OnTrek

Ektron 8.5

OnTrek in Ektron Reference

Ektron 8.5

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For the latest version of this manual, go to
http://www.ektron.com/Resources/Product-Documentation/

Trademarks

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Ektron OnTrek Requirements

OnTrek has the following requirements.

- OnTrek works for both CMS Users and Membership Users.
- When you use eSync to update your server from the OnTrek site, you must manually copy the `application.config` and `application.security.config` files to the [*siteroot*]; eSync does not automatically synchronize these files for security reasons. Also synchronize the bin directory when you synchronize the database and templates to ensure that `skmValidators.dll` is synchronized.
- Do not disable aliasing. If you do, the site will break.
- Do not delete the pre-defined Information Architecture implemented via Ektron Taxonomy, Menu, and Folder components. If you do, the site will break.

application.config

The `application.config` file is located at the `[siteroot]` folder of OnTrek.

```
<?xml version="1.0"?>
  <appSettings>
  <!-- Site specific keys -->
  <add key="SiteTitle" value="OnTrek" />
  <add key="LoadDefaultThemeRollerTheme" value="false" />
  </appSettings>
```

This file contains application-specific keys as follows.

1. **SiteTitle** key—Sets what shows up in the Browser's Title bar. For example, the browser title bar on the Products page is *OnTrek: Products*.
2. **LoadDefaultThemeRollerTheme** key—Determines whether to load its own jQuery UI ThemeRoller theme for any Ektron component. Some Ektron components require a jQuery UI ThemeRoller theme to render properly in a browser. This key defaults to `true`. You should set this to `false` only if the site has its own ThemeRoller theme. You can apply these components to three use-cases relative to ThemeRoller themes:
    - In the Workarea where the component needs to load the Workarea theme (the orange one).
    - In a Web site that has its own ThemeRoller theme, in which case, the component must load its own ThemeRoller theme (named "Smoothness" – which is silver) for the component to work properly.
    - Outside the Workarea in a Web site that does not have its own ThemeRoller theme, in which case, the component must NOT load its own ThemeRoller theme (and use the ThemeRoller theme provided by the site) because it otherwise would overwrite the site's ThemeRoller theme.

application.security.config

The `application.security.config` file is located at the [*siteroot*] folder of OnTrek. The alias paths are placeholders (and are commented out). You can set up secure pages by using these aliases, or by the template (`.aspx`). Templates can be accessed by multiple aliases.

```
<?xml version="1.0"?>
  <!-- paths are from root.  aliases must exactly match rawurl. -->
  <!-- template example:
    /example.aspx, and /folder-1/folder-2/example.aspx -->
  <!-- alias example:
    /Secure-Section/, and /Secure-Section/Super-Secure-Section/ -->
  <ektron:SecureRequests xmlns:ektron="urn:Ektron.OnTrek.Security">
  <!-- <ektron:template path="/checkout.aspx" /> -->
  <!-- <ektron:template path="/account.orderHistory.aspx" /> -->
  <!--
    <ektron:alias path="/" />
    <ektron:alias path="/" />
  -->
</ektron:SecureRequests>
```

WARNING! The `checkout.aspx` and `account.orderHistory.aspx` files are commented out to permit checkout to proceed without using a Secure Socket Layer (SSL) for demonstration purposes only. Your transactions will **not** be secure unless you set up SSL and uncomment those files. We highly recommend for any eCommerce implementation that you set up SSL for secure transactions. For information about setting up SSL, see .

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Introducing Ektron OnTrek

OnTrek is a starter site that is built on Ektron.

You can modify many things directly on the OnTrek site through the CMS Workarea, the in-context editor from the access point (), or from the PageBuilder menu (dropping a widget onto the page). OnTrek uses PageBuilder technology that lets you drag and drop blocks of functional content called widgets onto the page. Some widgets are so flexible, you can put what you want in them and display them at specified times or conditions.

You can access the *Ektron Developer Reference* (EDR) with a click in OnTrek. The EDR provides information about the Ektron API and Ektron UI controls. (You also can access the EDR at http://reference.ektron.com.)

Additionally, you can modify the site itself through the ASP.NET templates and user controls in your installation hierarchy, using Microsoft Visual Studio or similar tool. This *OnTrek in Ektron Reference* describes direct manipulation of the starter site and does not contain information about modifying the templates or user controls. Developers of .NET templates and user controls can refer to *Ektron Users Guide: Building an Ektron Powered Website* and the *Ektron Reference*.

- Templates (`.aspx` files) and PageBuilder templates (`.pb.aspx` files) in the ***[siteroot]*** folder of the installation.
- Master pages—***[siteroot]*** **> OnTrek > components > templates.**
- User controls—***[siteroot]*** **> OnTrek > components > userControls**.

Revenue Generation

- Sell products and services from the Web site.
- Analyze customer activity to increase site traffic and sales conversions.

Customer Loyalty and Satisfaction

- Promote your company brand and provide promotional and customer events.
- Communicate with your customers through social networking and product ratings.
- Support customers with forums, knowledge base, and technical support.

Operational Efficiency

- Track customer purchases and support cases.
- Attract top talent to your organization.
- Ektron OnTrek Requirements—Read this topic before you get started.
- Touring Ektron OnTrek Site—Read this topic to see how OnTrek is laid out.
- *Ektron OnTrek Reference* (PDF)—Open a PDF version of this document.
- *Ektron Reference*—Open the Ektron Reference.
- http://www.ektron.com/Resources/Product-Documentation/—Get the latest versions of Ektron documentation.

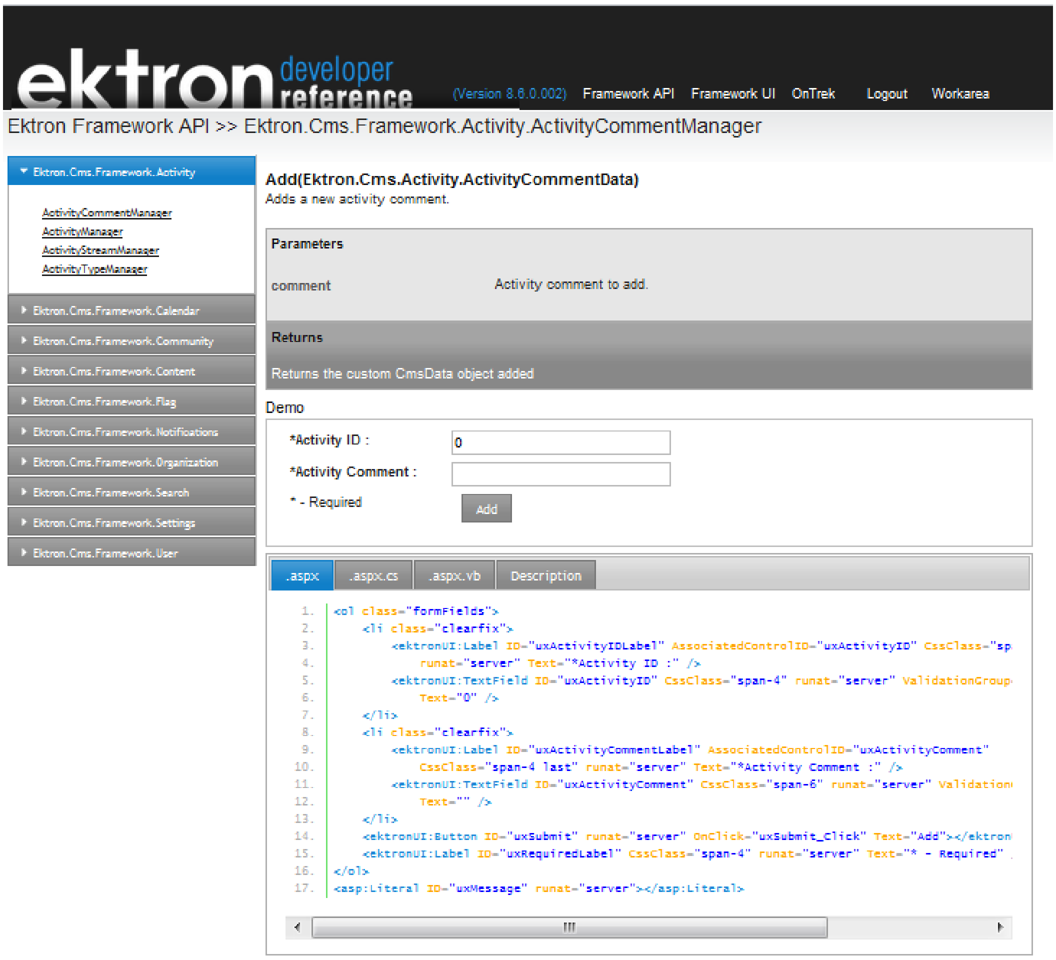
Touring Ektron OnTrek Site

OnTrek comes with the following pre-built pages and templates.

Home Page

OnTrek provides a home page design from which you can start customizing your Web site. The home page displays dynamic up-to-date content about your company, providing access to your products, services, and other company information. For information about modifying the home page, see *Modifying the OnTrek Home Page* on page 27. The following figure shows the Home Page when you are logged in as *Admin*.

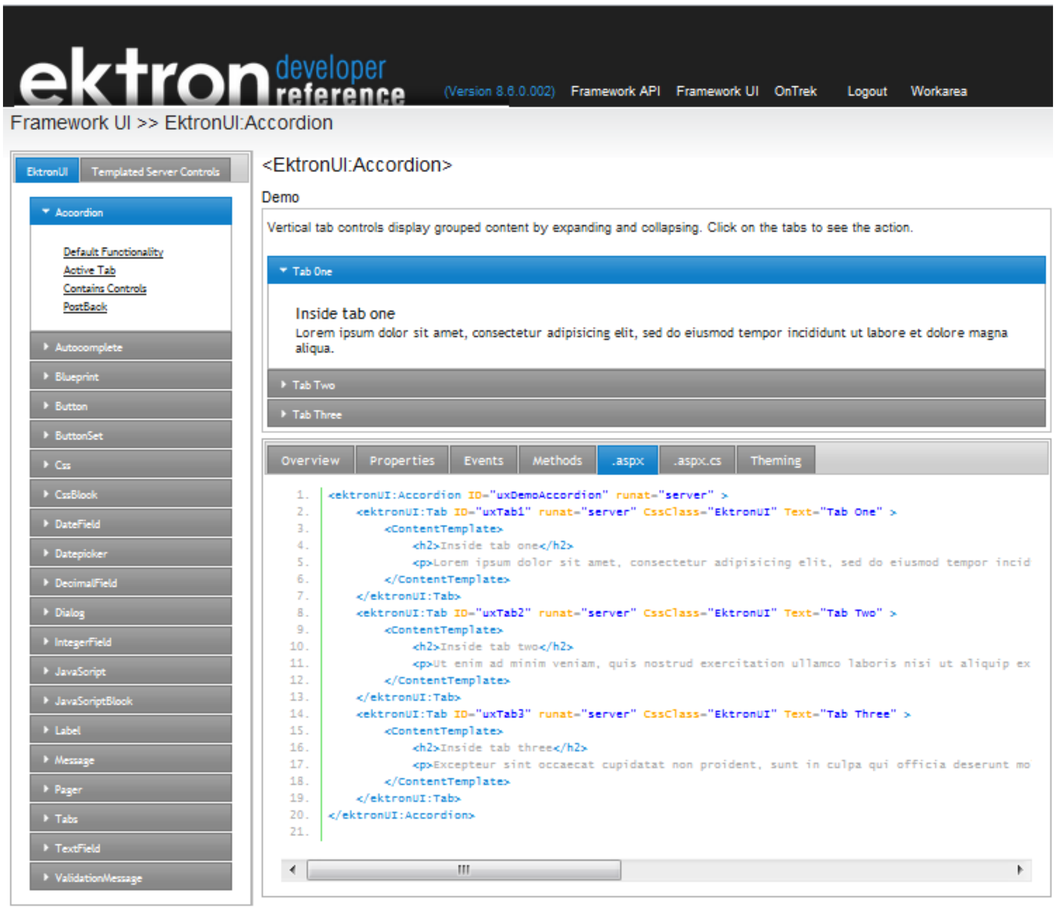
The following images show the Ektron Developer Reference that you can access from the Home page.


ektron developer reference
(Version 8.6.0.002) Framework API Framework UI OnTrek Logout Workarea
Ektron Framework API >> Ektron.Cms.Framework.Activity.ActivityCommentManager
Ektron.Cms.Framework.Activity
ActivityCommentManager
ActivityManager
ActivityStreamManager
ActivityTypeManager
Ektron.Cms.Framework.Calendar
Ektron.Cms.Framework.Community
Ektron.Cms.Framework.Content
Ektron.Cms.Framework.Flag
Ektron.Cms.Framework.Notifications
Ektron.Cms.Framework.Organization
Ektron.Cms.Framework.Search
Ektron.Cms.Framework.Settings
Ektron.Cms.Framework.User
Add(Ektron.Cms.Activity.ActivityCommentData)
Adds a new activity comment.
Parameters
comment
Activity comment to add.
Returns
Returns the custom CmsData object added
Demo
*Activity ID :
0
*Activity Comment :
* - Required
Add
.aspx
.aspx.cs
.aspx.vb
Description
<ol class="formFields">
<li class="clearfix">
<ektronUI:Label ID="uxActivityIDLabel" AssociatedControlID="uxActivityID" CssClass="sp
runat="server" Text="*Activity ID :" />
<ektronUI:TextField ID="uxActivityID" CssClass="span-4" runat="server" ValidationGroup
Text="0" />

<li class="clearfix">
<ektronUI:Label ID="uxActivityCommentLabel" AssociatedControlID="uxActivityComment"
CssClass="span-4 last" runat="server" Text="*Activity Comment :" />
<ektronUI:TextField ID="uxActivityComment" CssClass="span-6" runat="server" Validation
Text="" />

<ektronUI:Button ID="uxSubmit" runat="server" OnClick="uxSubmit_Click" Text="Add"></ektron
<ektronUI:Label ID="uxRequiredLabel" CssClass="span-4" runat="server" Text="* - Required"

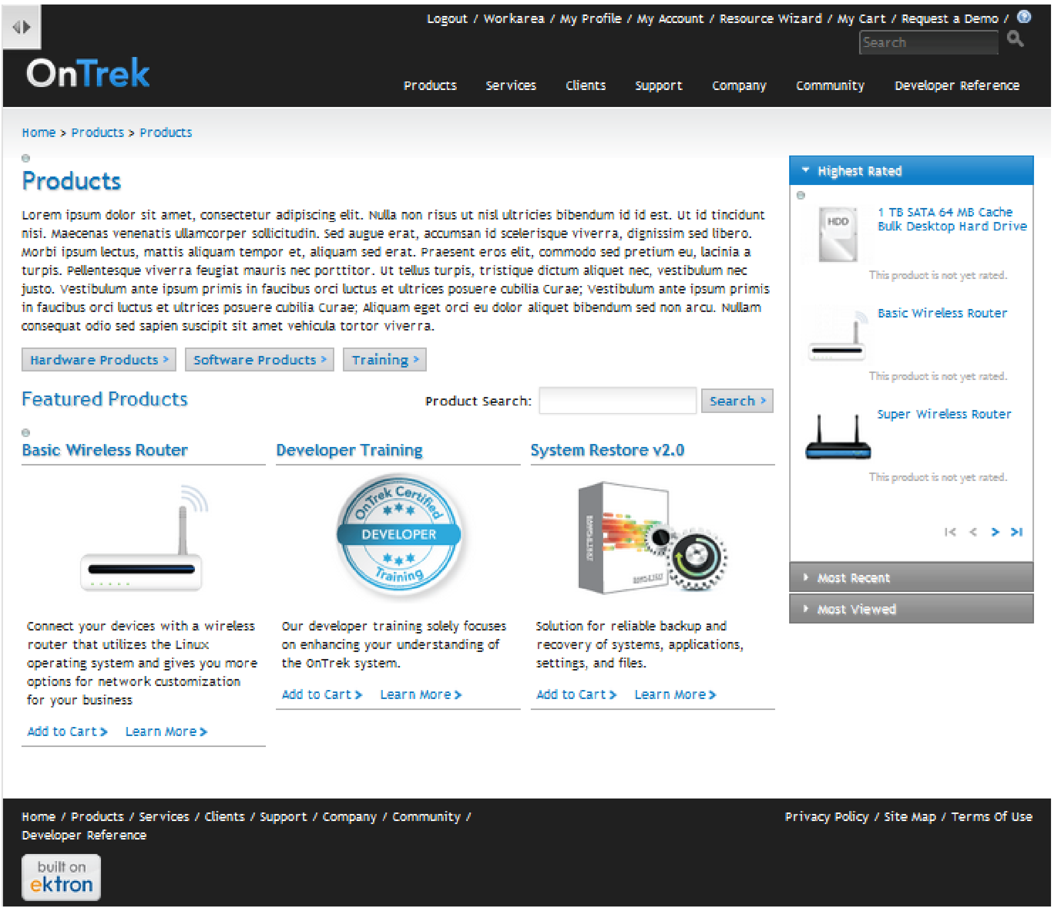
<asp:Literal ID="uxMessage" runat="server"></asp:Literal>



Products Page

Displays the products you want to sell. The default OnTrek Products page contains the building blocks to get your products and services up for sale. To modify these pages, see *Modifying the Products Pages* on page 37.

- Secure purchasing.
- Search, filter, and browse products.
- Promote highest rated, most purchased, newest, most bookmarked, and most shared products to cross-sell, up-sell, and customer-sell your products.
- Add items to a purchasing cart or wish list.
- The text block introduces your products and can be edited on the page or in the Workarea content. (See .)
- Displays a short description and optional image of the product with links to go to a Product Detail page, or to add the product to the customer's cart.

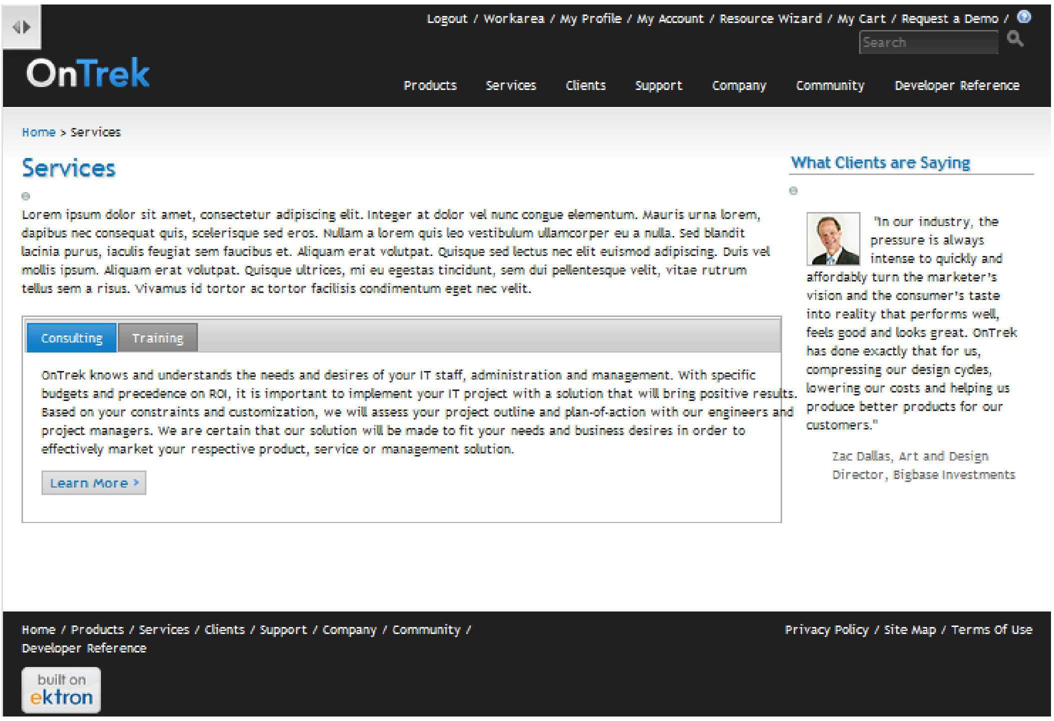


Services Page

Displays the services you want to provide:

- Training
- Consulting
- Installation
- Contact information for representatives

To modify the Services pages, see *Modifying the Services Pages* on page 47.

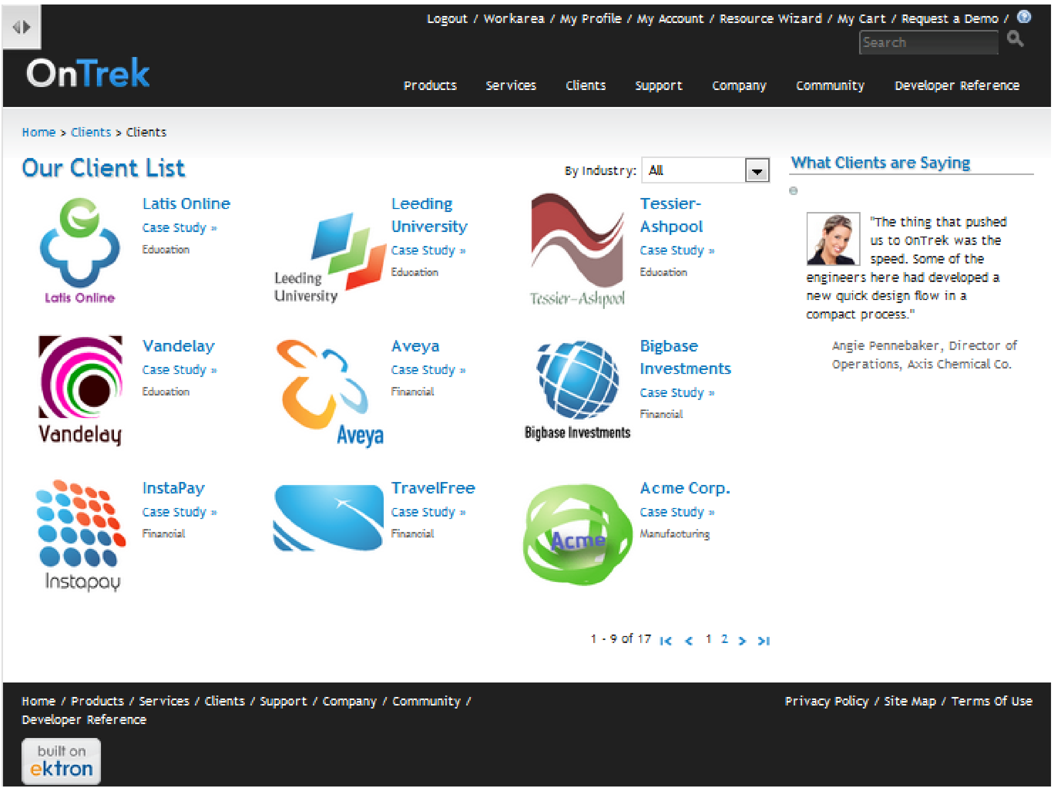


Clients Page

Contains the building blocks to display your client list and successful partnering stories and case studies.

- Client biographies
- Testimonial quotes and videos

To modify these pages, see *Modifying the Clients Pages* on page 53

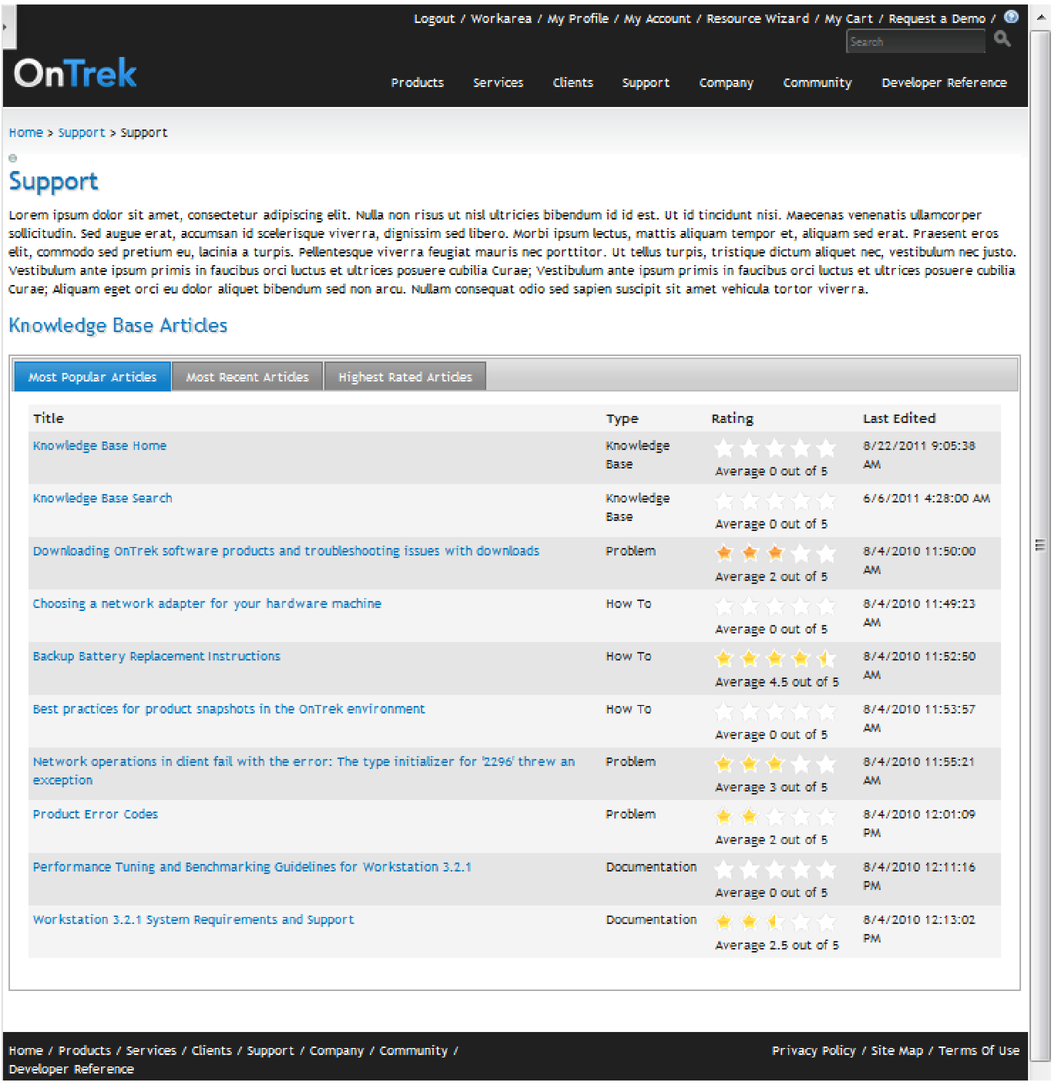


Support Page

Contains the building blocks for you to place information and knowledge into the hands of your customers.

- Host customer forums about your products
- Maintain a knowledge base and FAQs
- Handle online support requests

To modify these pages, see *Modifying the Support Pages* on page 58.

