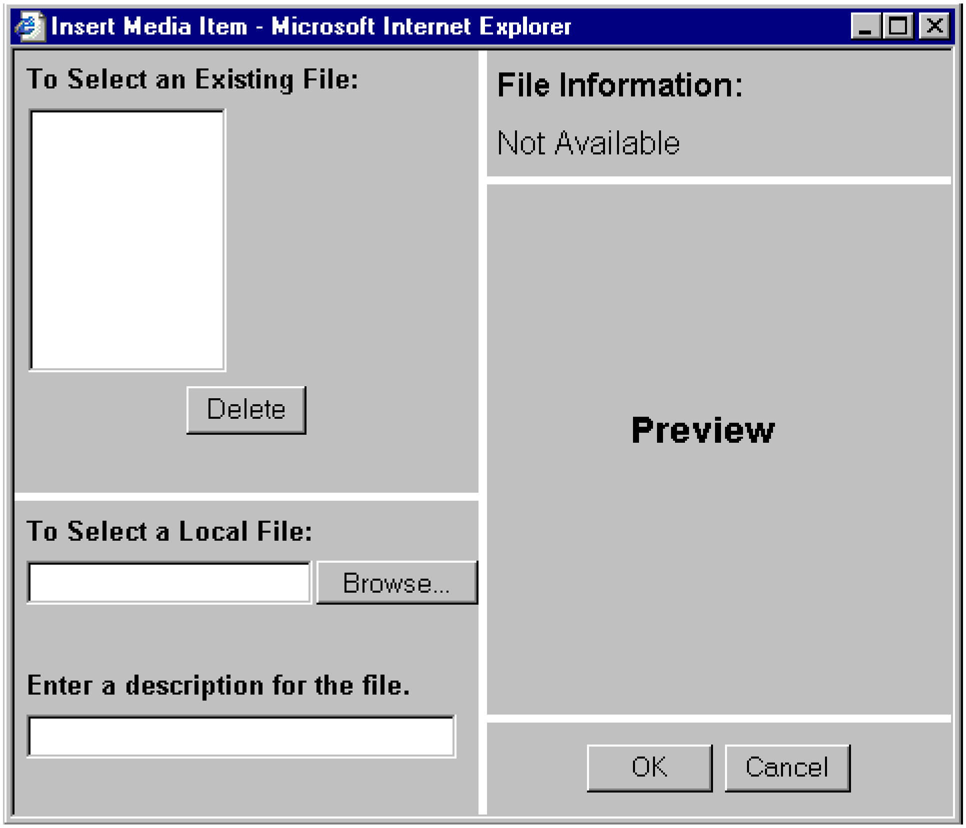
1. Click the picture.
2. Right click the mouse.
3. Click **Picture** from the menu.

If you see the first dialog box, proceed to "Using the First Picture Properties Dialog Box" on page 673. If you see the second dialog box, proceed to "Using the Second Media Selection Dialog Box" on page 677.

Using the First Picture Properties Dialog Box

When the first Picture Properties dialog box appears, click the **Select New File** button. When you do, the Insert Media Item dialog box appears.

This box and lets you insert a picture from your computer (and any network folder available to your computer), or from the Web server to which your computer is connected. Both choices are described below.



Inserting a Picture from the Server

The top left corner of the dialog box (Illustrated below) lists the pictures on the Web server.

Pictures that you previously inserted appear on this list, as do pictures inserted by other users connected to that server.

To insert a picture from the server, follow these steps.

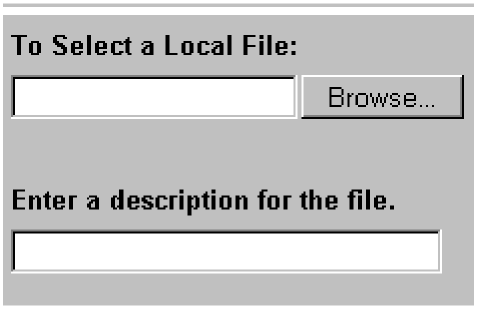
1. Click the picture from the **To Select an Existing File** field that you want to insert.
2. Information about the picture's file size, width and height appears in the upper right corner of the dialog box.
3. If you want to view a picture before inserting it, click **Preview** (on the right side of the dialog box).
4. Click **OK**.
5. The Picture Properties dialog box reappears. Here, you can change the properties of the picture. For more information, see
    - "Adjusting a Picture" on page 679
    - "Setting a Border" on page 680
    - "Aligning the Picture" on page 681
    - "Adding Space around the Picture" on page 683
6. Click **OK** to insert the picture into the editor.

Deleting a Picture from the Server

To delete a picture from the server, select the picture and click the **Delete** button.

Inserting a Picture from Your Computer

Use the lower left corner of the dialog box to insert pictures from your computer (and any network folder available to your computer) into the editor.



NOTE You can only select files in the **To Select a Local File:** field if your computer has permission to upload files to the server.

To insert a picture from your computer, follow these steps.

1. Click the **Browse** button.
2. Navigate to the file that you want to insert and press **Open** to insert it.

   Your Webmaster can set a maximum size (in kilobytes) for images. If you select an image that exceeds the maximum, an error message appears and you cannot insert it.

   Your Webmaster can also restrict the type of image file you can insert. For example, if your Webmaster does not authorize you to insert bitmap (.bmp) files and you try to do so, an error message lists valid file extensions, and you cannot insert the image.

3. Click in the **Enter a description for the file** field. Enter a title to describe the file.
4. After you insert the picture, the title appears in the dialog box's top left corner to identify the picture to you and all users connected to the same Web server.

NOTE The title is also the `alt` text for the image. The `alt` text appears in place of the image on the Web page if the image itself cannot display for any reason.

5. Information about the picture's file size, width and height appears in the upper right corner of the dialog box.
6. If you want to view a picture before inserting it, click **Preview** (on the right side of the dialog box).
7. Click **OK**.
8. The Picture Properties dialog box reappears. Here, you can change the picture's properties. For more information, see
   - "Adjusting a Picture" on page 679
   - "Setting a Border" on page 680
   - "Aligning the Picture" on page 681

- "Adding Space around the Picture" on page 683
- "Editing the Picture's Title" on page 684

9. Click **OK** to insert the picture into the editor.

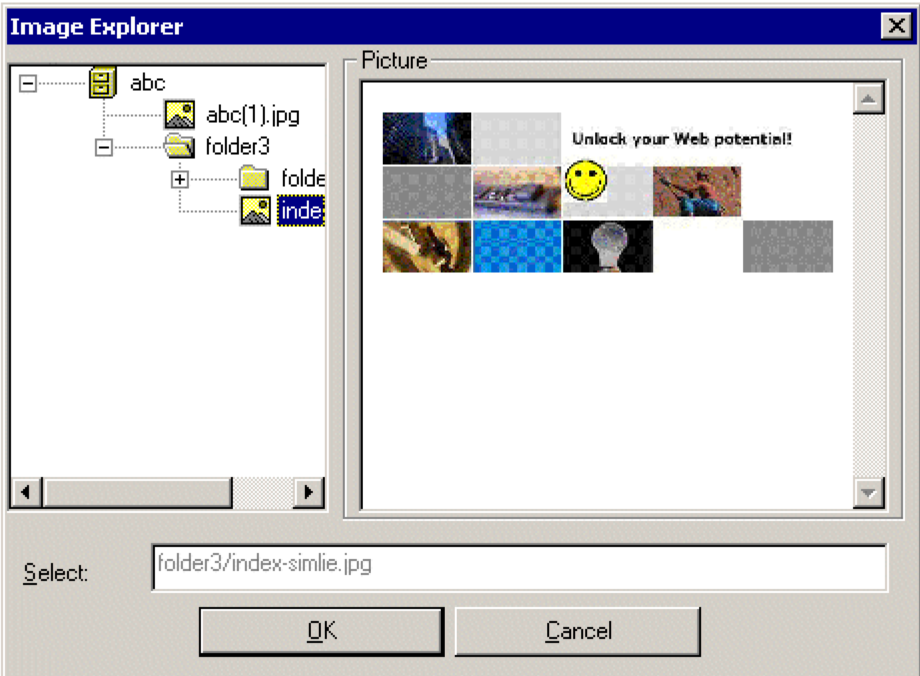
Using the Second Media Selection Dialog Box

When using the second Media Selection dialog box, you can insert a picture from any folder available to your computer (whether the folder is on your computer or a remote computer) or from the Web server. Your Webmaster determines which pictures are available on the Web server.

To insert a picture from

- a folder available to your computer, click **Select New File**, navigate to the file of interest, and click **OK**.
- the Web server, click the **Select Server File** button.You are prompted to enter a **User Name** and **Password**. Your Webmaster assigns these codes to you, which are needed to copy the file to the Web server.

Next, the Image Explorer dialog appears (illustrated below). Navigate through the folder structure until you find the image. Then click **OK** to insert the image into **eWebEditPro+XML**.



See Also:

- ”The Picture Properties Dialog Box” on page 678
- ”Adjusting a Picture” on page 679
- ”Pixels” on page 680
- ”Setting a Border” on page 680
- ”Aligning the Picture” on page 681
- ”Resetting Width, Height, Border Thickness, and Alignment” on page 683
- ”Adding Space around the Picture” on page 683
- ”Editing the Picture’s Title” on page 684
- ”The Options Button” on page 684

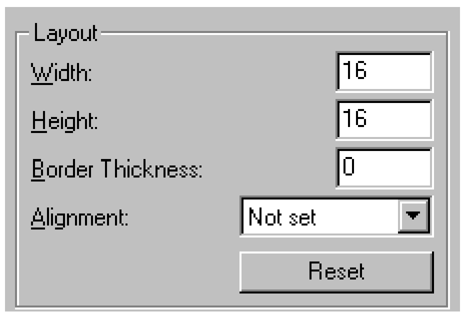
The Picture Properties Dialog Box

You can also use the Picture Properties dialog box to

- adjust the picture's width, height, border thickness, and alignment
- reset the image's properties width, height, border thickness, and alignment to their original specifications
- set spacing between the picture and surrounding information on the page
- enter or edit the picture's title
- view technical information about your connection

Adjusting a Picture

The layout area of the Picture Properties dialog box lets you adjust a picture's width, height, border thickness, and alignment.



You can use the following fields to adjust the picture before inserting it into the editor.

To make this change	Use this field
The width of the picture, in pixels	**Width**
The height of the picture, in pixels	**Height**
Add a border around the picture	**Border Thickness** For more information, see "Setting a Border" on page 680

To make this change	Use this field
Adjust the alignment of the picture	**Alignment** For more information, see "Aligning the Picture" on page 681

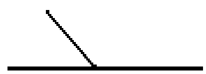
WARNING! If you substantially adjust the picture's height and/or width, the picture may be distorted when users view your Web page.

Pixels

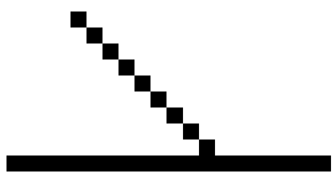
A pixel is a single point in a graphic image.

Computer monitors display pictures by dividing the screen into thousands of pixels, arranged in rows and columns. The pixels are so close together that they appear connected.

Below is an image shown at regular size and then enlarged so you can see the pixels that make up the picture.



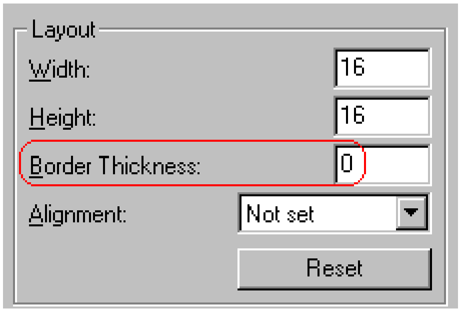
regular size



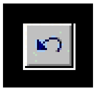
enlarged to show pixels

Setting a Border

To add a border around a picture, enter the border's thickness in pixels in the **Border Thickness** field on the Picture Properties dialog box.



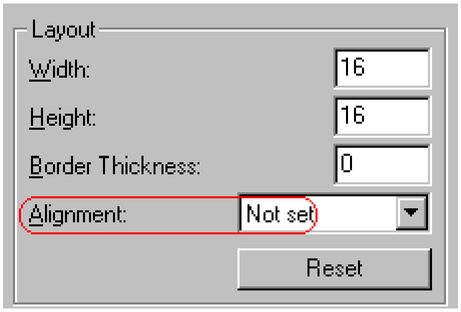
Here is a picture with a 1 pixel border. 

Here is the same picture with a 10 pixel border. 

If the picture is not a hyperlink, its border is black. If the picture is also a hyperlink, the border is the same color as a hyperlink (for example, blue or purple if visited).

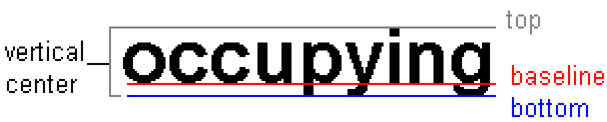
Aligning the Picture

To align a picture, use the **Alignment** field on the Picture Properties dialog box.

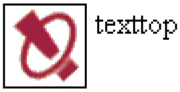


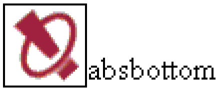
When deciding how to align a picture, you need to become familiar with these terms.

- *baseline* of text - the imaginary line on which the text lies. Some letters (such as g, p and y) have *descenders*, segments of letters that extend below the baseline
- *bottom* of text - the lowest section of a line to which a descender extends
- *top* of text - the highest spot of a line to which any segment of a letter extends
- *vertical center* - the midpoint between the top and bottom of the line



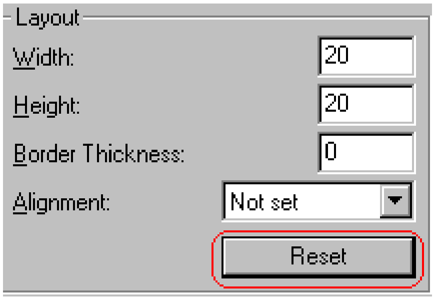
The following table lists your alignment choices.

To align	Click this in the Alignment field	Illustration
The picture on the left margin, allowing subsequent text to wrap around it	**Left**	
The picture on the right margin, allowing subsequent text to wrap around it	**Right**	
The top of the picture with the top of the text	**Text Top, Top**	
The vertical center of the picture with the *baseline* of the text	**Middle**	
The vertical center of the picture with the *vertical center* of the text	**AbsMiddle**	

To align	Click this in the Alignment field	Illustration
The bottom of the picture with the *baseline* of the text (This is the default alignment)	**Bottom, Baseline**	
The bottom of the picture with the *bottom* of the text	**AbsBottom**	

Resetting Width, Height, Border Thickness, and Alignment

If you adjust the picture's width, height, border thickness, and/or alignment and later want to restore *all* of those settings to their original values, click the **Reset** button.

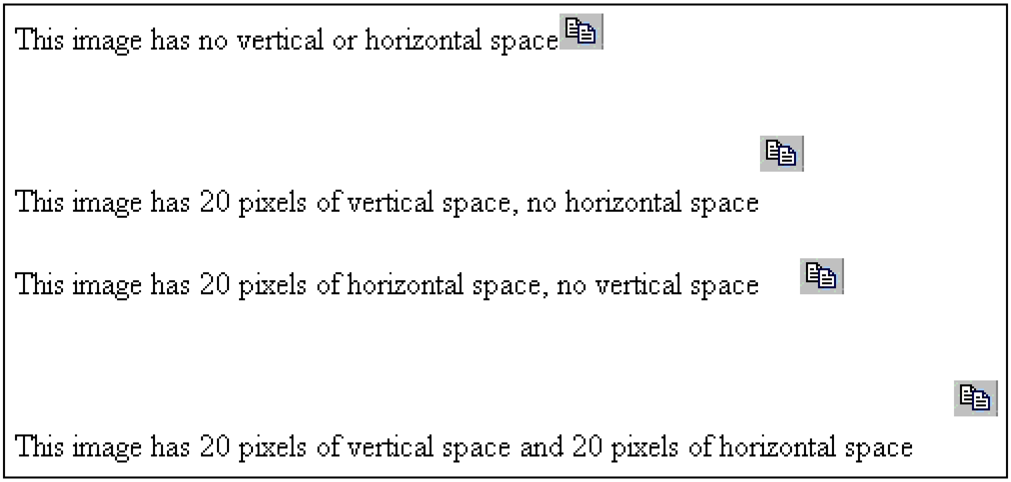


Note that you cannot selectively restore some settings -- the **Reset** button automatically restores all of them.

Adding Space around the Picture

On the Picture Properties dialog box, you can use the **Spacing** fields (**Horizontal** and **Vertical)** to add space around the picture. You enter a number of pixels to determine spacing value.

The following graphic illustrates the effect of adding spacing to a picture.



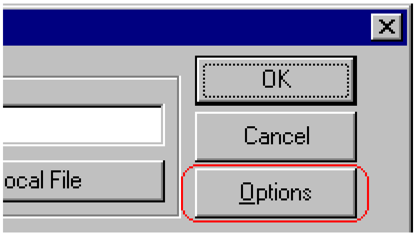
Editing the Picture's Title

The title that you entered in the Insert Media Item dialog box defaults into the **Title** field of the Media Selection dialog box. You can edit the title in this field if desired.

NOTE The title is also the `alt` text for the image. The `alt` text appears in place of the image on the Web page if the image itself cannot display for any reason.

The Options Button

When you click the **Options** button on the File Properties dialog box, the options dialog box appears. The box displays information about your connection to the Web server.

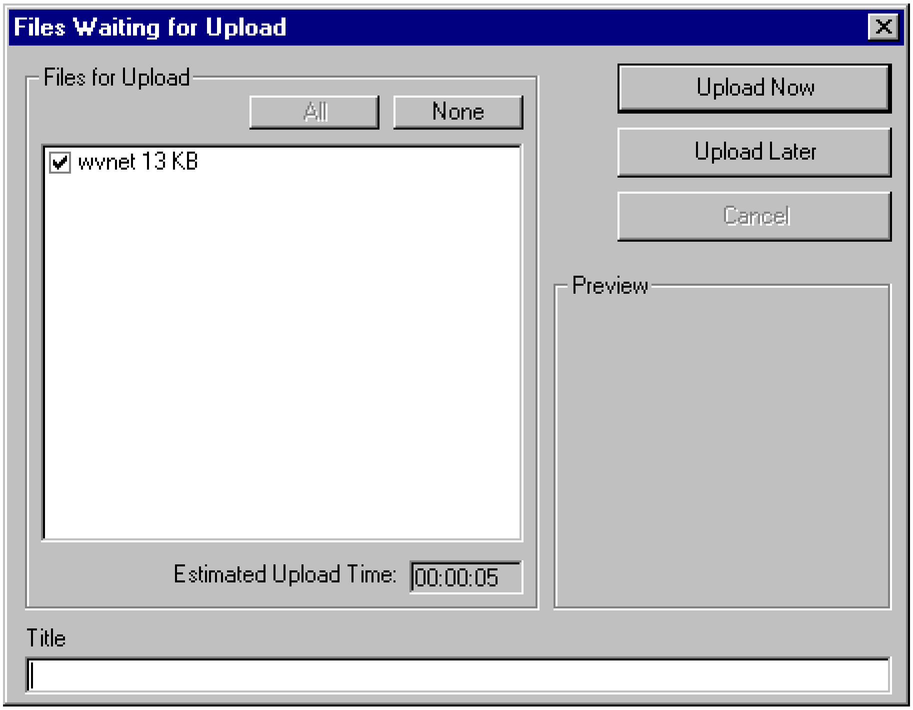


For information about these settings, see “Uploading Images” in the **eWebEditPro+XML** Developer’s Reference Guide.

Moving an Image to the Server

If you insert an image from your computer into **eWebEditPro+XML** content, that image must be moved to the server when you save the content. The image can only appear on Web pages that display it after you move it to the server.

When you save content that includes an image you inserted, the following dialog appears.



All inserted files appear in the dialog, which also estimates how long it will take to move the files to your server. If you do not want to wait that long to upload the files, click **Upload Later**. If you do this, the images will not appear on the published Web content until you move them to the server.

You can also enter a **Title** for the image near the bottom of the screen. If you do, this text appears when the user reading the Web pages moves the cursor over the image.

Deleting a Picture

If you want to delete a picture, follow these steps.

1. Move the cursor over the picture.
2. Click the mouse to select the picture.
3. Click the Cut button ().

Editing Images

WebImageFX lets you select an image from the content, edit that image, and then insert the updated image into the content. Editing consists of several functions available on the toolbar, such as

- brightening
- rotating
- changing the color depth
- inserting text

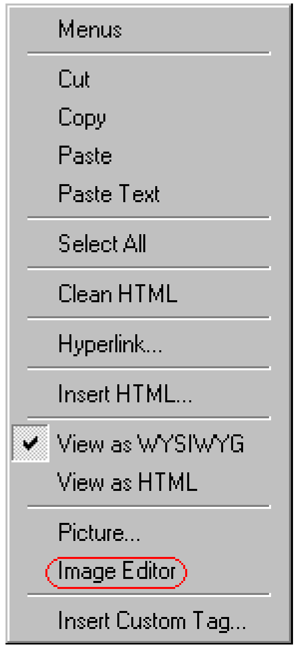
This section explains WebImageFX.

NOTE WebImageFX is an external, add-on product available from Ektron.

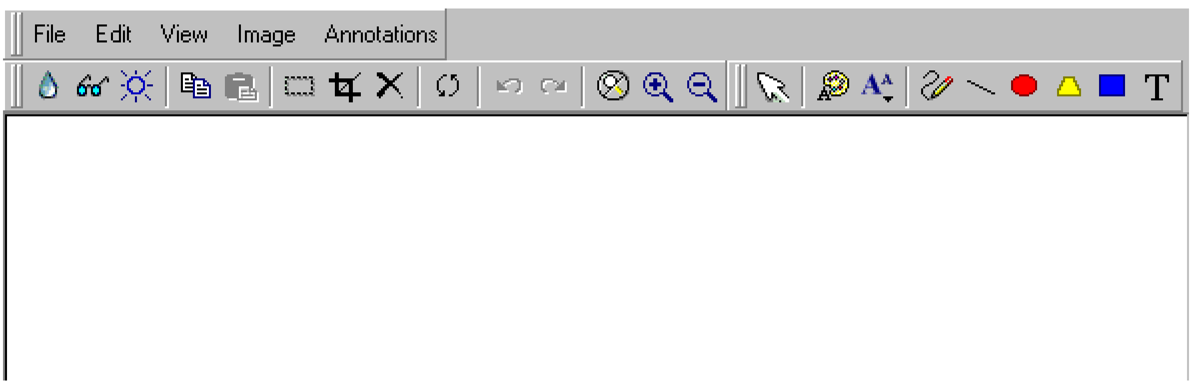
Using WebImageFX

Choosing the Image

If you double click an image, it appears within WebImageFX. You can also right click the mouse and choose **Image Editor** from the menu that appears.



WebImageFX looks similar to **eWebEditPro+XML** but has different menu and toolbar buttons.



If the Image Edit button () appears on your toolbar, you can click it to open WebImageFX. If no image is selected when you press the button or click the menu command, a blank editor appears, and you can use the **File -> Open** command to choose an image.

Once the image is in WebImageFX, you can use the buttons and menu options to edit it. The rest of this chapter describes those buttons and menu options.

Saving the Image

When you finish editing the image, you can insert it into the content by pressing the **Exit** button (). Alternatively, you can save the image to a local or network folder using the Save button ().

When you insert the image into the content, WebImageFX checks the file extension. If the image is a .gif file, it is saved as a .png file in your temporary directory. For example test.gif is saved as `C:\Documents and Settings\`*`your user name`*`\Local Settings\Temp\test.png`.

Any other file type is saved in your temporary directory without changing the file extension, *unless* you use the Save As option. For example, you save test.jpg as test.png.

Assigning a Name to a New Image

If you create an image in WebImageFX, and then exit WebImageFX and return to **eWebEditPro+XML**, the system assigns the image a random name, such as WIF50A.jpg.

If you want to assign a different name and/or folder to the image, use the Save as command.

See Also: "Save As" on page 712

Toolbar Buttons and Menu Commands

The following tables list each toolbar button and menu command. They are followed by a more detailed description of each function.

File Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	Create New	Creates a new image.	”Create New” on page 699
	Open	Selects an image to edit.	”Open” on page 705
	Save	Saves changes to an image.	”Save” on page 711
	Save As	Saves the current image under a different name or format.	”Save As” on page 712
	Twain Acquire	Performs a single page scan. Before scanning, you must select a source using the Twain Source command.	”Twain Acquire” on page 716
	Twain Source	Allows the user to select a source for acquiring an image, such as a scanner or digital camera.	”Twain Source” on page 716
	Exit	Save changes and return to **eWebEditPro+XML**.	”Exit” on page 701
	Exit without save	Ignore changes; return to **eWebEditPro+XML**.	”Exit without Save” on page 702

Edit Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	copy	Copies a selected area of an image.	”Copy” on page 699

Toolbar Button	Command	Brief Description	For more information, see
	paste as new image	Inserts copied image or area into a new file.	”Paste as New Image” on page 707
	undo	Reverses the most recent action.	”Undo” on page 717
	redo	Reapplies the changes from the command that occurred before you pressed Undo.	”Redo” on page 710
	select	Selects an area of an image. You can then perform actions on the area, such as blur and delete.	”Select” on page 713
	crop	Removes everything outside of selected area of an image.	”Crop” on page 699
	delete	Deletes selected area of an image.	”Delete” on page 700

View Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	reset zoom ratio	Displays image at full size.	”Reset Zoom Ratio” on page 710
	zoom in	Increases an image’s magnification.	”Zoom In” on page 717
	zoom out	Decreases an image’s magnification.	”Zoom Out” on page 718

Image Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	image info	Displays information about an image.	"Image Info" on page 703
	dimensions	Modifies an image's width and height.	"Dimensions" on page 700
	color depth	Changes the number of colors available to an image.	"Color Depth" on page 697
	blur	Blurs or softens an image.	"Blur" on page 693
	sharpen	Sharpens edges within an image.	"Sharpen" on page 713
	brightness	Changes an image's brightness.	"Brightness" on page 694
	contrast	Changes the difference between light and dark areas of an image.	"Contrast" on page 698
	horizontal flip	Reverses an image horizontally left to right.	"Horizontal Flip" on page 703
	vertical flip	Flips an image vertically top to bottom.	"Vertical Flip" on page 717
	rotate	Turns an image a specified number of degrees.	"Rotate" on page 711

Annotation Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	pointer selection	Click an annotation to select it.	”Pointer Selection” on page 707
	choose color	Sets the color for an annotation before you insert it.	”Choose Color” on page 695
	choose font	Sets the color of text before you insert it.	”Choose Font” on page 696
	freehand	Draws a line in any shape that you want.	”Freehand” on page 702
	line	Draws a straight line.	”Line” on page 704
	oval	Draws an oval.	”Oval” on page 706
	polygon	Draws a polygon (a closed figure surrounded by straight lines).	”Polygon” on page 708
	rectangle	Draws a rectangle.	”Rectangle” on page 709
	text	Inserts text.	”Text” on page 714

Blur

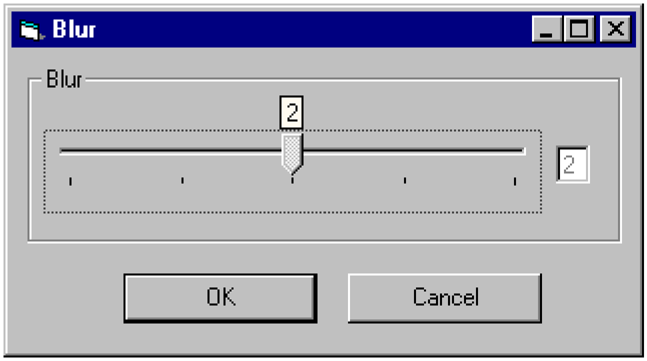
Standard Toolbar Button

Description

Blurs or softens an image. You can select a level of blur, from 0 through 4.

If you select an area of the image, the command only changes that area.

Dialog Box



Brightness

Standard Toolbar Button

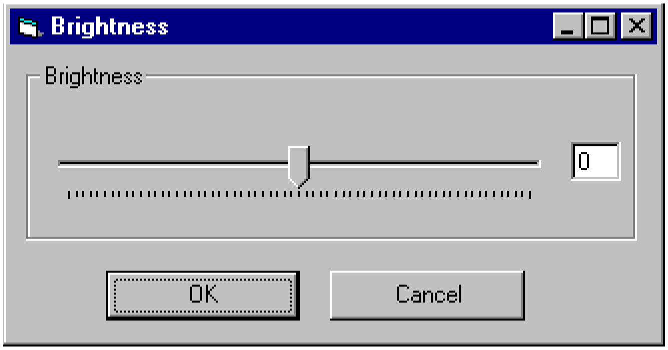
Description

Increases or decreases an image's brightness. You can select a brightness level from 32 (brightest) through -32 (darkest).

If you select an area of the image, the command only changes that area.

NOTE You cannot adjust brightness if the image's bit depth is 8 or fewer. *See Also:* "Specifying Color Depth" on page 718

Dialog Box



Choose Color

Standard Toolbar Button

Description

Lets you choose the color of an annotation before you insert it.

To change an annotation's color *after* inserting it, place the cursor on the annotation and press the right mouse button to display the Attributes menu.

Dialog Box

Choose Font

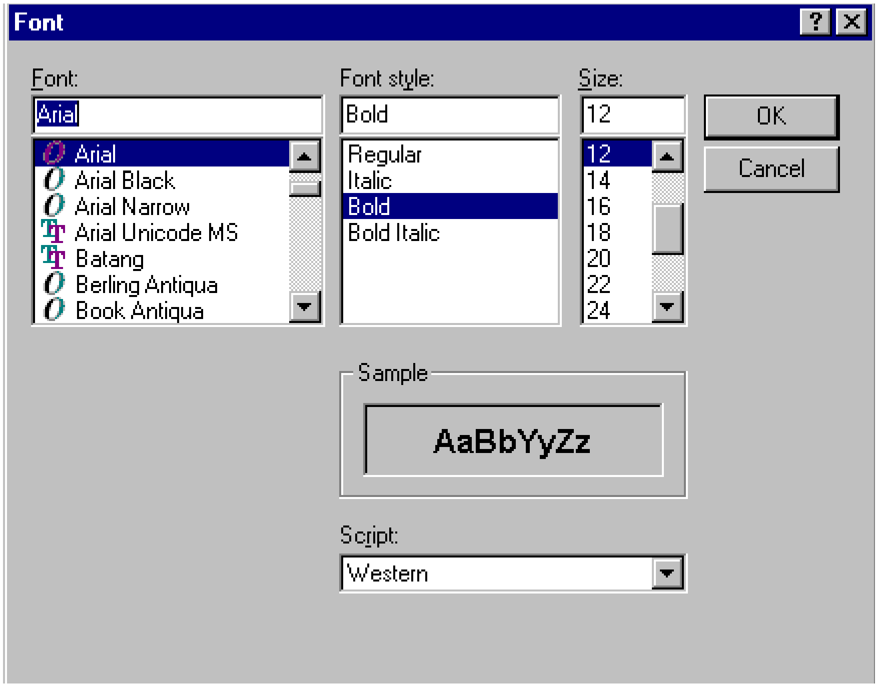
Standard Toolbar Button

Description

Lets you choose the color of annotation text before you insert it.

To change an annotation's color *after* inserting it, place the cursor on the annotation and press the right mouse button to display the Attributes menu.

Dialog Box



Color Depth

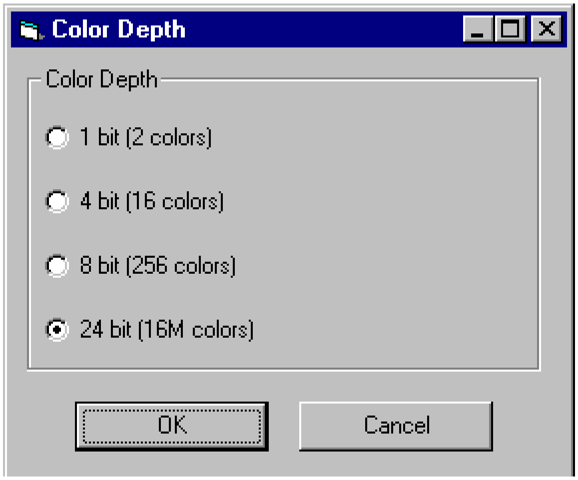
Standard Toolbar Button

Description

Changes an image's color depth.

See Also: "Specifying Color Depth" on page 718

Dialog Box



Contrast

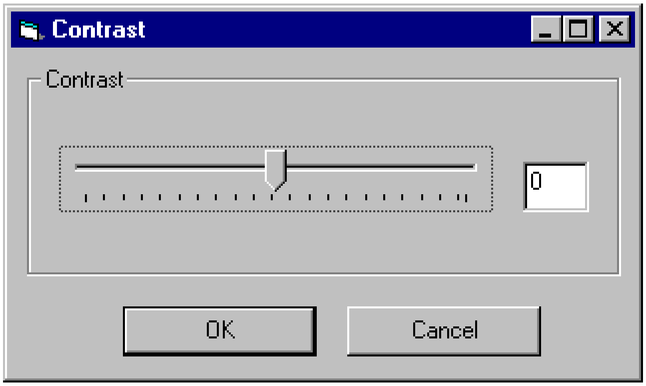
Standard Toolbar Button

Description

Increases or decreases an image’s contrast (that is, the difference between light and dark areas of an image). You can select a contrast level, from 10 through -10.

If you select an area of the image, the command only changes that area.

Dialog Box



Copy

Standard Toolbar Button

Description

Copies a selected area of an image. After you copy an image, you can paste it using the paste command. *See Also:* ”Paste as New Image” on page 707

To select an area of an image, use the Select command. *See Also:* ”Select” on page 713

If you do not select an area, the entire image is copied.

Create New

Standard Toolbar Button

Description

Lets you create a new image. If you are editing an image when you press this command, you are asked if you want to save changes to it first.

By default, a new image’s bit depth is 24, but you can change it if desired using the color depth command.

See Also: ”Color Depth” on page 697

Crop

Standard Toolbar Button

Description

Keeps selected area of an image; removes everything outside that area.

To use the Crop command, follow these steps.

1. Select an area of an image that you want to keep.
2. Press the Crop button ().
3. Everything outside the selected area is removed.

Delete

Standard Toolbar Button

Description

Removes a selected area of an image. You must select an area before you delete it.

The deleted area is not saved for later pasting. In contrast, if you use the Cut command, you can later paste the cut area.

Dimensions

Standard Toolbar Button

Description

Lest you change an image’s width and/or height, which are defined in pixels.

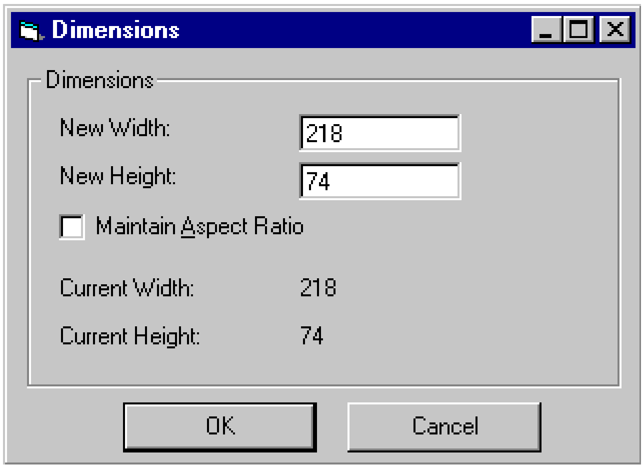
Maintaining Aspect Ratio

Use this check box to change an image’s size while maintaining its *aspect ratio.*

Aspect ratio is the ratio of an image’s width to height. For example, if a graphic has an aspect ratio of 2:1, its width is twice as large as its height.

If you check the **Maintain Aspect Ratio** box, just specify a new width -- the height is calculated automatically.

Dialog Box



Exit

Standard Toolbar Button

Description

Save the change in the WebImageFX and return to **eWebEditPro+XML**, where the updated image appears.

Exit without Save

Standard Toolbar Button

Description

Ignore changes made to the image in WebImageFX. Return to eWebEditPro+XML.

Freehand

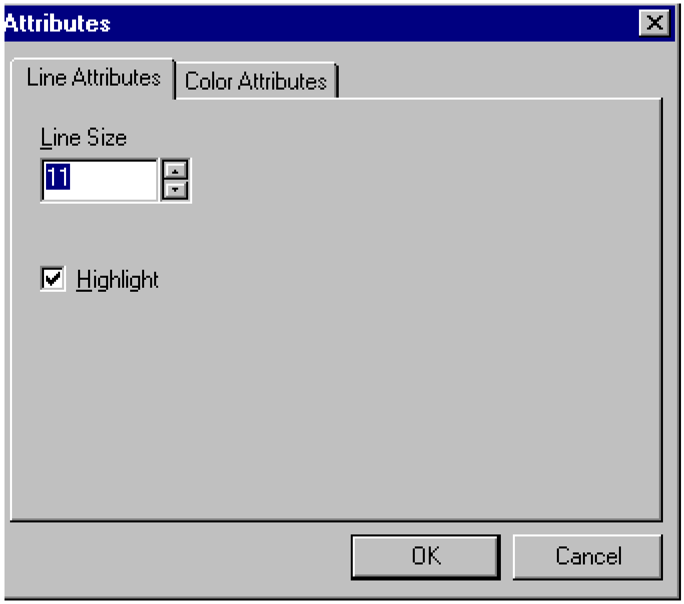
Standard Toolbar Button

Description

Lets you draw a line in any shape that you want, similar to using a pen on paper.

To use this command, click the freehand command, drag the line, and release the mouse. To change the line's size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box



Horizontal Flip

Standard Toolbar Button

Description

Reverses an image horizontally left to right.

Click this command again to reverse the image horizontally right to left.

Image before horizontal flip 

Image after horizontal flip 

Image Info

Standard Toolbar Button

Description

Displays information about an image:

- image name
- height and width in pixels
- bit depth (*See Also:* ”Specifying Color Depth” on page 718)
- file format

Line

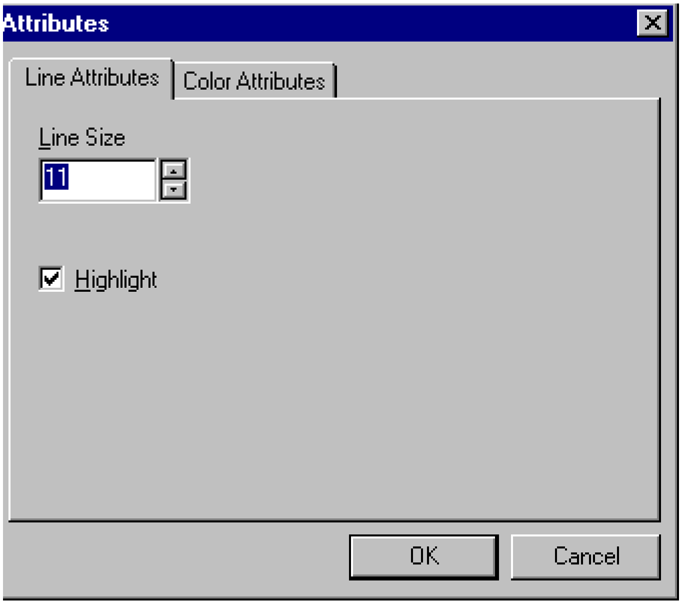
Standard Toolbar Button

Description

Draw a straight line. To change a line’s size or color, right click it after drawing it.

To use this command, click the line command, drag the line, and release the mouse. To change the line’s size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box



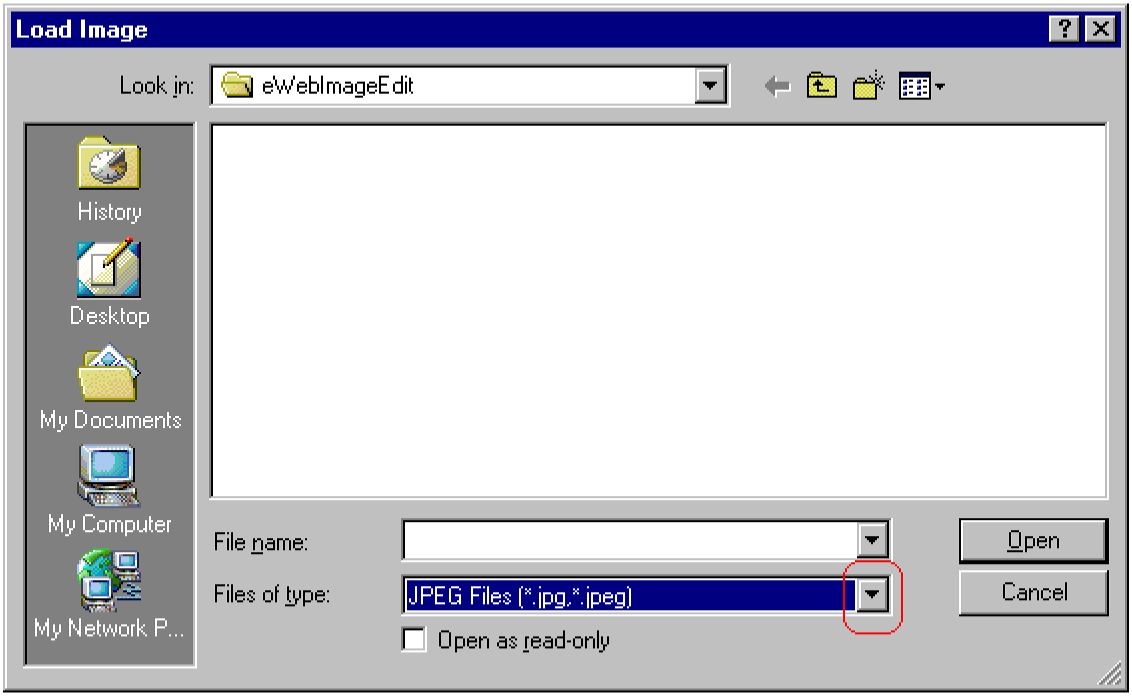
Open

Standard Toolbar Button

Description

Select an image for editing. The image can be on your computer or a local area network.

Dialog Box



To change the type of file that appears in the window, click the down arrow (circled above) to the right of the **Files of type** field. Your system administrator determines which types of files you can edit.

Oval

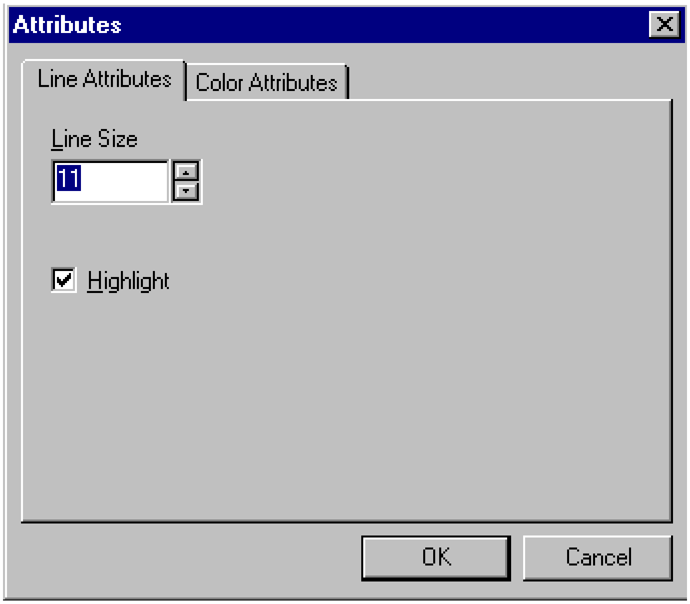
Standard Toolbar Button

Description

Draws an oval.

To use this command, click the oval command, drag the line, and release the mouse. To change the oval's line size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box



Paste as New Image

Standard Toolbar Button

Description

After you copy or cut an image or an area of an image, use paste as new image to insert it into a new file.

Before creating a new file, WebImageFX asks if you want to save changes to current file.

Pointer Selection

Standard Toolbar Button

Description

Click an annotation to select it. After you select an annotation, you can perform functions on it, such as delete it.

This command is a toggle, which means the first time you click it, it is on, and the next time you click it, it is off.

Polygon

Standard Toolbar Button

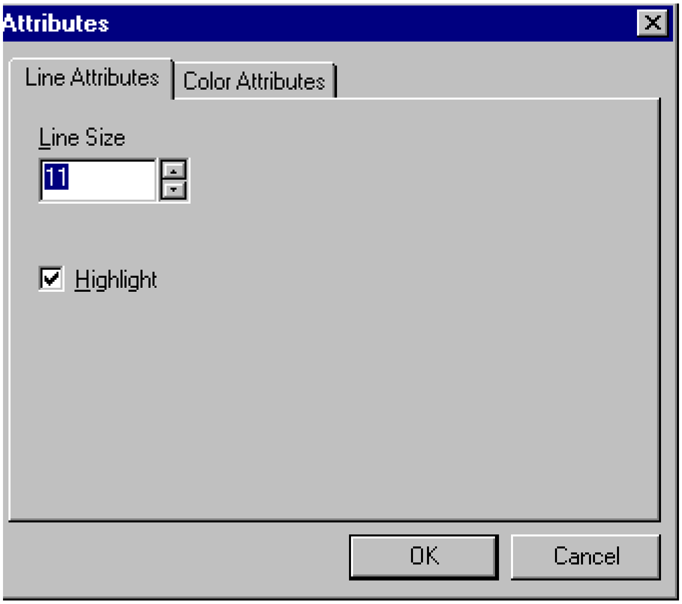
Description

Draws a polygon (that is, a closed figure surrounded by straight lines).