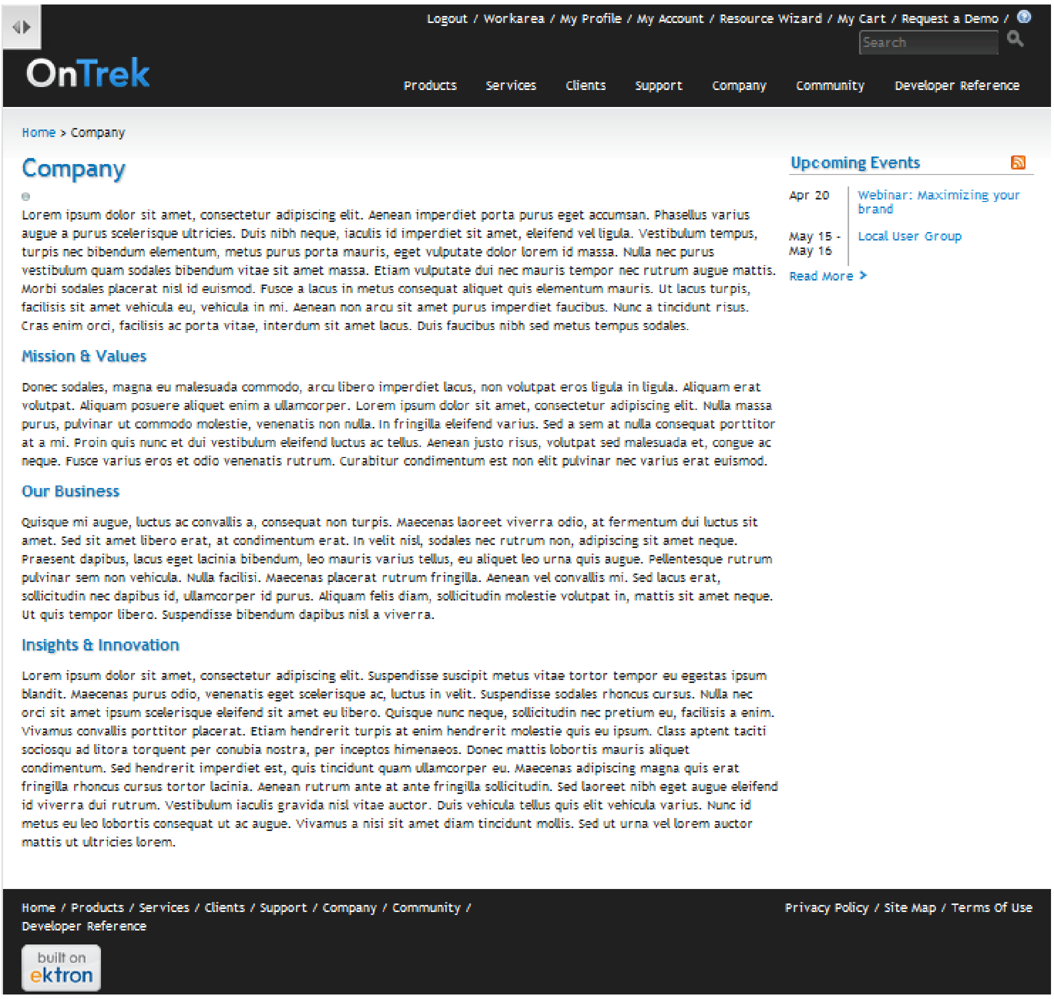


Company Page

Contains the building blocks to display information about your company. Related Company pages include the following information:

- News Articles Page
- Events
- Our team
- Careers
- Office Locations
- Contact Information

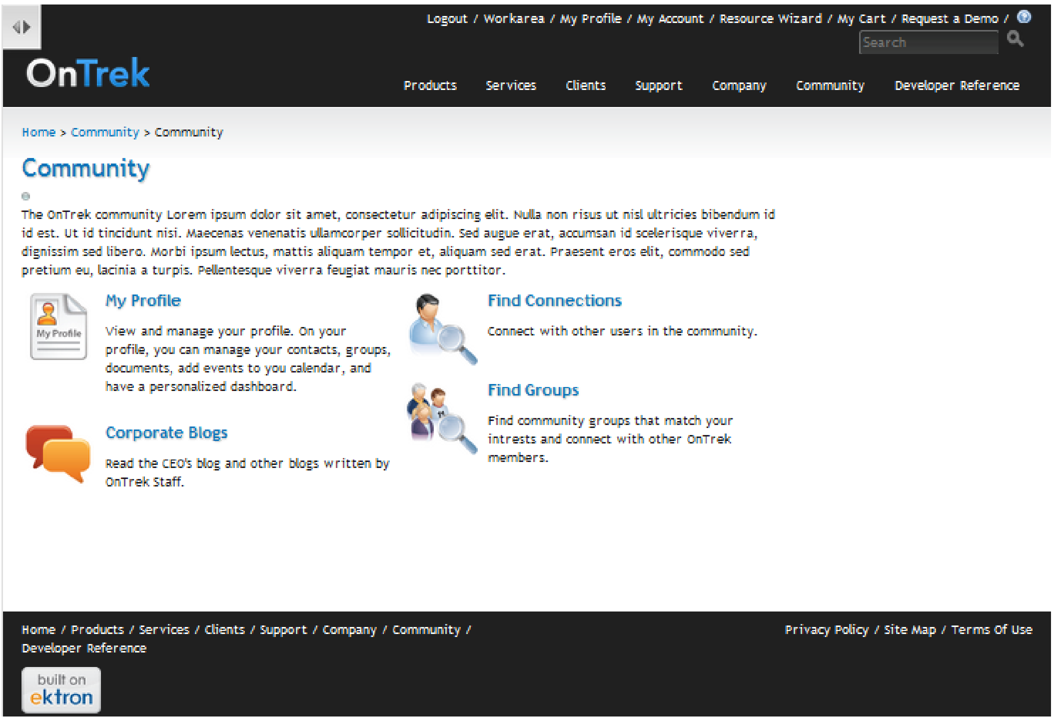
To modify these pages, see *Modifying the Company Pages* on page 69.



Community Page

Contains the building blocks to create a social networking community and can display customer-driven information about your products and services. To modify these pages, see *Modifying the Community Pages* on page 80

- Registration and login
- Custom dashboard and user profile for each user
- Social networking forums to discuss, propose, and answer
- Blogs

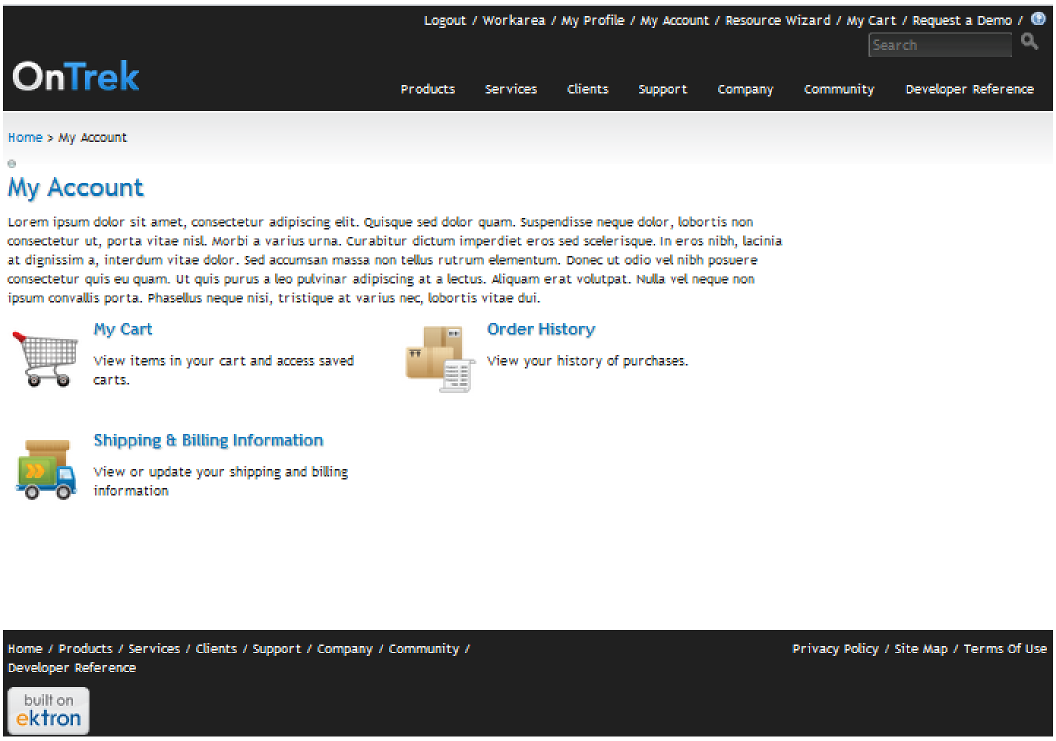


My Account Page

Contains the building blocks to create an account for a registered user. You also can do the following in this area.

- My Cart
- Order History
- Shipping and Billing Information

To modify these pages, see *Modifying the My Account Pages* on page 103.



Search Page

Search the site for content using sorting, relevance, date, and other filters.

More information: *Searching the Site* on page 32

Widgets

Functional content blocks that you drag and drop onto a PageBuilder page.

More information: *Using Widgets in OnTrek* on page 119

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Modifying the OnTrek Web Site

You can customize the OnTrek Web site to suit your organization. The following sections describe managing your site.

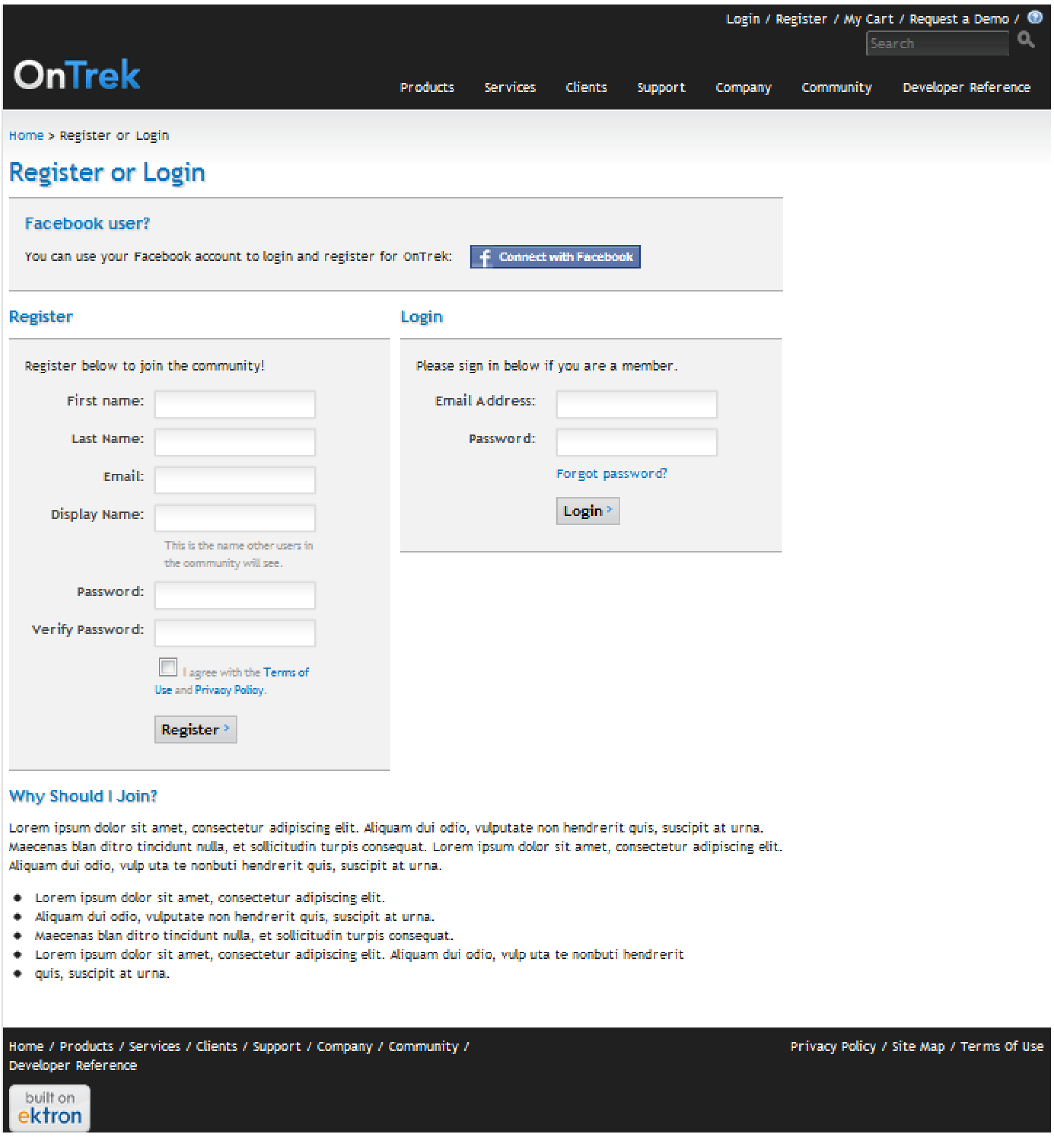
- *Logging into OnTrek* below
- *Logging in With a Facebook Account* on next page
- *Registering a User* on page 24
- *Using the Smart Desktop to Manage Your OnTrek Site* on page 25
- *Managing Site Permissions* on page 26

The following topics describe how to modify the landing pages and their associated sub-pages.

- *Modifying the OnTrek Home Page* on page 27
- *Modifying the Products Pages* on page 37
- *Modifying the Services Pages* on page 47
- *Modifying the Clients Pages* on page 53
- *Modifying the Support Pages* on page 58
- *Modifying the Company Pages* on page 69
- *Modifying the Community Pages* on page 80
- *Modifying the My Profile Page* on page 91
- *Modifying the My Account Pages* on page 103
- *Modifying Site Styles* on page 112

Logging into OnTrek

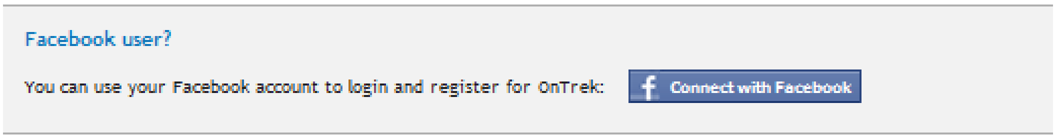
You can log into OnTrek by clicking Login on the main page. The Register or Login page appears as shown in the following figure.



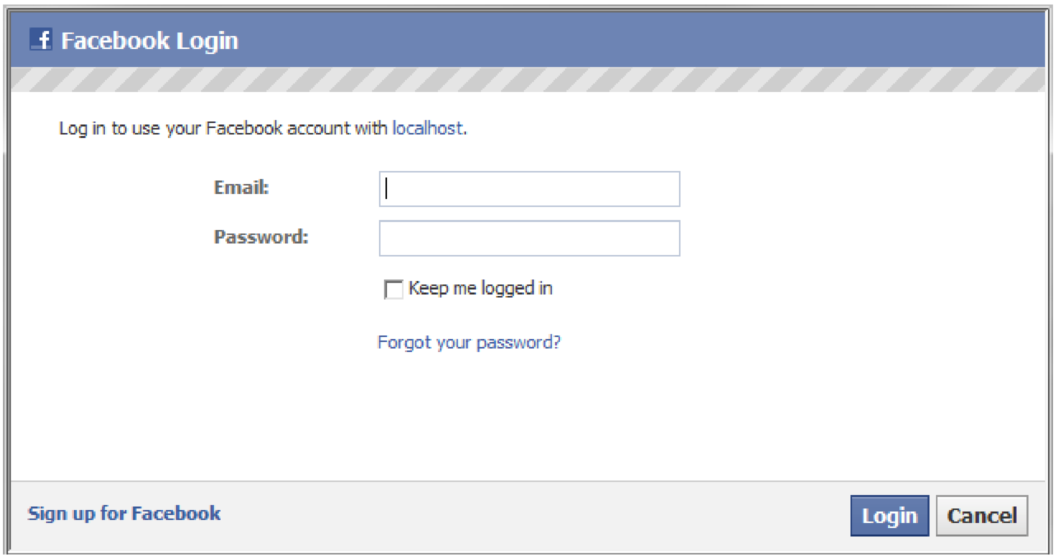
- If you are modifying the OnTrek site, you can enter `admin` in the Email Address field and `admin` in the Password field and login with full editing privileges.
- If you are an existing user, enter your email address and password. Your privileges are determined by a site administrator.
- If you are a Facebook user, you can login in using your Facebook account credentials by clicking **Connect with Facebook**. Your privileges are determined by a site administrator. For more information, see *Logging in With a Facebook Account* below.
- If you are a new user, use the register block to join the community. Your privileges are determined by a site administrator. For more information, see *Registering a User* on page 24.

Logging in With a Facebook Account

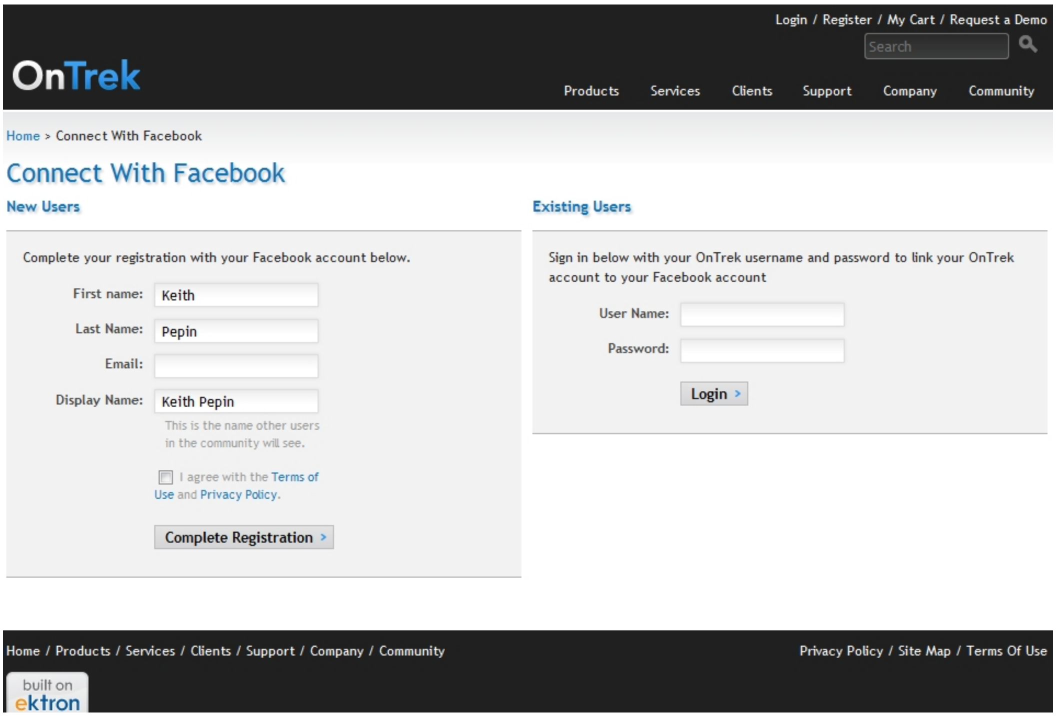
You can use your Facebook account credentials to login to OnTrek by following these steps.



1. Click **Connect with Facebook** on the login screen. The Facebook Login screen appears.



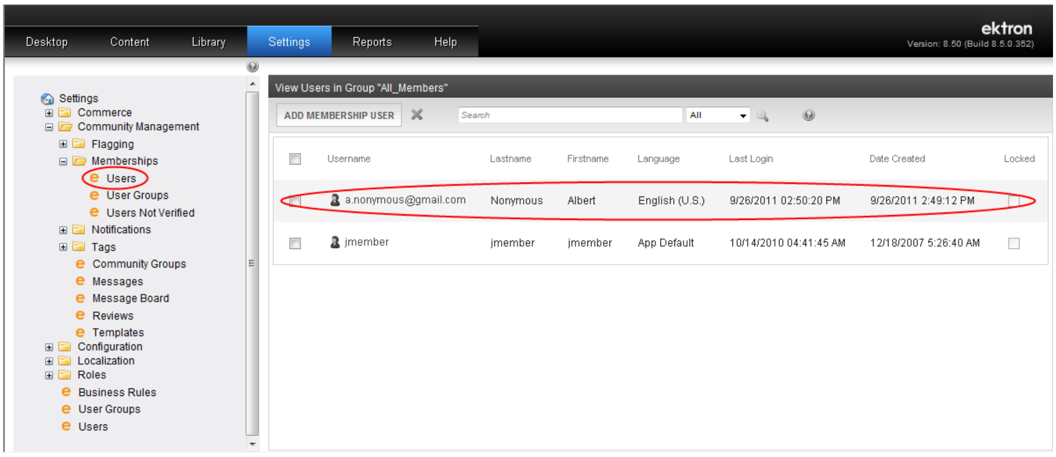
2. New users can register by filling out the form and clicking **Complete Registration**. Existing users can enter their User Name and Password and click **Login**.



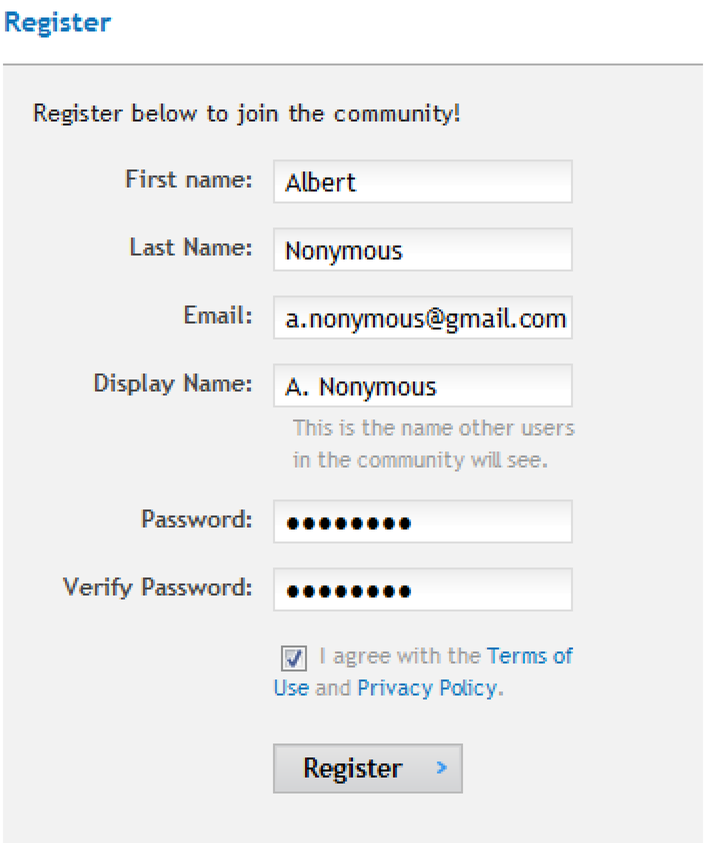
To set up the Facebook login, see *Developer Experience: Setup Instructions* in the [Ektron Reference](). The user control files are located at `[siteroot]/OnTrek/facebookRegister.aspx` and `facebookRegister.aspx.cs`.

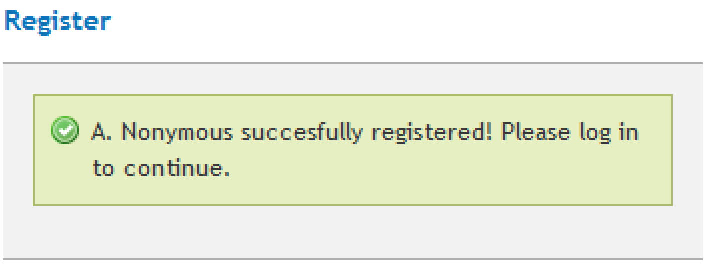
Registering a User

When someone registers to become part of the online community you set up, the user information is stored in the Settings section of the Workarea at **Settings > Community Management > Memberships > Users**.

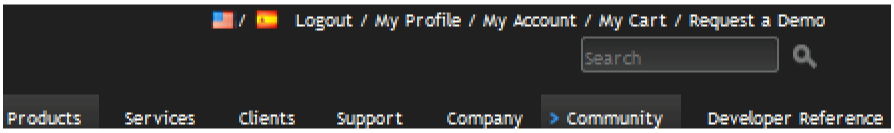


To register as a member of the online community, fill in the Register form and click **Register**. A confirmation dialog box appears.

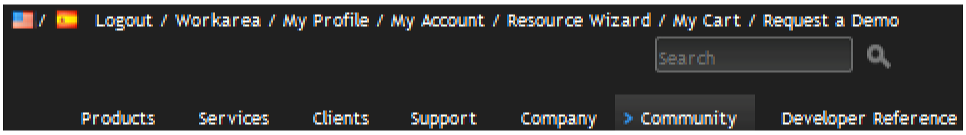




A registered member has limited options in the activity panel, as shown in the following figure.



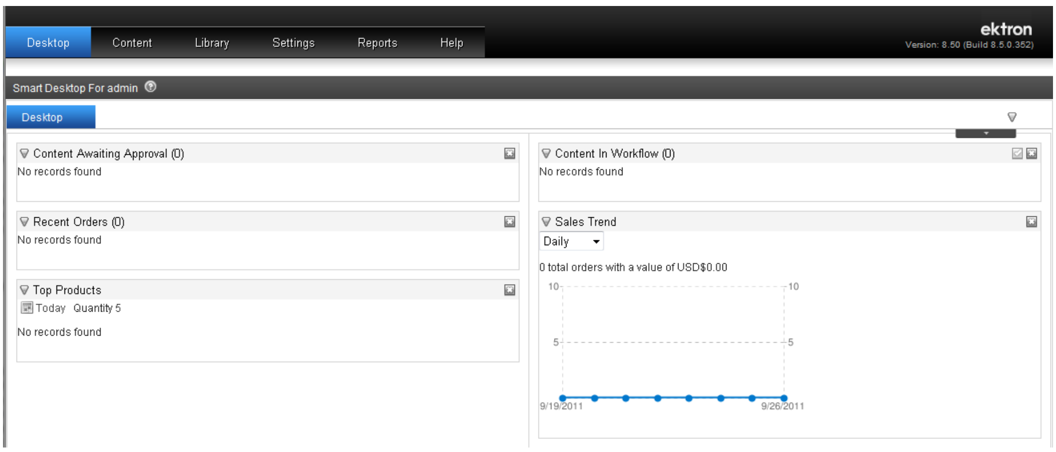
By contrast, an administrator has the following options.



Using the Smart Desktop to Manage Your OnTrek Site

You can maintain your site content using your Workarea Smart Desktop. Measure Web page traffic, approve comments and content where necessary, or maintain content to keep it current and up-to-date from this page.

The Smart Desktop contains widgets that help you identify tasks to complete, or view comments and content that you need to approve. The Smart Desktop uses PageBuilder technology to help you rearrange or add/delete widgets.



You can add, rearrange, or remove widgets on your Smart Desktop. To learn more about customizing the Smart Desktop, see *How Customizing the Smart Desktop Works* in the Ektron Reference.

Managing Site Permissions

Site permissions are determined by a user profile. The following matrix tables show the permissions a user has based on their context.

Administrator visits a...	...that is...	...then has access to...
user	a colleague	all tabs; full rights to user profile content (add, edit, delete).
	not a colleague	all tabs; full rights to user profile content (add, edit, delete).
public group	a member	all tabs
	not a member	Group tab Documents tab Photos tab
private group	a member	all tabs
	not a member	Group tab Documents tab Photos tab (May join a private group without having to be approved)

Non-administrator visit a...	...that is...	...then has access to...
user	colleague	all tabs, but not content in folders that have "share-level" set to "selected colleagues"
	a selected colleague	all tabs, and content in folders that have "share-level" set to "selected colleagues"

Non-administrator visit a...	...that is...	...then has access to...
	not a colleague	Group tab Documents tab Photos tab
public group	a member	all tabs
	not a member	Group tab Documents tab Photos tab
private group	a member	all tabs
	not a member	Group tab Documents tab Photos tab

Modifying the OnTrek Home Page

The OnTrek home page is an example of how you may want to display your "first impression." The page employs many controls and uses PageBuilder technology to let an administrator drag and drop widgets onto the page.

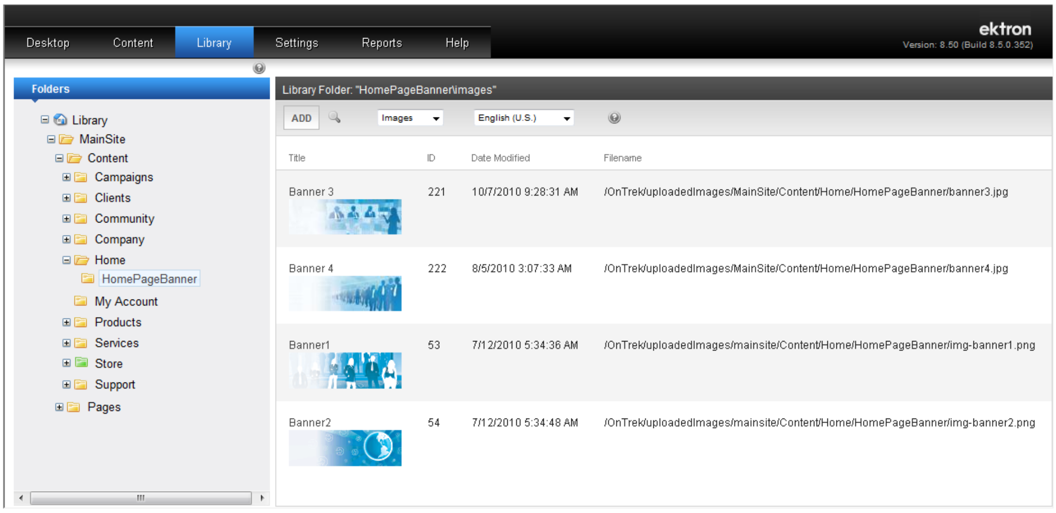
The following topics show you how to modify the home page.

Modifying the Rotating Home Page Banner Images

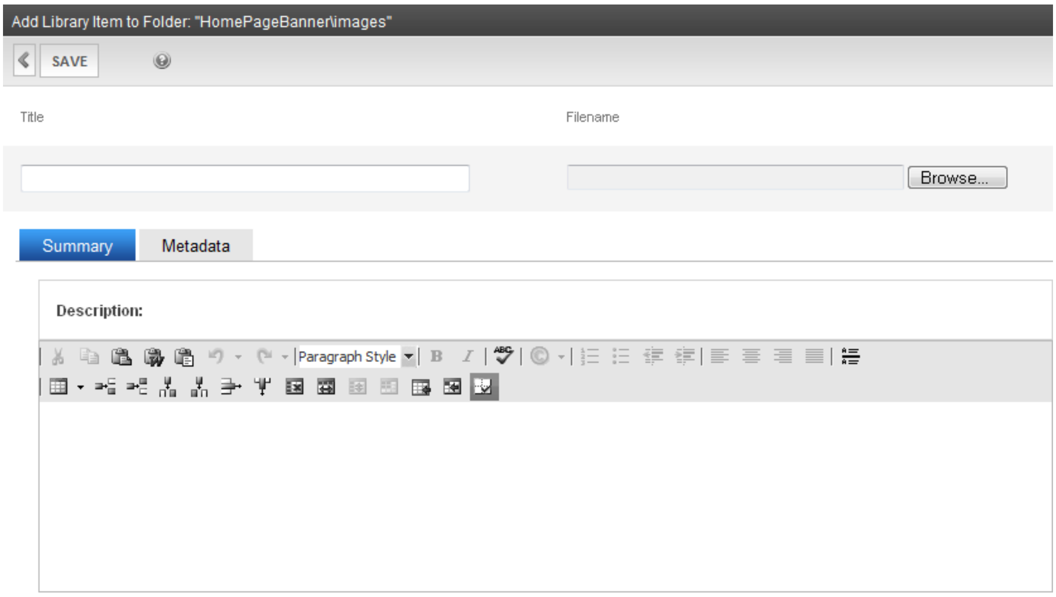
The home page displays a set of rotating banner images. You can modify the rotating banner with the following steps.