To use this command, follow these steps.

1. Click the polygon command.
2. Drag the line in one direction as far as you want.
3. Drag the line in the other directions to complete the polygon.
4. Double click the mouse to terminate the polygon.
5. To change the polygon’s line size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box



Rectangle

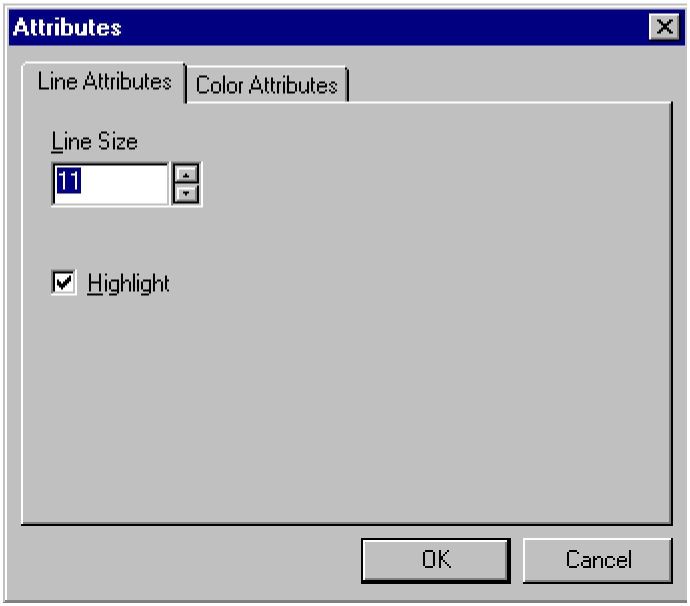
Standard Toolbar Button

Description

Draws a rectangle.

To use this command, click the rectangle command, drag a rectangle, and release the mouse. To change the rectangle's line size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box



Redo

Standard Toolbar Button

Description

If you use the Undo command and then decide that it was a mistake, use this command. It re-applies the changes from the command that occurred before you pressed Undo.

See Also: ”Undo” on page 717

Reset Zoom Ratio

Standard Toolbar Button

Description

Displays image at full size.

See Also: ”Zoom In” on page 717; ”Zoom Out” on page 718

Rotate

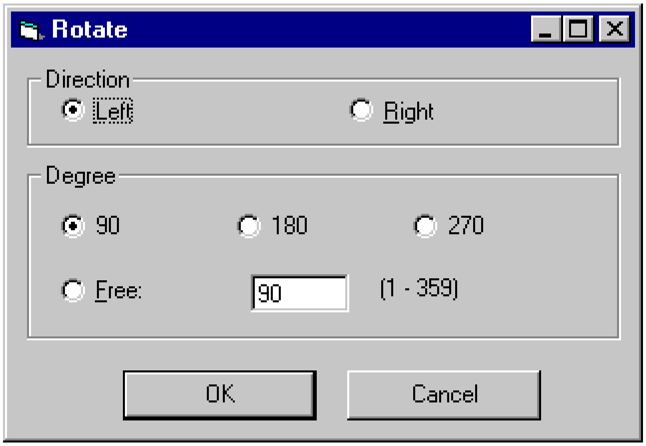
Standard Toolbar Button

Description

Turns an image a specified number of degrees. Note that the dialog box lets you rotate the image

- left or right
- 90, 180, or 270 degrees
- any number of degrees between 1 and 359

Dialog Box



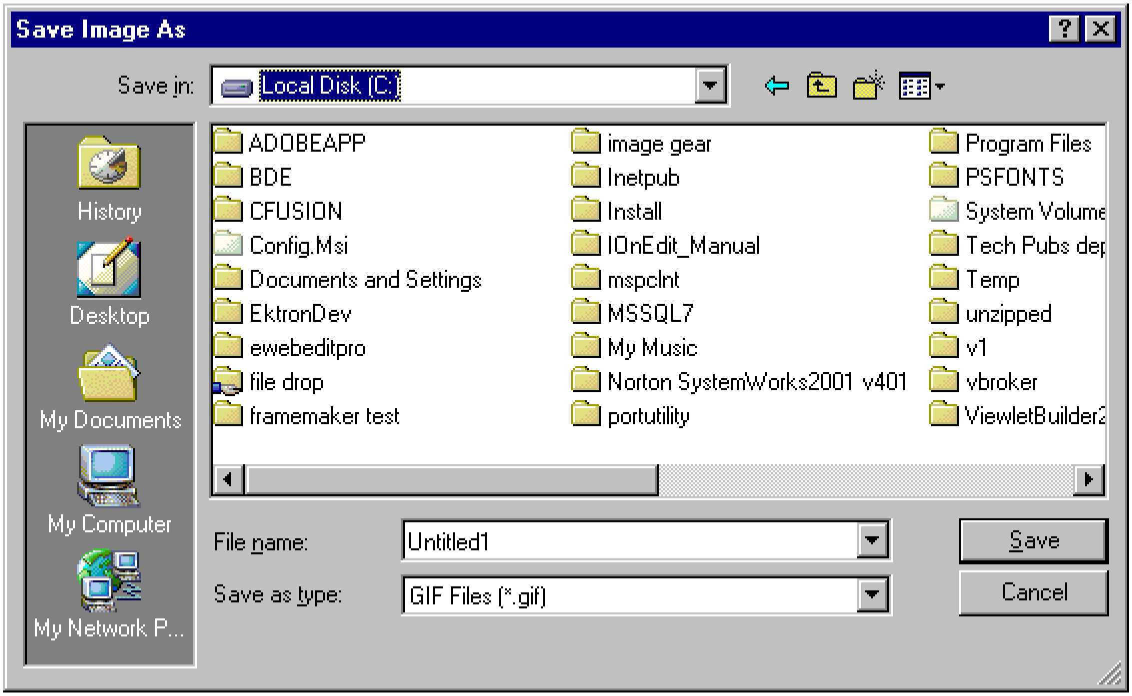
Save

Standard Toolbar Button

Description

Save changes to an image. If required information is missing, such as the image name, you are prompted for this information.

Dialog Box



NOTE The dialog box only appears the first time you save the image. If you later want to save it to a different folder, or under a different name or file type, use the Save As command.

Save As

Standard Toolbar Button

Description

Save the current image under a different name or format. For example, you might save mypicture.gif as mypicture.jpg.

Your system administrator determines which file formats are available.

Dialog Box

See ”Save” on page 711

Select

Standard Toolbar Button

Description

Selects an area of an image. You can then execute other commands on the selected area, such as blur, sharpen, cut, and delete.

NOTE Once you press the Select command, it remains selected and continues to be active until you press it a second time.

Sharpen

Standard Toolbar Button

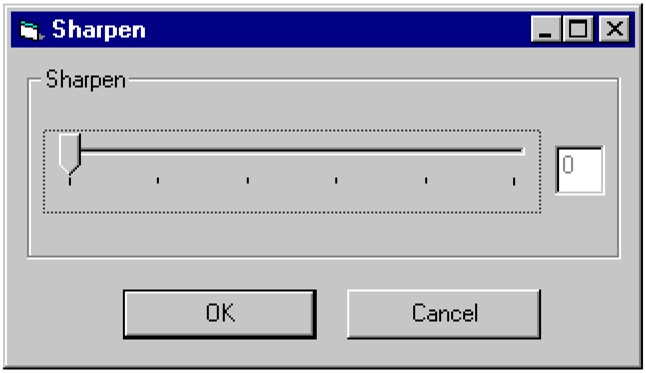
Description

Sharpens edges within an image. You can select a level of sharpness, from 1 through 5.

Sharpening brings an image into better focus and increases the detail.

If you select an area of the image, the command only changes that area.

Dialog Box



Text

Standard Toolbar Button

Description

Places text on an image. You can also change the text's size, font, color, and attributes (bold, italic, etc.).

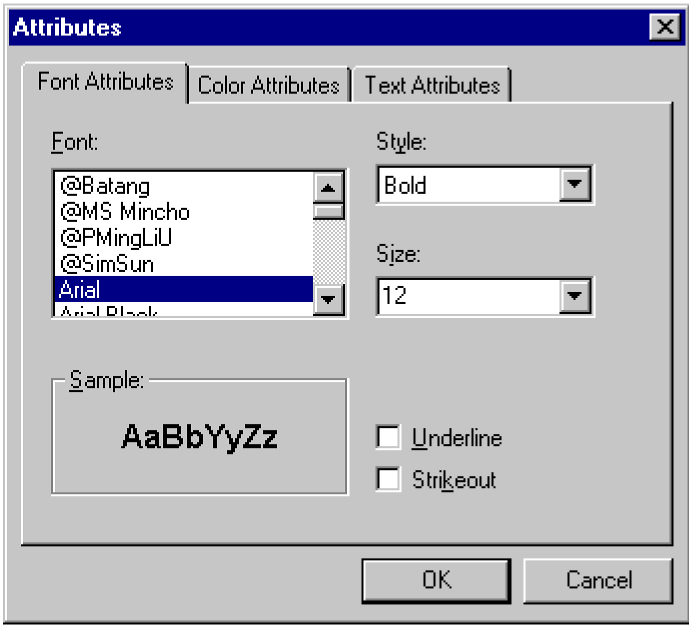
To use the Text command, follow these steps.

1. Click the Text button ().
2. Move the cursor to where you want to place the text.
3. Click the mouse button and drag a rectangle in which to insert the text.

NOTE Make sure the rectangle is large enough to accommodate your text. The rectangle disappears after you enter text.

4. Type the text.
5. Click outside the rectangle to close it.
6. To change the text or its font, size, style, color, etc., place the cursor over the text and right click the mouse. The text attributes dialog appears.

Dialog Box



The following table lists functions you can perform with this dialog.

To change this	Use this tab/field
font	**Font Attributes/Font**
font size	**Font Attributes/Size**
font style (**bold**, *italic*, etc.)	**Font Attributes/Style**
<u>underlining</u>	**Font Attributes/Underline**
strikeout (for example, ~~sample~~)	**Font Attributes/Strikethrough**
font color	**Color Attributes/Primary Color**
text	**Text Attributes**/*white box*
if text wraps when it reaches the end of a line	**Text Attributes/ Wrap**

Twain Acquire

Standard Toolbar Button

Description

Perform a single page scan from a previously selected source.

See Also: "Twain Source" on page 716

Importing Scanned Images

WebImageFX lets you acquire images from a scanner or digital camera that supports the Twain standard. You select the source (using Twain Source) and do a quick acquire from that source (using Twain Acquire).

Limitations

- You can only acquire one page at a time
- Few digital cameras support twain. Usually, digital cameras resemble a hard drive or use proprietary software to extract images. Ektron does not support an interface to proprietary software.
- Not all scanners support the twain standard

Twain Source

Standard Toolbar Button

Description

Lest you select a source for acquiring an image, such as a scanner or digital camera.

See Also: "Twain Acquire" on page 716

Undo

Standard Toolbar Button

Description

Reverses the most recent commands within the current editing session.

You can undo several commands at once by pressing the undo command repeatedly. The first time you press the command, the most recently completed command is “undone.” The next time, the second most recently completed command is “undone”, etc.

See Also: ”Redo” on page 710

Vertical Flip

Standard Toolbar Button

Description

Flips an image vertically top to bottom.

Click this command again to reverse the image vertically bottom to top.

Image before vertical flip 

Image after vertical flip 

Zoom In

Standard Toolbar Button

Description

Increases an image’s magnification.

You can press this command several times to continue to increase magnification.

See Also: ”Zoom Out” on page 718; ”Reset Zoom Ratio” on page 710

Zoom Out

Standard Toolbar Button

Decrease an image’s magnification.

You can press this command several times to continue to decrease magnification.

See Also: ”Zoom In” on page 717; ”Reset Zoom Ratio” on page 710

Specifying Color Depth

To specify an image’s color depth (that is, the number of colors available to an image), specify a *bit depth*. The color depth is derived from the bit depth. Here are the bit depth values.

Bit depth	Color depth
1	2 colors
4	16 colors
8	256 colors
24	16M colors

Introduction to Tables

Sometimes, the information on your Web page looks better when displayed on a table. Here is an example.

City	Baseball Team	Hockey Team
Boston	Red Sox	Bruins
New York	Yankees / Mets	Rangers
Chicago	White Sox / Cubs	Black Hawks

This section explains

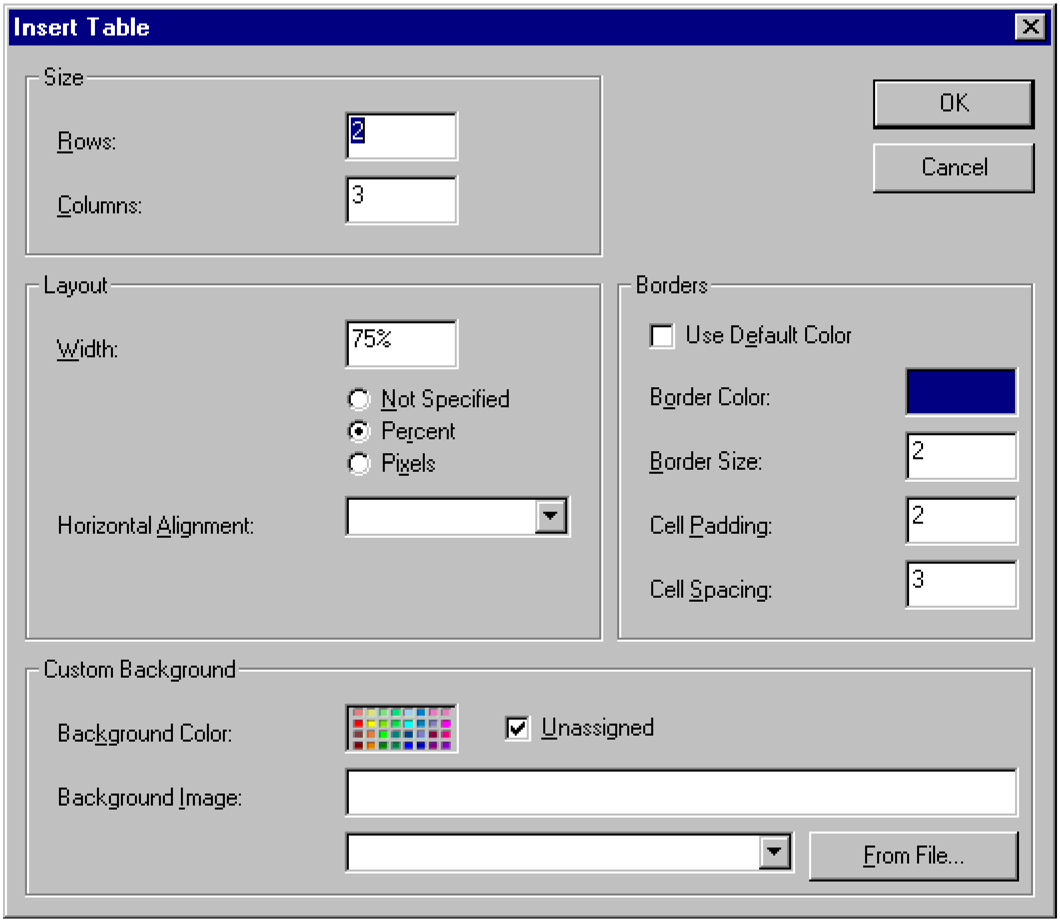
- ”Creating a Table” on page 720
- ”Deleting a Table” on page 721
- ”Inserting a Table within a Table” on page 722

See Also:

- “Table Dialog Boxes and Menus” on page 723
- “Manipulating Your Table’s Format” on page 730
- “Working with Table Cells” on page 746
- ”Section 508 Tables” on page 787

Creating a Table

To create a table, click the table button ( ) then click **Insert Table** from the menu. When you do, the Insert Table dialog box appears.



You can also access this dialog box after you insert it. You would do this if you wanted to edit any of the information entered in the dialog.

To access this dialog after insertion, follow these steps.

1. Click the table.
2. Right click the mouse.
3. Click **Table Properties** from the menu.

When creating a table, you can specify the

- number of rows and columns
- width
- horizontal alignment on the page
- background color or background picture
- border size and color

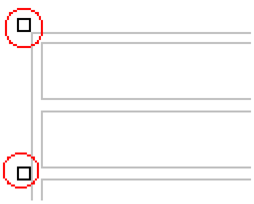
For more information about managing tables, see “Manipulating Your Table’s Format” on page 730.

For more information about managing individual cells within a table, see “Working with Table Cells” on page 746.

Deleting a Table

To delete a table, follow these steps

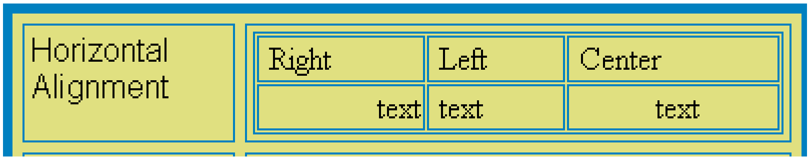
1. Move the cursor over the table until the cursor becomes a four-headed arrow ( ).
2. Click the mouse button. The table becomes selected (small squares appear around it).



3. Press <Delete>.

Inserting a Table within a Table

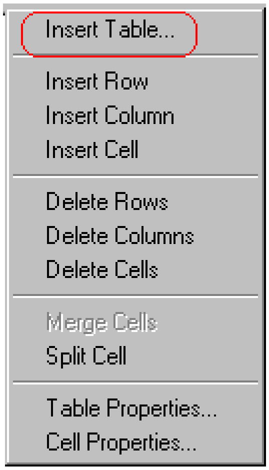
You can insert a table within a table. You might want to do this to arrange text in columns.



NOTE HTML does not let you use tabs or spaces to align text in columns. You must use a table to align columns. You can remove the table's border, so that no lines appear between the columns and rows.

To insert a table within a table, follow these steps.

1. Place the cursor in the cell into which you want to insert a table.
2. Click the Insert Table button ( ).
3. Click **Insert Table** from the menu.



4. The Insert Table dialog box appears.
5. Edit the fields in the dialog box as needed. Then, click **OK**.

Table Dialog Boxes and Menus

This section explains the menu options and dialog boxes you use to manipulate tables and cells. In most cases, you are referred to another section that describes the feature in more detail.

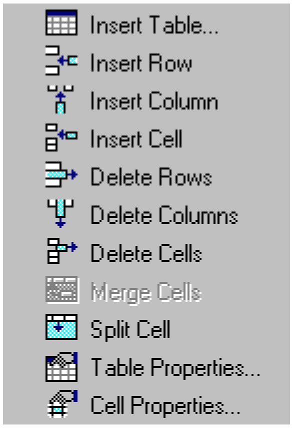
This section explains

The Insert Table Menu

You access the Insert Table menu by clicking on the Insert Table button ( ) while the cursor is inside a table.

NOTE Before you click the button, make sure the table is not selected (that is, the table is not surrounded by small boxes).

When you do, the following menu appears.

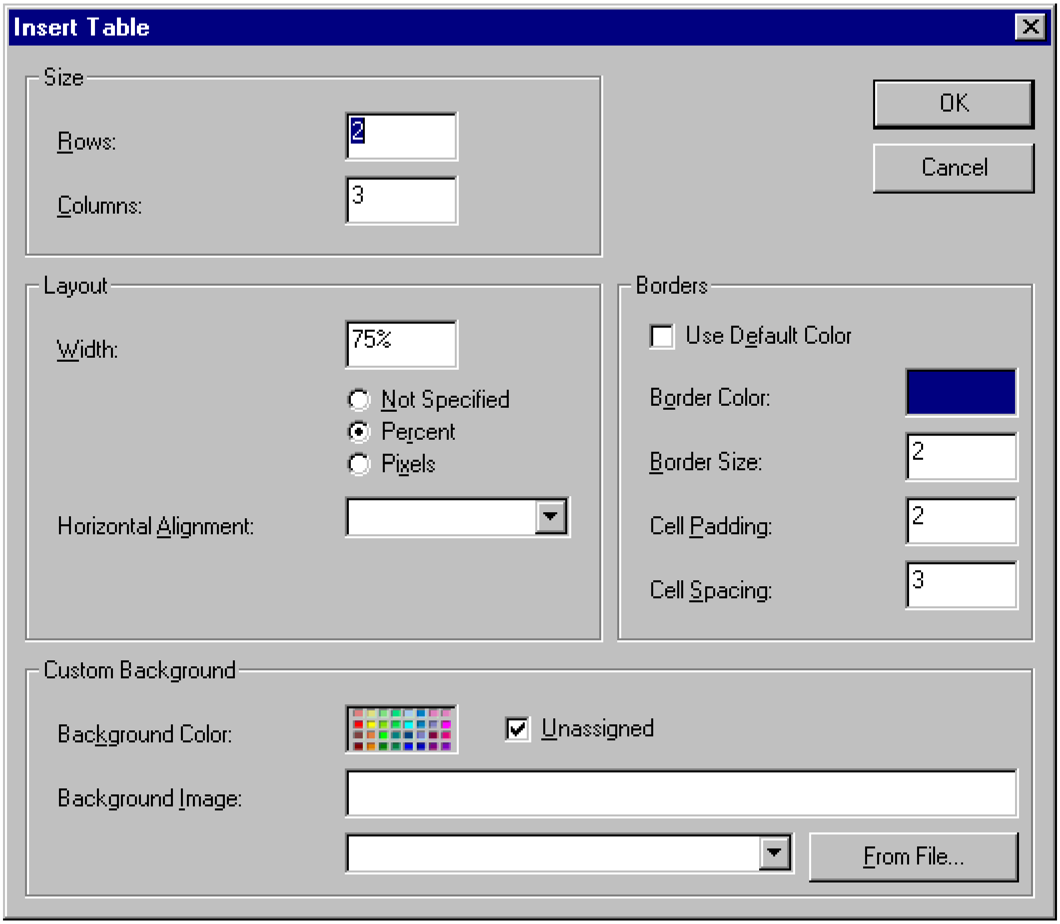


The following table lists the menu options and where to get more information on each.

Menu Option	Description	For more information, see
Insert Table	Inserts a new table where the cursor is currently resting	“Creating a Table” on page 720
Insert Row	Creates a new table row above the row in which the cursor is currently resting	“Adding or Removing Rows and Columns” on page 731
Insert Column	Creates a new table column next to the column in which the cursor is currently resting	“Adding or Removing Rows and Columns” on page 731
Insert Cell	Inserts a cell to the left of the cursor in a table	
Delete Rows	Deletes table row in which the cursor is currently resting	“Adding or Removing Rows and Columns” on page 731
Delete Column	Deletes table column in which the cursor is currently resting	“Adding or Removing Rows and Columns” on page 731
Delete Cells	Deletes the selected cells	
Merge Cells	Combines the contents of two or more selected cells into one	“Merging Two Cells” on page 760
Split Cell	Divides a cell into two. Each cell occupies one half the size of the original cell.	“Splitting a Cell” on page 759
Table Properties	Displays and lets you edit table properties, such as the number of rows and columns, cell padding, and borders.	“The Table Properties Dialog Box” on page 725
Cell Properties	Displays and lets you edit cell properties, such as width and alignment	“The Cell Properties Dialog Box” on page 727

The Table Properties Dialog Box

The Insert Table dialog box lets you manipulate most elements of a table's appearance.