1. Add a new banner to the ones that came with OnTrek.

a. Choose **Library > MainSite > Content > Home > HomePageBanner**.



b. Click **Add**. the Add library Item form appears.



c. Enter a **Title** and **Description**.

d. Click **Browse...** to find the image file you want.

e. Click **Save**. the images is added to the library in the **HomePageBanner** folder.

2. Edit the Smart Form that is the basis for the rotating banner.

a. Choose **Content > Folders > MainSite > Content > Home > HomePageBanner**. The HomePageBanner item appears in the View Contents panel.

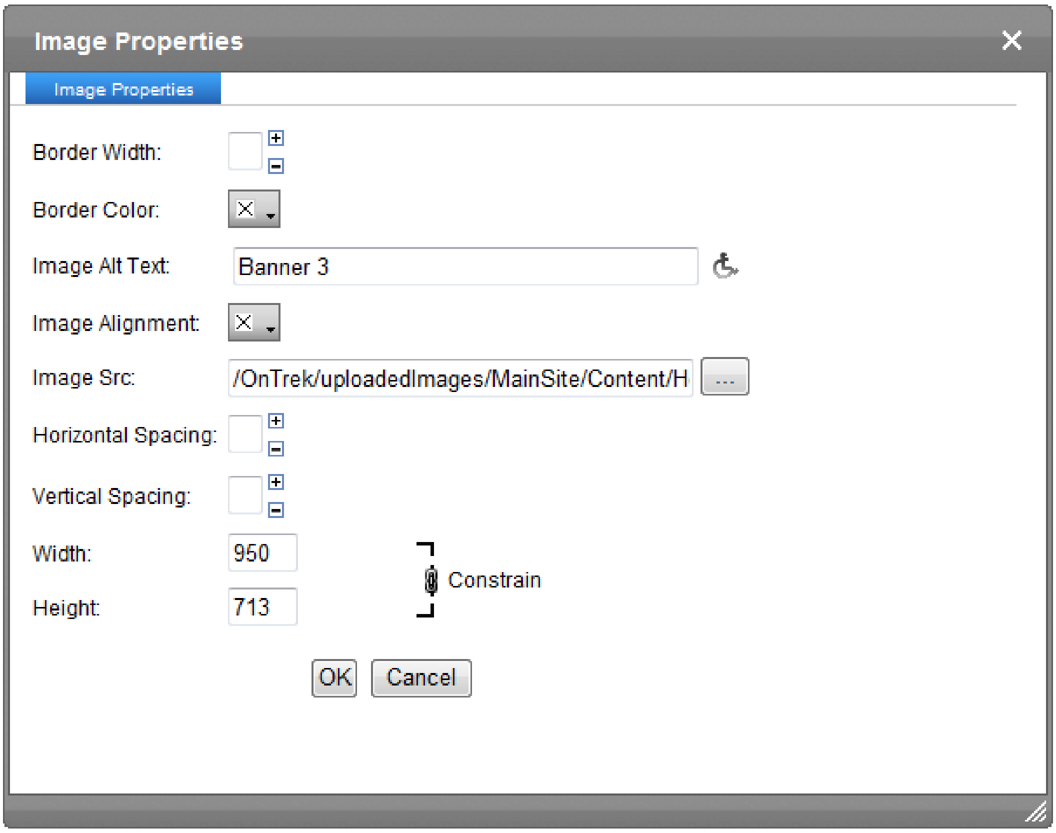
b. Click the **HomePageBanner** item (ID=366). The details appear.

c. Click **Edit**. The editor appears.

NOTE: This example duplicates a slide and then modifies it.

d. In the Homepage Slideshow contentin the editor, click on the **Slides** menu ( ) and choose **Duplicate**. A duplicate slide is added.

e. To change the image, click **Select Picture** ( ). An Image properties dialog box appears.



f. Choose a new image, specify the other properties and click **OK**. the new image appears.

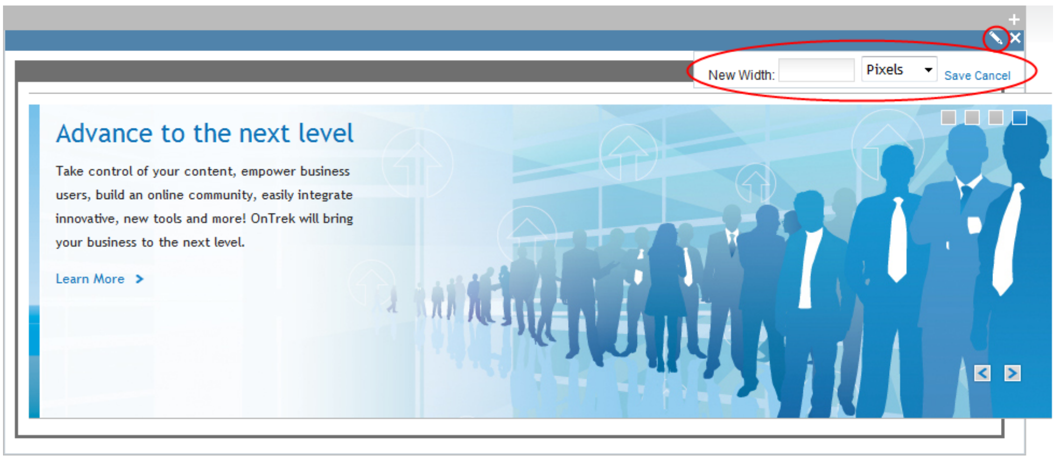
g. Modify the **Title** and **Summary** then click **Publish**.

Refresh the screen (**Ctrl/F5**) on the Home page to see your image added to the default page banner images.

For information about Smart Forms, see the *Ektron Reference*.

You can also resize the banner width directly on the home page by following these steps.

1. While logged in, choose **File > Edit** from the PageBuilder menu. The home page appears in PageBuilder mode.



2. In the banner widget click **Edit** (). The New Width box appears.
3. Specify a numeric value and unit (Pixels, Em, or Percent) and click **Save**.

Adding a Widget to the Page

Some pages in OnTrek have spaces where you can add one or more widgets to the page. This is indicated by the PageBuilder menu when you are logged in. To add a widget to the page:

1. While logged into the page, open the PageBuilder menu and choose **File > Edit**. The widget area appears on the page.
2. Open the widget bar ( ) and choose a widget.
3. Drag and drop a widget in to the widget space.

Adding Assets

Assets are files that are created outside of Ektron. You can store and manage assets on your OnTrek site. To add a single asset:

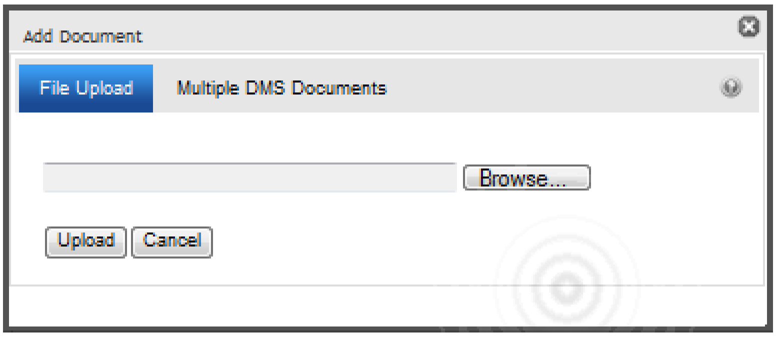
1. Find a page that accepts assets; for example, the Documents accordion tab on My Profile page.
2. Choose **Add new... > Add Asset**. A dialog box appears.
3. Click on the **File Upload** tab.
4. Click **Browse**... to locate the file.
5. Click **Upload**.

The following browsers use different methods for uploading assets.

Adding Assets with Microsoft Internet Explorer

You can upload 1 file at a time using the File Upload dialog box.

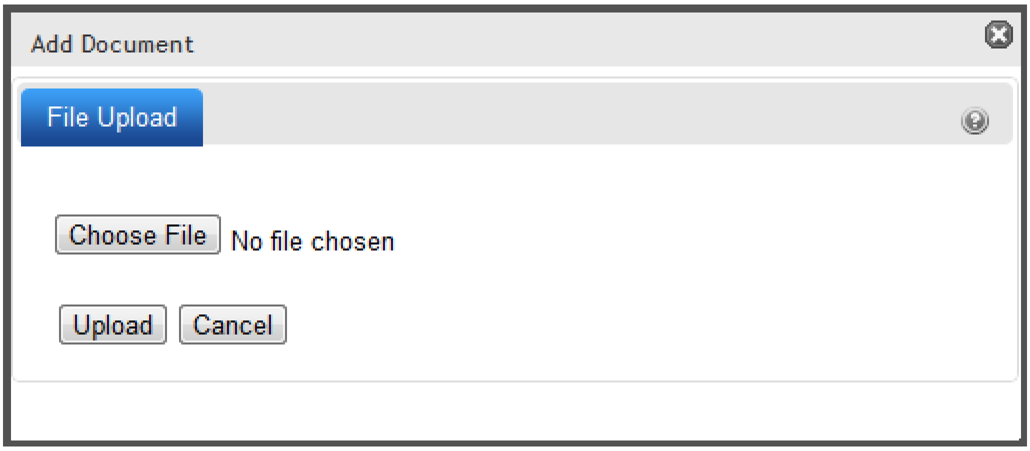
1. Click **Browse**.
2. Select the file you want, then click **Upload**.



Adding Assets with Google Chrome

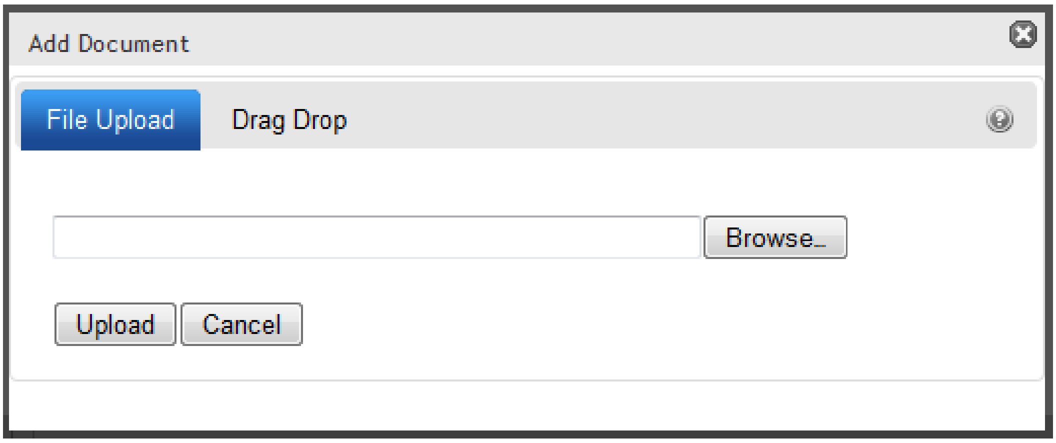
You can upload 1 file at a time using the File Upload dialog box.

1. Click **Choose File**.
2. Select the file you want, then click **Upload**.



Adding Assets with Mozilla FireFox

You can upload 1 file at a time using the File Upload dialog box. You can also upload multiple files clicking on the Drag Drop tab and dragging files to the Drag Drop area.



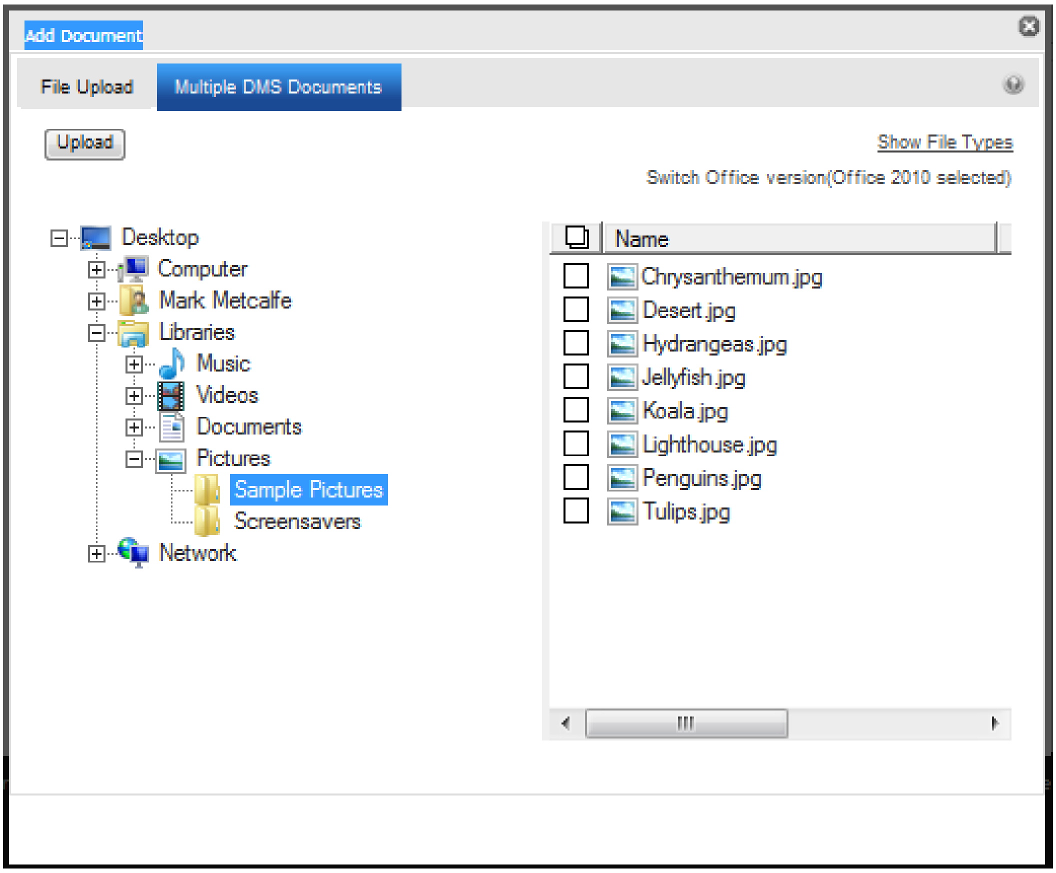
Adding Assets with Microsoft Internet Explorer and Microsoft Office

You can upload 1 file at a time using the File Upload dialog box.

1. Click **Browse**.
2. Select the file you want, then click **Upload**.

You can also upload multiple files by checking boxes next to the files that you want to upload.

1. Click the **Multiple DMS Documents** tab.
2. Select your office version (Microsoft Office 2010, or Microsoft Office 2003 or 2007).
3. Check the boxes next to the files you want, then click **Upload**.



NOTE: You can see a list of allowed file types by clicking **Show File Types**. Ektron administrators can edit this list in the Workarea.

4. If any selected file type is not allowed, you are notified. OnTrek uploads all allowed file types.

Selecting a Language for the Web Site

OnTrek comes installed in U.S. English ( ) and Spanish ( ) languages. Click on the language icon to display OnTrek in that language.

NOTE: If you login with a computer in another country, another version of English may be installed. For example,British English is installed in the United Kingdom ( ).

To install a language that is not shown in the links, (for example, to add French), see *Working with Multi-Language Content* in the *Ektron Reference*.

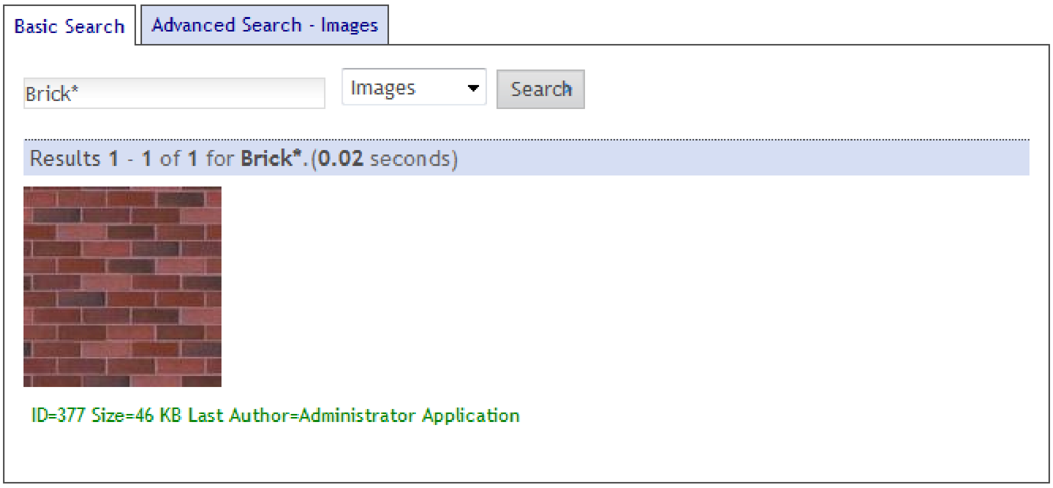
Searching the Site

To search the OnTrek site, type a string into the search box at the top of the screen and click the magnifying glass icon.

The Search page appears, which displays Basic Search and Advanced Search tabs.

Filtering Your Search

If you receive too many results from your search, you can filter the results by using the drop down menu beside the Basic Search box. You can filter by Site, HTML, Documents, Images, Multimedia, Forms, Tags, or Pages. The following image shows a search filtered by Images.



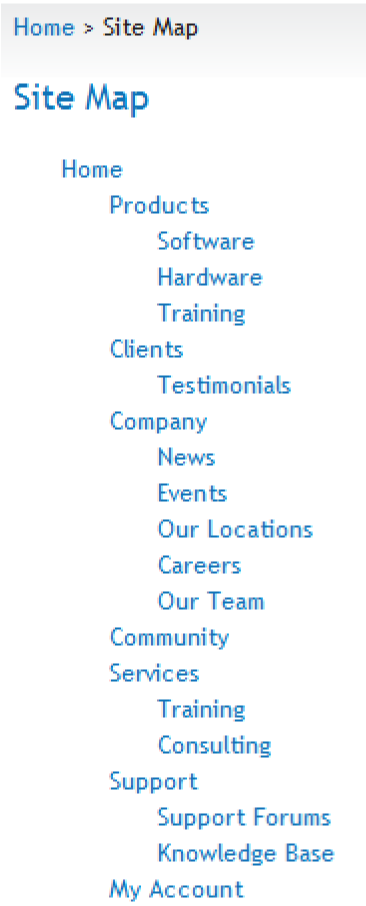
Specifying an Advanced Search

From the Advanced Search tab, you can refine your search to very fine granularity. The Advanced Search parameters are as follows.

- **with all of the words**—Results must have all the words specified; uses an AND operator for the strings that you specify.
- **advanced search exact phrase**—Results must contain the exact string that you specify.
- **at least one of the words**—Results must have any the words specified; uses an OR operator for the strings that you specify.
- **without the word**—Results must not have the string that you specify.
- **Filter Results**—Choose one of the following filters. Click **Add Filter** to specify more than one filter.
    - **Created Before**—Results show items created before *YYYY/MM/DD*.
    - **Created After**—Results show items created after *YYYY/MM/DD*.
    - **Modified Before**—Results show items modified before *YYYY/MM/DD*.
    - **Modified After**—Results show items modified after *YYYY/MM/DD*.
    - **Author**—Results show items created by the specified author.
    - **File Size**—Results show items larger (>) or smaller (<) than the specified file size in kilobytes.

Using the Site Map Page

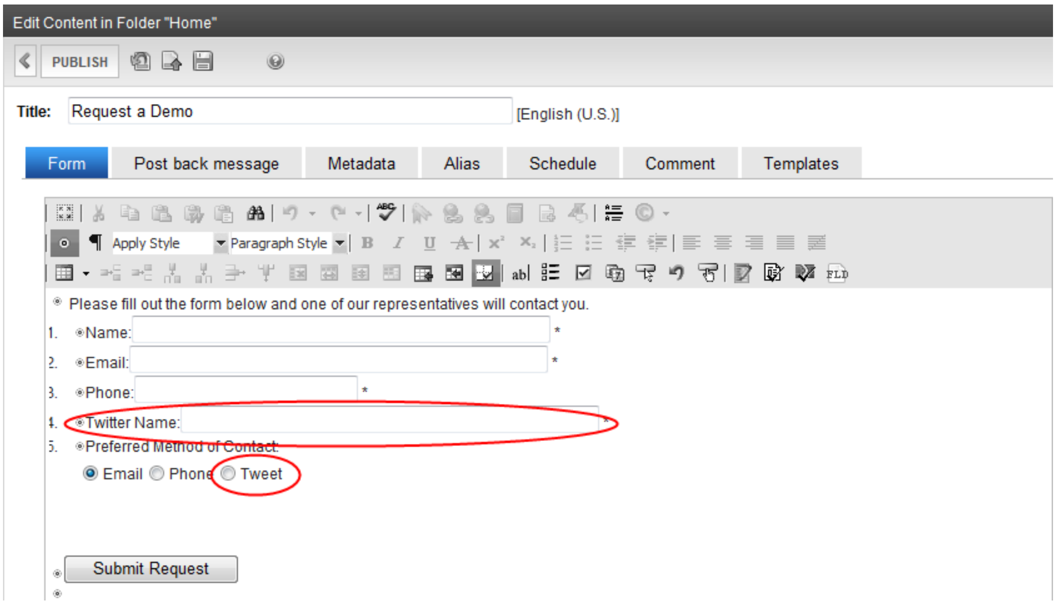
The following figure shows the default OnTrek Site Map page. It is automatically generated from the pages of your Web site, and changes accordingly. You can click on any of the links to go to the selected page.

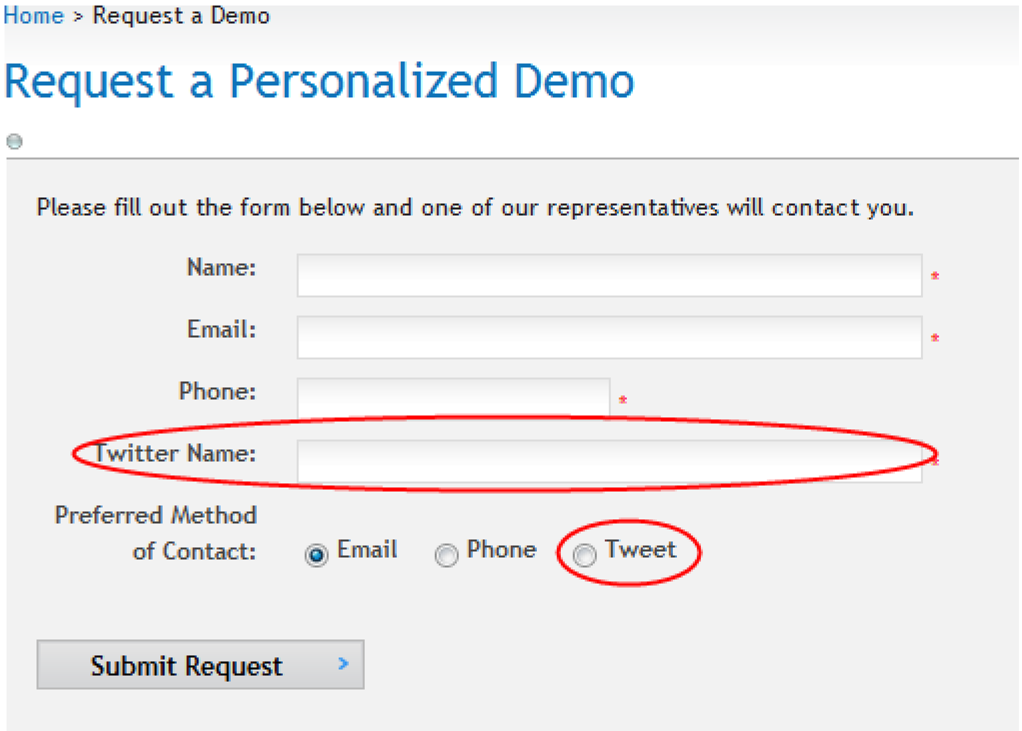


Modifying the Request a Demo Page

The Request a Demo page is an HTML Form.

1. While logged in to the Request a Demo page, open the access point ( ) and choose **Edit**. The Request a Demo form appears in the content editor.
2. Modify the form. For information about HTML Forms, see the *Ektron Reference*. The following figure shows a modified form.
   - *Twitter Name* field was added
   - *Tweet* was added to Preferred Method of Contact.



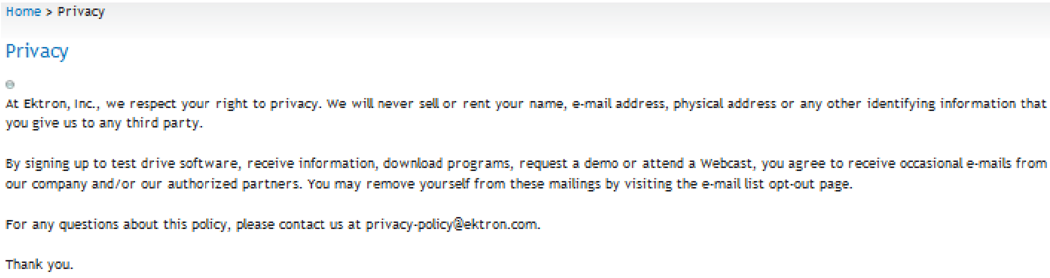


Modifying the Privacy Policy Page

To modify it for your company:

1. While logged in to the Privacy Policy page, open the access point (◉) and choose **Edit in Context** to modify the page text, or **Edit** to modify the text and other content data in the Ektron editor.
2. Change the content (and metadata) to suit your company and click **Save**.

The following figure shows the default Privacy Policy page.


Home > Privacy

Privacy

At Ektron, Inc., we respect your right to privacy. We will never sell or rent your name, e-mail address, physical address or any other identifying information that you give us to any third party.

By signing up to test drive software, receive information, download programs, request a demo or attend a Webcast, you agree to receive occasional e-mails from our company and/or our authorized partners. You may remove yourself from these mailings by visiting the e-mail list opt-out page.

For any questions about this policy, please contact us at privacy-policy@ektron.com.

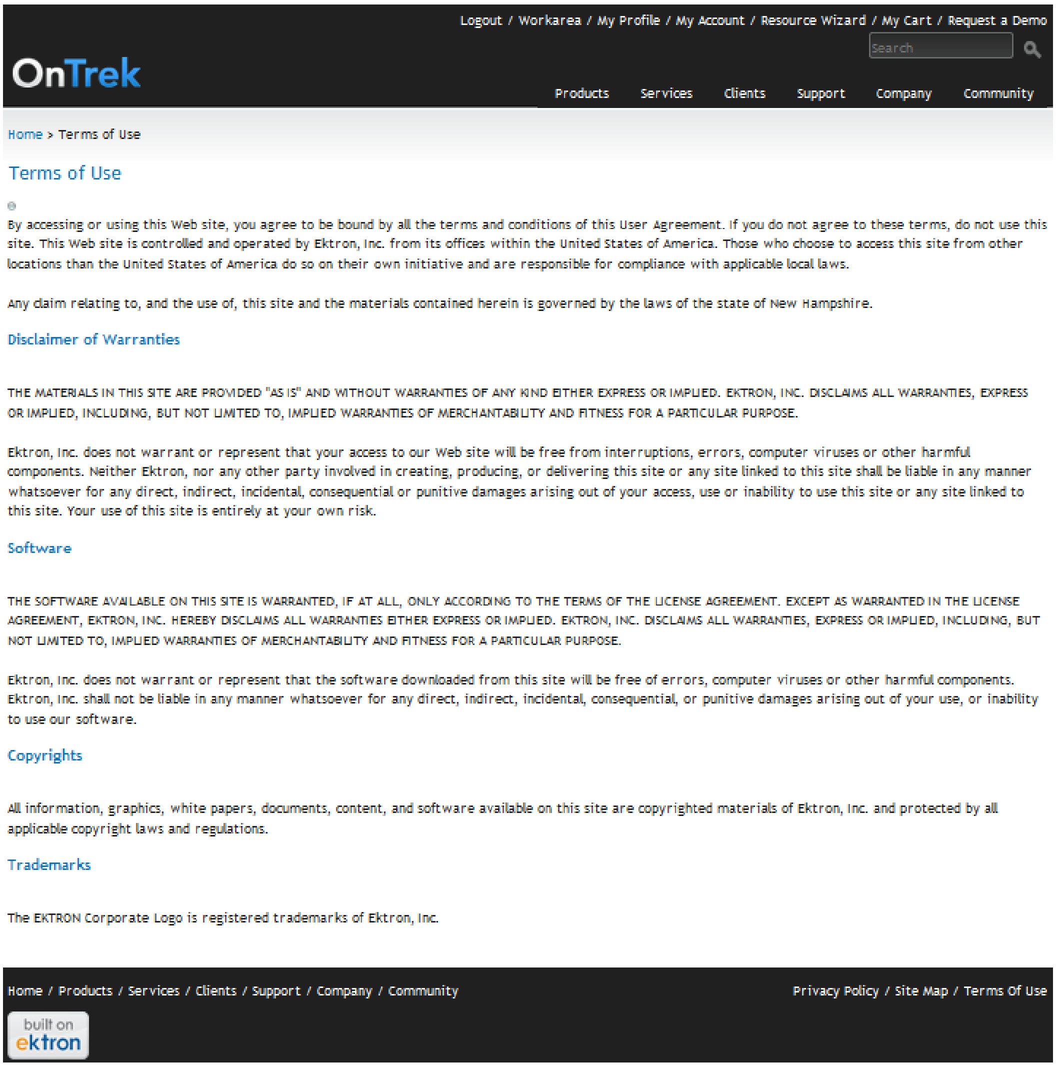
Thank you.

Modifying the Terms of Use Page

To modify it for your company:

1. While logged in to the Terms of Use page, open the access point ( ) and choose **Edit in Context** to modify the page text, or Edit to modify the text and other content data in the Ektron editor.
2. Change the content (and metadata) to suit your company and click **Save**.

The following figure shows the default Terms of Use page.


Logout / Workarea / My Profile / My Account / Resource Wizard / My Cart / Request a Demo

Search

OnTrek

Products Services Clients Support Company Community

Home > Terms of Use

Terms of Use

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Modifying the Products Pages

The Products page displays products and services that you want to sell. To see the default Products page, see *Products Page* on page 12.

To create your own Products page, you must modify or create templates and user controls, which is not described in this *OnTrek in Ektron Reference*. Developers of .NET templates and user controls can find product templates and user controls at the following locations.

- Template files (`.aspx`), PageBuilder template files (`.pb.aspx`), and c# code behind files (`.cs`) in the [*siteroot*] folder of the installation.
- Master pages—**[*siteroot*] > OnTrek > Components > Templates**.
- User controls—**[*siteroot*] > OnTrek > Components > userControls**.

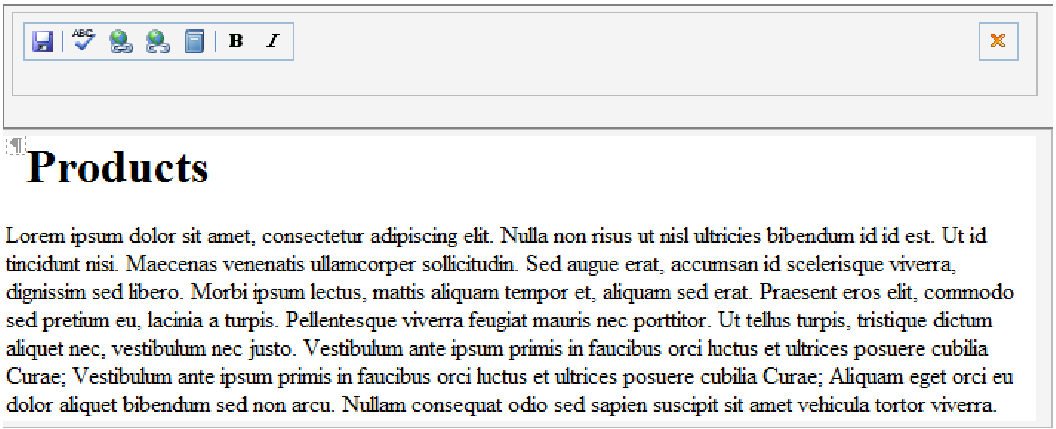
For additional information, see the *Ektron Users Guide: Building an Ektron Powered Website* and the *Ektron Reference*.

You can modify this page, and its associated pages, in the following ways.

Editing the Products Page Introduction In Context

OnTrek preloads the introduction to the Products page with *Lorem ipsum* text to give you an example of what a Products page introduction can look like. You can edit this content from the page by following these steps after logging in:

1. Open the access point ( ) above the content.
2. Choose **Edit in Context**. An editor window appears.



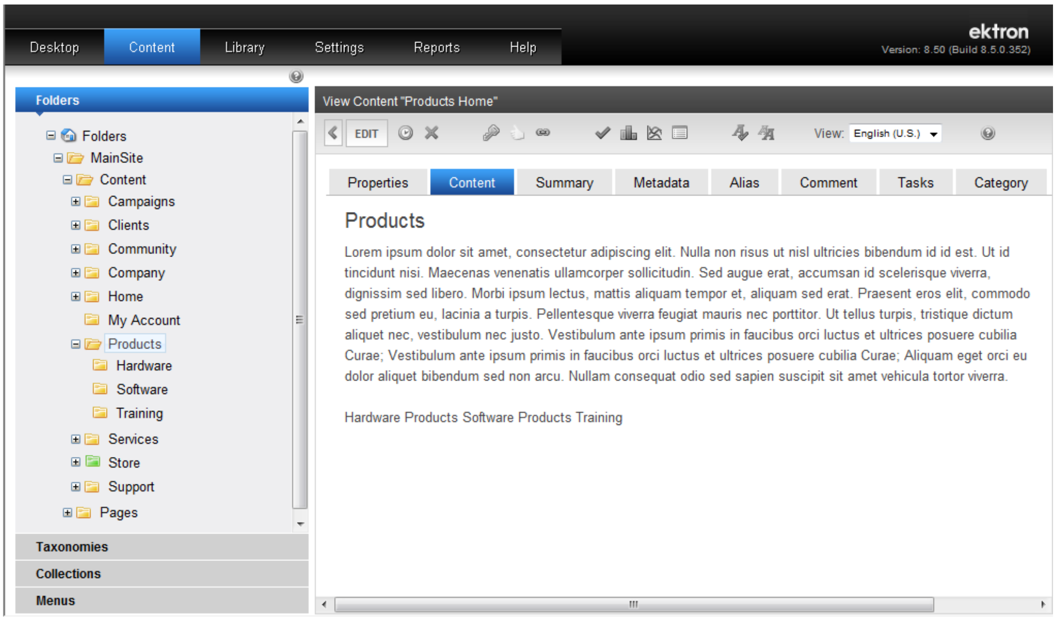
3. Edit the text, and click **Save** ( ). The text is changed on the page.

Editing the Products Page in the Workarea

You can access the Products page introductory content in the Workarea, where you can create additional information about the content (such as Metadata).

1. Login to the Workarea and choose the Content tab.
2. Choose **Folders > MainSite > Content > Products**.
3. Choose **Products Home** from the content list.

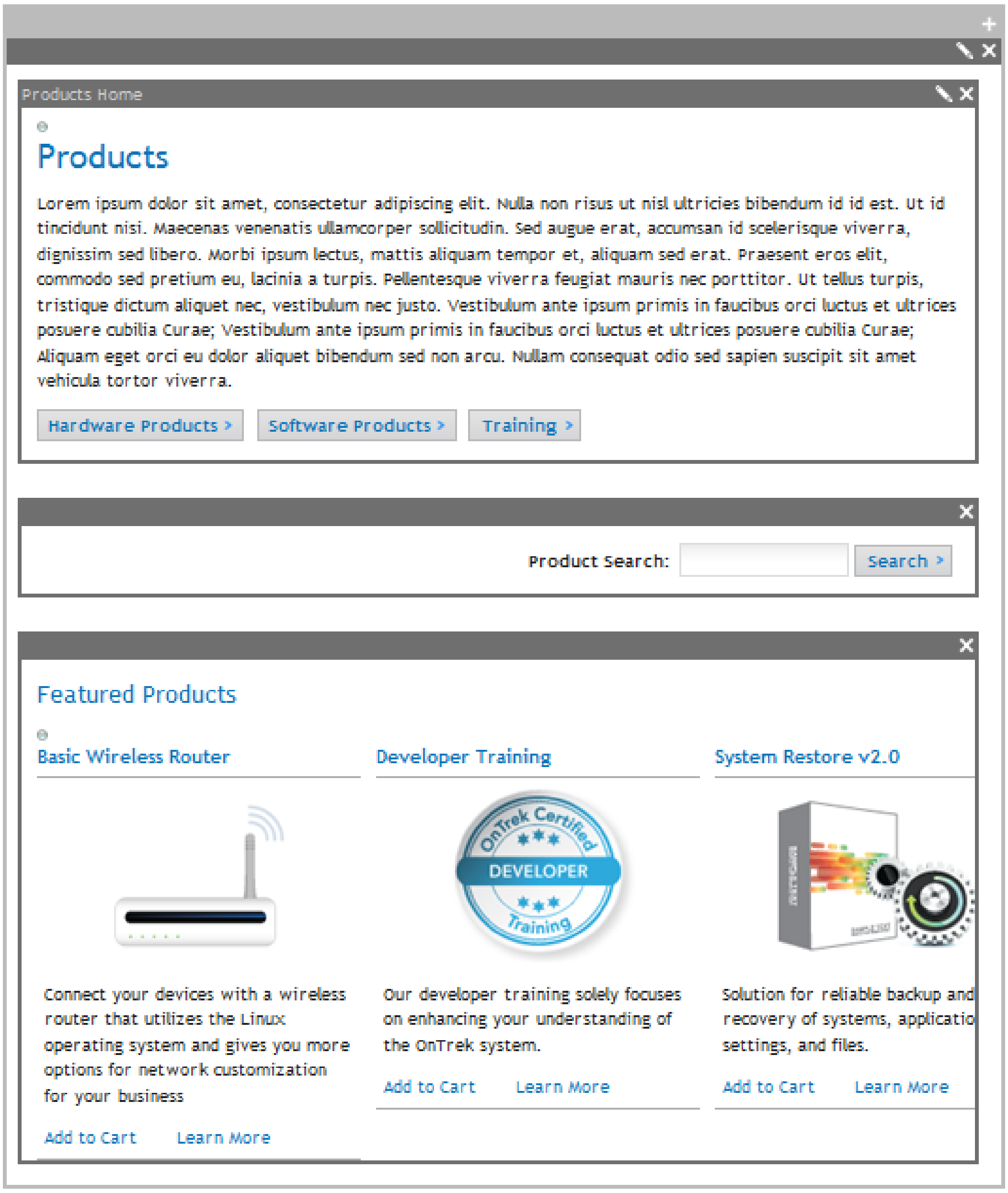
4. Choose **Edit**.



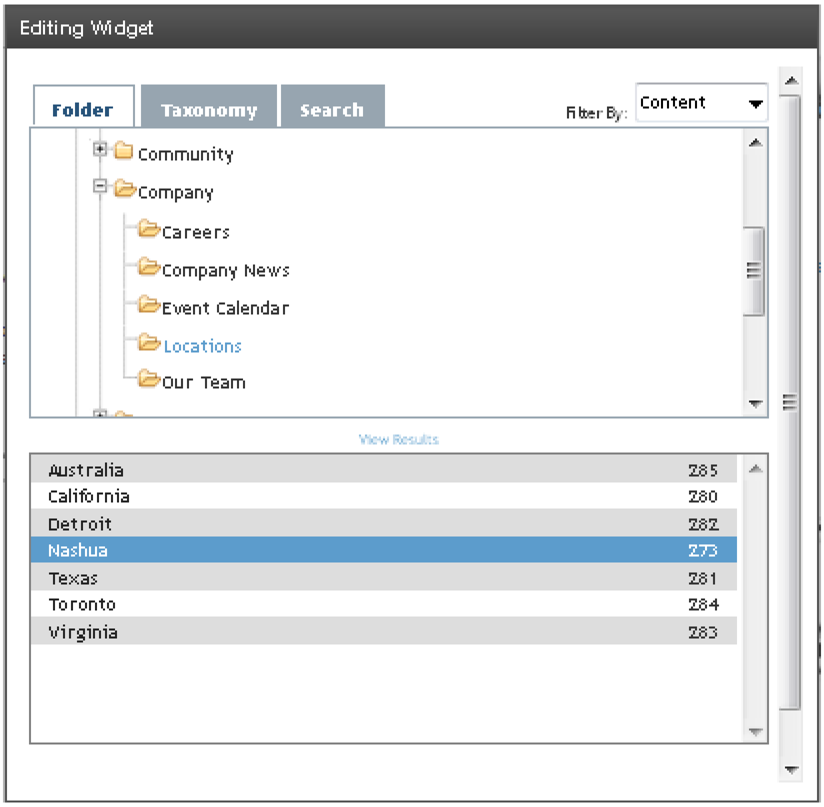
Selecting a Content Block for the Products Introduction Content

To change the Products page introduction by selecting an existing piece of content, follow these steps:

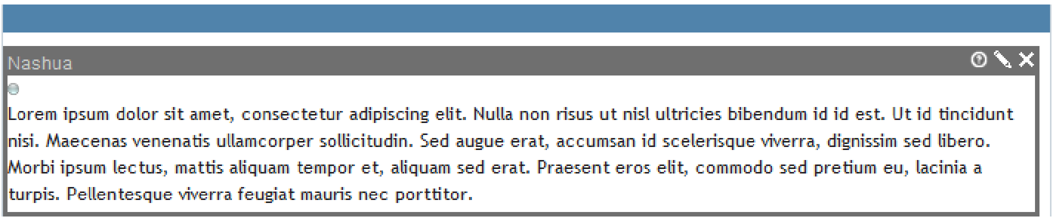
1. While logged in to the Products page, open the PageBuilder menu and choose **File > Edit**. The widget spaces appear on the page.



2. Click **Edit** (✎) in the Products Home widget. The Editing widget dialog box appears.
3. Navigate the folder hierarchy to find a piece of content. When you click on a folder, valid content appears in the View Results panel.



4. Double click on a content item. The content appears on the page.



5. Choose **File > Publish**.

Searching the Product Inventory

The search box on the Product page operates only on products contained on the Product pages (and not on the entire OnTrek site). To search the Products area, type a string into the search box at the top of the screen and click **Search**.

The Search page appears, which displays Basic Search and Advanced Search tabs. From the Advanced Search tab, you can refine your search to very fine granularity. The Advanced Search parameters are as follows.

- **with all of the words**—Results must have all the words specified; uses an AND operator for the strings that you specify.
- **advanced search exact phrase**—Results must contain the exact string that you specify.

- at least one of the words—Results must have any the words specified; uses an OR operator for the strings that you specify.
- **without the word**—Results must not have the string that you specify.
- **Filter Results**—Choose one of the following filters. Click **Add Filter** to specify more than one filter.
  - **Price Below**—Results show products below the specified price.
  - **Price Above**—Results show products above the specified price.
  - **Product SKU**—Results match the stock-keeping unit (SKU) number specified.

Displaying Product Specifications

When you click on a product title or a **Learn more >** link, a product specifications page appears with more details about the product. Product information is located in the Content section of the Workarea at **Folders > MainSite > Content > Store**, and in one of the store's folders. For example, in the Hardware folder you can click on **Basic Wireless Router** to display or edit the content about this product.

You can create new products in the **Hardware**, **Software**, and **Training** folders from the **New** menu. If you want to create a new catalog and new product types, see *Creating a New Catalog* below.

Creating a New Catalog

Unless you create your own products page, you only can add a catalog, new product types, and new products to the content management system to the existing Hardware, Software, and Training pages. To create your own products page, you must modify or create templates and user controls, which is not described in this *OnTrek in Ektron Reference*. Developers of .NET templates and user controls can find templates and user controls at the following locations.

- Template files (`.aspx`), PageBuilder template files (`.pb.aspx`), and C# code behind files (`.cs`) in the ***[siteroot]*** folder of the installation.
- Master pages—***[siteroot]*** **> OnTrek >Components > Templates.**
- User controls—***[siteroot]*** **> OnTrek >Components > userControls**.

For more information, see the *Ektron Users Guide: Building an Ektron Powered Website* and the *Ektron Reference*.

To place products on your Web site for sale, you can do the following steps directly to the OnTrek pages.

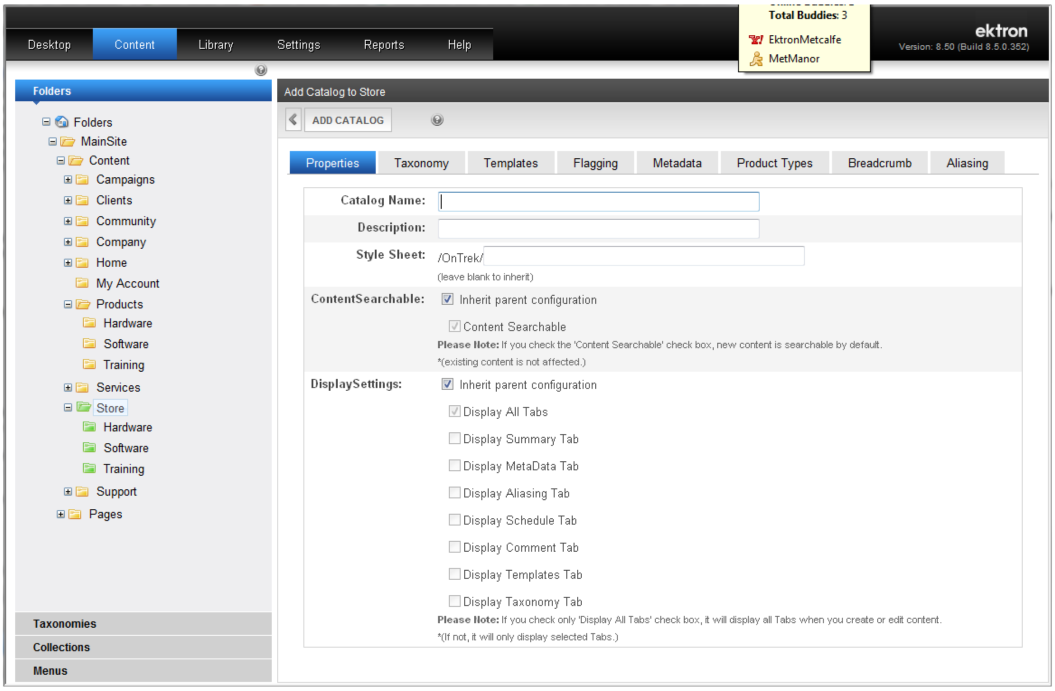
- *Adding a Catalog to the Product Store* below
- *Creating New Product Types* on page 43
- *Adding a New Product Type to a Catalog* on page 45
- *Adding Products to a Catalog* on page 46

Adding a Catalog to the Product Store

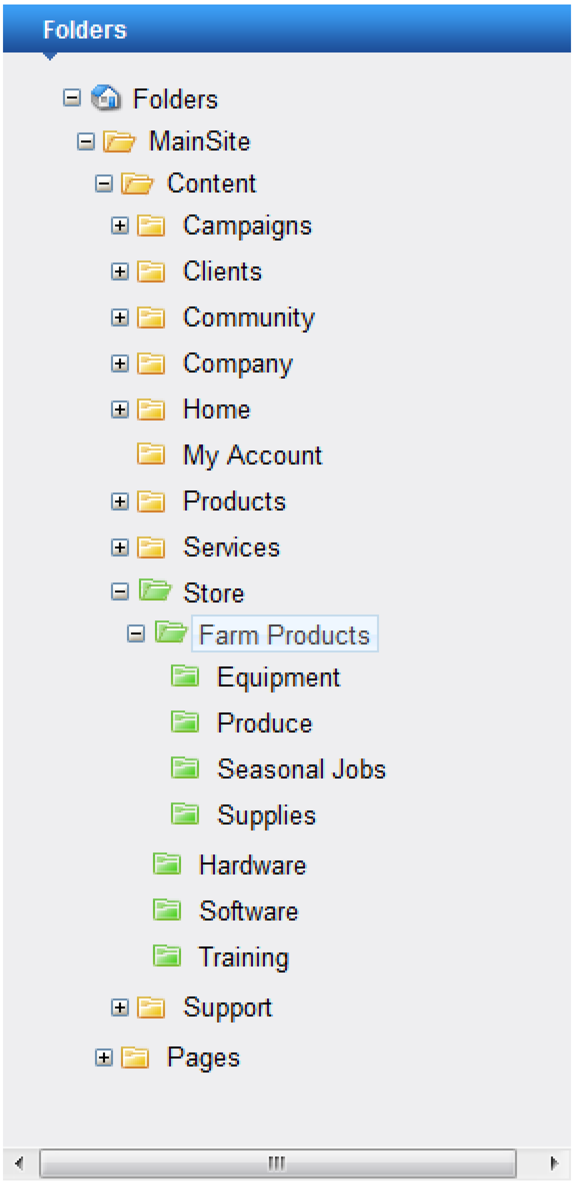
OnTrek comes with 3 product catalogs: Hardware, Software, and Training. In the Workarea, the catalog folders (and the Store folder) are green for quick identification.

The following example shows you how to add a new catalog called *Farm Products* for the sale of farm-fresh fruits and vegetables and other farm-related items.

1. While logged into the Workarea, open the Content tab.
2. Choose **Folders > MainSite > Content > Store**.
3. Right click on **Store** and choose **Add Catalog** (or choose **New > Catalog** from the menus). The Add Catalog to Store screen appears.



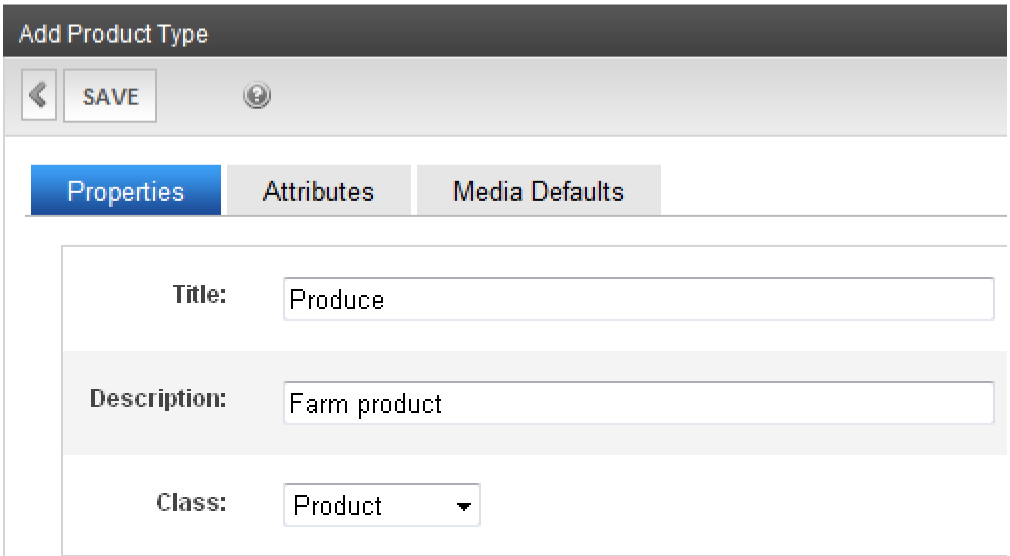
4. Enter the name `Farm Products` in the **Catalog Name** field. Optionally add other data.
5. Click **Add Catalog**. The new category appears in the list. The following figure shows the **Farm Products** Catalog with other catalogs already created under it.



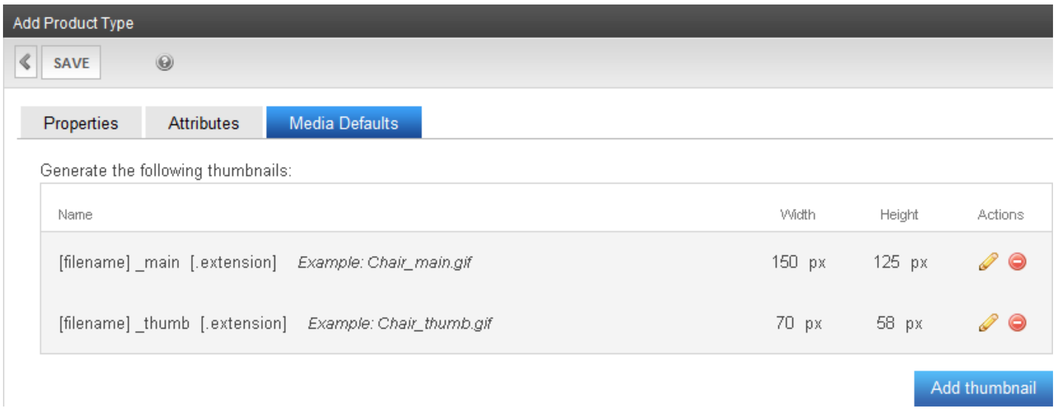
Creating New Product Types

Product types let you categorize your product line so that customers can browse your product line more easily. For example, you can have *Produce*, *Equipment*, and *Supplies* product types for a *Farm Products* catalog, or *Monitors*, *Systems*, and *Accessories* product types for *Computer Products*.

1. Login to the Workarea and choose the Settings tab.
2. Choose **Settings > Commerce > Catalog > Product Types**.
3. In the View Product types panel, choose **New > Product Type**. The Add Product Type screen appears.
4. On the Properties tab, enter the **Title** (`Produce`), **Description** (`Farm Produce`) and **Class** (*Product*).

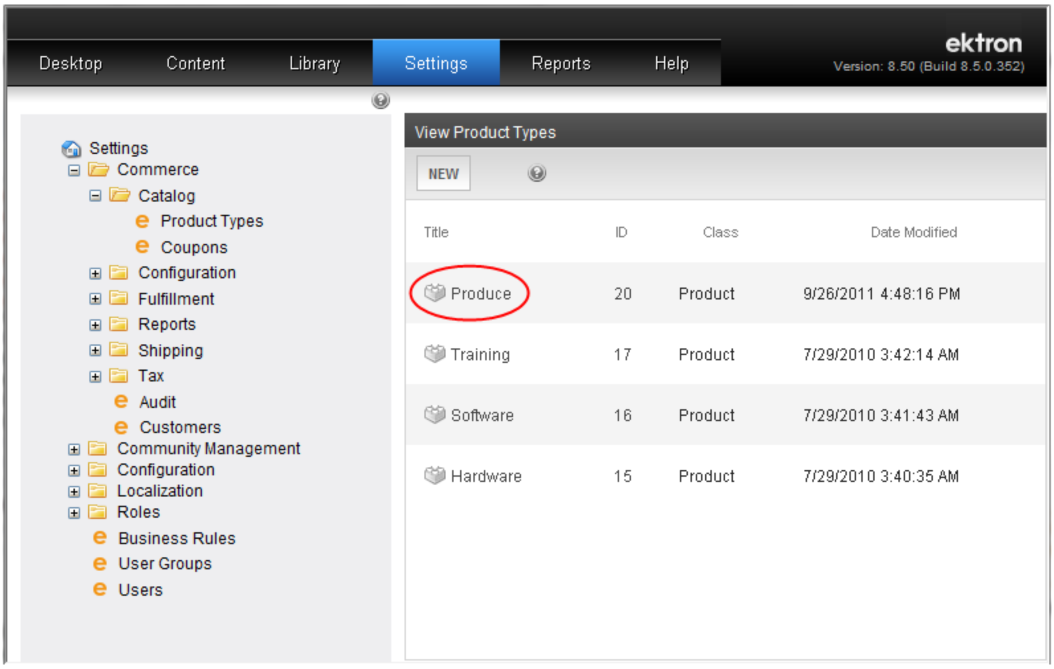


5. On the Media Defaults tab, click **Add Thumbnail** and specify the following 2 media default items:
   - **Name:** `_main`, **Width:** `150` **px**, **Height:** `125` **px**
   - **Name:** `_thumb`, **Width:** `70` **px**, **Height:** `58` **px**



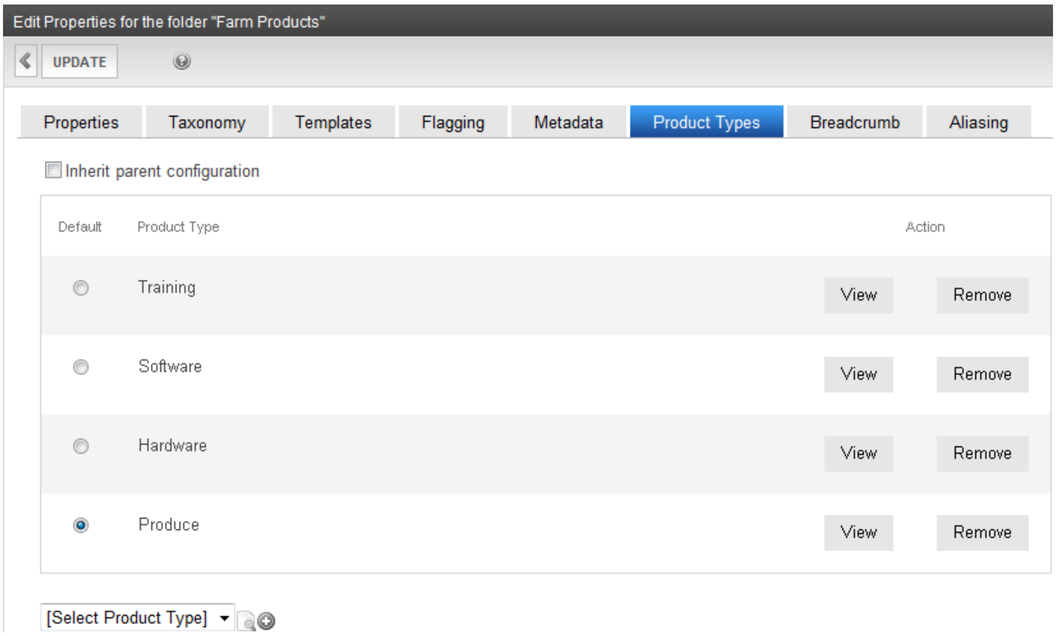
IMPORTANT: The dimensions of the images are optimized for the OnTrek presentation of product images on a product page. Also, because OnTrek uses the _main and _thumb filename prefixes, do not use these in your product image filenames, or it may cause unpredictable results. The code-behind and XSLT used in the product section of OnTrek key off of these text strings.