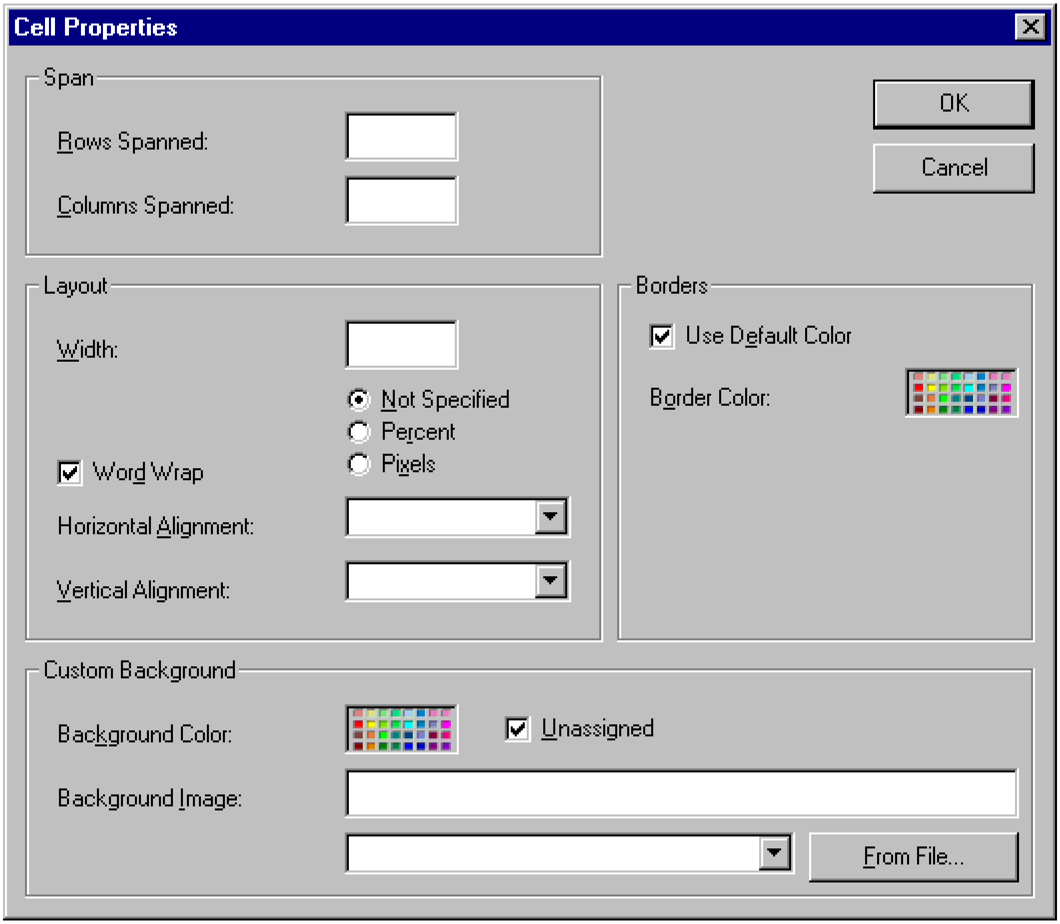


The following table lists the fields on this dialog box and refers you to the section that explains each field.

Field(s)	Lets you specify	For more information, see
Size: Rows, Columns	The number of rows and columns in the table	“Choosing the Number of Rows and Columns” on page 730
Layout: Width	Table width	“Specifying Table Width” on page 732
Layout: Horizontal Alignment	The table’s alignment across the Web page	“Setting Horizontal Alignment” on page 756
Background Color	The background color of the table	“Specifying a Table’s Background Color” on page 739
Background Image	A background image for the table	“Specifying a Background Image for a Table” on page 741
Borders: Use Default Color	Whether or not to use the default color (gray) for table borders	
Border Color	If you do not use the default, the color of the table border	“Assigning Border Color” on page 742
Border Size	The size of the table border	“Assigning Border Size” on page 744
Cell Padding	The space (in pixels) between the cell text and a cell’s border	“Assigning Cell Padding” on page 762
Cell Spacing	The space (in pixels) between a cell and surrounding cells	“Assigning Cell Spacing” on page 763

The Cell Properties Dialog Box

The Cell Properties dialog box lets you manipulate most elements of a cell's appearance.

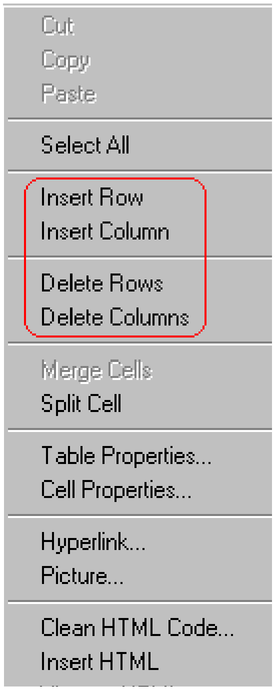


The following table lists the fields on this dialog box and refers you to the section that explains each field.

Field(s)	**Lets you specify**	**For more information, see**
Rows Spanned	If the cell spans two or more rows	"Spanning Rows or Columns" on page 754
Columns Spanned	If the cell spans two or more columns	"Spanning Rows or Columns" on page 754
Width	The minimum cell width	"Specifying the Width of a Cell" on page 746
Word Wrap	Whether text moves down to the next line when it reaches the specified width of a cell	"Word Wrap" on page 761
Horizontal Alignment	The alignment of data across a cell	"Setting Horizontal Alignment" on page 756
Vertical Alignment	The alignment of data up and down within a cell	"Setting Vertical Alignment" on page 757
Background Color	The cell's background color, if you want it to be different from the table's background color	"Specifying a Cell's Background Color" on page 750
Background Image	A background image for the cell	"Specifying a Background Image for a Cell" on page 752
Use Default Color	Apply the table border color to this cell border	
Border Color	Apply a color other than the table border color to this cell border	"Setting a Cell's Border Color" on page 749

The Table Context Sensitive Menu

The following menu appears when you right click the mouse while the cursor is in a table.



All items on this menu are described in "The Context Sensitive Menu" on page 654 except **Tables**, which is described in "The Insert Table Menu" on page 723.

Manipulating Your Table's Format

This section explains how to manipulate your table's format by specifying

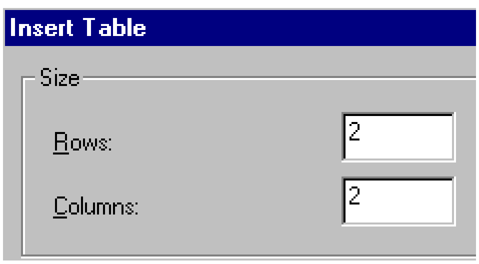
- a number of rows and columns
- a width
- horizontal alignment
- a background color or image
- border color and size

NOTE You can also apply most of these properties to individual cells within a table. See "Working with Table Cells" on page 746 for details.

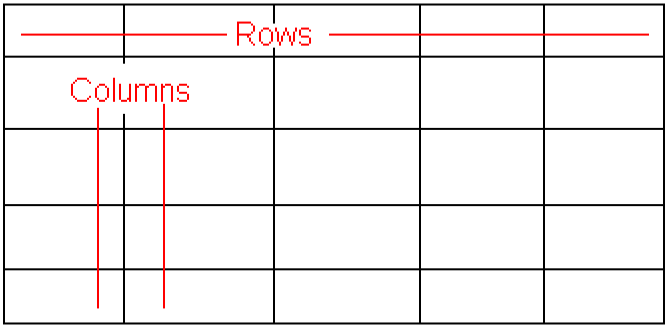
- "Choosing the Number of Rows and Columns" on page 730
- "Specifying Table Width" on page 732
- "Specifying Horizontal Alignment" on page 737
- "Table Backgrounds" on page 738
- "Setting Table Borders" on page 742

Choosing the Number of Rows and Columns

Use the **Size** section of the Insert Table dialog box to specify the number of rows and columns in the table.



A row is a horizontal series of cells, while a column is a vertical series.



If you know how many rows and columns the table will be, enter those numbers. If you don't know the number of rows and columns you need when you create the table, estimate how many you need. You can add or remove rows and columns later.

Placement of Inserted Row or Column

If you add a row, it appears above the row in which the cursor was resting when you pressed **Insert Row**.

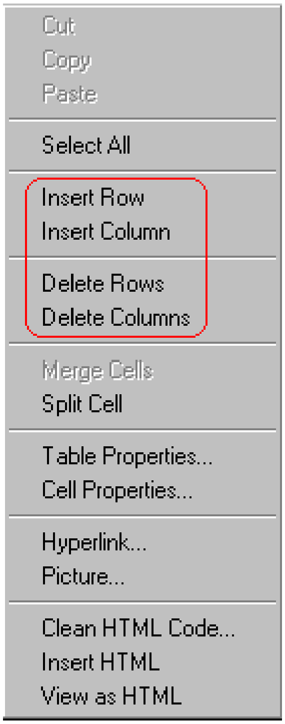
If you add a column, it appears on the left side of the table.

Adding or Removing Rows and Columns

To add or remove rows and columns after you create the table, follow these steps.

1. Place the cursor in the cell from which you want to add or delete.

2. Right click the mouse. A menu appears.



3. Click the appropriate action from the menu. For example to add a row, click **Insert Row**.

NOTE If you are working with nested tables, and you add or remove a column then undo that action and redo it, you must press the redo button once for each cell in the row or column.

Specifying Table Width

When you create a table, you can set its width by specifying one of the following:

- *percentage* of the window: the table’s width varies as a user adjusts the browser size
- *fixed number of pixels,* the table’s width stays the same as a user adjusts the browser size

You can also *not* set a width but instead let information you enter into the table’s cells determine its width.

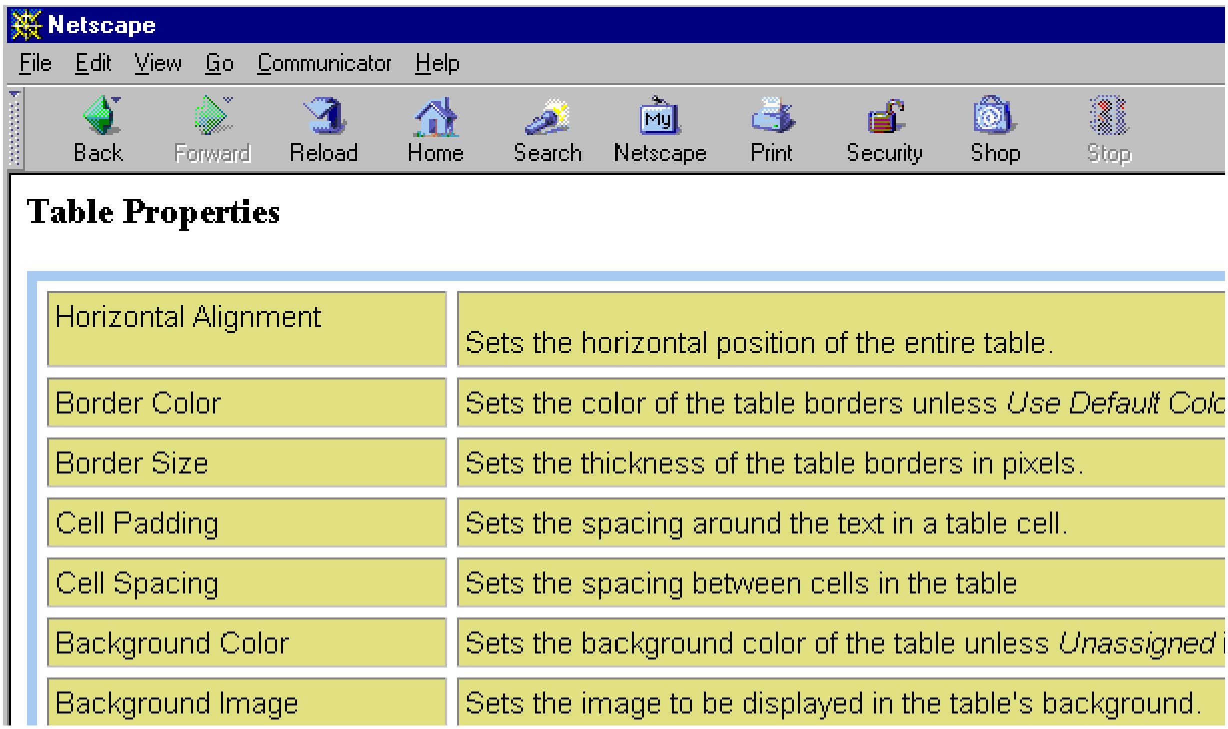
NOTE To set the width of a table column, adjust the width of one of the cells within the column (as described in "Specifying the Width of a Cell" on page 746). Usually, this change affects all other cells in the column.

Specifying Table Width by Percentage

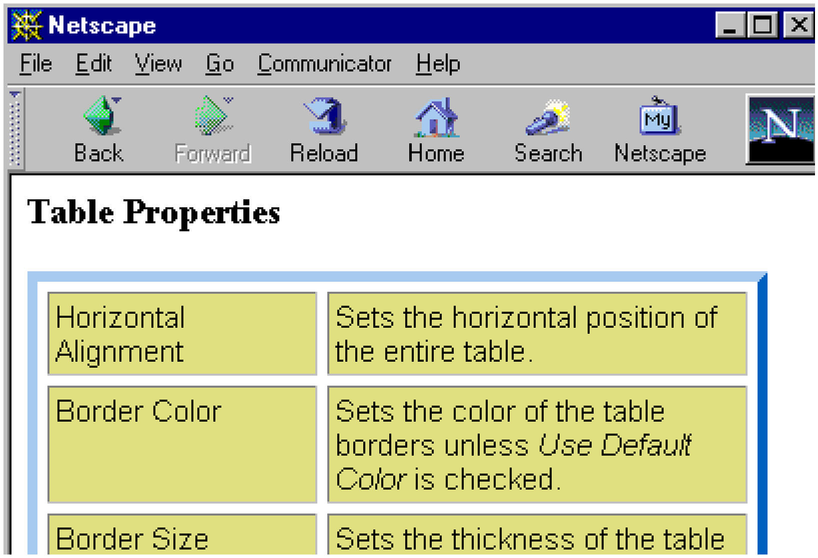
Specify table width by percentage if you want the table to be resized as the user resizes the browser.

NOTE In order for the table to resize with the browser, the Word Wrap attribute must be turned on in all of a table's cells. For details, see "Word Wrap" on page 761.

For example, if you specify that a table is 100% wide, and your browser displays 14 inches across when it is maximized, the table fills the screen (except for the browser border).

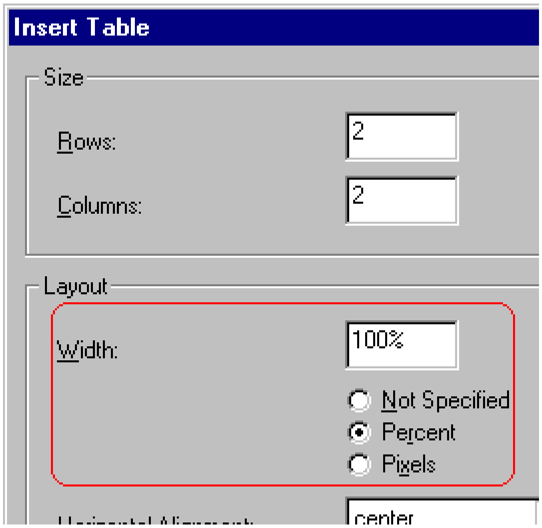


If you resize the browser to half the screen, the table will be about 7" wide. You still see both columns, but some of the data is moved down.



Setting Table Width by Percentage

To specify table width by percentage, choose **Percent** in the layout section of the Insert Table dialog box. Then, specify the percentage at the **Width** field.

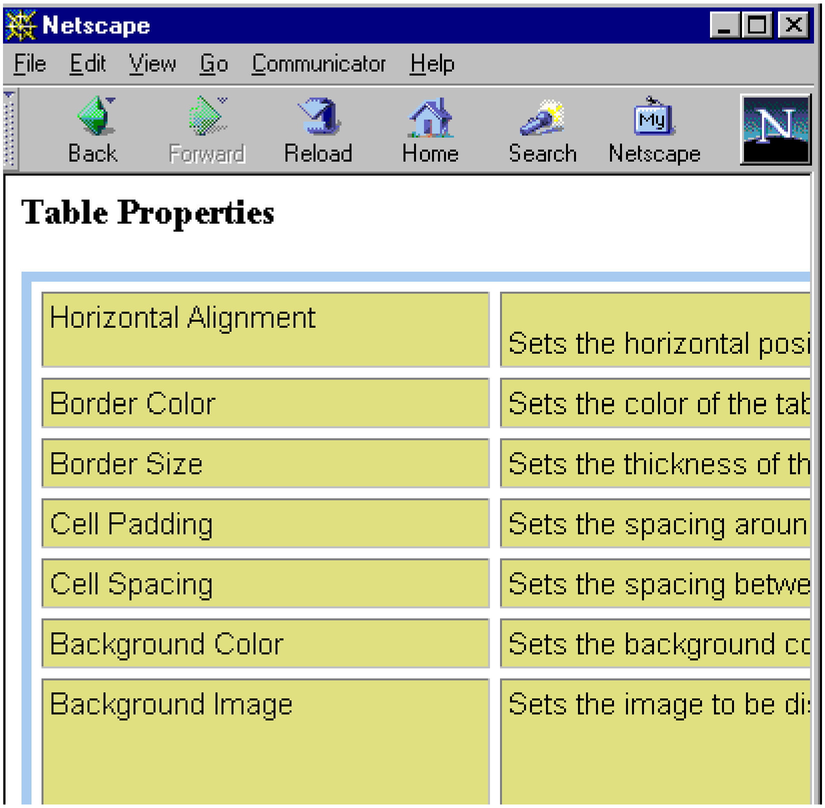


Specifying Table Width by Pixels

Specify table width by pixels if you want the table to remain the same size if a user resizes the browser.

For example, if you specify that a table is 610 pixels wide, and the user’s browser is set to low resolution (640 x 480 pixels), the table occupies the full width of the browser when it is maximized.

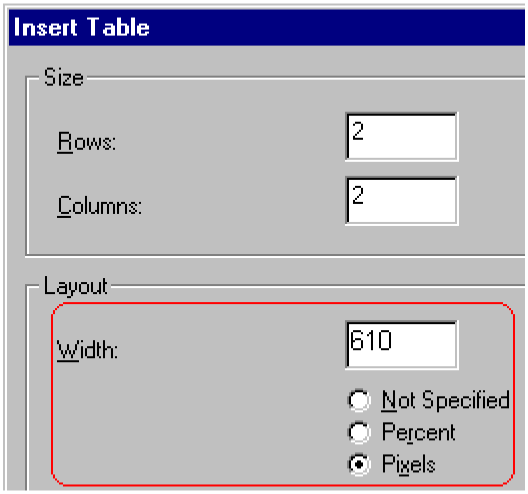
If the user resizes the browser so that it only occupies the left half of the screen, only the left half of the table appears. A scroll bar appears at the bottom of the browser. The user must move the scroll bar to see the rest of the table.



If you set table width by pixels, do not set it to more than 610 pixels. Otherwise, the table will not fully display on a monitor set to low resolution (640 x 480).

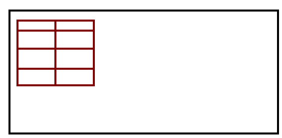
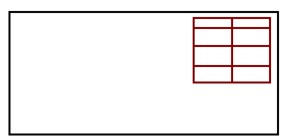
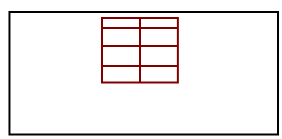
Setting Table Width by Pixels

To specify table width by pixels, choose **Pixels** in the layout section of the Insert Table dialog box. Then, specify the number of pixels at the **Width** field.

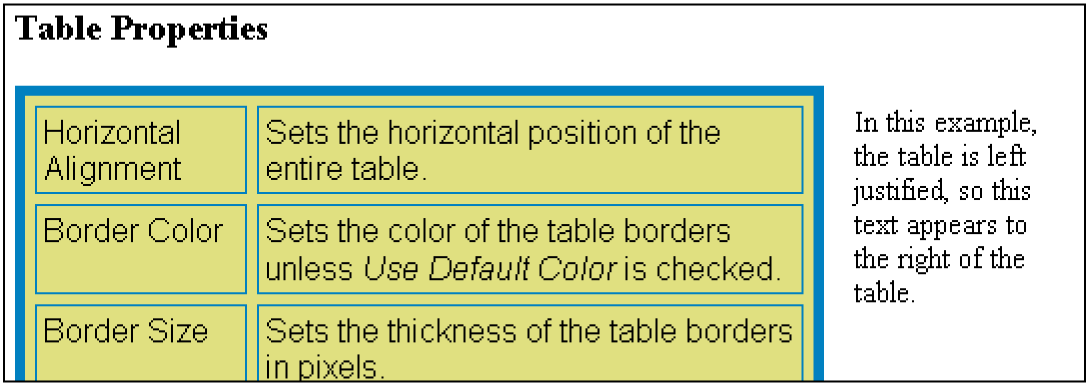


Specifying Horizontal Alignment

You can specify your table’s horizontal alignment (left, right, or center) within the browser.

Alignment	Example
left	
right	
center	

If you specify right or left justify, you can wrap text around the table. To do this, move the cursor to the right or left of the table and begin typing.



Specify the table alignment at the **Horizontal Alignment** field on the Layout area of the Insert Table dialog box.

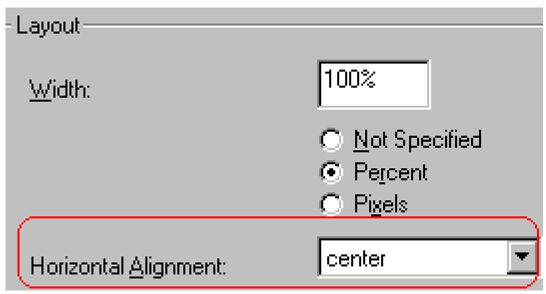
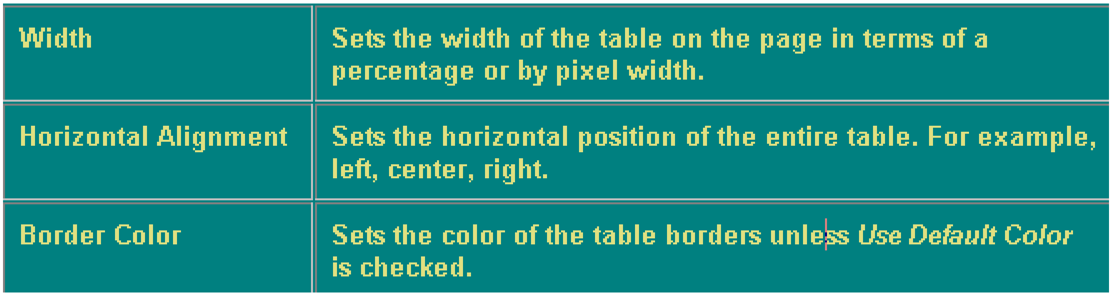


Table Backgrounds

You can specify a background color or image for your table.