6. Click **Save**. The new product type appears in the View Product Types panel.



Adding a New Product Type to a Catalog

1. Login to the Workarea and choose the Content tab.
2. Choose **Folders > Mainsite > Content > Store > Farm Products** (assuming that you created Farm Products as described in *Adding a Catalog to the Product Store* on page 41).
3. In the View Entries panel, choose **View > Catalog Properties**. The properties appear.
4. Click **Edit Properties**.
5. Click the Product Types tab.
6. Break the inheritance value by unchecking **Inherit Parent Configuration**.
7. Select a product type and click **Add** (⊕). For example, select *Produce*. (See *Creating New Product Types* on page 43.)
8. Click on the radio button (◉) to enable the product type. The following figure shows 4 product types added to the *Farm Products* catalog.



9. Click **Update**. The View Properties panel reappears.

Adding Products to a Catalog

NOTE: This example builds on prior steps outlined in *Creating a New Catalog* on page 41.

1. Login to the Workarea and choose the Content tab.
2. Choose **Folders > MainSite > Content > Store > Farm Products > Produce**.
3. In the View Entries panel, choose **New > Produce**. The Add Catalog Entry window appears.
4. Enter the following information:
   a. Title: `Pumpkins`
   b. Summary tab: `Pumpkins`
   c. Properties tab:
      - SKU: `123412341234`
      - Number of Units: `200`
      - Tax class: **Goods**
   d. Pricing tab:
      - List price: `$3`
      - Our Sales Price: `$2.60`
   e. Media tab:
      a. Click **Add New Image**.
      b. Title: `Pumpkins`
      c. Alt Text: `Pumpkins`
      d. Browse for an image and click **Upload**.
      e. Click **Set as Product Icon**.
   f. Metadata tab:
      a. Description: `Pumpkins`
      b. Keywords: Text: `Produce`. Click **Add** ().

c. Keywords: Text: `Pumpkins`. Click **Add** ( ).
d. Title: Pumpkins

g. Category tab:
a. Open the category tree to **OnTrek Site Navigation** and hover the cursor over **Products** and click **Add** ( ). The Add Category dialog box appears.
b. Category Title: `Pumpkins`.
c. Click **Save**.
d. Check **Products** and **Pumpkins**

5. Click **Action > Publish**. The View Entries screen appears with Pumpkins in the Produce catalog.

Modifying the Services Pages

The Services page displays information about training and consulting services you offer. To see the default Services page, see *Services Page* on page 13. You can access the pages associated with the Services page by clicking the **Learn More** button in a tabbed window, or from the Services menu. You can create and modify the following types of Services pages.

- Services page introductory text
- Training Services page
- Consulting Services page
- Widget space

To create your own Services page, you must modify or create templates and user controls, which is not described in this *OnTrek in Ektron Reference*. Developers of .NET templates and user controls can find product templates and user controls at the following locations.

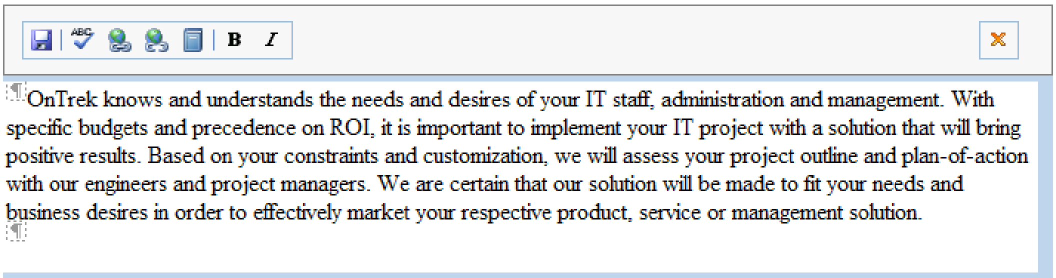
- Template files (`.aspx`), PageBuilder template files (`.pb.aspx`), and c# code behind files (`.cs`) in the [*siteroot*] folder of the installation.
- Master pages—**[*siteroot*] > OnTrek > Components > Templates**.
- User controls—**[*siteroot*] > OnTrek > Components > userControls**.

For additional information, see the *Ektron Users Guide: Building an Ektron Powered Website* and the *Ektron Reference*.

Editing the Services Page Introduction In Context

OnTrek preloads the introduction to the Services page with text to give you an example of what a Services page can look like. You can edit this content from the page by following these steps after logging in:

1. Open the access point ( ) above the content.
2. Choose **Edit in Context**. An editor window appears.

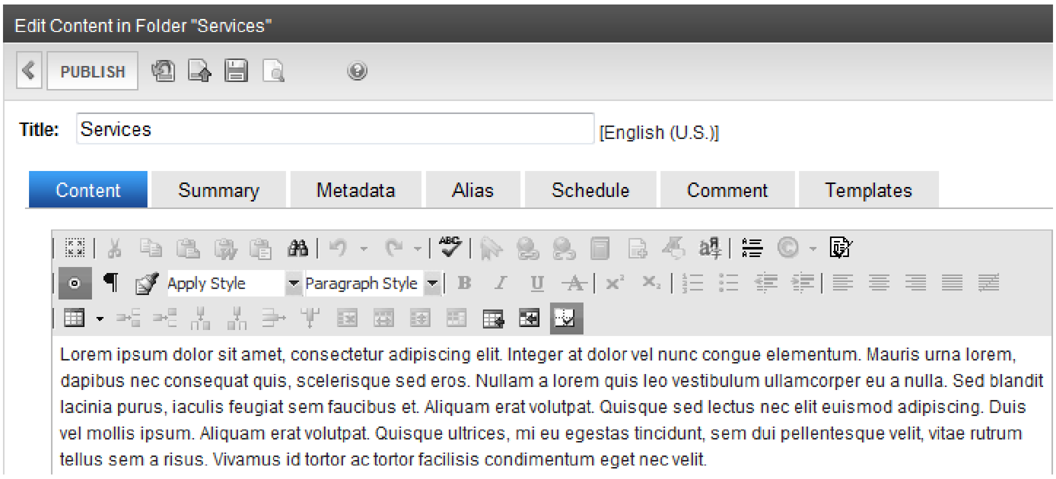


3. Edit the text, and click **Save** (). The text changes on the page.

Editing the Services Page Introduction in the Workarea

You can access the Services page introductory content in the Workarea where you can create additional information about the content (such as Metadata).

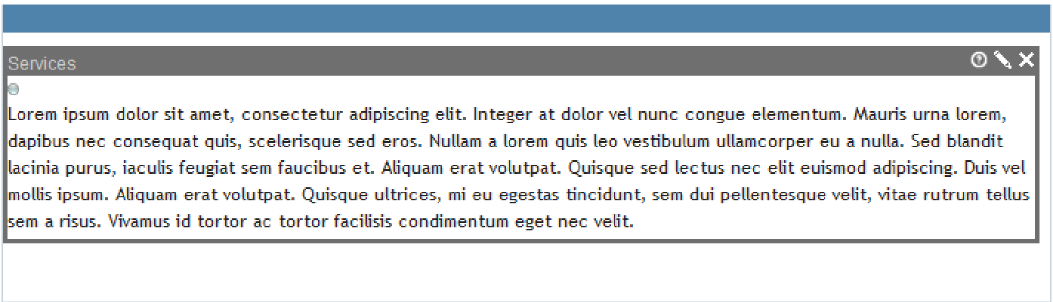
1. Login to the Workarea and choose the Content tab.
2. Choose **Folders > MainSite > Content > Services**.
3. Choose **Services** from the content list.
4. Choose **Edit**.



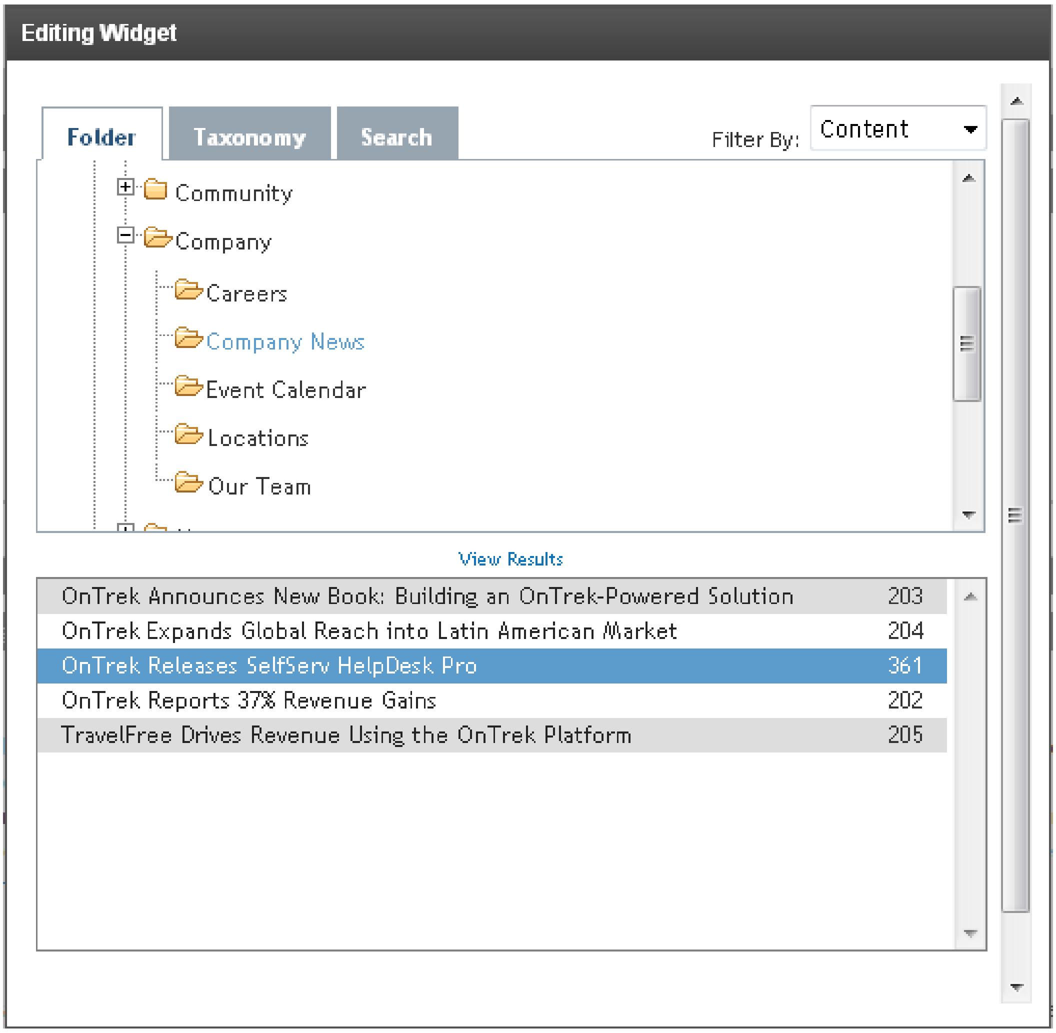
Selecting a Content Block for the Services Introduction

To change the Services page introduction by selecting an existing piece of content, follow these steps:

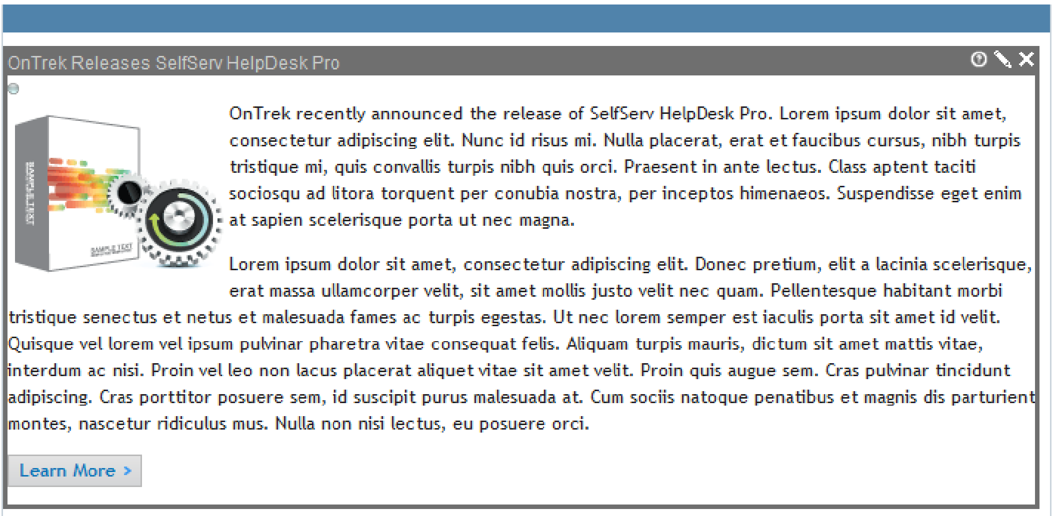
1. While logged in to the Services page, open the PageBuilder menu and choose **File > Edit**. The widget spaces appear on the page.



2. Click **Edit** () in the Services widget. The Editing widget dialog box appears.
3. Navigate the folder hierarchy to find a piece of content. When you click on a folder, valid content appears in the View Results panel.



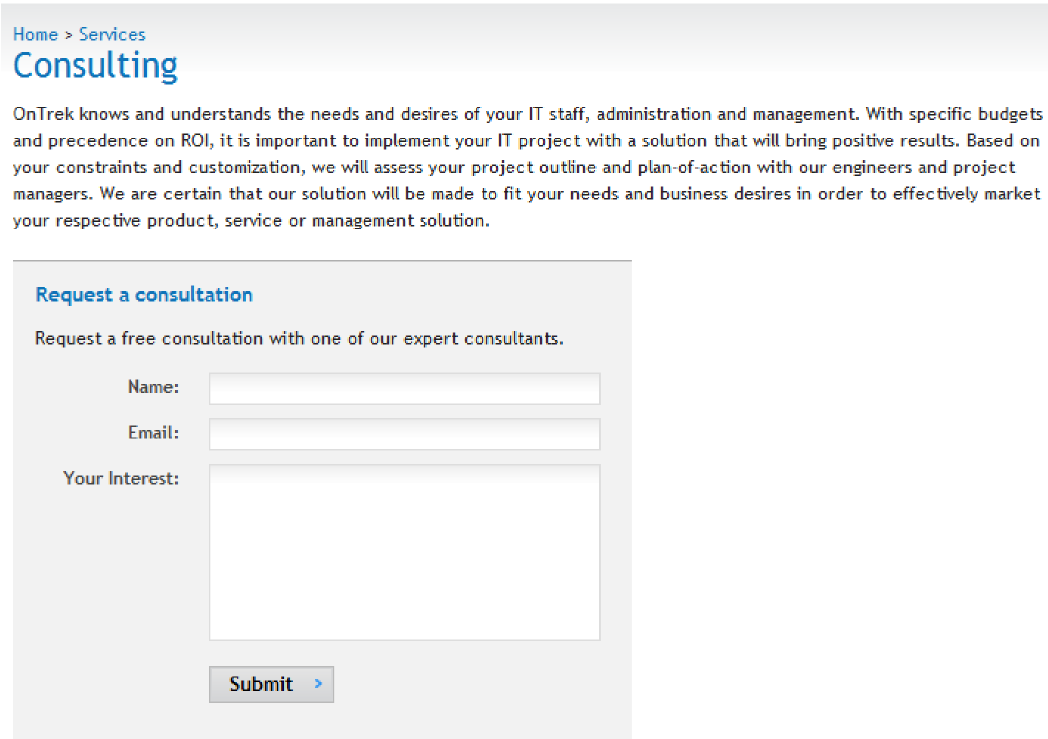
4. Double click on a content item. The content appears on the page.



5. Choose **File > Publish**.

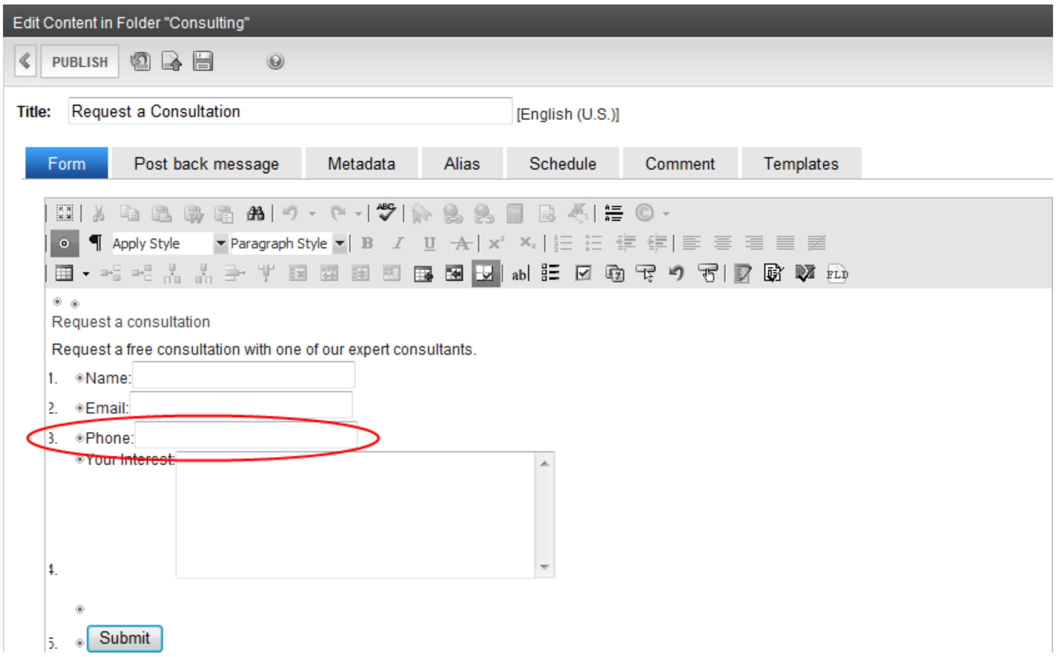
Modifying the Consulting Services Page

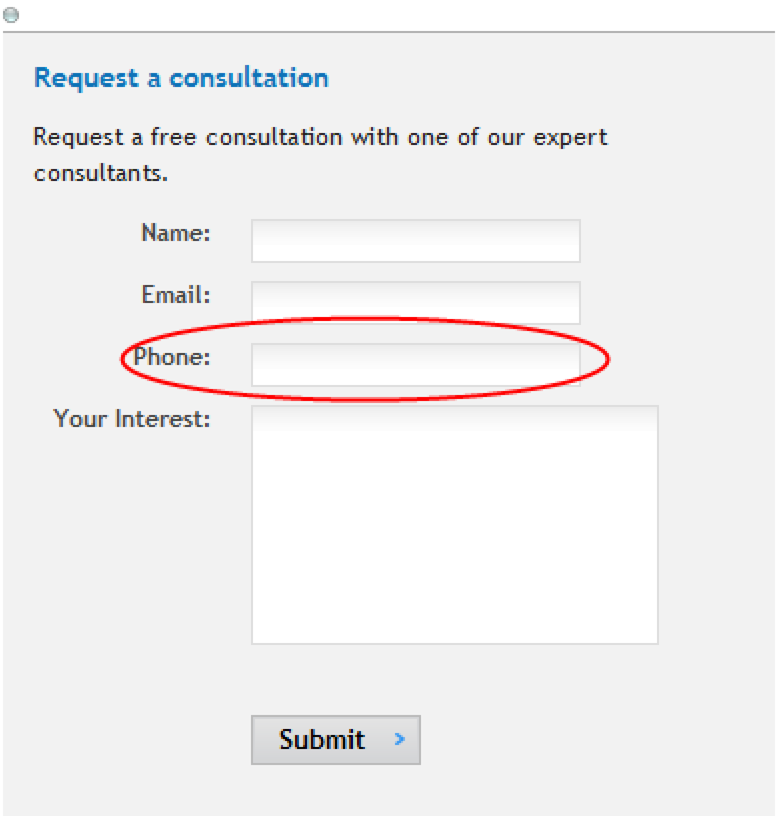
The following figure shows the default OnTrek Consulting Services page.



To modify the form on the Consulting Services page to display your company information, follow these steps:

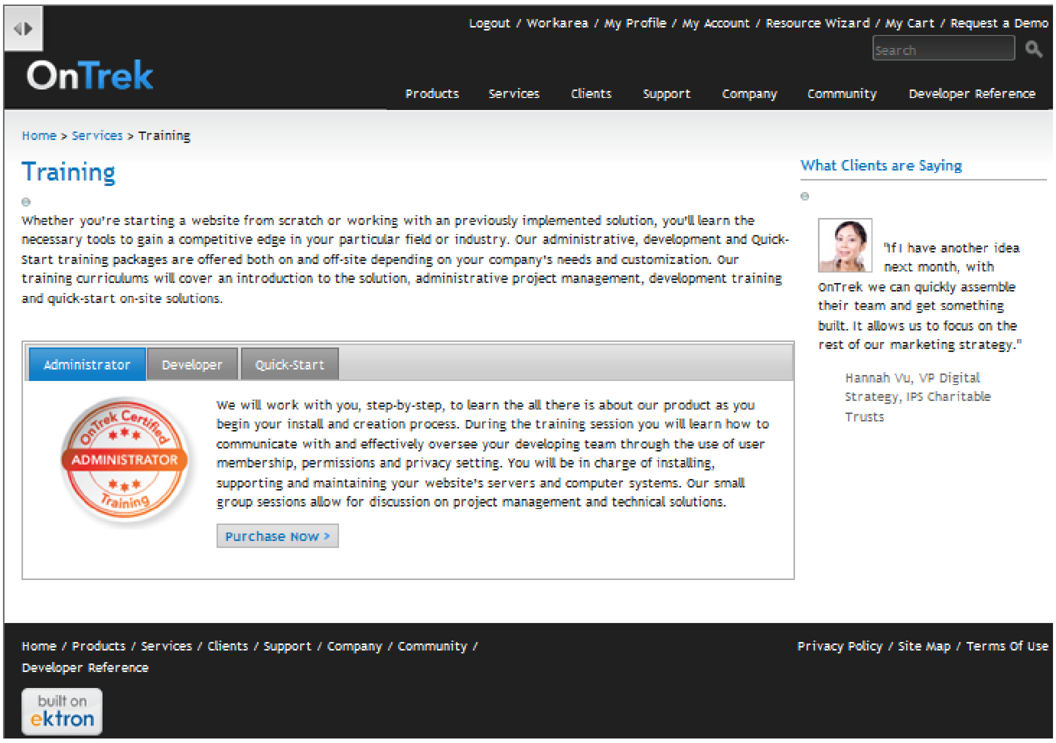
1. While logged in to the Consulting Services page, open the access point (◉) and choose **Edit**. The Edit Content editor appears with the consultation form.
2. Modify the form. For information about HTML Forms, see the *Ektron Reference*. The following figure shows a modified form with a Phone field added to the form, and the result on the page when you click **Publish**.





Modifying the Training Services Page

The following figure shows the default OnTrek Training Services page.



The Training Services page has 3 sections: the introduction, the tabbed course offering section, and a widget space. The following topics describe each section.

Modifying the Training Page Introduction

To modify the introductory text, open the access point (◉) and choose **Edit in Context**, or choose **Edit** to modify the content in the Workarea, if you want to specify additional metadata.

Adding a Course and Tab to the Course Offering Section

1. In the Workarea in the Content section, choose **Folders > MainSite > Content > Services > Training**. The contents of the folder appear in the View Contents panel.
2. In the View Contents panel, choose **New > HTML Content**. The content editor appears.
3. Specify the content for a new training course. When done, click **Publish**. The new course appears in the View Contents panel with the other courses.
4. In the Workarea in the Content section, choose **Collections > Training Tabs**. The existing tabs appear in the View Collection panel.
5. In the View Collection panel, click **Add Items**. The Add Items panel appears.
6. Check the box next to the new course and click **Add**. The new course appears in the View Collection screen.

Removing a Tab from the Course Offering Section

1. In the Workarea in the Content section, choose **Collections > Training Tabs**. The existing tabs appear in the View Collection panel.

2. Click on the tab you want to remove. The View Content screen appears for the selected item.
3. Click **Delete** () and then **OK**.
4. Choose **Collections > Training Tabs** to see the changes in the course offering tab.

Modifying the Clients Pages

The Clients page uses Smart Form content placed in a custom template. To see the default Clients page, see . You can add clients to the client list, and drag and drop widgets onto the page.

To create your own Clients page, you must modify or create templates and user controls, which is not described in this *OnTrek in Ektron Reference*. Developers of .NET templates and user controls can find product templates and user controls at the following locations.

- Template files (`.aspx`), PageBuilder template files (`.pb.aspx`), and c# code behind files (`.cs`) in the [*siteroot*] folder of the installation.
- Master pages—**[*siteroot*] > OnTrek > Components > Templates**.
- User controls—**[*siteroot*] > OnTrek > Components > userControls**.

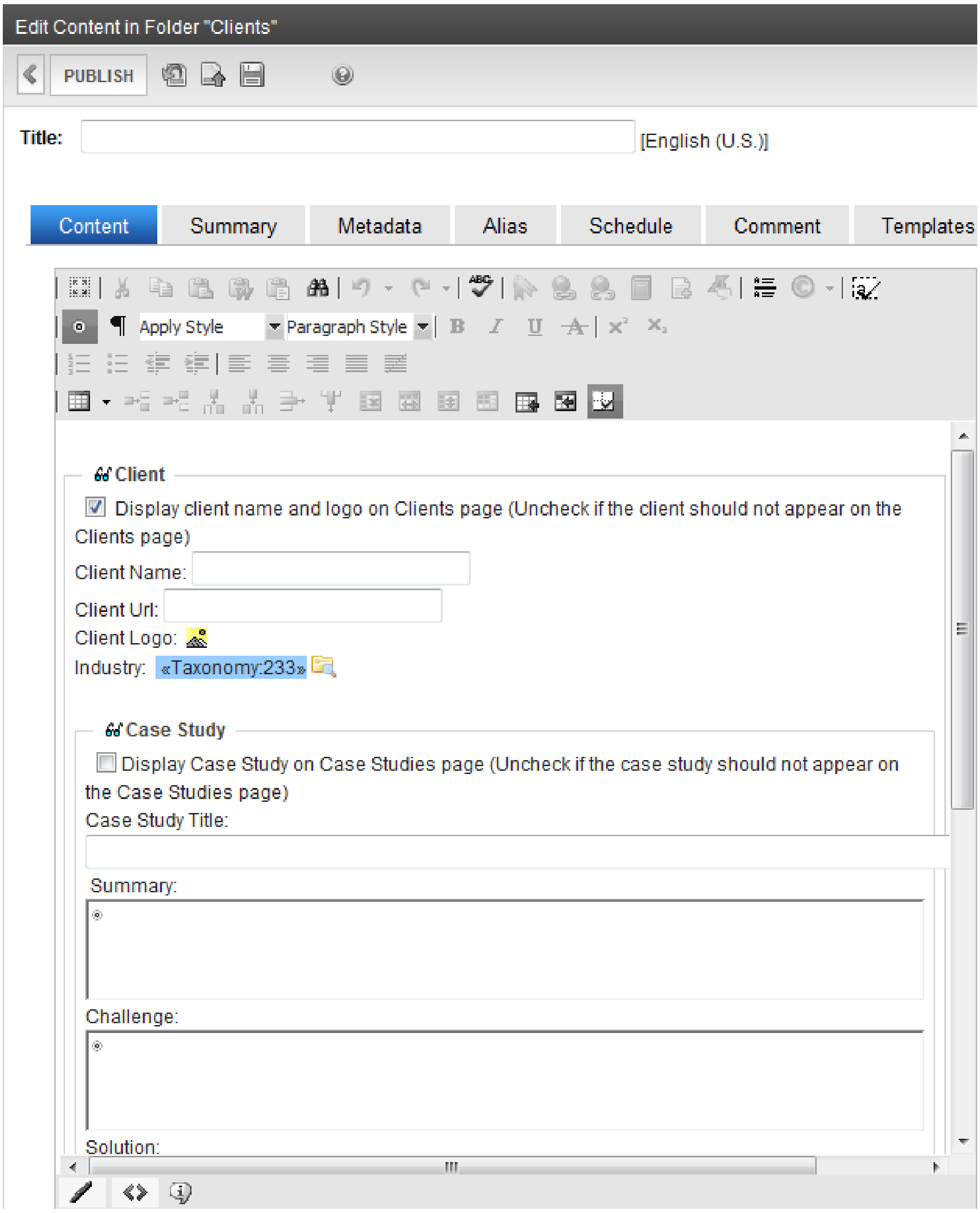
For additional information, see the *Ektron Users Guide: Building an Ektron Powered Website* and the *Ektron Reference*.

The following topics describe the modification you can make the default Clients pages.

- *Adding a Client and Case Study* below
- *Modifying the Case Studies Page* on page 55
- *Adding Testimonials* on page 55

Adding a Client and Case Study

1. While logged into the Case Studies page, click on **Add Case Study**, which opens a Client Smart Form in **Folders > MainSite > Content > Clients** in the Contents section of the Workarea. For information about Smart Forms, see the *Ektron Reference*.



2. Enter a **Title**.
3. Enter a **Client Name**.
4. Enter a **Client URL** to the client's Web site.
5. Click **Select Picture** ( ) to upload a Client Logo. The Library Folder: "Clients\Images" dialog box appears.
   a. Select an image from the library and click **Insert** ( ).