Specifying a Table’s Background Color

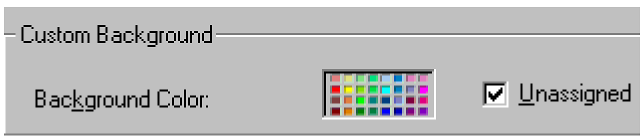
You can assign a background color to a table to make it more pleasing to the eye. Here is an example.



Width	Sets the width of the table on the page in terms of a percentage or by pixel width.
Horizontal Alignment	Sets the horizontal position of the entire table. For example, left, center, right.
Border Color	Sets the color of the table borders unless *Use Default Color* is checked.

NOTE If you apply a dark background color to a table, you may want to apply a light foreground color to the text. Use the font color button ( ) to change the text color.

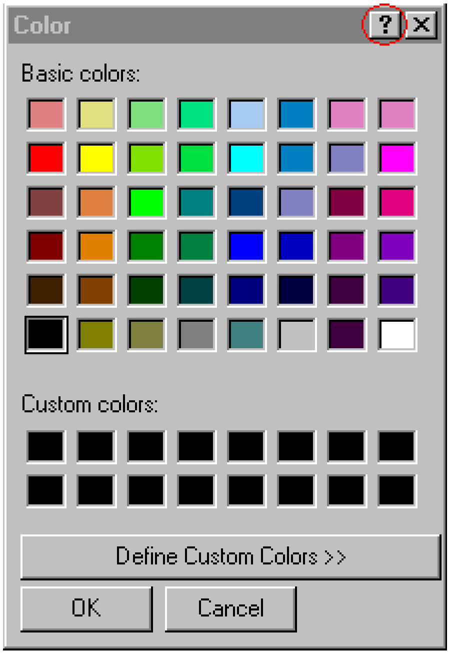
To assign a background color to your table, click the **Background Color** field on the Insert Table dialog box.



When you click that field, a color dialog box appears. Click the color that you want to apply to the background of the table.

Follow these steps to get help on how to use the color box.

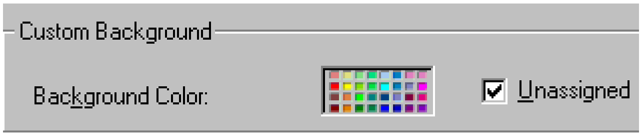
1. Click the question mark in the top right corner.



2. A large question mark appears next to your cursor.
3. Drag the question mark to the area of the dialog box that you want to learn about.
4. Click the mouse button. A box appears with instructions for that area.

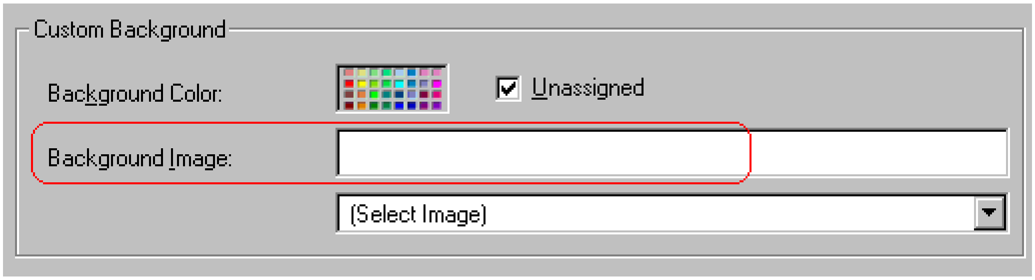
Deleting a Table’s Background Color

To delete a table’s background color, click the **Unassigned** box in the **Custom Background** area of the Insert Table dialog box.



Specifying a Background Image for a Table

If you want a background image to appear in all table cells, use the **Background Image** field of the Insert Table dialog box.



Your Webmaster determines which images are available to you.

To insert a background image

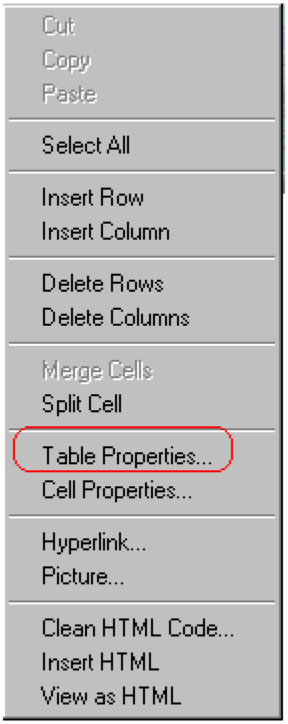
1. Click the down arrow to the right of (**Select Image**). A list of background images appears.
2. Click the image of your choice.
3. Click **OK**.

Note that when you apply a background image to a table

- it applies to the entire table, including the borders.
- if the table is larger than the image, the image repeats until it fills the table.
- if the image is larger than the table, the top left corner of the image aligns with the top left corner of the table. The rest of the image fills as much of the table as possible.
- you can also apply an image to individual cells (see "Specifying a Background Image for a Cell" on page 752).
- make sure that the image does not obscure user's ability to read the table text.

Deleting a Background Image

1. Move the cursor to any cell on the table and right click the mouse.
2. Click **Table Properties** from the menu.



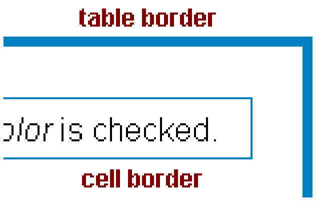
3. Select the value in the **Background Image** field and press <Backspace>.
4. Click **OK**.

Setting Table Borders

You can specify a border color or size for your table.

Assigning Border Color

A table border is the line that separates the table from the rest of your Web page. By default, table borders are gray. You can change the color of table borders.

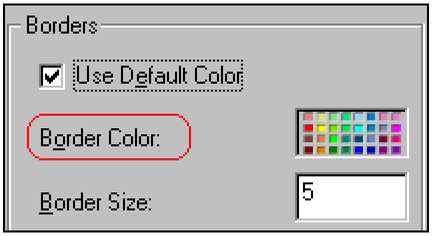


If you want a table's border to "disappear," set it to the same color as the page's background color. This technique is often used to format text on a Web page.

Assigning a Cell Border Color

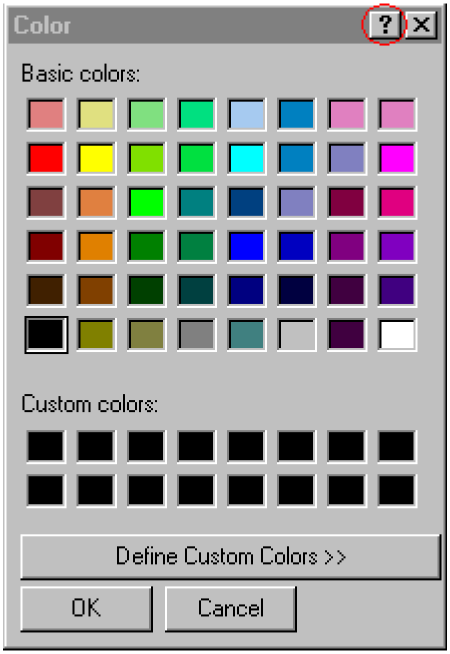
Each cell also has a border that separates it from the other cells and the table border. By default, a cell's border color matches the table border. However, you can individually change a cell border color (see "Setting a Cell's Border Color" on page 749).

To assign a color to your table's border, click the **Border Color** field on the Insert Table dialog box.



When you click that field, a color selection box appears. Click the color that you want to apply to the table's border. Follow these steps to get help on how to use the color box.

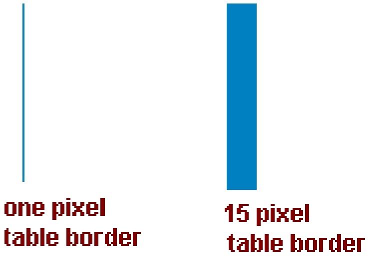
1. Click the question mark in the top right corner.



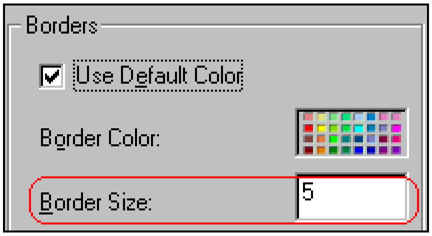
2. A large question mark appears next to your cursor.
3. Drag the question mark to the area of the dialog box that you want to learn about.
4. Click the mouse button. A box appears with instructions for that area.

Assigning Border Size

You can also adjust the size of a table border. Size is measured in pixels.



To assign a border size to your table, enter a number of pixels into the **Border Size** field on the Insert Table dialog box.



If you set a table’s border size to zero (0) but wish to view the table’s boundary lines while you are editing it, select the table and click the border button (). Boundary lines will appear while you are editing but disappear when a user views the page.

Working with Table Cells

Along with functions for managing tables (described in "Introduction to Tables" on page 719 and "Manipulating Your Table's Format" on page 730), **eWebEditPro+XML** also lets you perform actions on individual cells within a table.

You can perform the following actions on individual table cells.

NOTE HTML does not allow you to adjust the width of a cell's border.

You can also select several cells or a row of cells and change them as described above. However, you cannot select and change a column of cells.

Specifying the Width of a Cell

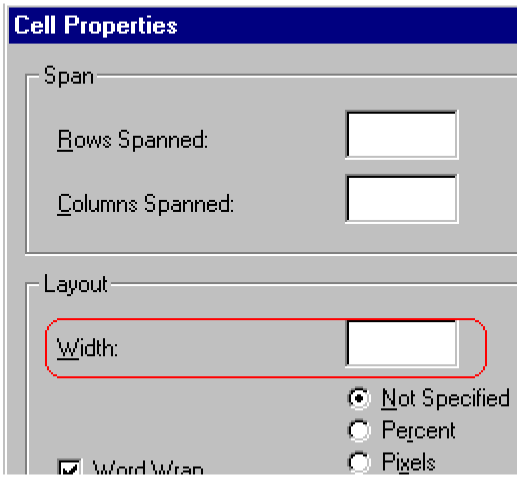
As described in "Specifying Table Width" on page 732, there are several ways to set the width of a table. Within a table, you can also specify the width of an individual cell.

When you set a cell width, there is no guarantee that the cell will occupy that width when displayed in a browser. This is because the cell is part of a column, and changes to other cells in the column can affect the cell whose width you set. Setting cell width only guarantees that the cell will not be *less than* the width you specify.

If you want to ensure that a cell's size does not change, set all cells in a column to that width.

To specify a cell's width, follow these steps.

1. Place the cursor in the cell whose width you want to set.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog box appears.



6. In the layout section of the dialog box, enter the cell width at the **Width** field. You can enter the width in pixels or percentage. These choices are explained in "Specifying Table Width" on page 732.
7. Click **OK**.

Inserting a Cell

To insert a cell, follow these steps.

1. Move the cursor to the right of where you want the new cell to appear.
2. Right click the mouse.
3. Click **Insert Cell** from the menu.

The new cell appears to the left of the cell in which the cursor resides when you click **Insert Cell**. The cursor cell and all cells to its right shift right to make room for the new cell.

In this example, the cursor was in cell “b” when the user clicked **Insert Cell**.

Before

a	b cursor	c
d	e	f

After

a	new cell	b	c
d	e	f	

Deleting a Cell

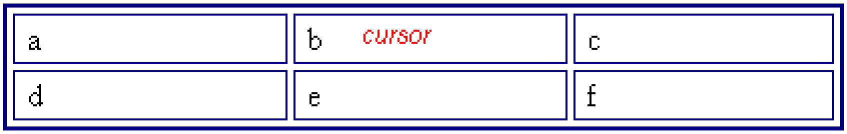
To delete one or more cells, follow these steps.

1. Move the cursor to the first cell you want to delete.
2. To delete only that cell, proceed to the next step. To delete several contiguous cells, select them. Contiguous cells can cross rows.
3. Right click the mouse.
4. Click **Delete Cells** from the menu.

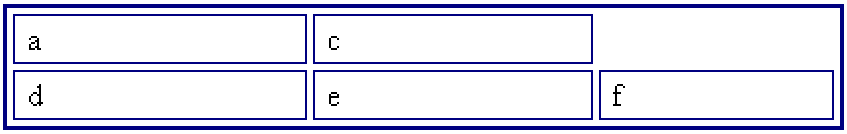
Any cells to the right of the deleted cells shift left to occupy the vacant space.

In this example, the cursor was in cell “b” when the user clicked on **Delete Cells**.

Before



After



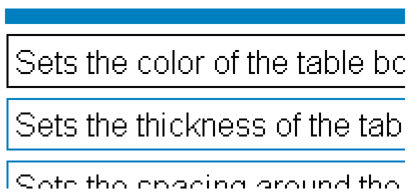
Setting a Cell’s Border Color

A cell border is the line that separates it from other cells.

By default, the color of a cell’s border matches the color of the table border. However, you can change the color of any cell border individually.

NOTE When viewed in Netscape Navigator, cell borders are gray, regardless of any change you make on the Cell Properties dialog box.

This example illustrates the effect of different cell border colors within a table.



If you want a cell’s border to “disappear,” set it to the same color as the table’s background color.

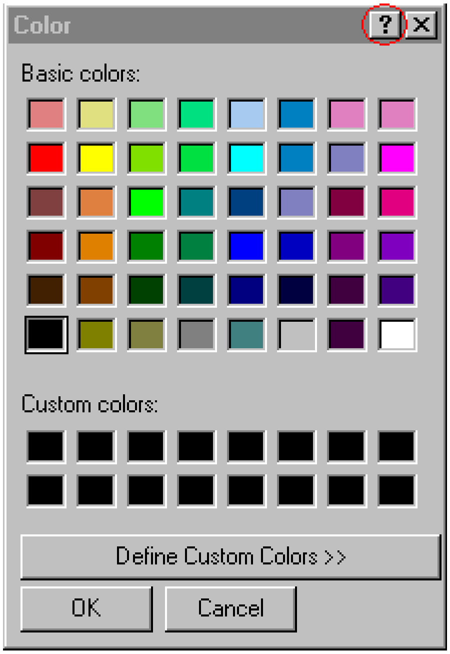
To change the color of a cell’s border, follow these steps.

1. Move the cursor to the cell and right click the mouse.
2. Click **Table** from the menu.
3. Click **Cell Properties** from the menu.

4. Click the **Border Color** field on the Cell Properties dialog box.

5. When you click that field, a Windows Color selection box appears. Click the color that you want to apply to the cell border.

   See Also: "Using the Color Box" on page 753



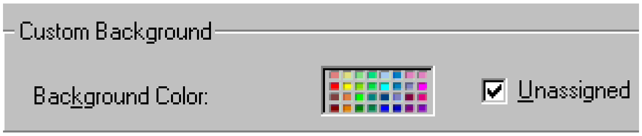
Specifying a Cell's Background Color

"Specifying a Table's Background Color" on page 739 explains how to apply a background color to a table. You can also apply a background color to a cell.

To apply a background color to a cell, follow these steps.

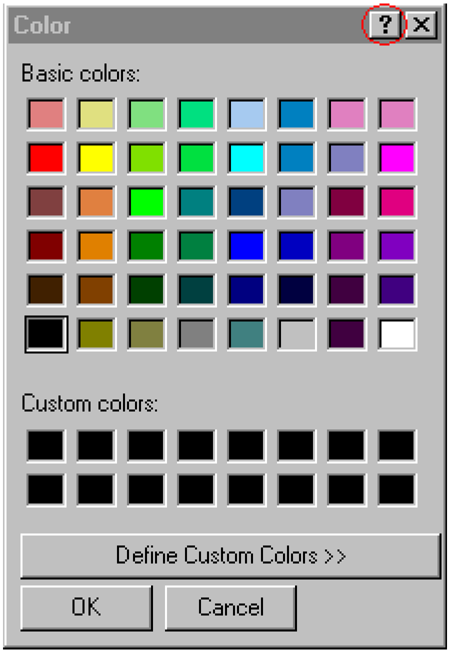
1. Move the cursor to the cell and right click the mouse.

2. Click **Table** from the menu.
3. Click **Cell Properties** from the menu.
4. Click the **Background Color** field on the Cell Properties dialog box.



5. When you click that field, a Windows Color selection box appears.

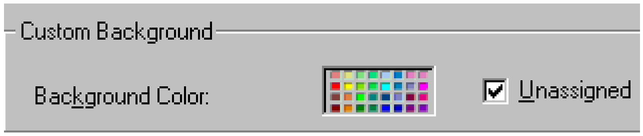
   See Also: "Using the Color Box" on page 753



6. Click a color to apply to the background of the cell.

Deleting a Cell's Background Color

To delete a cell's background color, click the **Unassigned** box in the **Custom Background** area of the Cell Properties dialog box.



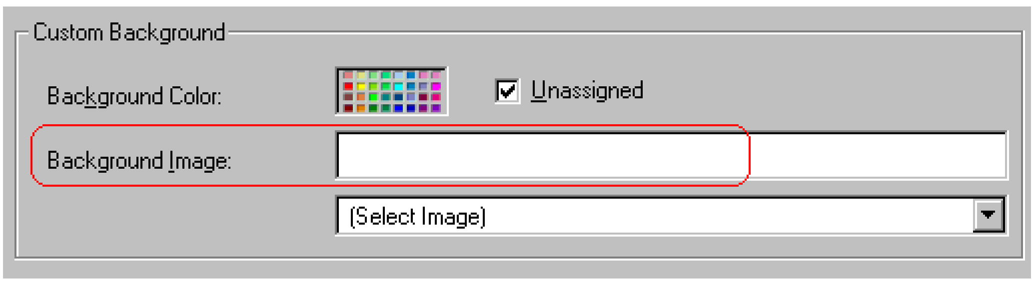
Specifying a Background Image for a Cell

"Specifying a Background Image for a Table" on page 741 explains how to apply a background image to a table. You can also apply a background image to a cell.

Your Webmaster determines which images are available.

To insert an image into a cell, follow these steps.

1. Move the cursor to the cell and right click the mouse.
2. Click **Table** from the menu.
3. Click **Cell Properties** from the menu.
4. Move the cursor to the **Background Image** field of the Cell Properties dialog box.



5. Click the down arrow to the right of **(Select Image)**. A list of background images appears.
6. Click the image of your choice.
7. Click **OK**.

Note that when you apply a background image to a cell

- If the cell is larger than the image, the image repeats until it fills the cell.

- If the cell is smaller than the image, the top left corner of the image appears in the top left corner of the cell. The rest of the image fills as much of the cell as possible.
- Make sure the image does not obscure a user's ability to read the cell text (if any exists).

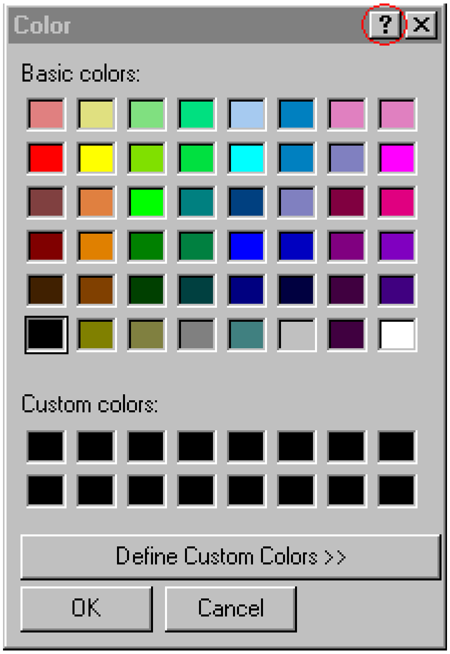
Deleting a Background Image

1. Move the cursor to the cell and right click the mouse.
2. Click **Table** from the menu.
3. Click **Cell Properties** from the menu.
4. Select the value in the **Background Image** field and press <Backspace>.

Using the Color Box

Follow these steps to get help on how to use the color box.

1. Click the question mark in the top right corner.



2. A large question mark appears next to your cursor.

3. Drag the question mark to the area of the dialog box that you want to learn about.
4. Click the mouse button. A box appears with instructions for that area.

Spanning Rows or Columns

You can create a table cell that stretches across more than one row or column. In the following table, notice how the row that contains “Sports Teams” spans three columns.

Sports Teams		
City	**Baseball Team**	**Hockey Team**
Boston	Red Sox	Bruins
New York	Yankees	Rangers
Chicago	White Sox	Black Hawks

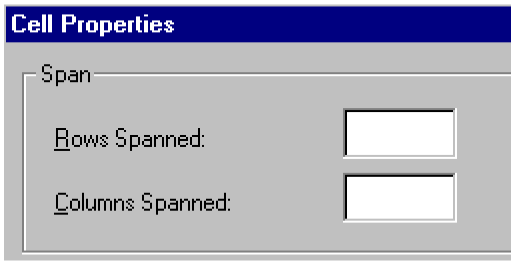
You can also create a column that spans several rows, as illustrated below. Notice that Boston spans three rows.

Colleges	
City	**Name**
Boston	Boston College
	Northeastern University
	Boston University
New York	Columbia University

Spanning More than One Row or Column

To have a table cell span more than one row or column, follow these steps.

1. Place the cursor in the cell that will span rows or columns.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog box appears. In the **Rows Spanned** or **Columns Spanned** field, enter the number of rows or columns that you want this cell to span.

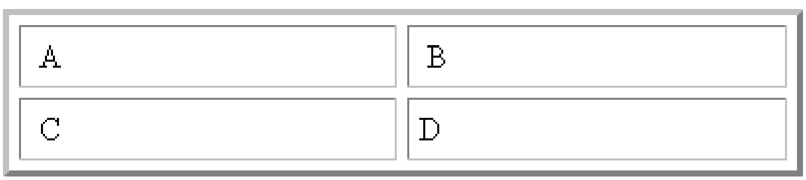


6. Click **OK**.

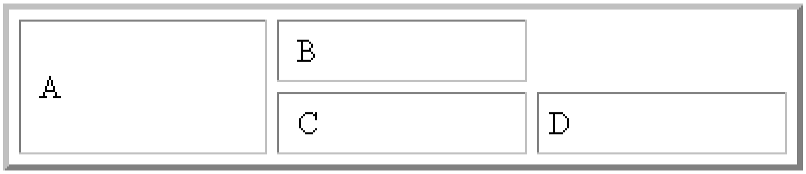
Effect of Spanning a Cell

When you set a cell to span rows or columns, the editor does not remove the cells that are in the way. Instead, it moves those cells across or down to the next available position.