   NOTE: If you do not have the image already loaded in the library, you can search your computer by clicking **Add Library**, browsing for the image, and then click **Add Library** to continue with the Image Properties dialog box.

   b. Specify the **Width**. The **Height** is automatically calculated when you specify width.

c. Click **OK**. The client logo displays on the Client Smart form.

6. Checking the box next to **Display Case Study on Case Studies page** if you want it to show there.
7. Specify the case study information you want.
8. In the Category tab, check the taxonomies that apply at **Ontrek Site Navigation > Clients > Industries**.
9. Click **Publish**. The new client appears in the client list and on the Clients page.

If you set the **Education** industry in the Category tab, then choose **Education** from the **By Industry** filter menu on the Clients page to see your new client filtered with other clients with the same taxonomy.

Modifying the Case Studies Page

Like the Clients page, the Case Studies page displays clients that you can filter with the By Industry filter menu. However, the Case Studies page displays more information about the clients that was entered in the Client Smart Form, which is described in . To add a case study to the Case Studies page, you must check the box in the Smart Form next to **Display Case Study on Case Studies page**.

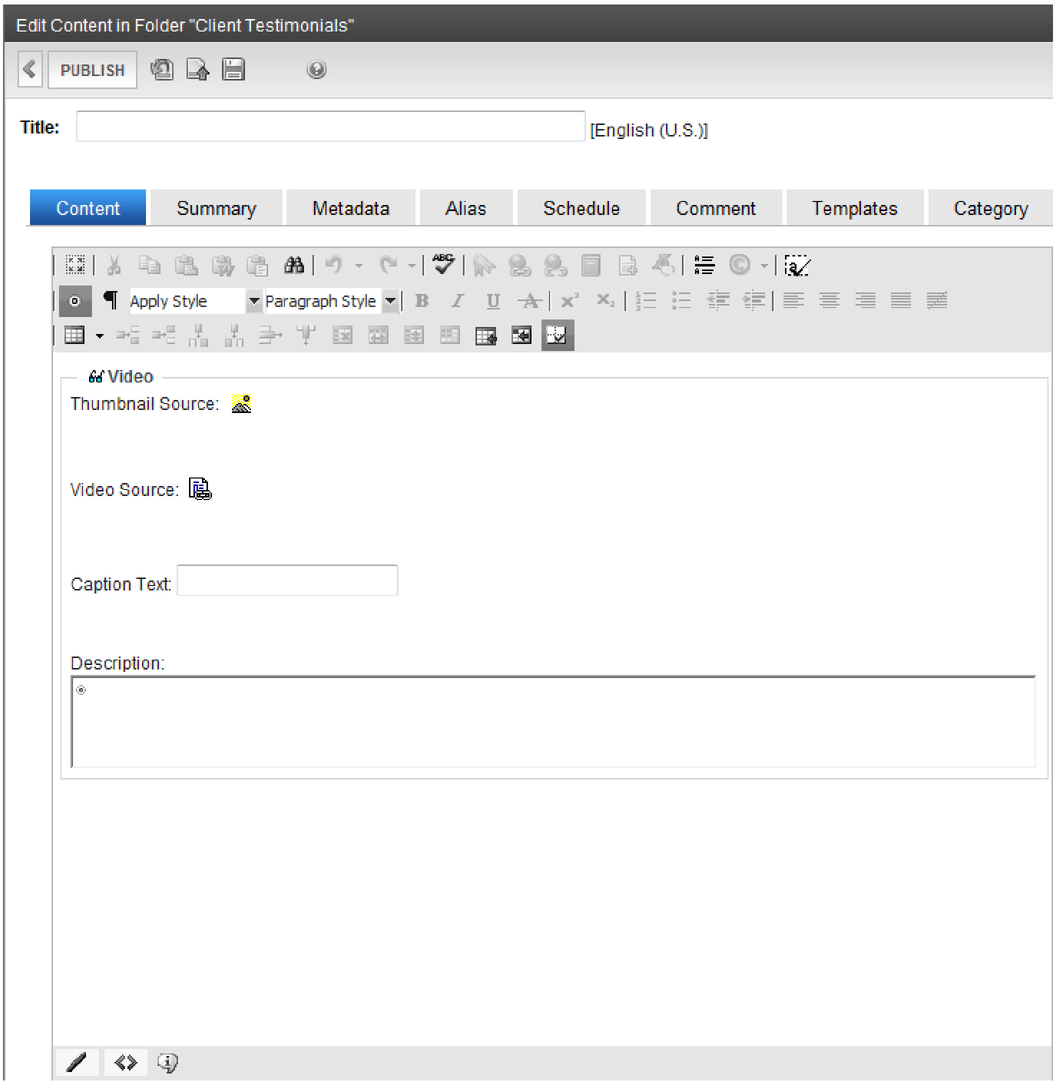
You can edit the introduction by opening the access point () and choosing **Edit in Context**. You can specify additional metadata in the Workarea for the introduction by choosing **Edit**.

The Case Studies page also contains a widget space. For information about adding a widget to the page, see .

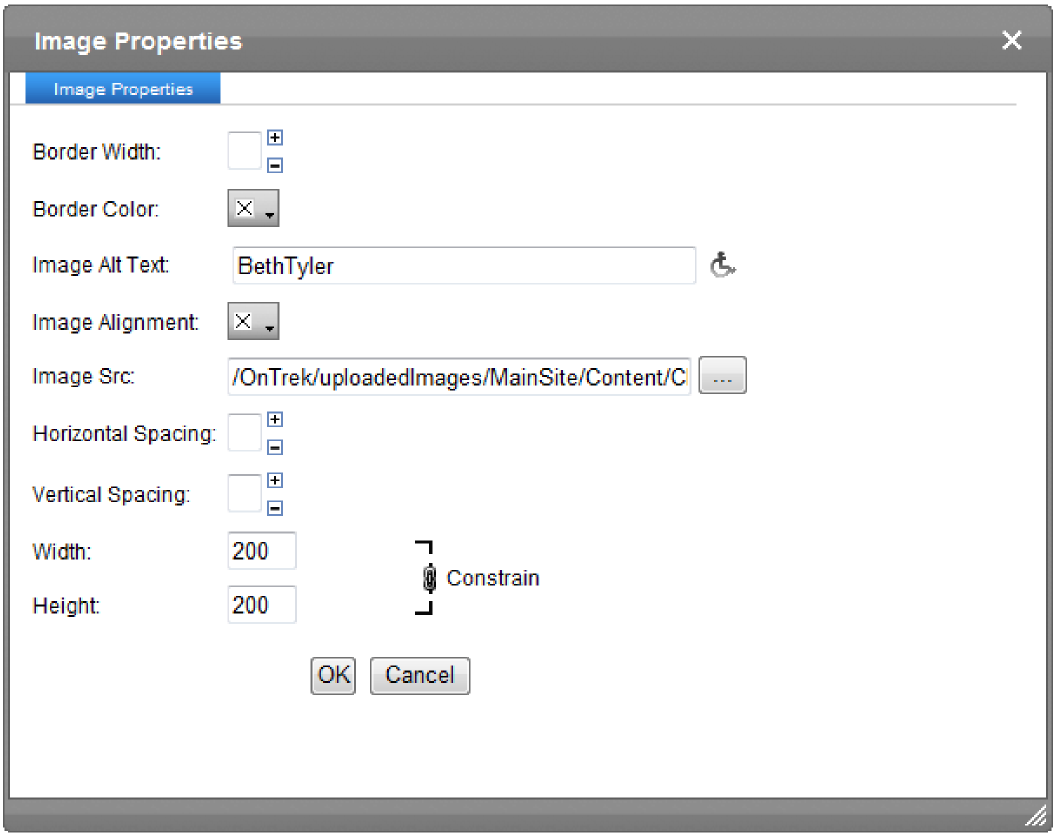
Adding Testimonials

The testimonials in OnTrek are created from a Video Smart Form.

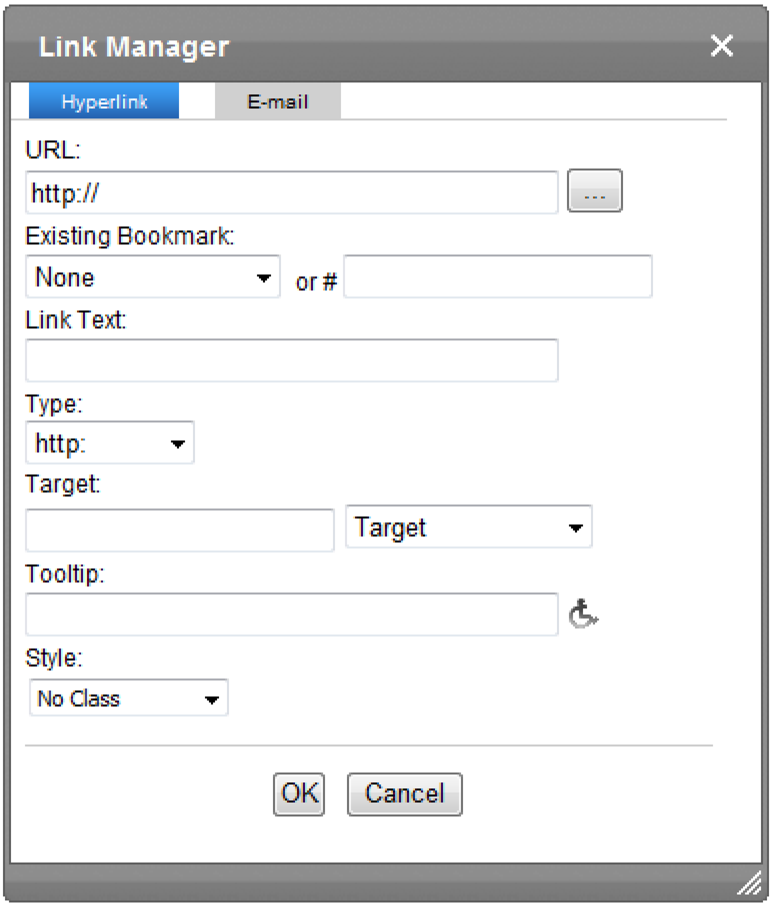
1. While logged into the Testimonials page, click on **Add Testimonial**, which opens a Video Smart Form in **Folders > MainSite > Content > Clients > Client Testimonials** in the Contents section of the Workarea. For information about Smart Forms, see the *Ektron Reference*.



2. Click **Select Picture** (). The Edit Content in Folder "Client Testimonials" screen appears.
3. Double click an item from the Library folder, or click **Add Library** to browse for a new one. The item appears in the Video section of the editor.
4. To change the image properties, click **Select Picture** (). The Images Properties dialog box appears.



5. Fill in the dialog box and click **OK**.
6. Click **Select File** ( ) next to Video Source. The Link Manager dialog box appears.



7. Fill in the dialog box and click **OK**.
8. Enter **Caption** text.
9. Enter a **Description** of the testimony.
10. On the Category tab, check the taxonomies that apply.
11. Click **Publish**. A testimonial is added to the group of existing testimonies.

Modifying the Support Pages

You can create and modify the following types of Support pages. To see the default Support page, see *Support Page* on page 15.

- Support page introductory text
- Support Forums
- Knowledge Base
- Support Request
- Support Search
- Widget space

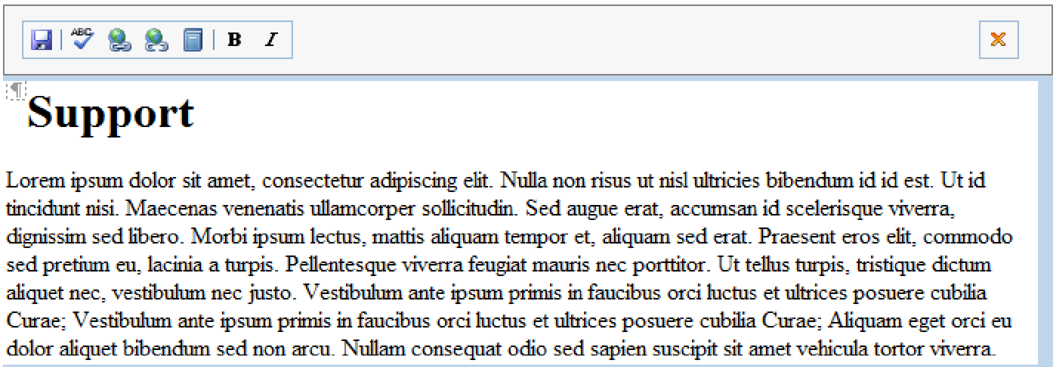
To create your own Support page, you must modify or create templates and user controls, which is not described in this *OnTrek in Ektron Reference*. Developers of .NET templates and user controls can find product templates and user controls at the following locations.

- Template files (`.aspx`), PageBuilder template files (`.pb.aspx`), and c# code behind files (`.cs`) in the [*siteroot*] folder of the installation.
- Master pages—**[*siteroot*] > OnTrek > Components > Templates**.
- User controls—**[*siteroot*] > OnTrek > Components > userControls**.

Editing the Support Page Introduction In Context

OnTrek preloads the introduction to the Support page with *Lorem ipsum* text to give you an example of what a Support page introduction can look like. To edit this content from the page after logging in:

1. Open the access point ( ) above the content.
2. Choose **Edit in Context**. An editor window appears.

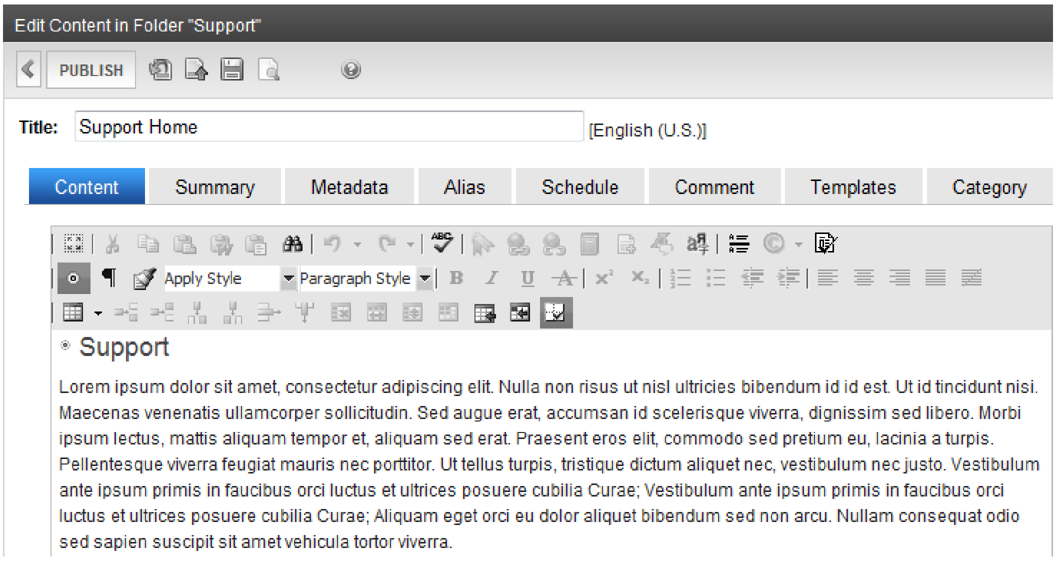


3. Edit the text, and click **Save** ( ). The text is changed on the page.

Editing the Support Page in the Workarea

You can access the Support page introductory content in the Workarea, where you can create additional information about the content (such as Metadata).

1. Login to the Workarea and choose the Content tab.
2. Choose **Folders > MainSite > Content > Support**.
3. Choose **Support Home** from the content list.
4. Click **Edit**.

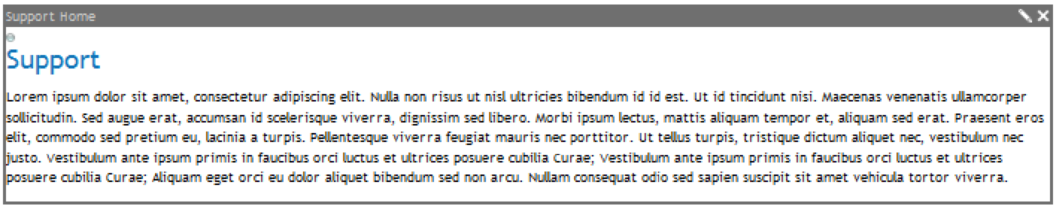


5. Click **Publish** to display your changes.

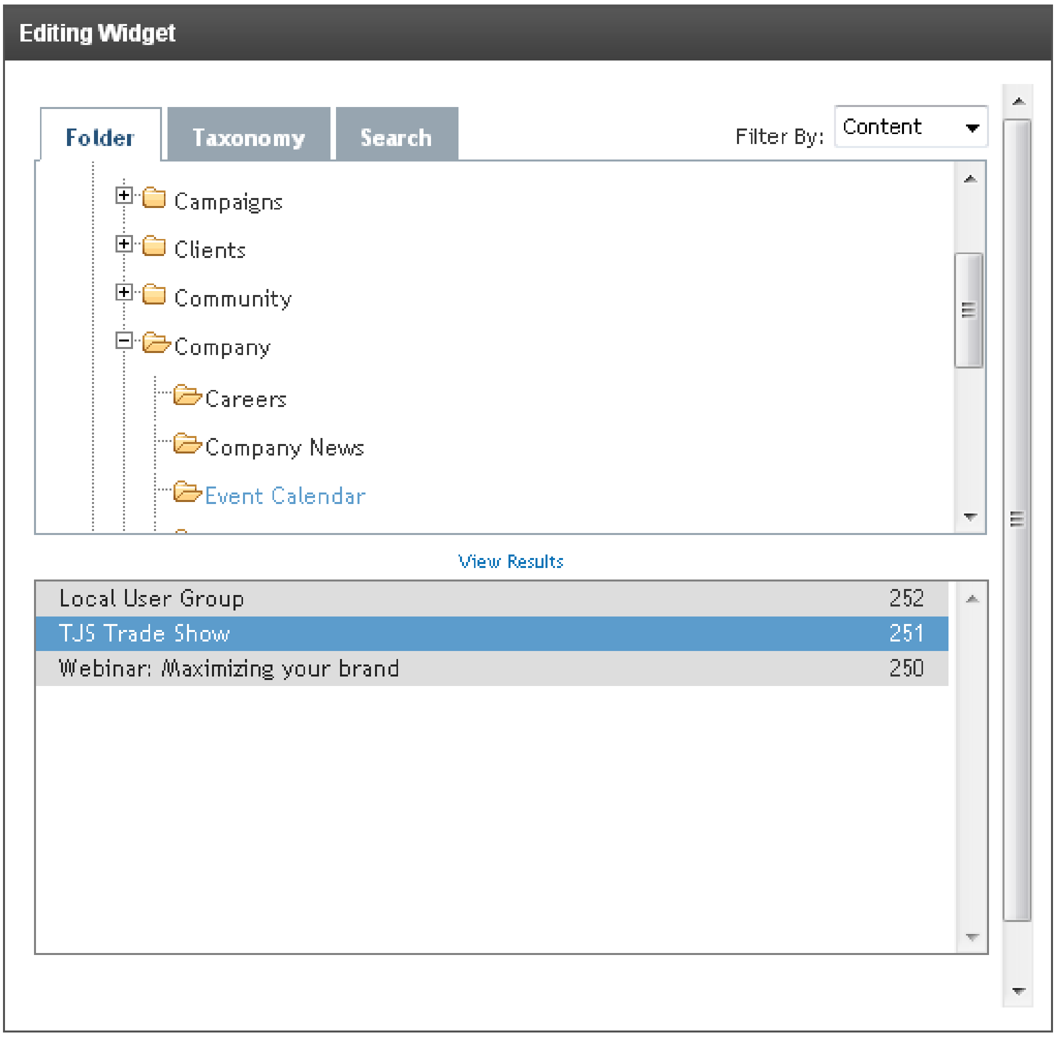
Selecting a Content Block for the Support Introduction

To change the Support page introduction by selecting an existing piece of content:

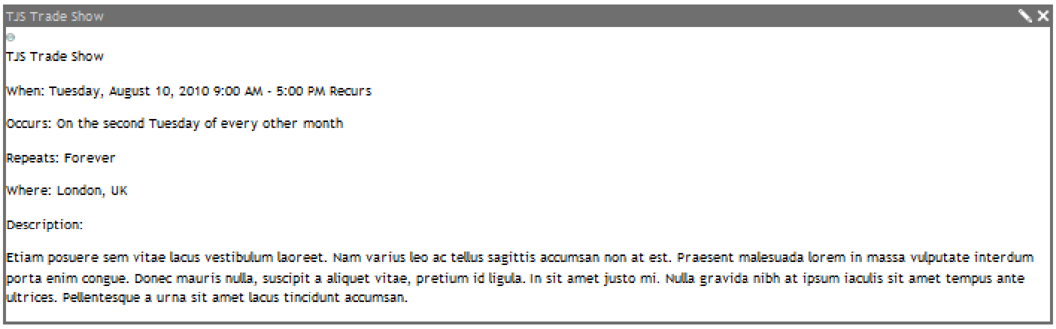
1. While logged in to the Support page, open the PageBuilder menu and choose **File > Edit**. The widget spaces appear on the page.



2. Click **Edit** ( ) in the Support Home widget. The Editing widget dialog box appears.
3. Navigate the folder hierarchy to find a piece of content. When you click on a folder, valid content appears in the View Results panel.



4. Click on a content item, then click **Save**. The content appears on the page.

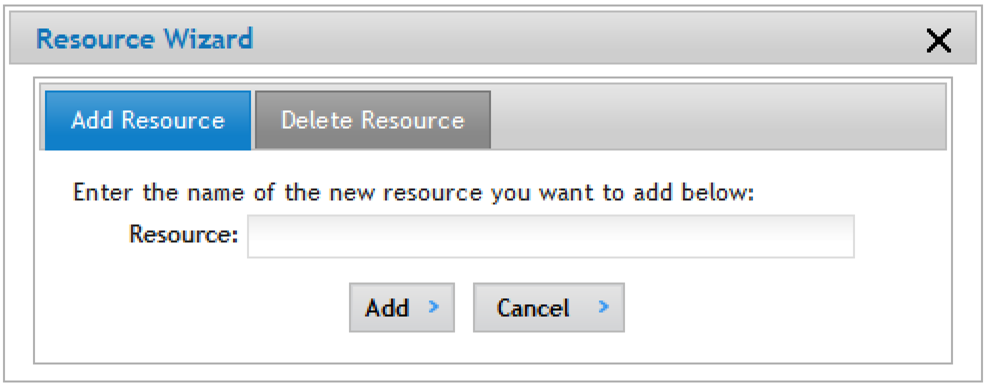


5. Choose **File> Publish** from the PageBuilder menu.

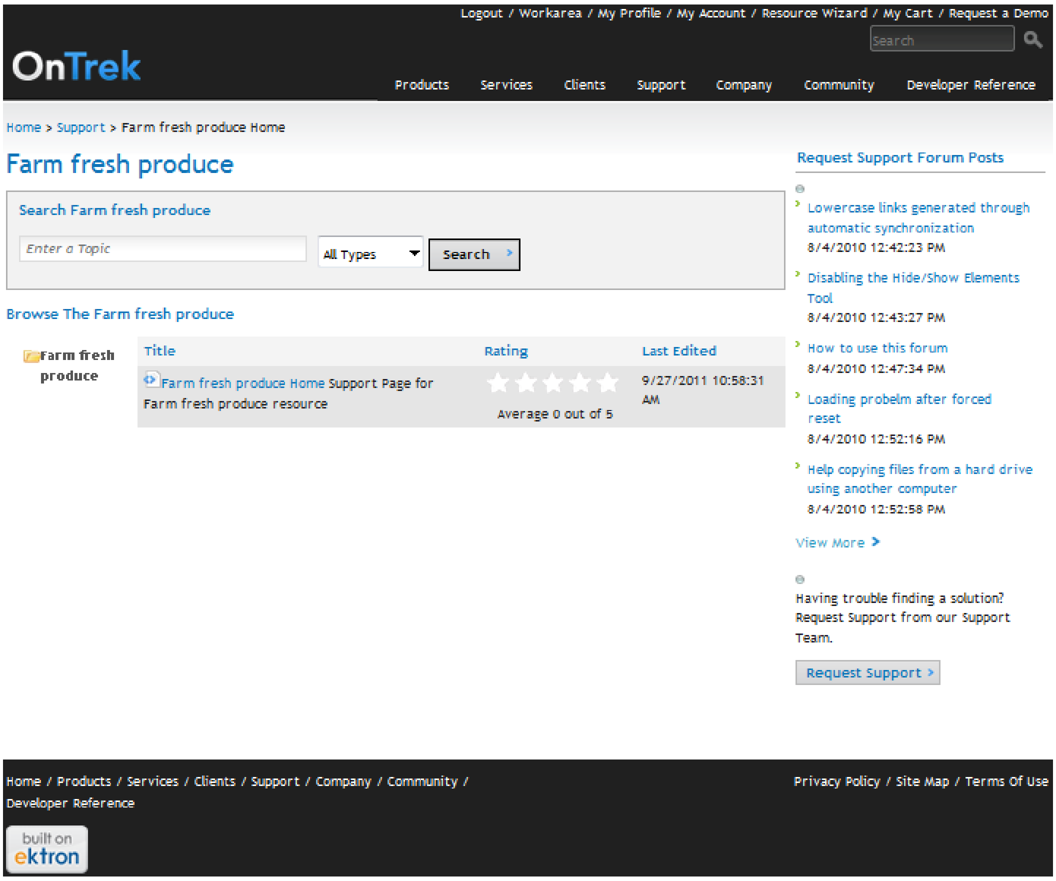
Creating a New Knowledge Base Page

To add a Knowledge Base page:

1. Click **Resource Wizard** in the top navigation area. A dialog box appears.



2. Enter the name of a new Knowledge Base resource and click **Add**. A new Knowledge Base resource page is created. The following figure shows a new Knowledge Base resource page for *Farm fresh produce*.



The new page is pre-loaded with Content, a PageBuilder Page, a taxonomy category, and menu links.

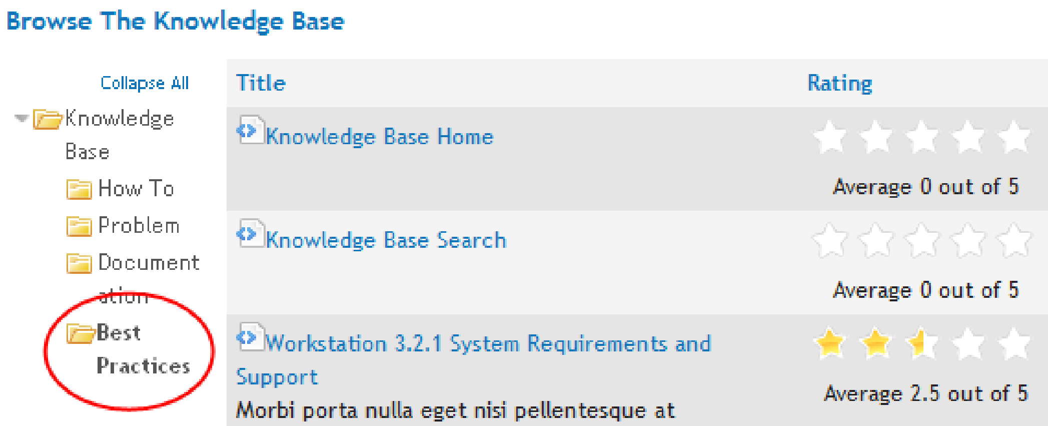
Adding Content to a Knowledge Base Page

1. While logged into the Workarea in the Content section, choose **Folders > MainSite > Content > Support > Knowledge Base**. The View Content screen displays the current articles in the Knowledge Base.
2. Choose **New > HTML Content**. A content editor appears.

3. Add the **Title** and content of the article.
4. On the Category tab, choose **OnTrek Site Navigation > Support > Knowledge Base**, and check the type of article.
5. Click **Publish**.

Administrators can add subfolders to the default or user-created Knowledge Base page directly, as described in the following steps.

1. On the Knowledge Base page on the left side, right click on the Knowledge Base folder and choose **Add Folder**. The Add Folder dialog box appears.
2. Specify the name of a subfolder (or example, `Best Practices`) then click **Add**. The folder is added to the list as shown in the following sample figure.