For example, the following table has two rows and two columns.



If you set cell A to span two rows, note that cell C moves across to make room for cell A. This action pushes cell D to the next column.



Aligning Text Within a Cell

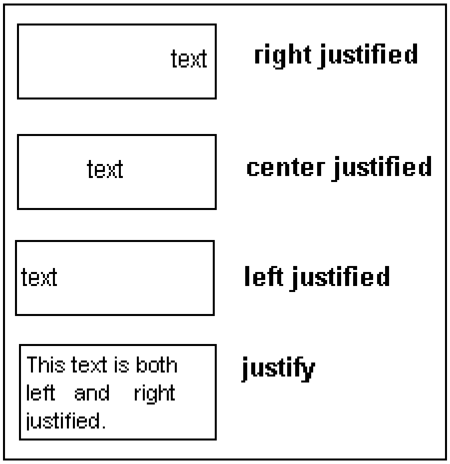
Within a cell, you can specify how your text aligns horizontally and vertically.

Setting Horizontal Alignment

In the Cell Properties dialog box, you can specify the horizontal alignment of a cell. You have set the alignment to left, center, or right, or

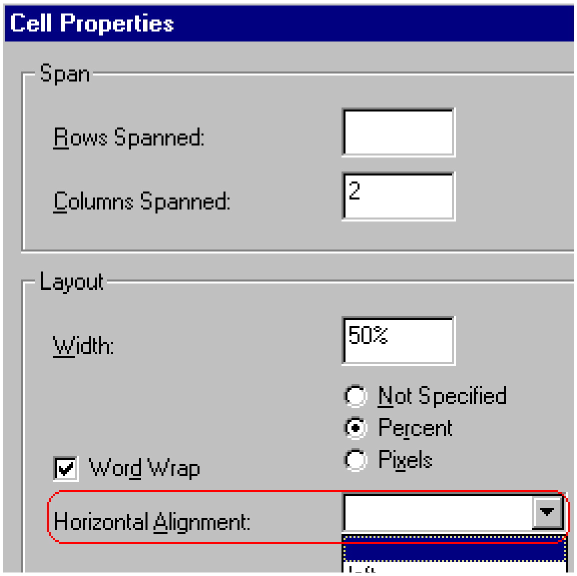
- left
- center
- right
- justify - the text is justified down both left and right edges. Many books use this alignment style. (This alignment is not supported by all browsers.)

This example illustrates these choices.



To set horizontal justification of a table cell, follow these steps.

1. Place the cursor in the cell that you want to edit.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu
5. The Cell Properties dialog box appears. Click the down arrow to the right of the **Horizontal Alignment** field.



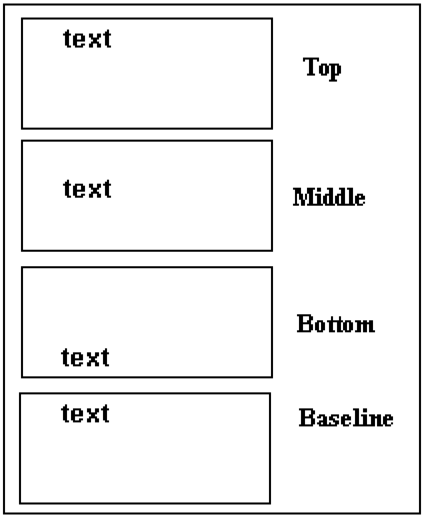
6. Click your choice from the list and click **OK**.

Setting Vertical Alignment

In the Cell Properties dialog box, you can specify the vertical alignment of a cell. You have four choices.

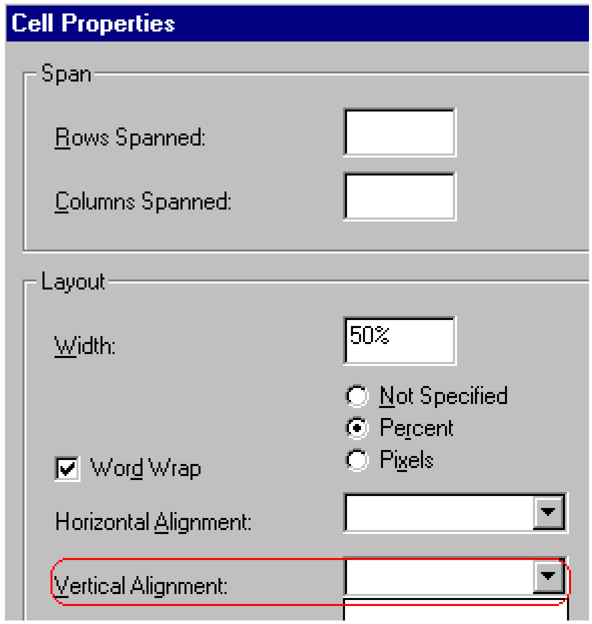
- top
- middle
- bottom
- along the baseline of the first line of text (the term “baseline” is defined in ”Aligning the Picture” on page 681)

This example illustrates the choices.



To set vertical justification for a table cell, follow these steps.

1. Place the cursor in the cell that you want to edit.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog box appears. Click the down arrow to the right of the **Vertical Alignment** field.



6. Click your choice from the list and click **OK**.

Splitting a Cell

You can divide a cell into two. If you split a cell, each cell occupies one half the size of the original cell.

Row before split

A	**B**

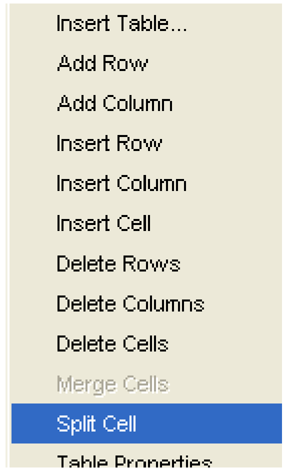
Row after split

A1	**A2**	**B**

To split a table cell into two cells, follow these steps.

1. Place the cursor in the cell that you want to split.

2. Right click the mouse.
3. Click **Table**.
4. Click **Split Cell** from the menu.



5. Two cells now appear where only one appeared before.

Merging Two Cells

You can merge two cells into one. If you merge two cells, the new cell contains all of the information from both. The new cell's width equals the sum of the two cells that were merged.

Cells Before Merge

A	B

Cell After Merge

AB

To merge two or more cells, follow these steps.

1. Select the cells that you want to merge.

2. Click the Insert Table button ( ).
3. Click **Merge Cells** from the menu.

Word Wrap

Word Wrap is a text formatting feature of tables. It causes text to move down to the next line when the width of the characters on a line equals the column width. For example, if you set column width to 50%, with word wrap turned on, a table looks like this.

Horizontal Alignment	Sets the horizontal position of the entire table. For example, left, center, right.
Border Color	Sets the color of the table borders

If you turn Word Wrap off for the same table, you get this result.

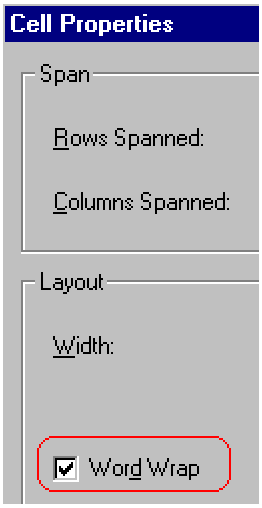
Horizontal Alignment	Sets the horizontal position of the entire table. For example, left, cent
Border Color	Sets the color of the table borders unless *Use Default Color* is check

If Word Wrap is turned off, text stays on one line until the user entering table text presses <Enter>. That keystroke causes text to move down to the next line.

By default, all cells have the Word Wrap feature turned on.

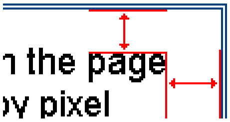
To turn Word Wrap on or off for a cell, follow these steps.

1. Place the cursor in the cell that you want to edit.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog box appears. Click or off the **Word Wrap** checkbox and click **OK**.

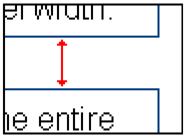


Setting Cell Padding and Spacing

Cell *padding* is the space between a cell's data and its border.

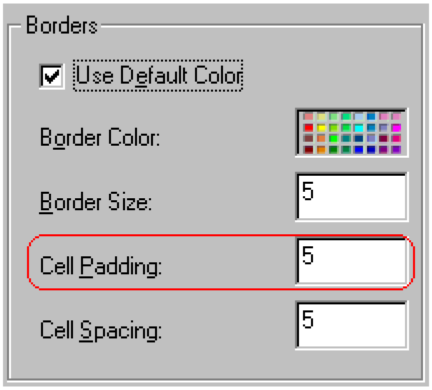


Cell *spacing* is the space between a cell and surrounding cells.



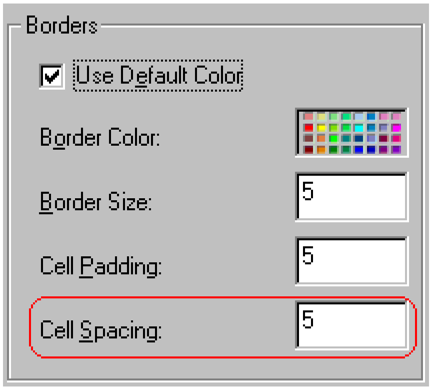
Assigning Cell Padding

To assign cell padding to your table, click the **Cell Padding** field on the Insert Table dialog box. Enter the number of pixels.



Assigning Cell Spacing

To assign cell spacing to your table, click the **Cell Spacing** field on the Insert Table dialog box. Enter the number of pixels.



Using Bookmarks

Use a bookmark to let a user “jump” from any word, phrase, or image to another place in the content. On your Web page, text appears in a different color to indicate that additional information is available at the bookmark’s location.

For example, if your Web page includes meeting minutes, the top of the page could list the meeting dates. You could then assign a hyperlink to each date and a bookmark to each set of minutes.

The user sees that a date is in a different color, so clicks the date to “jump” to the bookmark that marks the location of the meeting minutes.

“Creating a Bookmark” on page 764 describes how to set up a hyperlink to a bookmark within a file. You can also set up hyperlink to

- another Web page. This procedure is described in “Using Hyperlinks” on page 768.
- a bookmark within another Web page. This procedure is described in “Creating a Hyperlink to a Location Within a Web Page” on page 771.

Creating a Bookmark

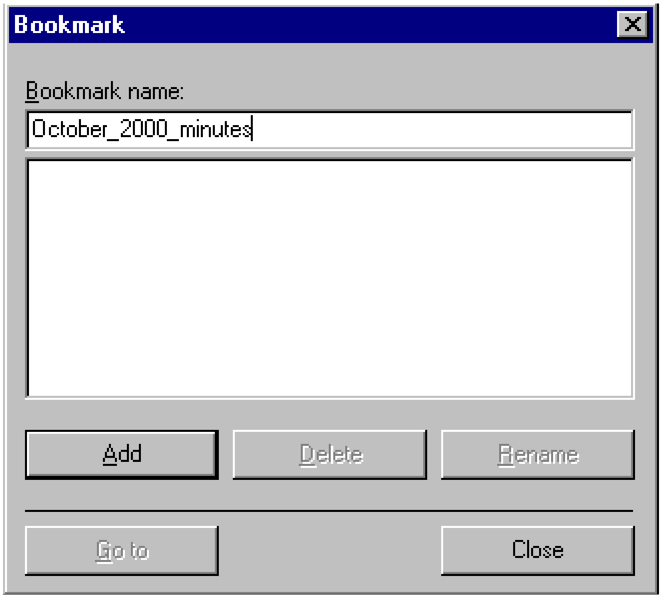
When creating a bookmark, you must specify a

- *source,* the text or image that the user clicks to move to the bookmark
- *bookmark*, the place to which the cursor jumps when the user clicks the source

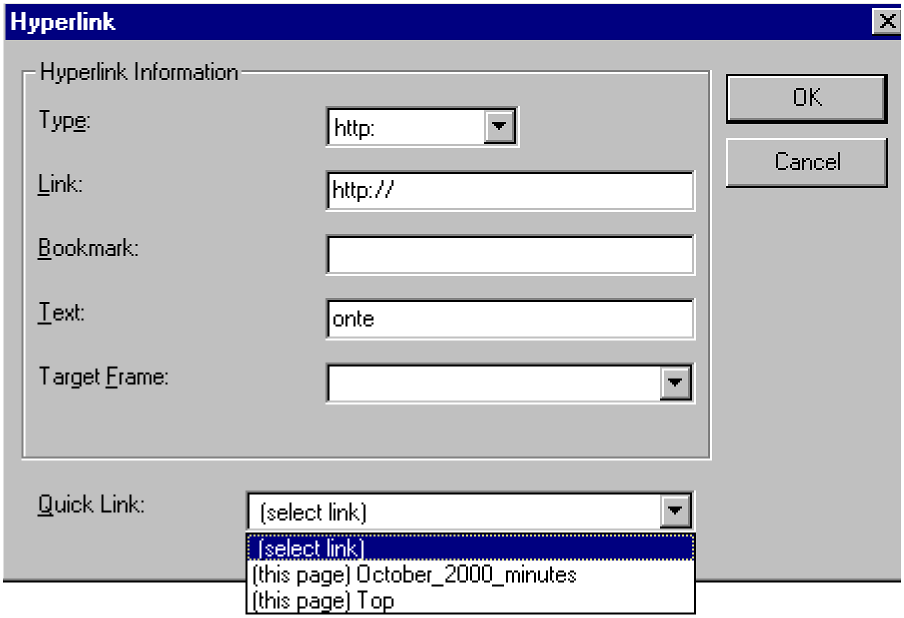
To continue with the above example, a meeting date is the source, and the meeting minutes are the bookmark.

To create a bookmark, follow these steps.

1. Select the bookmark text or image.
2. Click the Bookmark button ( ).
3. The Bookmark dialog box appears. Enter the name of the bookmark. The bookmark can include the following non-alphabetic characters: ; / ? : @ & = + $, - _ . ! ~ * ' ( ).



4. Click **Add**.
5. The editor screen returns. (The bookmark does not appear on the page.) Select the source text or image.
6. Click the Hyperlink button ( ).
7. The Hyperlink dialog box appears.
8. Click the down arrow to the right of the **Quicklink** field and click the bookmark you created in Step 3.



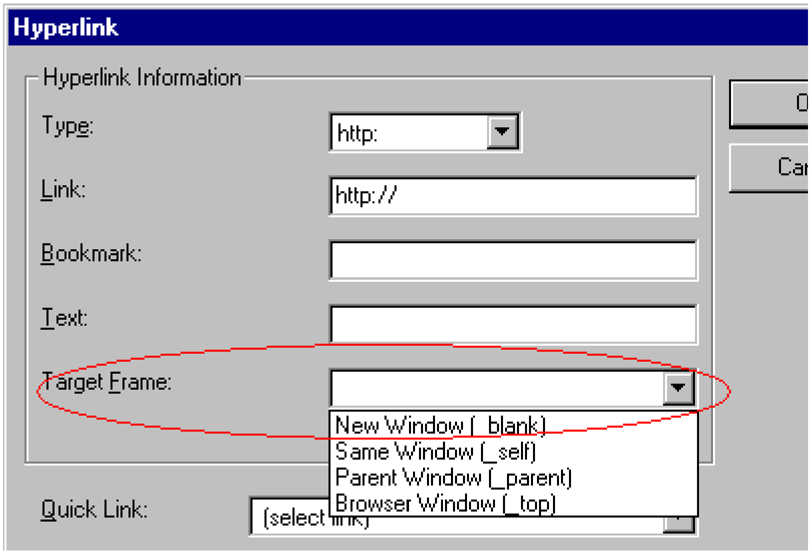
9. If desired, you can use the **Target Frame** field to change the window in which the destination text appears. For details, see "Changing the Destination Window" on page 767.

   If you leave the **Target Frame** field blank, the new window replaces the current window.

10. Click **OK**.

Changing the Destination Window

While defining hypertext, you can use the **Target Frame** field on the Hyperlink dialog box to change the window in which the destination page appears.



The possible values that you can enter into the **Target Frame** field are explained below.

If you want the destination page to appear	Click this in the Target Frame field
In a new browser window, on top of the current browser.	**New Window(_blank)**
In the same position within the browser window. The new window replaces the current one.	**Same Window(_self)** Note: this is the default.
If your page contains frames, in the frame that contains the frame with the hyperlink.	**Parent Window(_parent)**
If your page contains frames, in the full display area, replacing the frames.	**Browser Window(_top)**
If your page contains frames, in the frame with the specified name.	Enter the name of the frame.

Using Hyperlinks

Use hyperlinks to let a user "jump" from any word, phrase or image to another Web page. The page can be within your network (that is, on an intranet) or anywhere on the internet.

NOTE If you want to create jumps within a file, see "Using Bookmarks" on page 764.

For example, if your Web page includes a jump to the Ektron Web site, you would enter the text to indicate the jump (for example **Ektron Web Site**), then create a hyperlink to `www.ektron.com`. When users see **Ektron Web Site** in a different color, they can click the text to "jump" to the site.

Although most jumps go to the top of another Web page, you can also jump to a bookmark within a Web page.

This section explains

Creating a Hyperlink

When creating a hyperlink, you must specify a

- *source,* the text or image the user clicks to move to the destination
- *destination*, the Web page the browser displays when the person viewing the page clicks the source

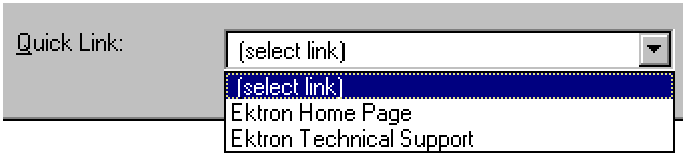
To continue with the above example, Ektron Web Site is the source, and the Web page available at `www.ektron.com` is the destination.

To create a hyperlink, click the Hyperlink button ( ). When you do, the Hyperlink dialog box appears. From there, you can select from a list of Web pages (also known as Quicklinks). Or, if the page you are jumping to is not on the list, enter the URL address of the destination Web page.

Each choice is described below.

Using a Quicklink

Your Web master can add to the Hyperlink dialog box any number of Quicklinks, that is, Web addresses that you can link to simply by selecting an item from a drop down menu.

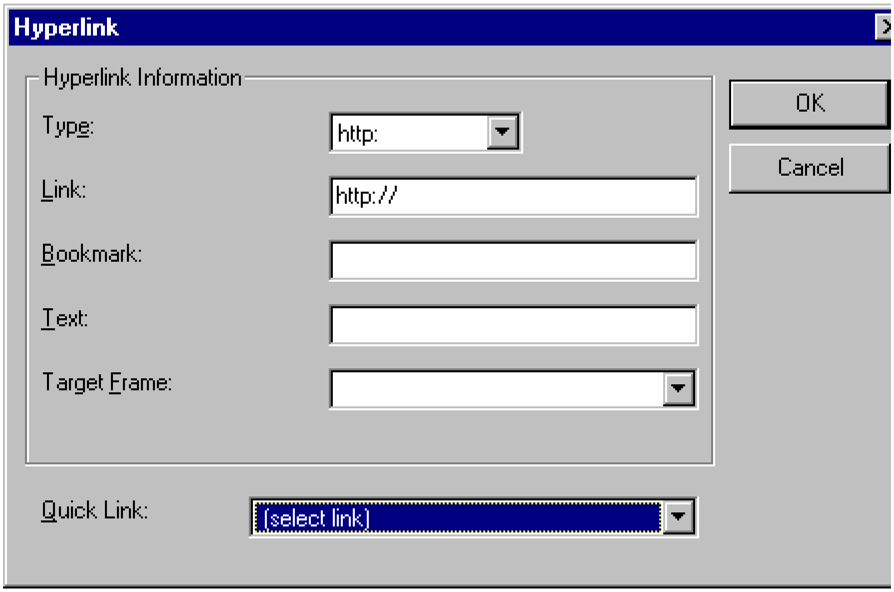


Quicklinks are “quick” because you do not need to enter or know the URL of the destination Web page -- your Web master has already stored that information for you.

To apply a Quicklink, follow these steps.

1. Select the source text or image.

2. Click the Hyperlink button (). The Hyperlink dialog box appears.



3. Click the down arrow to the right of the **Quicklink** field. A list of Web pages that your Web master has pre-loaded appears.
4. Click an item from the list to select it.
5. If desired, you can use the **Target Frame** field to change the window in which the destination text appears. For details, see "Changing the Destination Window" on page 767.

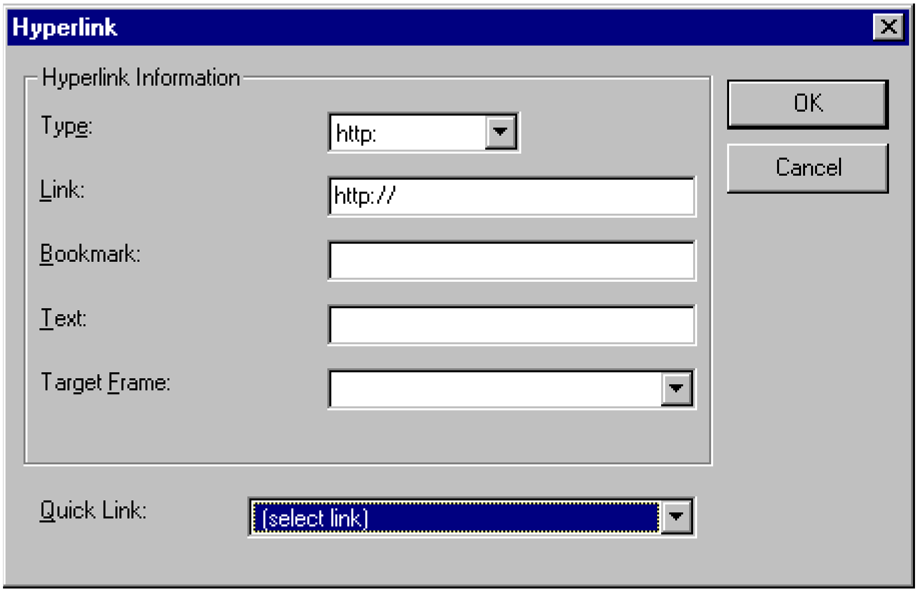
   If you leave the **Target Frame** field blank, the new window replaces the current window
6. Click **OK**.

Entering a Hyperlink Manually

To create a hyperlink, follow these steps.

1. Select the source text or image.

2. Click the New Hyperlink button (). The Hyperlink dialog box appears.



3. Click in the **Link** field after `http://`. Then, enter the address of the destination Web page. For example, to enter a hyperlink to the ektron Web site, enter `www.ektron.com`.
4. If desired, you can use the **Target Frame** field to change the window in which the destination text appears. For details, see “Changing the Destination Window” on page 767.

   If you leave the **Target Frame** field blank, the new window replaces the current window
5. Click **OK**.