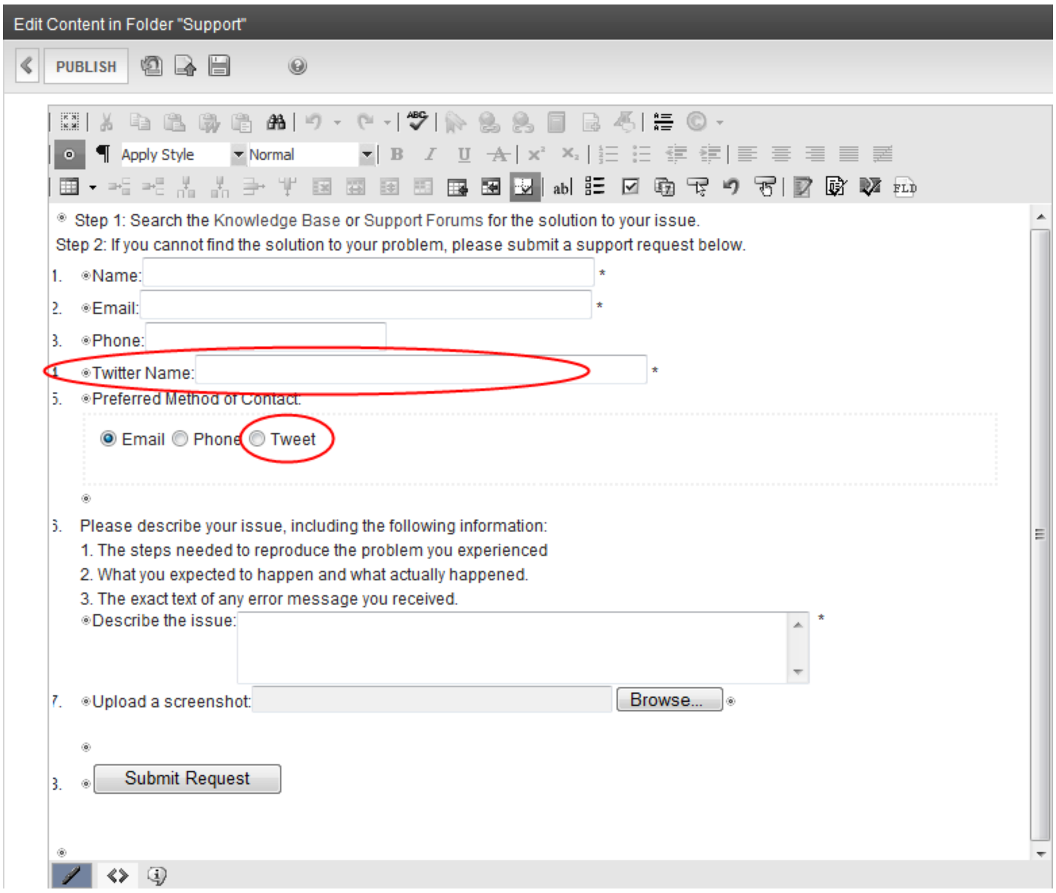


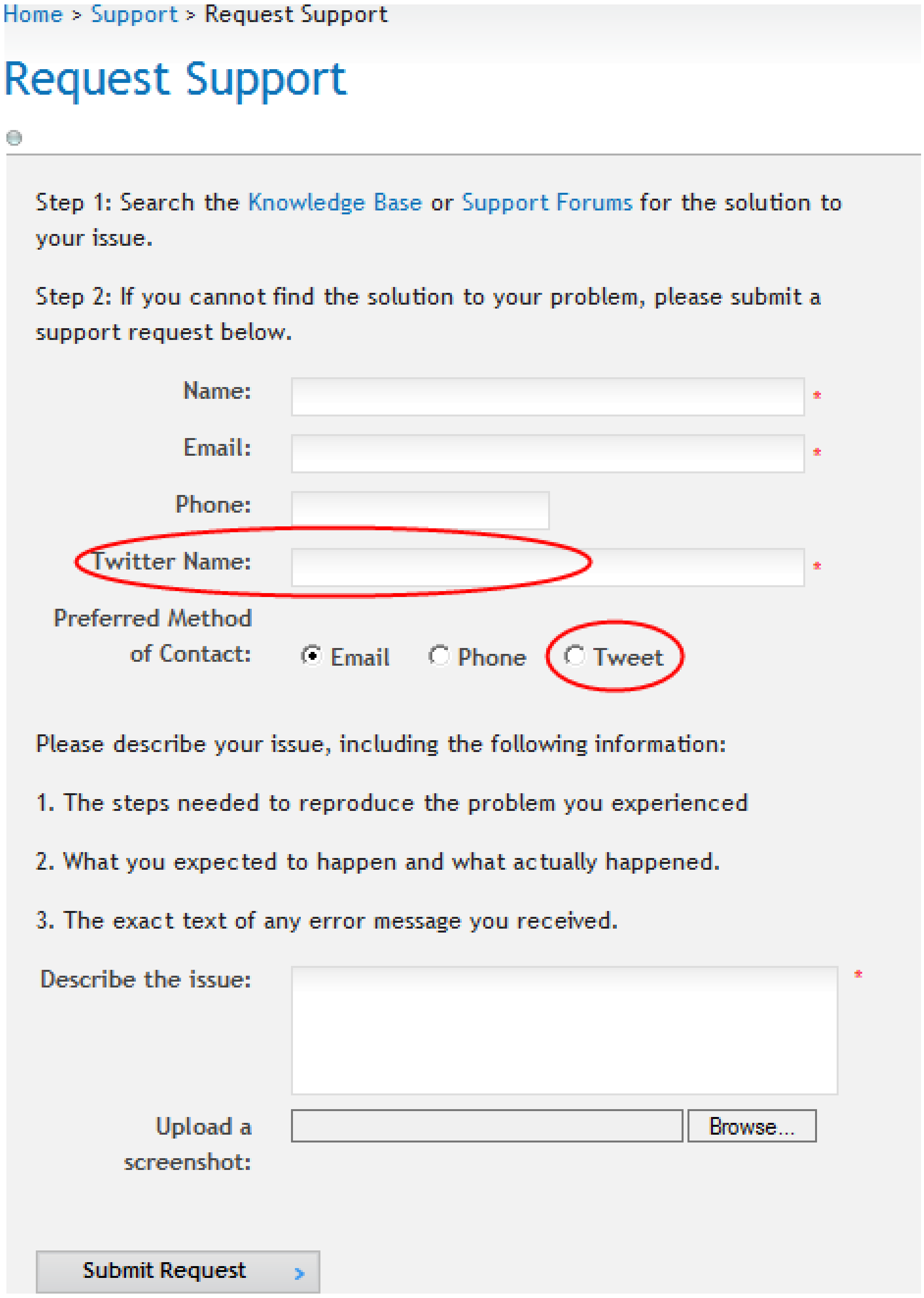
When you add content to a folder, the taxonomy of the folder is applied to the content automatically.

Modifying the Request Support Form

The Request Support page is created with a HTML Form. To modify the form:

1. While logged in to the Request Support page, open the access point (●) and choose **Edit**. The Request Support form appears in the content editor.
2. Modify the form. For information about HTML Forms, see the *Ektron Reference*. The following figure shows a modified form and the result when you click **Publish**.
   - *Twitter name* field was added
   - *Tweet* was added


Edit Content in Folder "Support"
PUBLISH
Apply Style
Normal
Step 1: Search the Knowledge Base or Support Forums for the solution to your issue.
Step 2: If you cannot find the solution to your problem, please submit a support request below.
Name:
Email:
Phone:
Twitter Name:
Preferred Method of Contact:
Email
Phone
Tweet
Please describe your issue, including the following information:
1. The steps needed to reproduce the problem you experienced
2. What you expected to happen and what actually happened.
3. The exact text of any error message you received.
Describe the issue:
Upload a screenshot:
Browse...
Submit Request

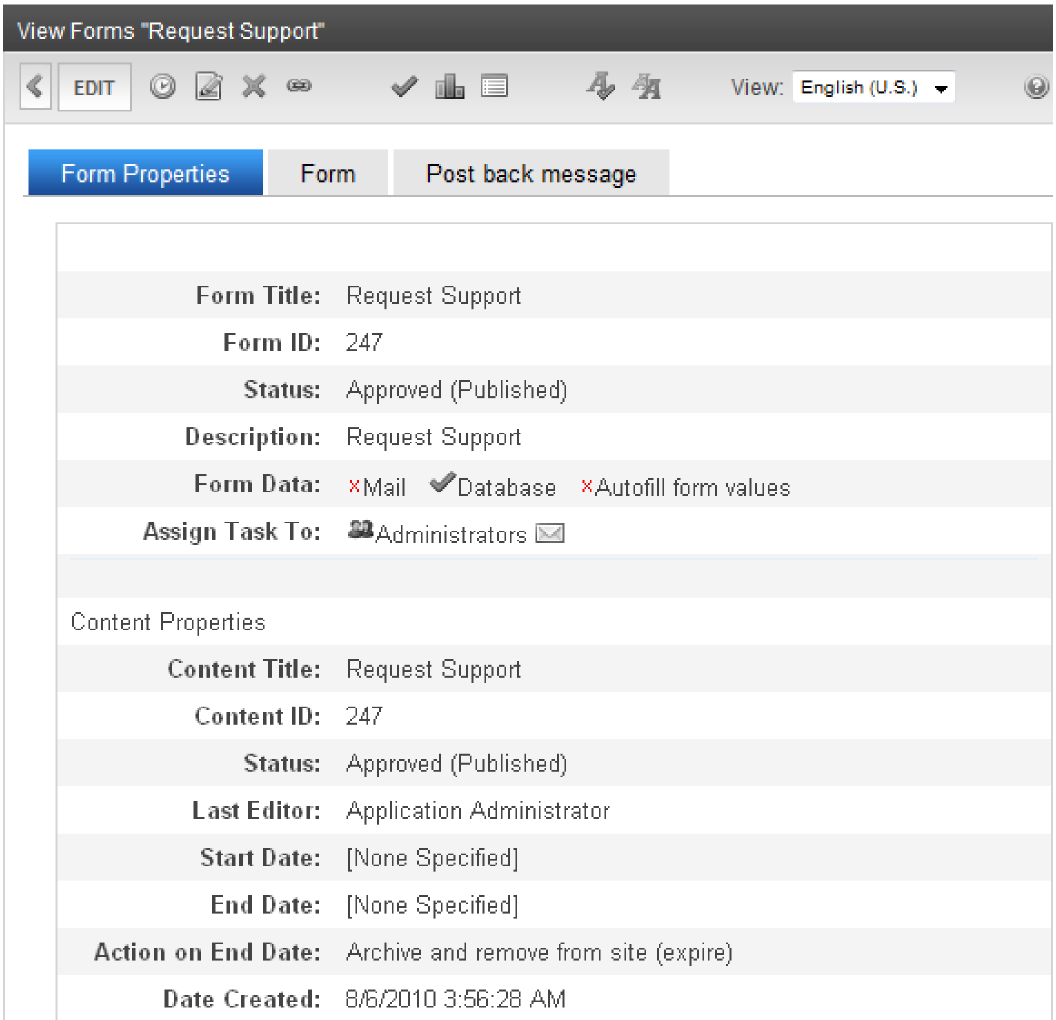


The Request Support page also has a widget space that contains two List Summary widgets by default. To add a widget, see .

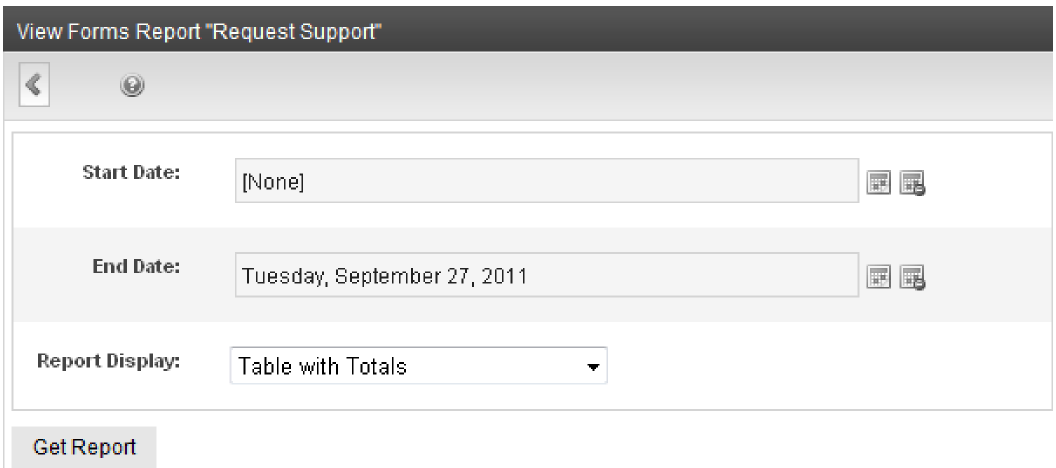
Viewing Support Requests

When the Request Support form is filled out and the **Submit Request** is clicked, the form data is added to Ektron. To view submitted requests:

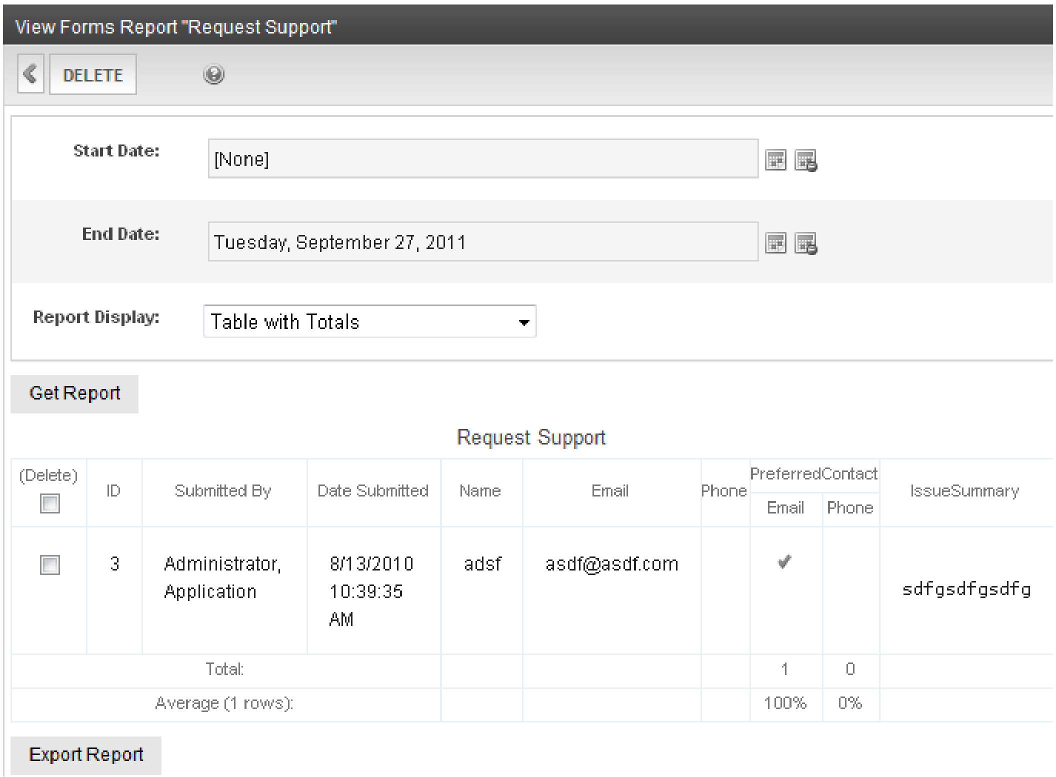
1. Login as administrator.
2. Navigate to **Support > Request Support**. The Request Support page appears.
3. Open the access point ( ) and choose **Properties**. The View Forms "Request Support" screen appears in the Ektron Workarea.



4. Click **Report** (). The form changes for you to specify viewing criteria, such as start and end dates and so on.

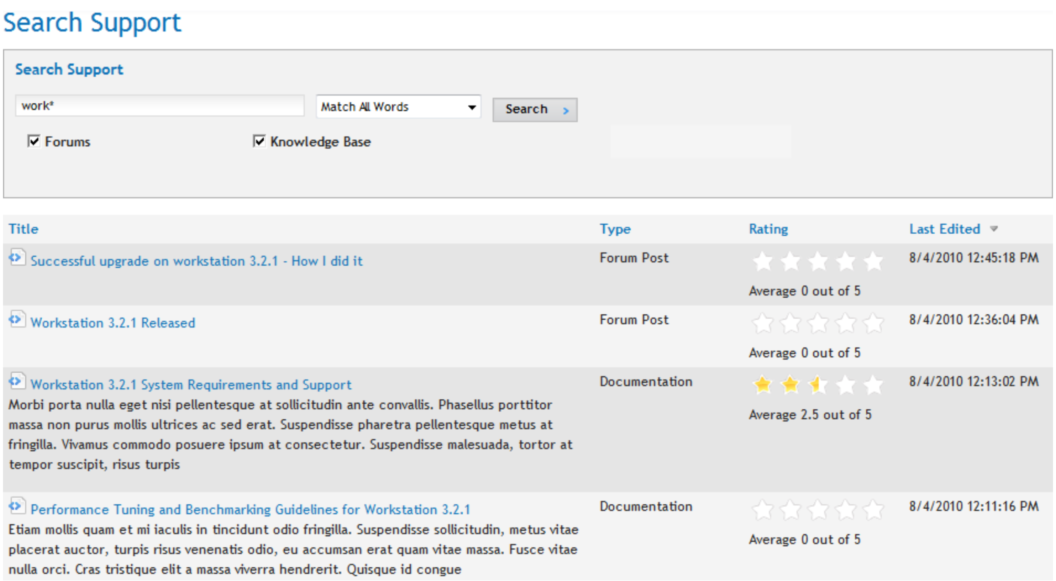


5. Click **Get Report**. The requests display within the criteria that you specified.



Searching the Support Database

The search tool on the support page operates on the forums and knowledge base content. The following example shows a search with a wildcard (*) for the word `work*` that produced 4 results. Specify your search criterion and click **Search**.

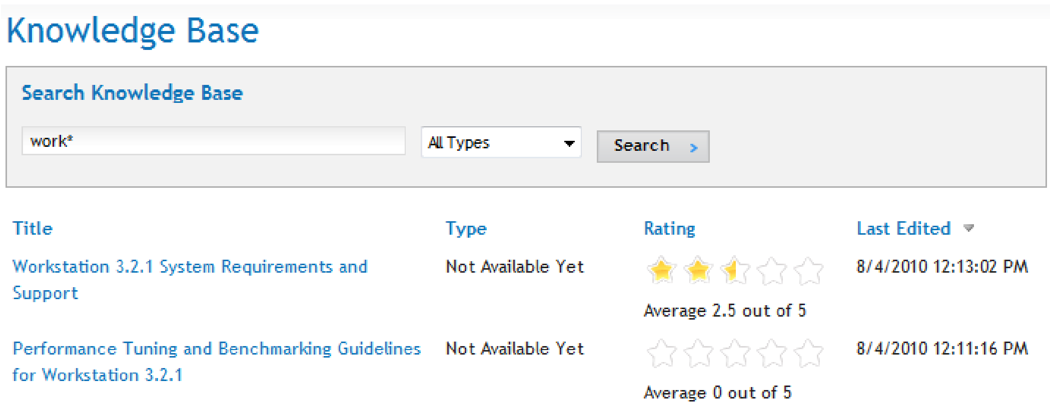


Searching the Knowledge Base

The search tool on the Knowledge Base page operates only on knowledge base content. (You can search the Knowledge Base and Support forums on the Search Support page (**Support >**

Support Search). See *Searching the Support Database* on previous page.)

The following example shows a search with a wildcard (*) for the word `work*` that produced 2 results. Specify your search criterion and click **Search**.

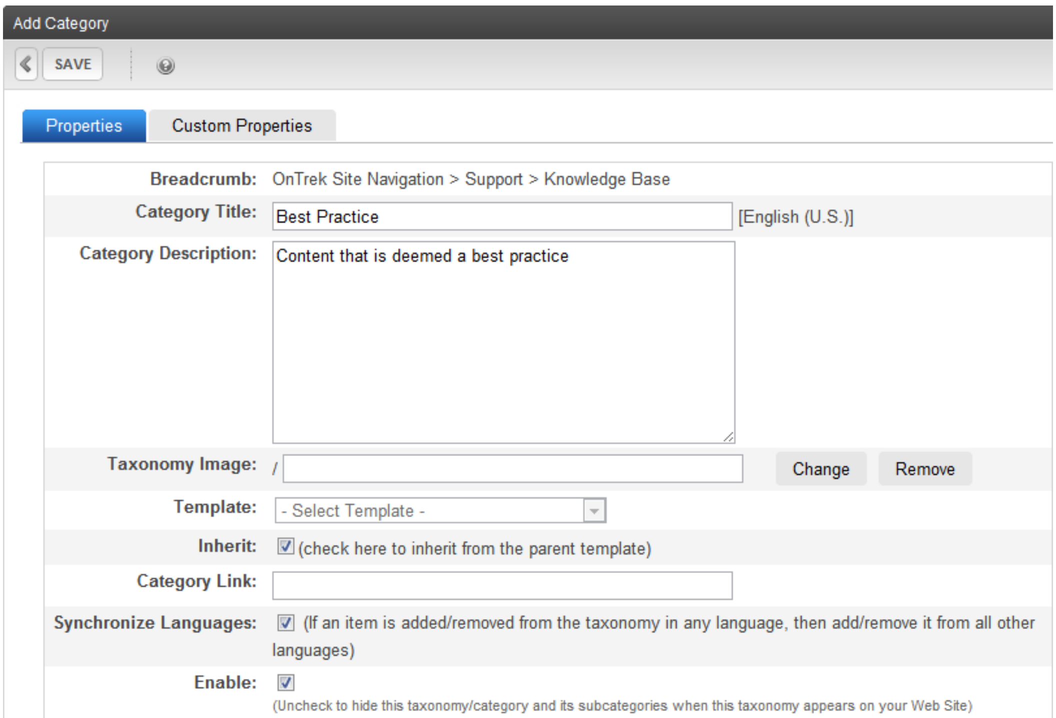


Filtering the Search

You can filter the search by **All Types**, **How To**, **Problem**, or **Documentation**.

Adding a Filter to the Search

1. Go to **Workarea > Content > Taxonomies > OnTrek Site Navigation > Support > Knowledge Base**.
2. Right click on **Knowledge Base** and choose **Add Category**. The Add Category screen appears.



3. Enter a **Category Title** (`Best Practice`, for example) and other optional information, then click **Save**.

NOTE: To enable topics to be found in a search by the new category, you must check the taxonomy on the Category tab of the content item in the Workarea. For information, see *Adding Content to a Knowledge Base Page* on page 62.

Modifying the Company Pages

The Company page and associated pages contain elements that you may want to present your company to visitors to your site. The main Company page displays a content block and a widget space with an Upcoming Events widget. To see the default Company page, see . You can create and modify the following types of Company pages.

- Company page introductory text
- Company News page—*Modifying the Company News Page* on page 72
- Company Calendar page—*Adding Events to the Company Calendar* on page 73
- Our Team page—*Modifying the Our Team Page* on page 74
- Careers page—*Modifying the Careers Page* on page 75
- Contact Us page—*Modifying the Contact Us Page* on page 77
- Widget space—*Adding a Widget to the Page* on page 30

To create your own Company page, you must modify or create templates and user controls, which is not described in this *OnTrek in Ektron Reference*. Developers of .NET templates and user controls can find product templates and user controls at the following locations.

- Template files (`.aspx`), PageBuilder template files (`.pb.aspx`), and c# code behind files (`.cs`) in the [*siteroot*] folder of the installation.
- Master pages—**[*siteroot*] > OnTrek > Components > Templates**.
- User controls—**[*siteroot*] > OnTrek > Components > userControls**.

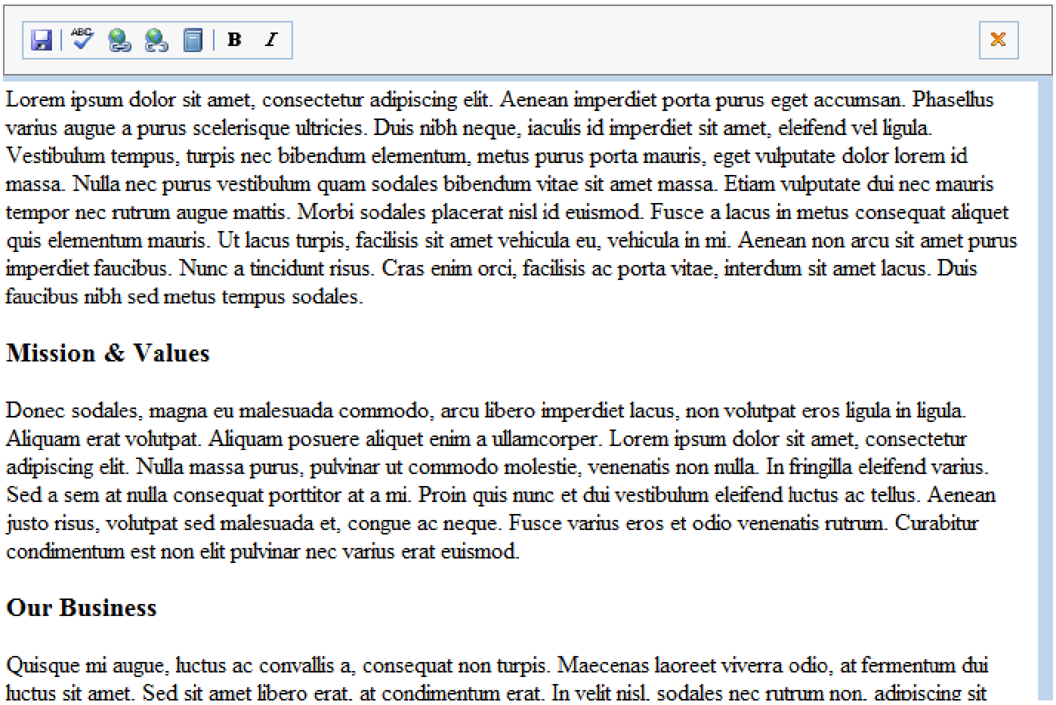
For additional information, see the *Ektron Users Guide: Building an Ektron Powered Website* and the *Ektron Reference*.

Editing the Company Page Introduction In Context

OnTrek preloads the introduction to the Company page with *Lorem ipsum* text to give you an example of what a Company page introduction can look like.

You can edit this content from the page by following these steps after logging in:

1. Open the access point (●) above the content.
2. Choose **Edit in Context**. An editor window appears.



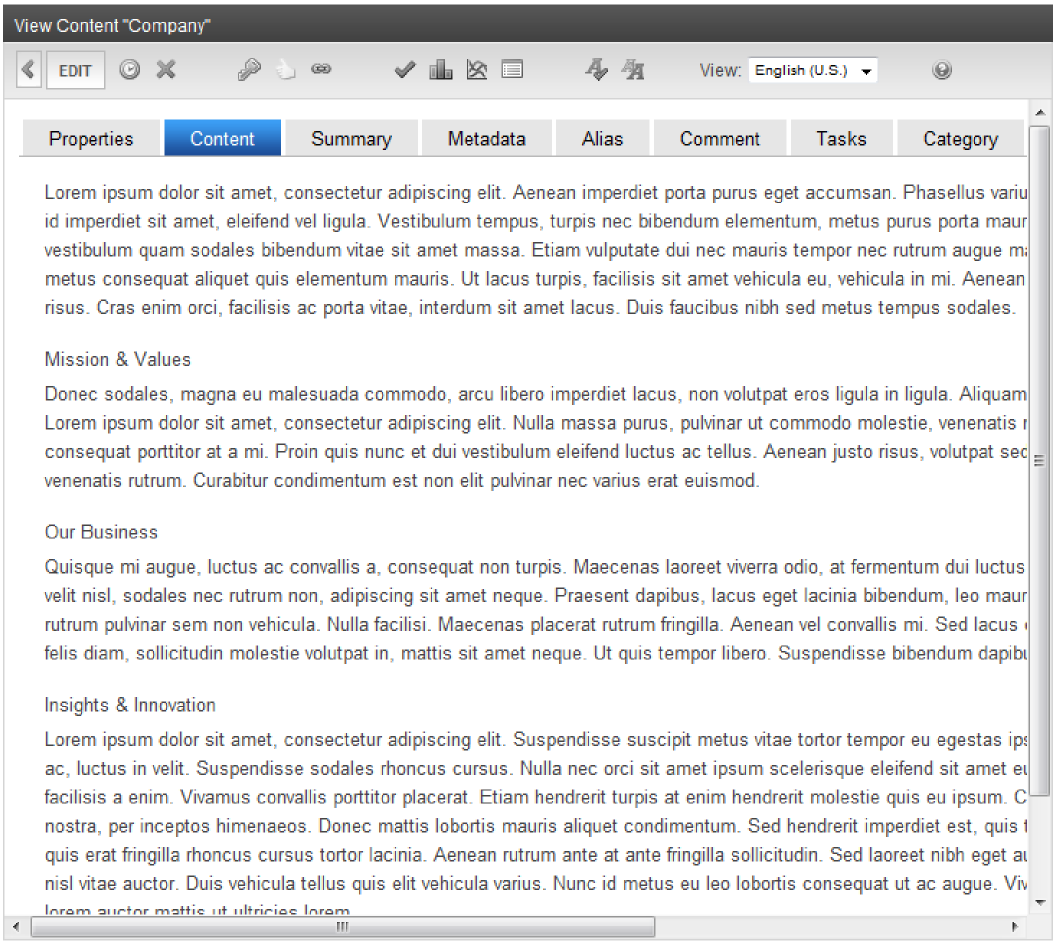
3. Edit the text, and click **Save**. The text is changed on the page.

Editing the Company Page in the Workarea

You can access the Company page introductory content in the Workarea, where you can create additional information about the content (such as Metadata). To do this, follow these steps:

1. Login to the Workarea and choose the Content tab.
2. Choose **Folders > MainSite > Content > Company**.
3. Choose **Company** from the content list.