Testing a Hyperlink

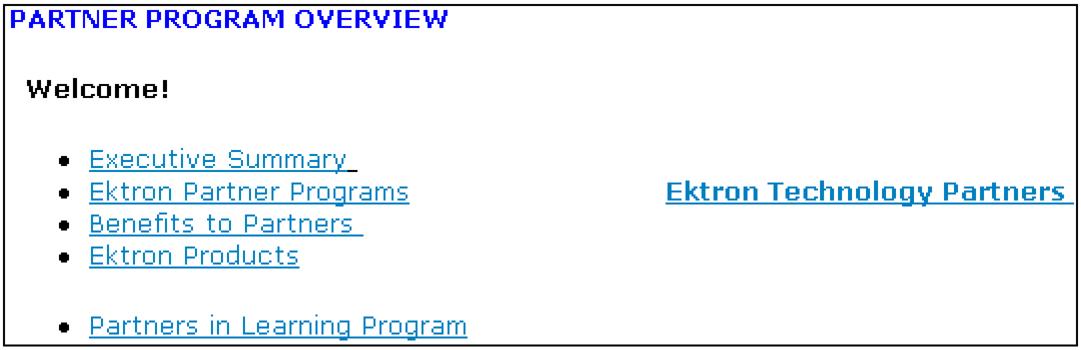
Within the **eWebEditPro+XML** editor, you can test a hyperlink. To do this, select the hyperlink then double click it. That action launches the Web page assigned to the hyperlink.

Creating a Hyperlink to a Location Within a Web Page

Sometimes, the destination Web page contains bookmarks, and you want to jump from your page to a bookmark on another page. (Bookmarks are described in “Using Bookmarks” on page 764.)

To create a hyperlink that jumps to another page's bookmark, follow these steps.

1. Go to the destination Web page.
2. Click the bookmark that you want to jump to. For example, on the illustration below, the text **Benefits to Partners** jumps to a bookmark further down on the page.



3. When you click the bookmark, its full address appears in your browser's address bar. This bookmark's address looks like this.

`http://www.example.com/single.cfm?doc_id=35#Benefits2`

4. Click the address bar. The address is selected. Press <Ctrl>+<C> to copy the address into the Windows clipboard.
5. Go to **eWebEditPro+XML**.
6. Select the text or image from which you want to jump to the bookmark.
7. Click the Hyperlink button (). The hyperlink dialog box appears.
8. Move the cursor to the **Link** field.
9. Press <Ctrl>+<V> to paste the address you copied in Step 4 into the **Link** field.
10. Click **OK**.

Editing a Hyperlink

If you need to change a hyperlink's destination Web page or target frame, follow these steps.

1. Click the Hyperlink button ( ). The hyperlink dialog box appears.
2. Edit the **Link** or **Target Frame** field as needed.
3. Press **OK**.

Removing a Hyperlink

If you want to remove the hyperlink from text or an image, select the text or image and press the Remove Hyperlink button ( ).

Preventing a URL from Becoming a Hyperlink

If you enter a URL or an email address into **eWebEditPro+XML**, it automatically becomes a hyperlink. To prevent this, enter an extra space in the URL or address.

For example, instead of entering **sales@ektron.com**, enter **sales**<blank>**@ektron.com**.

Working with HTML

eWebEditPro+XML creates pages for display on the World Wide Web or an intranet. These pages use HTML (hypertext markup language) to format text and images for display in a browser. You do not need to know HTML to use **eWebEditPro+XML**.

However, if you know HTML, you can view, insert or edit your Web page's HTML code.

This section explains

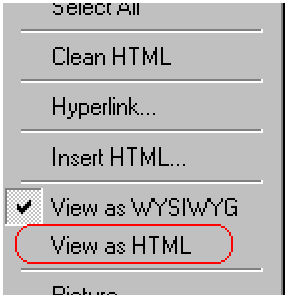
- "Viewing and Editing HTML" on page 774
- "Inserting Source" on page 775
- "Cleaning Source Code" on page 776
- "Inserting Content from MS Office" on page 777

Viewing and Editing HTML

When you choose to view your page as HTML, the editor cleans the content using a method determined by your Webmaster. (For more information, see "Cleaning HTML" in the **eWebEditPro+XML** Developer's Reference Guide.)

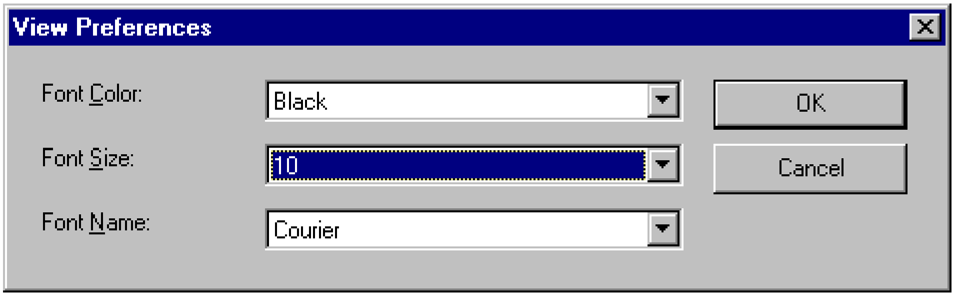
To view your page's HTML, follow these steps.

1. Click the View as HTML button (), or right click the mouse and click **View as HTML** from the menu.



2. The HTML code appears. While viewing the code, you can edit it using editor functions such as Cut, Copy, Paste and Replace. To select all content, press <Ctrl>+<A>.

   You can also set default values for the style, size and color in which the HTML appears. To do this, right click the mouse and click **Preferences**. When you do, a dialog box appears in which you can enter formatting information about the HTML code.



   These settings will be used whenever you view as HTML.

   The settings are ignored when you view the page in WYSIWYG mode and when the user views the page.

3. To return to normal view, click the **View as WYSIWYG** button ( ) or right click the mouse and click **View WYSIWYG**.

Editing a Section of a Page

If you want to edit only a section of the HTML on your Web page, follow these steps.

1. Select the portion of your Web page that you want to edit.
2. Right click the mouse.
3. Click **Edit Source** from the menu. The HTML code appears.
4. Edit the HTML code as desired.
5. Click **OK**.

Inserting Source

If you want to insert HTML source code into your Web page, follow these steps.

1. Place the cursor at the spot on the page where you want to insert the HTML.
2. Right click the mouse.
3. Click **Insert Source** from the menu.
4. The Insert Source dialog box appears. Paste or type your HTML code.
5. Click **OK**.

Cleaning Source Code

eWebEditPro+XML lets you “clean” the HTML source code for your Web page. You would typically use this feature after entering HTML text or pasting HTML code into **eWebEditPro+XML** from another application.

The Clean Source option removes unnecessary HTML tags, ensures that all tags begin and end properly, and maximizes the page for efficiency. As a result, the page should be error-free and load more quickly in a browser. Also, the appearance of clean HTML is more consistent when viewed in different browsers.

To clean your HTML, follow these steps.

1. Right click the mouse.
2. Click **Clean Source** from the menu.
3. **eWebEditPro+XML** cleans your Web page’s HTML content.

Inserting Content from MS Office

If you paste text into **eWebEditPro+XML** from a Microsoft Office 2000 (or higher) application, such as Microsoft Word, the following window appears.

For best results, click **Yes**.

Using Ektron CMS400.NET's Wiki Feature

The Wiki feature lets registered site visitors (that is, membership users) and CMS users insert hyperlinks to other content. The hyperlinks can connect to existing content or to content that doesn't exist yet. If the hyperlink's destination does not yet exist, the wiki creates both the hyperlink and the new content item to which it jumps.

This collaborative authoring style is used in wiki sites such as Wikipedia (`http://en.wikipedia.org`), where any author can contribute new content and articles.

Creating a Wiki

To create a wiki hyperlink, the user needs permission to add content to the folder that contains the content being edited.

There are two ways to create a wiki link. They are contrasted below.

Method	Advantages	For more information, see
Surround text with square brackets (`[[ ]]`)	Quick	"Creating a Wiki Link Using Square Brackets" on page 782

Method	Advantages	For more information, see
Use the wiki button ( )	• Can link to existing content or create new content • Can choose new content's folder Note: Membership users cannot choose a folder. The new content is created in the same folder as the content being edited. • Can change title of new content • Can select new window's target frame	"Using the Wiki Button" on page 779

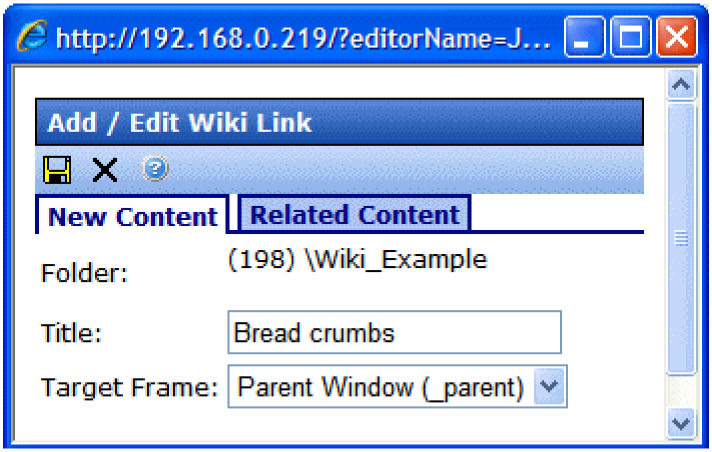
Using the Wiki Button

To create a wiki link using the wiki button, follow these steps.

1. Begin editing a content item. (For CMS users, this is explained in "Editing HTML Content" on page 52. For membership users, this is explained in the **Ektron CMS400.NET** Administrator manual section "Managing Content Folders" > "Community Folders.".)
2. Select the text to which you want to assign a wiki hyperlink. It can be one or several words.
3. Click the Wiki button ( ).

NOTE The Wiki button only appears if you have permission to add content to the folder that contains the current content.

4. The Add/Edit Wiki Link screen appears. It has two tabs.



- Use the **New Content** tab to create a *new content item* into which you will add information later. The new content item will appear when a site visitor clicks the link text.

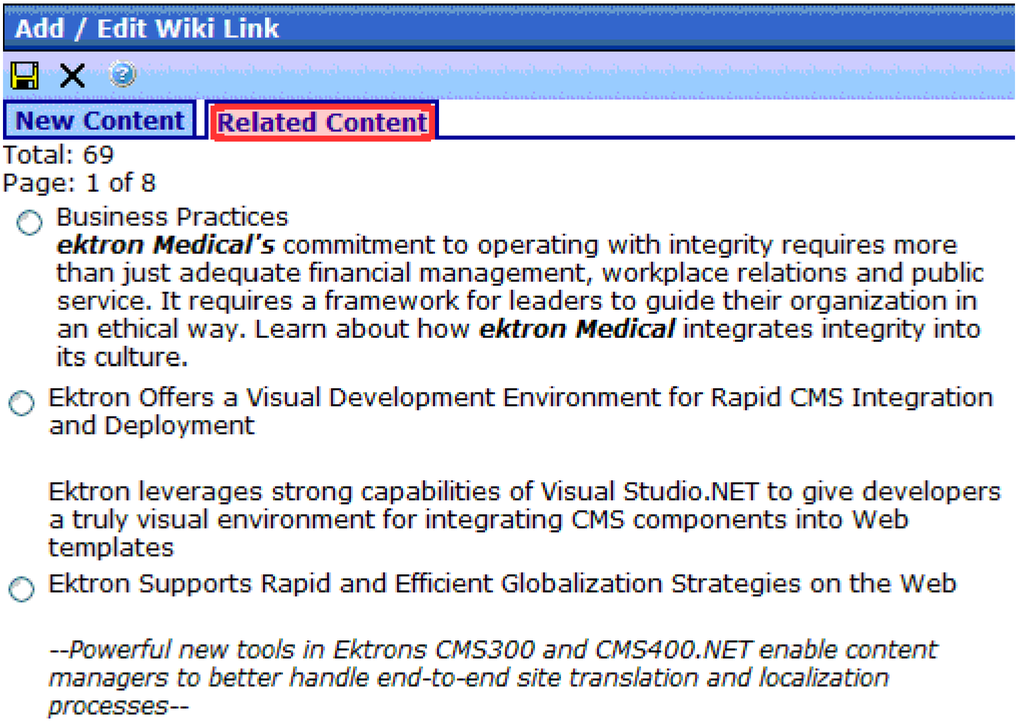
  If you want to place the new content item in the folder that contains the text you are editing, do nothing. To place new content in a different folder, click **Change** and navigate to that folder.

NOTE Membership users do not have an option to assign a folder. The new content is saved to the folder that contains the content to which the wiki is assigned.

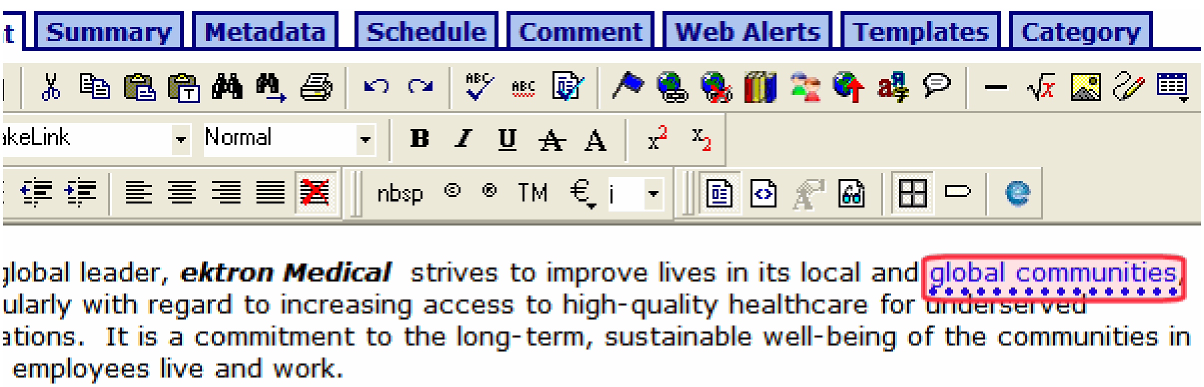
  You can also edit the **Title** and the **Target Frame**. To learn about target frames, see "Changing the Destination Window" on page 767.

- Use the **Related Content** tab to link to an *existing content item*. If you click this tab, **Ektron CMS400.NET** uses the selected text to search the Web site.

  All content with that text then appears on the screen. Each content item's title appears followed by its summary. Click the radio button next to the content you want to link to.



5. To indicate that a wiki to *new content* has been applied, the text color changes to blue and bold, and small dots appear under the wiki text.



If you applied a link to *related content*, a regular hyperlink appears.

Creating a Wiki Link Using Square Brackets

To create a wiki link using square brackets, follow these steps.

1. Begin editing a content item. (For CMS users, this is explained in "Editing HTML Content" on page 52. For membership users, this is explained in the **Ektron CMS400.NET** Administrator manual section "Managing Content Folders" > "Community Folders.")
2. Move the cursor to the left of the text to which you want to assign a wiki hyperlink. It can be one or several words.
3. Insert two open square brackets ([[).
4. Move the cursor to the end of the text to which you want to assign a wiki hyperlink.
5. Insert two close square brackets (]]).
6. Save the content.

Effect of Linking to Existing Content

If you link to existing content, the link is the same as quicklink. See "Using a Quicklink" on page 769

Effect of Linking to New Content

If you are creating new content, **Ektron CMS400.NET** assigns a `<span>` tag to the selected text. See example below.

```
<Span class = "makelink">selected text here</span>
```

When the content is published, **Ektron CMS400.NET**

1. detects the `<span class = "makelink">` tag
2. finds text surrounded by the `<span>` tag
3. creates a new content block in the selected folder

NOTE Membership users cannot select a folder. The new content is created in the folder that contains the source content.

- its name is typically the selected text. However, if the user used the wiki button, he can modify the new content block's title on the Add/Edit Wiki Link screen.
- its initial text is **New Content: content for *selected text***. (Fill in the topic text as you or other collaborators have time.)

4. gets the quicklink for the newly-created content block
5. opens the original content and replaces the `<span>` tag with the quicklink to newly-created content

Section 508 Compliance

IMPORTANT! This section explains how eWebEditPro+XML complies with Section 508 of the Rehabilitation Act. To learn about how the alternative editor, eWebEdit400, complies with Section 508, see ”Section 508 Tables” on page 570.

This section explains how **eWebEditPro+XML** complies with Section 508 of the Rehabilitation Act (a law enacted by the United States government that requires Federal agencies to make their electronic and information technology accessible to people with disabilities).

Specifically, this section explains the following topics.

Moving the Cursor into eWebEditPro+XML

Using Internet Explorer

If the **eWebEditPro+XML** editor is one of several fields on a page, and your browser is Internet Explorer, move to **eWebEditPro+XML** by pressing <Tab> until the cursor lands in the editor.

To move from the editor to the next field, press <Ctrl>+<Tab>.

Using Netscape

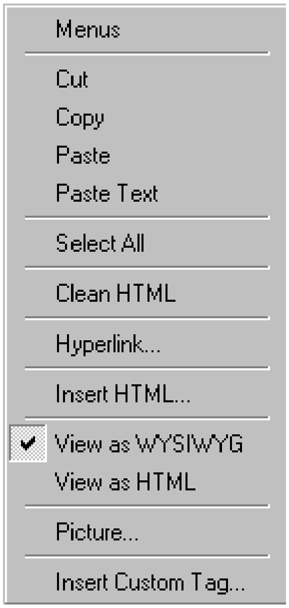
If the **eWebEditPro+XML** editor is one of several fields on a page, and your browser is Netscape, your Webmaster needs to create custom toolbar buttons that let you move into and out of the editor. (This procedure is described in the **eWebEditPro+XML** Developer’s Reference Guide.)

Using eWebEditPro+XML without a Mouse

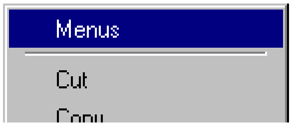
As explained in "Customizing Your Toolbar" on page 645, the **eWebEditPro+XML** toolbar consists of one or more toolbar menus. Menus have buttons that you click with the mouse to perform actions, such as copying text.

This section explains how to perform those actions without using the mouse.

1. With the cursor in the **eWebEditPro+XML** editor, press the application key ( ).
2. A menu appears.

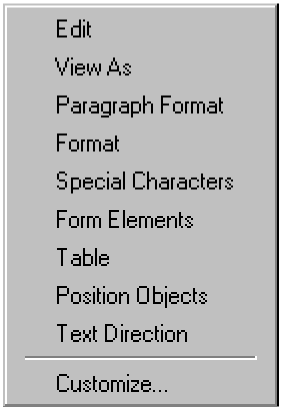


3. Press the down arrow key (↓) to select **Menus**. **Menus** becomes highlighted.

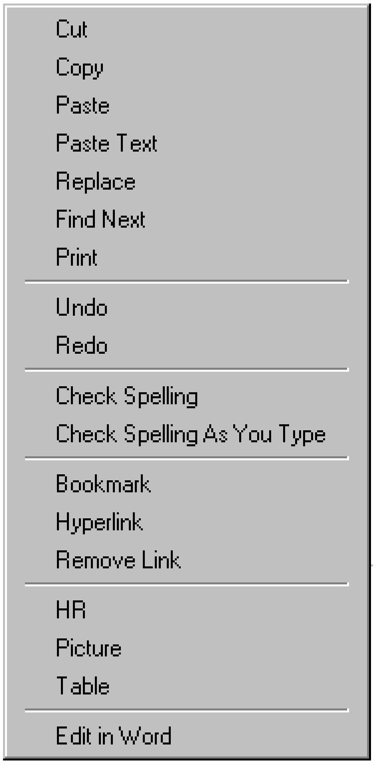


4. Press <Enter>. A new menu lists all toolbar menus available to you.

If your Webmaster has given you access to all standard toolbar menus, the menu looks like this.



5. Press the down arrow key (↓) to select the toolbar menu that has a button that you want to use.
6. A new menu appears, listing all options on the selected menu. The following menu displays what might appear if you select the Edit Menu. (Your Webmaster determines which menu options are available).



7. Press the down arrow key (↓) until the desired option is highlighted. Then, click the option to perform the action.

Section 508 Tables

You can apply the following information to any table to make it 508 compliant.

Information	Where applied	For more information, see
Heading Rows	Accessibility dialog	”Accessibility Dialog” on page 790
Heading Columns	Accessibility dialog	”Accessibility Dialog” on page 790

Information	Where applied	For more information, see
Summary	Accessibility dialog	"Accessibility Dialog" on page 790
Caption	Accessibility dialog	"Accessibility Dialog" on page 790
Horizontal Caption Alignment	Accessibility dialog	"Accessibility Dialog" on page 790
Vertical Caption Alignment	Accessibility dialog	"Accessibility Dialog" on page 790
Abbreviation	Cell properties dialog	"Accessibility Fields on Cell Properties Dialog" on page 792
Categories	Cell properties dialog	"Accessibility Fields on Cell Properties Dialog" on page 792

WARNING! The Section 508 Table Properties dialog only works if Internet Explorer version 6.0 or higher is installed. Once that is installed, any browser can be used (Netscape, FireFox, IE, etc.).

WARNING! Even if you change no values on the screen, you *must* open the Accessibility dialog whenever you modify a table (for example, add a new row). The table's properties, required for Section 508, are generated when you click OK to close the dialog box.

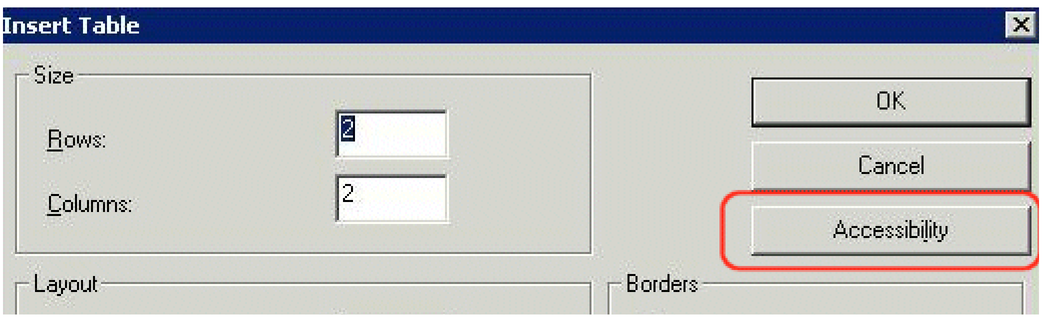
To create a 508 compliant table, follow these steps.

1. Create a new table or edit an existing one, as explained in "Introduction to Tables" on page 719.
2. Select the table by moving the cursor to a table border until you see a four headed arrow (illustrated below). When a table is selected, small squares surround it.

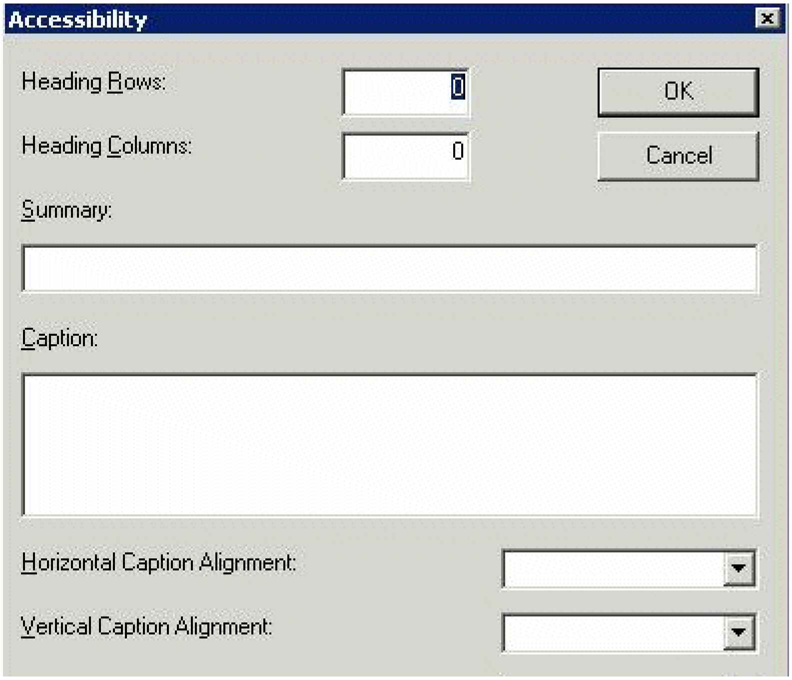
Employee Id	Department
1548	Marketing
1549	Human Resources
1550	Sales
1551	Administration

3. Click the Tables button ( ).
4. Click **Table Properties**.
5. The Table Properties dialog appears.
6. Click the **Accessibility** button.

NOTE Your system administrator can add or remove the **Accessibility** button from the Insert Table dialog.



7. The Accessibility dialog appears.



Accessibility Dialog

Respond to the fields in the dialog. They are described below.

Field	Description
Heading Rows	If you want your table to have a horizontal header, enter the number of rows that it should occupy. Beginning with the top, all cells in the specified number of rows are designated as table headers.
Heading Columns	If you want your table to have a header, enter the number of columns that it should occupy. Beginning with the left column, all cells in the specified number of columns are designated as table headers.
Summary	If desired, enter the table summary. Non-visual browsers can use the summary to explain the contents of the table.

Field	Description
Caption	If desired, enter the table caption. The caption appears centered below the table when viewed.
Horizontal Caption Alignment	If desired, enter the caption's horizontal alignment: • center • left • right
Vertical Caption Alignment	If desired, enter the caption's vertical alignment: • bottom • top

After you complete the Table Properties dialog, click **OK** to make the table comply with Section 508.

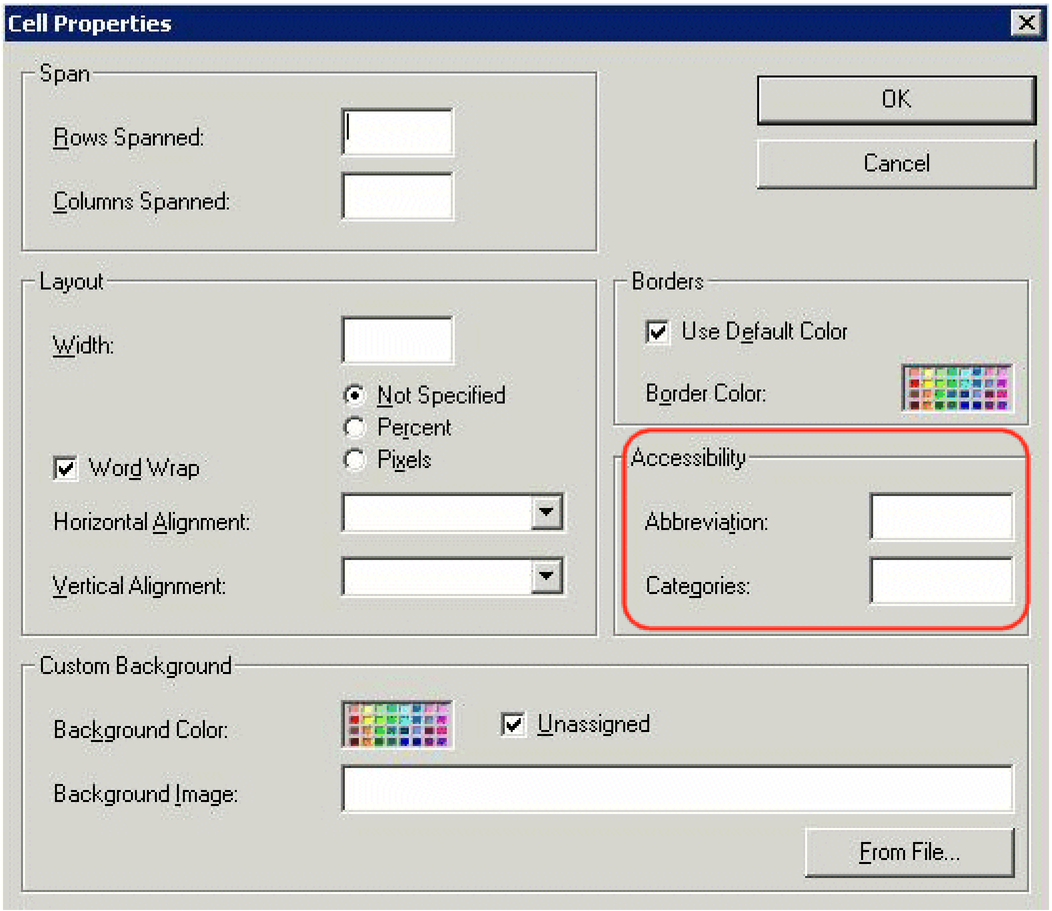
Setting Abbreviation and Category Attributes

You can modify abbreviation (ABBR) and category (AXIS) attributes within a table. To do so, follow these steps.

1. Select one or more cells.
2. RIght click the mouse.
3. Select **Table > Cell Properties**.
4. Access the Cell Properties dialog.

The Cell Properties dialog includes fields that let you adjust the Abbreviation and Category Attribute field values (see illustration below).

NOTE Your system administrator can add or remove the **Accessibility** fields from the Cell Properties dialog.



The following explains how to respond to these fields.

Accessibility Fields on Cell Properties Dialog

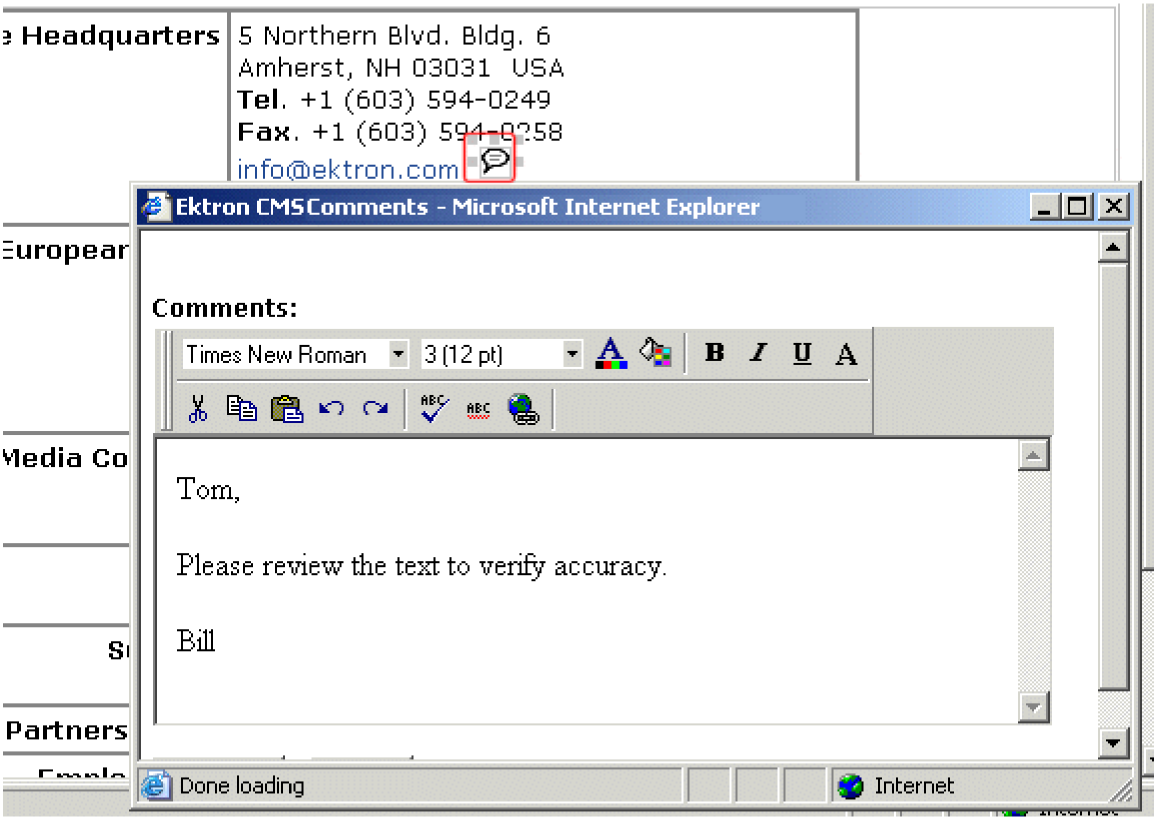
Field	Description
Abbreviation	Sets or retrieves abbreviated text for the content in the tag. Can be used to render non-visual media, such as speech or Braille. For more information, see http://msdn.microsoft.com/library/default.asp?url=/workshop/author/dhtml/reference/properties/abbr.asp

Field	Description
Categories	Sets or retrieves a comma-delimited list of conceptual categories associated with that tag. Can be used to render non-visual media, such as speech or Braille. For more information, see http://msdn.microsoft.com/workshop/author/dhtml/reference/properties/axis.asp

Inserting Comments within Content

While editing **Ektron CMS400.NET** content, you can insert comments to the content. Comments might be an author's note to himself or other authors about the content. For example, you could insert a comment explaining why you are using a certain style class.

Comments are only visible during editing -- they do not appear when the content is published on your Web site.



Other users can add comments to your comments. This feature is know as “Content Collaboration.”

Similar to other word processing programs, comments can be added, updated, and tracked to audit changes being made.

This section explains the content collaboration feature.

WARNING! Do not confuse these comments, which are inserted within the content, with history comments, which are inserted outside the content and used to indicate what changed during an editing session.

Adding Comments to Content

To add a comment to content, follow these steps.

1. Create new content or edit existing content. *See Also:* ”Adding HTML Content” on page 48
2. In the editor, place the cursor where you want to insert the comment.
3. On the *editor* toolbar, click the **Insert Comment** button ( ).
4. The Ektron CMS Comment window opens.
5. Insert a comment. Use the toolbar to format the text if desired.
6. Click the **Insert** button.
7. The comment is saved.
8. Click the **Close** button.
9. The comment window closes, and a comment icon is placed where the comment was added to the content.

.

Each comment appears in the table at the top of the window. From this window, you can add another comment and update an existing one. See the next section for more details.

Viewing a Comment

After a comment is inserted into content, it can be viewed by any user who can edit the content. To view a comment, follow these steps.

1. Edit the content that contains the comment.
2. Within the content, double-click the comment icon.

3. The Comments window opens.

Adding Another Comment

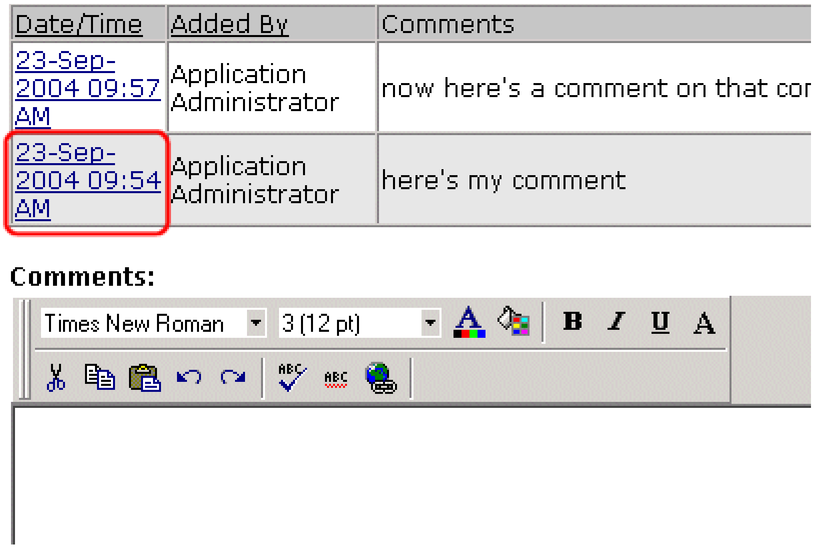
To comment on an existing comment, follow these steps.

1. Access the View Comment window for the comment, as described in "Viewing a Comment" on page 796.
2. Insert the comment.
3. Click the **Insert** button**.**
4. The comment is saved and added to the top row of the comment table.
5. Click the **Close** button.

Updating a Comment

You can change a comment if needed. To update a comment, follow these steps.

1. Access the View Comments window for the comment that needs to be updated.
2. Click the **Date/Time** link of the comment you want to edit.



3. The comment editor opens with the selected comment in it.
4. Update the comment.
5. Click the **Update** button to save the changes.

Appendix A: Content Statuses

The table below describes all possible content statuses. The rest of this appendix explains each status in more detail.

Letter	Border Color	Meaning	Content state	More Information
A	green	**Approved**	Through the workflow and published on the Web site.	"Approved Content" on page 799
O	red	**Checked Out**	Currently being edited. Has not been checked in.	"Checked Out Content" on page 802
I	green	**Checked In**	Checked in for other users to edit.	"Checked-In Content" on page 800
S	yellow	**Submitted for Approval**	Saved and submitted into the approval chain. *See Also:* "Approving/ Declining Content" on page 87	"Submitted Content" on page 803
M	yellow	**Marked for Deletion**	Requested for deletion.	"Marked for Deletion Content" on page 804
P	grey	**Pending Go Live Date**	Approved but the Go Live date hasn't occurred yet.	"Pending Start Date Content" on page 805
T		**Awaiting Completion of Associated Tasks**	Task(s) assigned to content are not complete	

Letter	Border Color	Meaning	Content state	More Information
D		**Pending Deletion**	Content was created with a future start date then checked in and deleted. This status only remains until the start date is reached. At that point, the content is deleted.	

Approved Content

If content has a green border, it is live on the Web site.

When content is approved, you can perform the following actions on it, depending on your permissions.

.

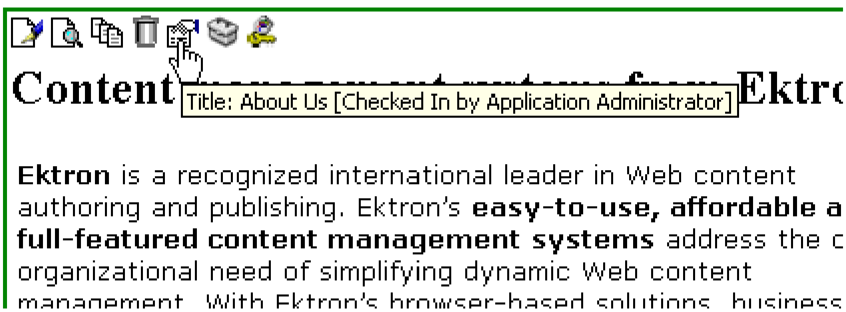
Button	Dropdown Menu Option	Description	For more information, see
	Check out and Save as	Check content out and save on your computer	”Checking Out, Saving, and Replacing an Office Document” on page 247
	Save as	Save copy of file to your computer	”Saving an Office Document” on page 249
	Edit or Edit in Office	Check out the content to change it	• ”Editing HTML Content” on page 52 • ”Editing a Managed File” on page 256 • ”Editing an Office Document” on page 244

Button	Dropdown Menu Option	Description	For more information, see
	Edit Properties	Edit content's summary, metadata, schedule, comment, etc.	
	View, View in Office, or View Properties	View all information about content	"Viewing Content from the Workarea" on page 41
	Delete	Submit a request to delete the content. If you are the last or only approver, the content is immediately deleted. *See Also:* "Example of an Approval Chain" on page 91	"Deleting Content" on page 57

Checked-In Content

If content has a green border, it could mean that the content is checked in. A checked-in content item is one to which changes were made, after which it was checked in instead of being submitted or published. When content is checked in, it is accessible to all users who have permissions to edit it. They can check it out and change it.

Keep in mind that the content seen on the template is not the same as the content in the editor view.



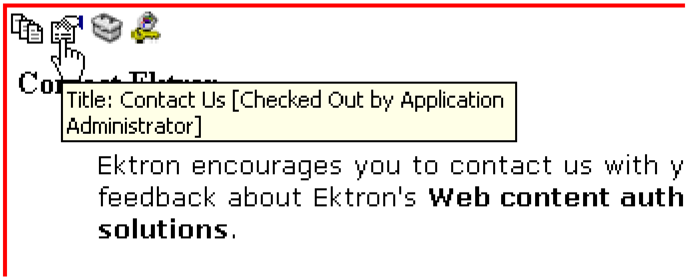
See Also: "Example of an Approval Chain" on page 91

Each option you may perform on checked-in content is described below.

Button	Name	Description	For more information, see
	Check out and Save as	Check content out and save on your computer	”Checking Out, Saving, and Replacing an Office Document” on page 247
	Save as	Save copy of file to your computer	”Saving an Office Document” on page 249
	Edit or Edit in Office	Check out the content to change it.	• ”Editing HTML Content” on page 52 • ”Editing a Managed File” on page 256 • ”Editing an Office Document” on page 244
	Edit Properties	Edit content’s summary, metadata, schedule, comment, etc.	
	View, View in Office, or View Properties	View all information about content	”Viewing Content from the Workarea” on page 41
	Delete	Submit a request to delete the content. If you are the last or only approver, the content is immediately deleted. *See Also:* ”Example of an Approval Chain” on page 91	”Deleting Content” on page 57
 	Submit/Publish	Submit content into approval chain. If you are last approver in the approval chain, the publish button/option appears. If you click it, the content is immediately posted to Web site.	”Asset Workflow” on page 258

Checked Out Content

If content has a red border, it was checked out by a user other than you. (If you checked it out, the border is green.) While in this status, other users are prevented from editing it.



The content remains checked out until it is checked in by the user who checked it out or a system administrator. Only the user who checked out the content can edit it.

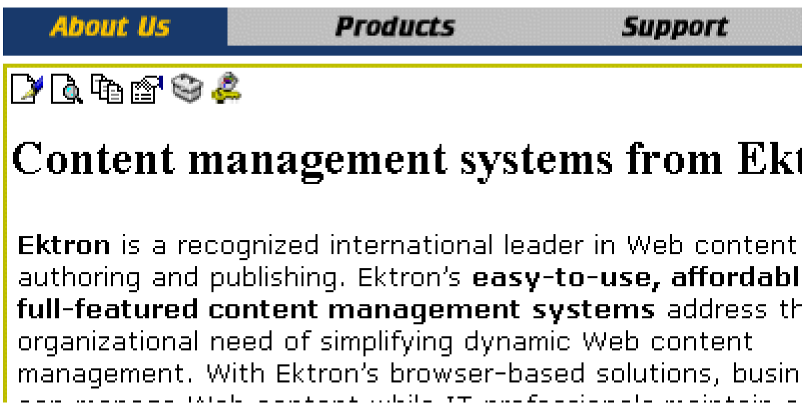
Each option you may perform on checked-out content is described below.

Button	Name	Description	For more information, see
	Check In	Check in content. Only appears to user who checked content out.	
	Force Check In	Only appears if user is a member of the Administrator group and content is checked out. Allows the admin to check in content even though he is not the one who checked it out.	
	Request Check In	Allows any user to send an email to the user who checked out content. The email asks the check-out user to check in the content.	
	Save as	Save copy of file to your computer	"Saving an Office Document" on page 249

Button	Name	Description	For more information, see
	Edit or Edit in Office	Check out content to change it. (Only available to user who checked content out.)	• "Editing HTML Content" on page 52 • "Editing a Managed File" on page 256 • "Editing an Office Document" on page 244
	Edit Properties	Edit content's summary, metadata, schedule, comment, etc.	
	View, View in Office, or View Properties	View all information about content	"Viewing Content from the Workarea" on page 41

Submitted Content

A yellow border shows that a user submitted the content into the approval chain. The border remains yellow until the content is published or declined. While the content is in the approval chain, no user can check it out.



See Also: "Example of an Approval Chain" on page 91

Each toolbar button is described below.

Button	Name	Description
	Approve	Approve and publish the content to the Web site. Note: Only the last approver in the chain has this option. *See Also:* ”Example of an Approval Chain” on page 91
	Decline	Refuse to publish the submitted content, and change its status to checked-in. Note: Only members of the approval chain have this option. This button rejects the changes and keeps the current version live on Web site. The approver is prompted to enter a reason for the decline. After the decline option is completed • The author who made the change is notified by email • The content is removed from the Approval Chain If an author updated content then submitted it for approval, the updated content remains in the file. If you do not want it to remain, choose the **Edit** option. Approvers are prompted to publish or decline content changes as well as requests to delete content.
	Edit	Check out the content and edit it. Only the user who submitted the content has this option. Note: If you edit the content, you need to resubmit it to the approval chain.
	View, View in Office, or View Properties	View all information about content

Marked for Deletion Content

Content that is *marked for deletion* has been requested to be removed from the Web site by a user. When content is marked for deletion, it passes through the approval chain like content that is submitted for publishing. When the content completes the approval chain, it is deleted from the Web site.

See Also: ”Example of an Approval Chain” on page 91

The table below describes the toolbar buttons.

Button	Name	Description
	Delete	Approve the deletion request. Note: If you are the last user in the approval chain, the content is deleted when you click this.
	Decline	Refuse the deletion request. This sends the content back into a checked-in status.
	Save As... (for assets only)	Save copy of file to your computer. *See Also:* "Saving an Office Document" on page 249
	View	View information about content

Pending Start Date Content

Content that is pending a Go Live date has been approved, but its start date and time have not occurred yet.

Button	Name	Description
	Edit	Check out the content and edit it. Only the user who submitted the content has this option. Note: If you edit the content, you need to resubmit it to the approval chain.
	View, View in Office, or View Properties	View all information about content

Staged Content

A staged version of content is one that is not published. It can be content that is checked in, or content that is approved with a pending a start date.

Staging lets you make changes to content, while keeping it from the Web site until you are ready to publish it.

See Also: "After you select the content, you have the following options." on page 43; "Appendix A: Content Statuses" on page 798; "Workflow in Ektron CMS400.NET" on page 8

Index

Note: All eWebEdit400 entries are listed under eWebEdit400.

F

G

H

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