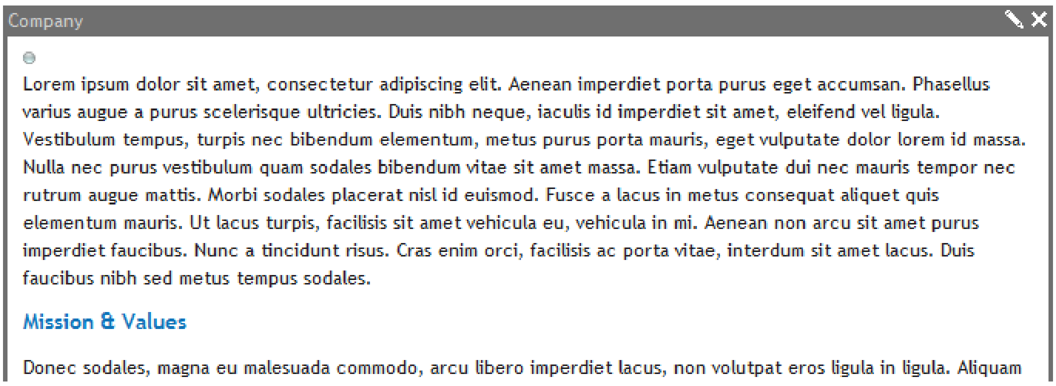
4. Click **Edit**.



Selecting a Content Block for the Company Page Introduction

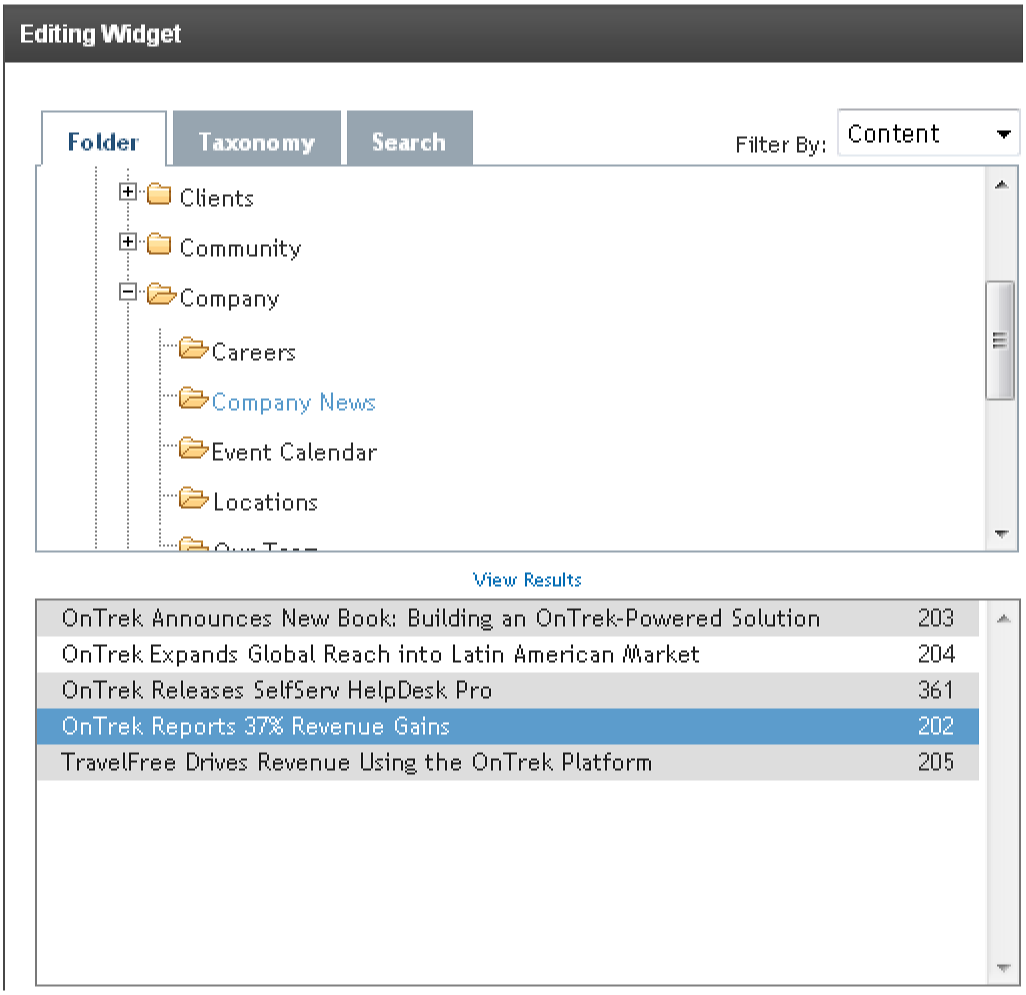
To change the Company page introduction by selecting an existing piece of content, follow these steps:

1. While logged in to the Company page, open the PageBuilder menu and choose **File > Edit**. The widget spaces appear on the page.



2. Click **Edit** ( ) in the Company widget. The Editing widget dialog box appears.

3. Navigate the folder hierarchy to find a piece of content. When you click on a folder, valid content appears in the View Results panel.



4. Click on a content item, then click **Save**. The content appears on the page.

5. Choose **File > Publish** from the PageBuilder menu.

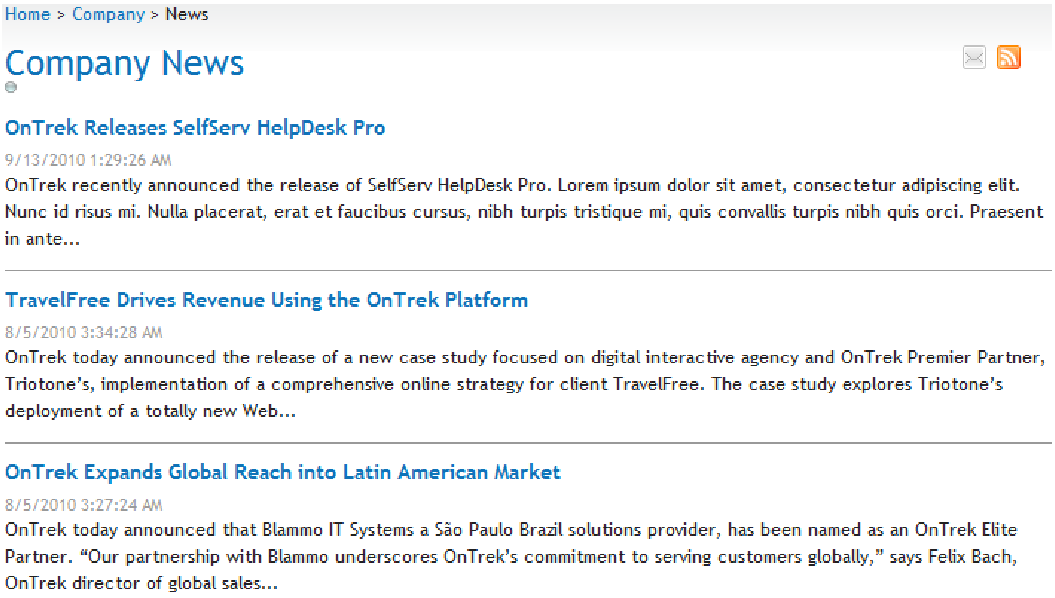
Modifying the Company News Page

To view the Company News page, choose **Company > Company News**.

To add a news item to the Company News page:

1. While logged in on the Company News page, open the access point (◉) and choose **Add News**. A content editor window appears.

2. Fill in the content and click **Publish** when done. The HTML content item is added to the following location in the Content section of the Workarea: **Folders > MainSite > Content > Company > Company News**.
3. Refresh the browser (**F5**) to see the changes on the Company News page.

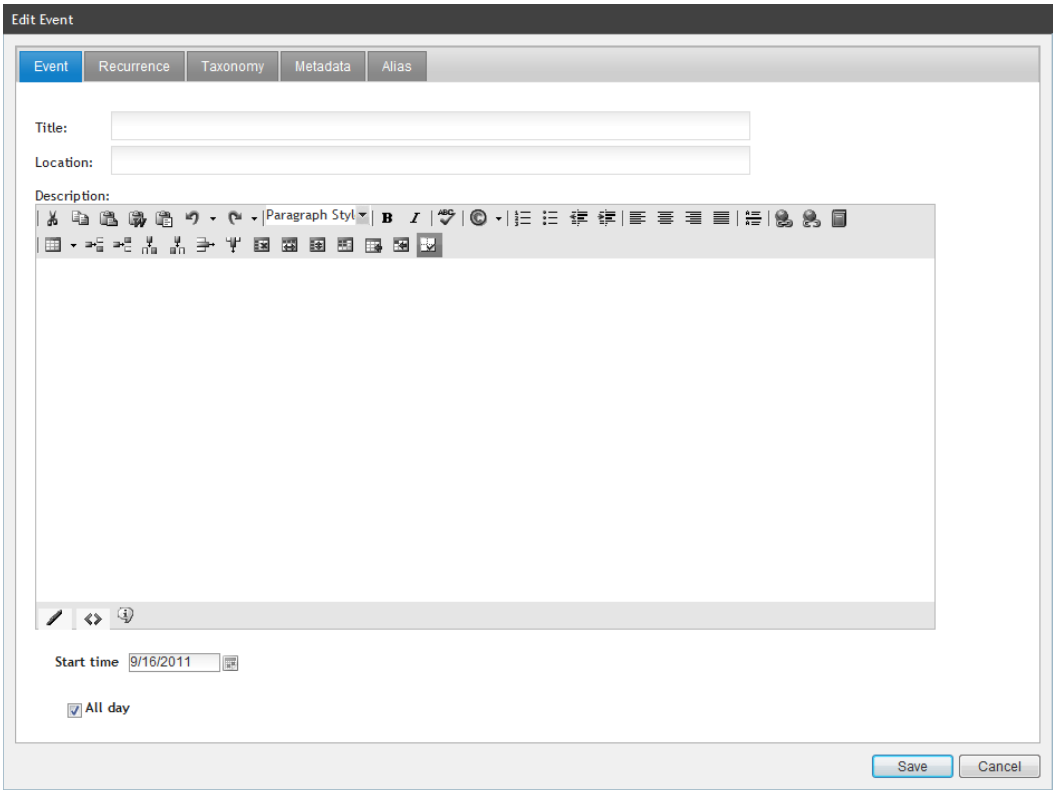


Adding Events to the Company Calendar

To view the Company calendar page, choose **Company > Events**. Events on the company calendar appear in the Upcoming Events widget.

To add a news item to the Company News page:

1. Double click on a day in the calendar. The Edit Appointment screen appears.



2. Fill out the form. When done, click **Save**.

NOTE: You can find the company calendar in the Workarea in the Content area at **Folders > MainSite > Content > Company > Event Calendar**.

Modifying the Our Team Page

The Our Team page consists of an introduction, a collection of team members, and a widget space in the right column. To modify the Our Team page introduction, see *Editing the Company Page Introduction In Context* on page 69 or *Editing the Company Page in the Workarea* on page 70.

Adding a Widget to the Page

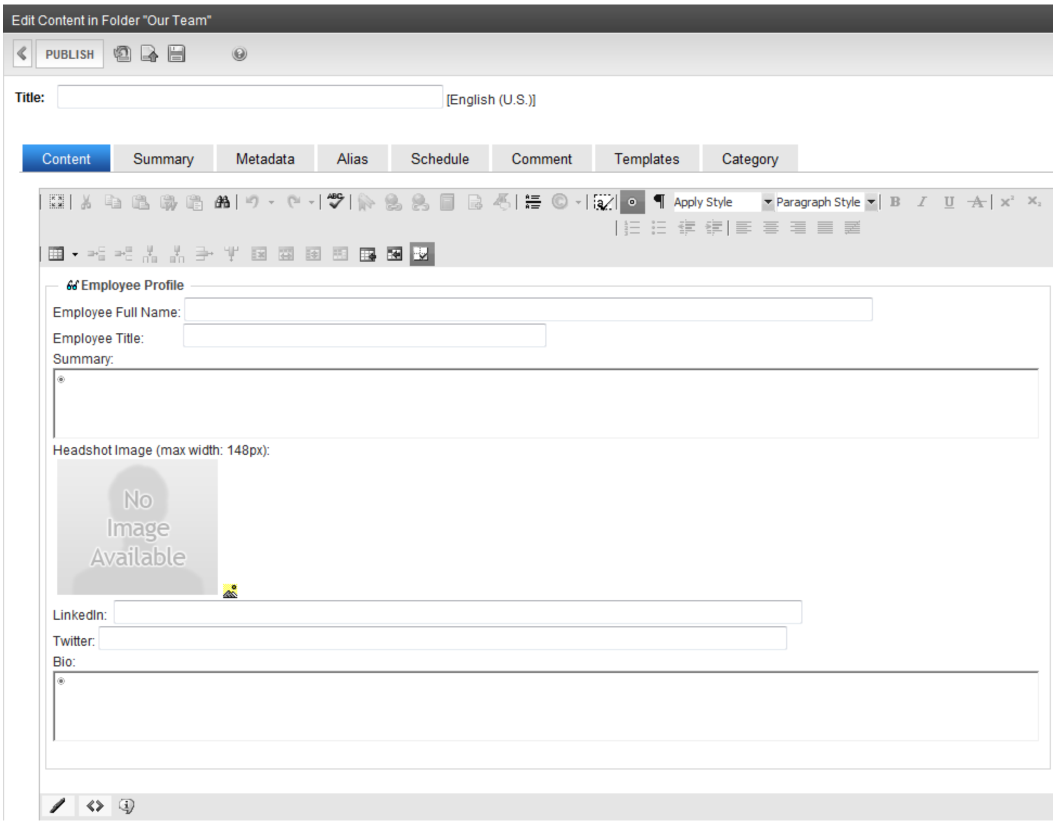
To add or change the widget on the page, see *Adding a Widget to the Page* on page 30.

Adding a Team Member to the Page

To add a team member to the page:

1. If you want to use a picture of a new team member, you must first add the image.
   a. While logged into the Workarea in the Library section, choose **Library > MainSite > Content > Company > Our Team**.
   b. Click **Add**.
   c. Enter Title.
   d. Click **Browse** to upload the image. You also can add additional information.
   e. Click **Save**.

2. While logged into the Our Team page, open the access point ( ) and choose **Add Team Member**. The Employee Profile form appears.



3. Fill out the form.
   a. Fill in the text fields.
   b. To use a previously stored image, click on the add image icon ( ). The Image Properties dialog box appears.
      1. Click the **Image Src** ellipses (...). The library folder Our Team/images appears.
      2. Double click on the image you want.
4. Click **Publish**. The new team member appears on the page.

Deleting a Team Member from the Page

To delete a team member:

1. While logged into the Workarea in the Content section, choose **Collections > Our Team**. The View Collection panel displays the team members.
2. Click the person you want to remove.
3. Click **Delete** ( ). The member is removed from the page.

Modifying the Careers Page

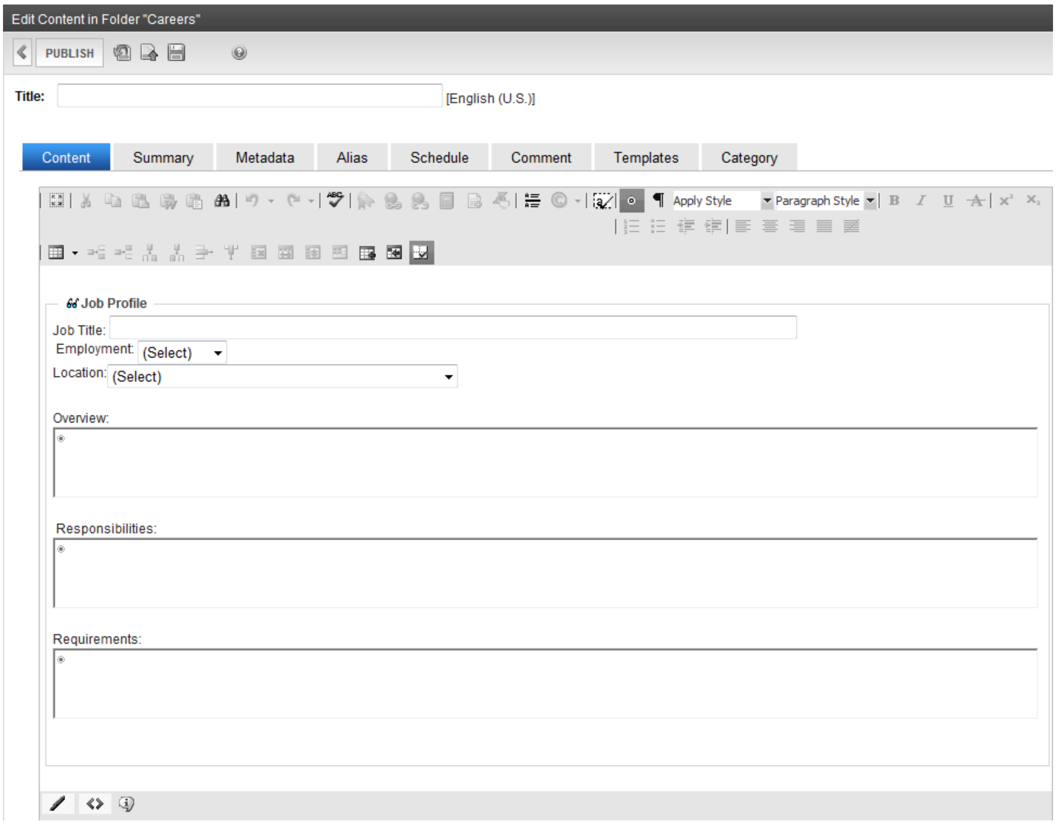
The Careers page contains a search box, a filter, a list of available jobs, and a widget space in the right column. The following topics show you how to modify these elements.

NOTE: The Search box is not modifiable.

Creating a Job Posting

Job postings are located in the Workarea in the Content section at **Folders > MainSite > Content > Company > Careers**. When you are logged in and at this location, you can create a new job posting with the following steps.

1. In the View Contents panel, choose **New > Job Description**. The content editor appears with a Job Profile Smart Form, as shown in the following figure. For information about Smart Forms, see the *Ektron Reference*.



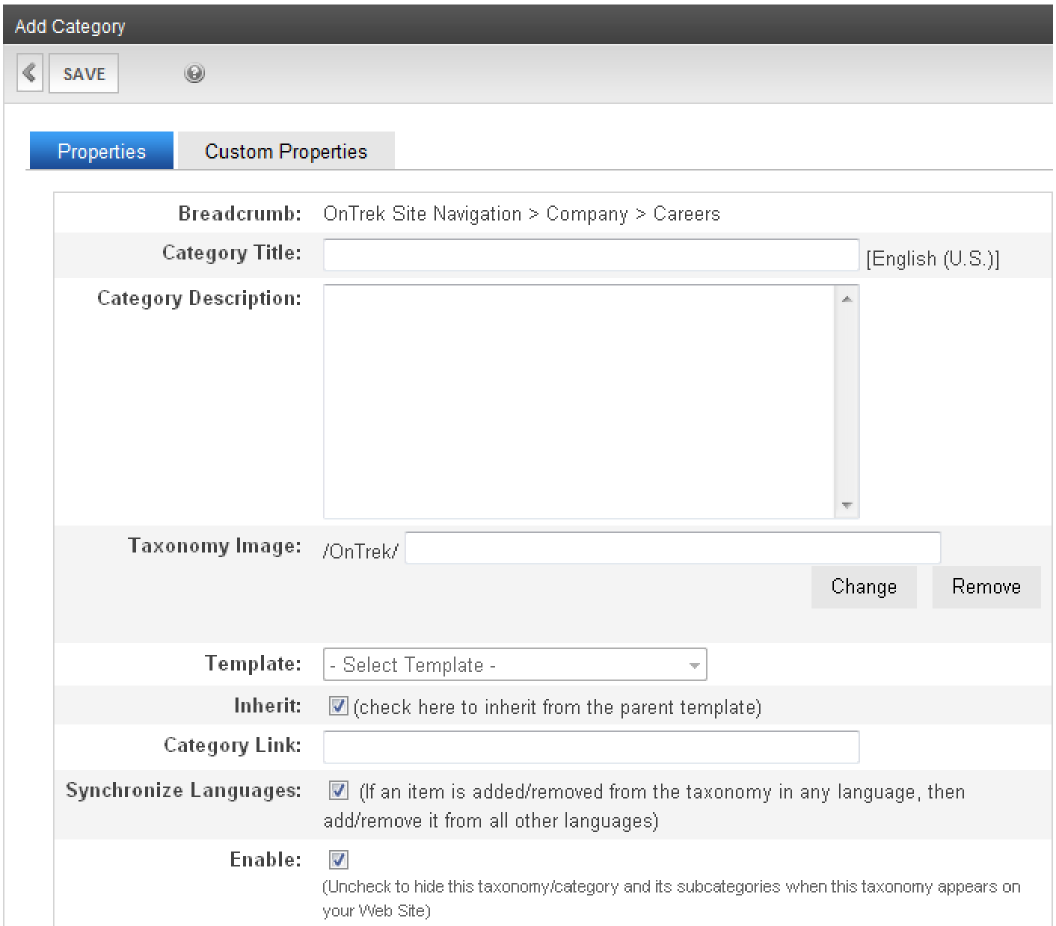
2. Fill out the form.
3. Select the type of job in the Category tab by checking one or more boxes next to the categories to which the job applies.
4. Click **Publish**. The new entry appears on the Careers page.

Modifying the Filter Careers Box

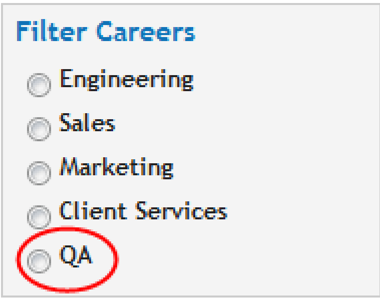
The Filters Career box is dynamically loaded from the taxonomy.

To add a filter, you must add a category to the taxonomy.

1. While logged into the Workarea in the Content section, choose **Taxonomies > Taxonomies > OnTrek Site Navigation > Company > Careers**. The View Taxonomy screen appears.
2. Click **Add Category**. The Add Category screen appears.



3. Enter a name in the **Category Title** field. For example, `QA`.
4. Click **Save**.
5. Refresh the browser (**F5**) to see the changes in the Filter Careers box.



To add or change the widget on the page, see *Adding a Widget to the Page* on page 30.

Modifying the Contact Us Page

The Contact Us page has an introduction section and a tabbed section. The following topics describe each section.

The Directions tab displays a Bing™ map from which you can search for geographic locations.

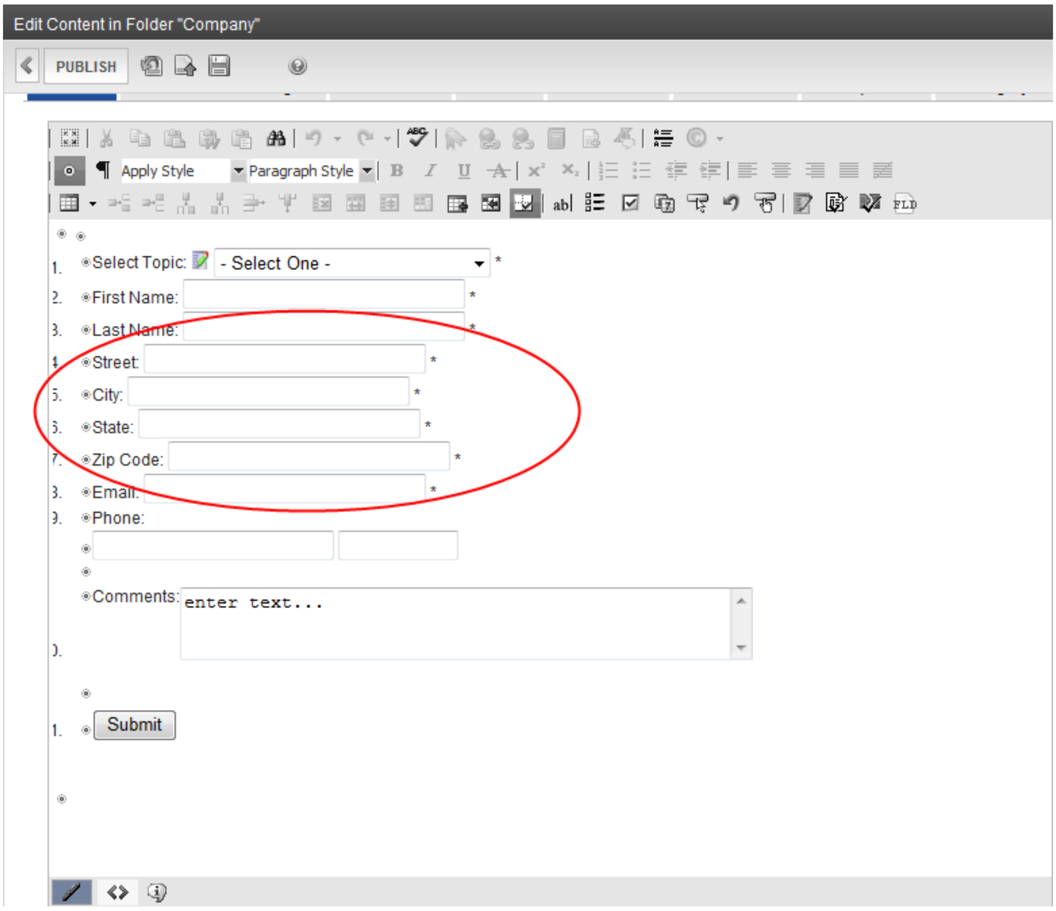
Modifying the Contact Us Page Introduction

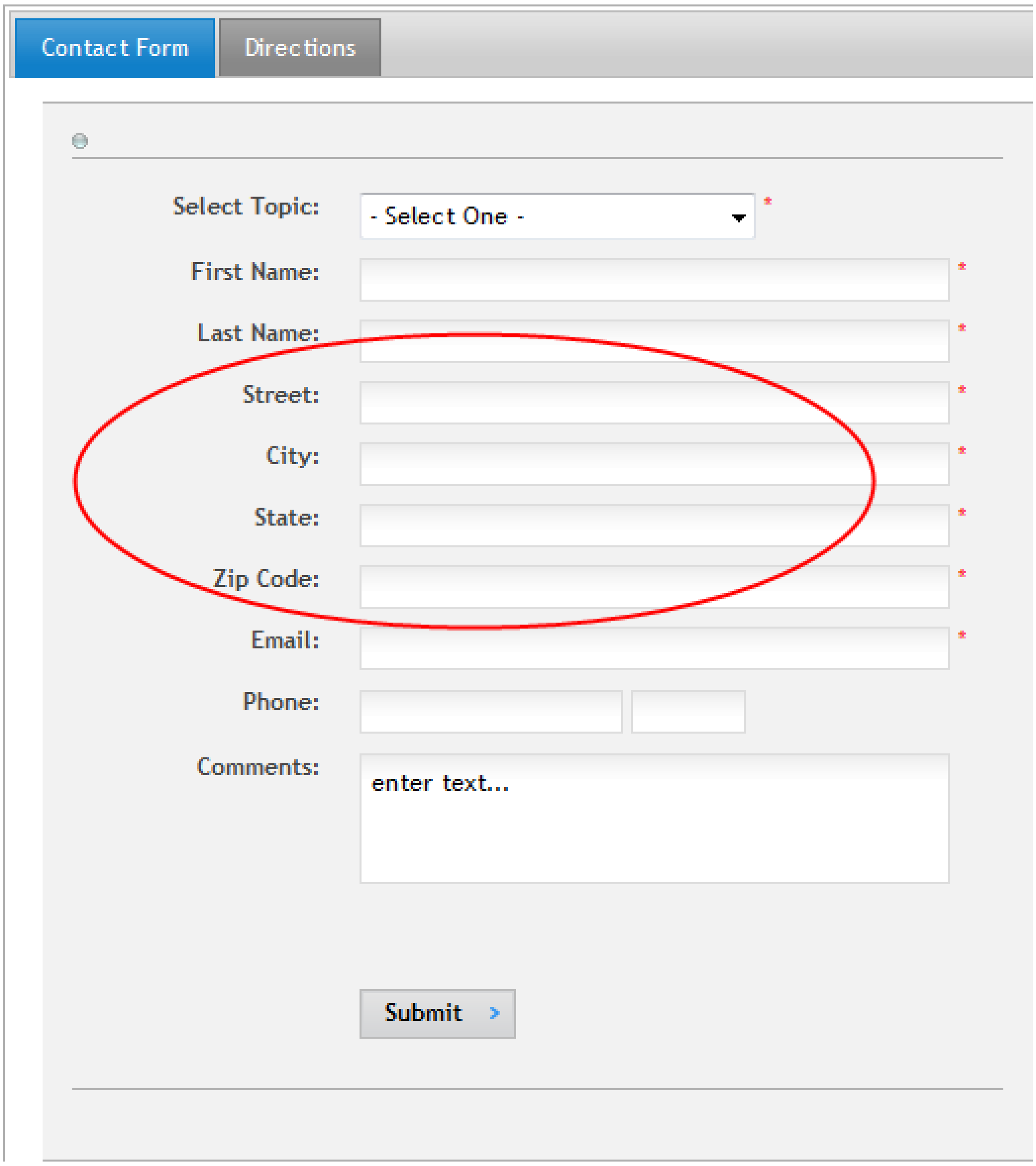
To modify the introductory text, open the access point (◉) and choose **Edit in Context**, or choose **Edit** to modify the content in the workarea, if you want to specify additional metadata.

Modifying the Contact Form

The Contact Us form is created with a HTML Form.

1. While logged in to the Contact Us page, open the access point (◉) and choose **Edit**. The Contact Us form appears in the content editor.
2. Modify the form. For information about HTML Forms, see the *Ektron Reference*. The following figure shows a modified form and the result when you click **Publish**.
   - *Street*, *City*, *State*, and *Zip Code* fields were added.



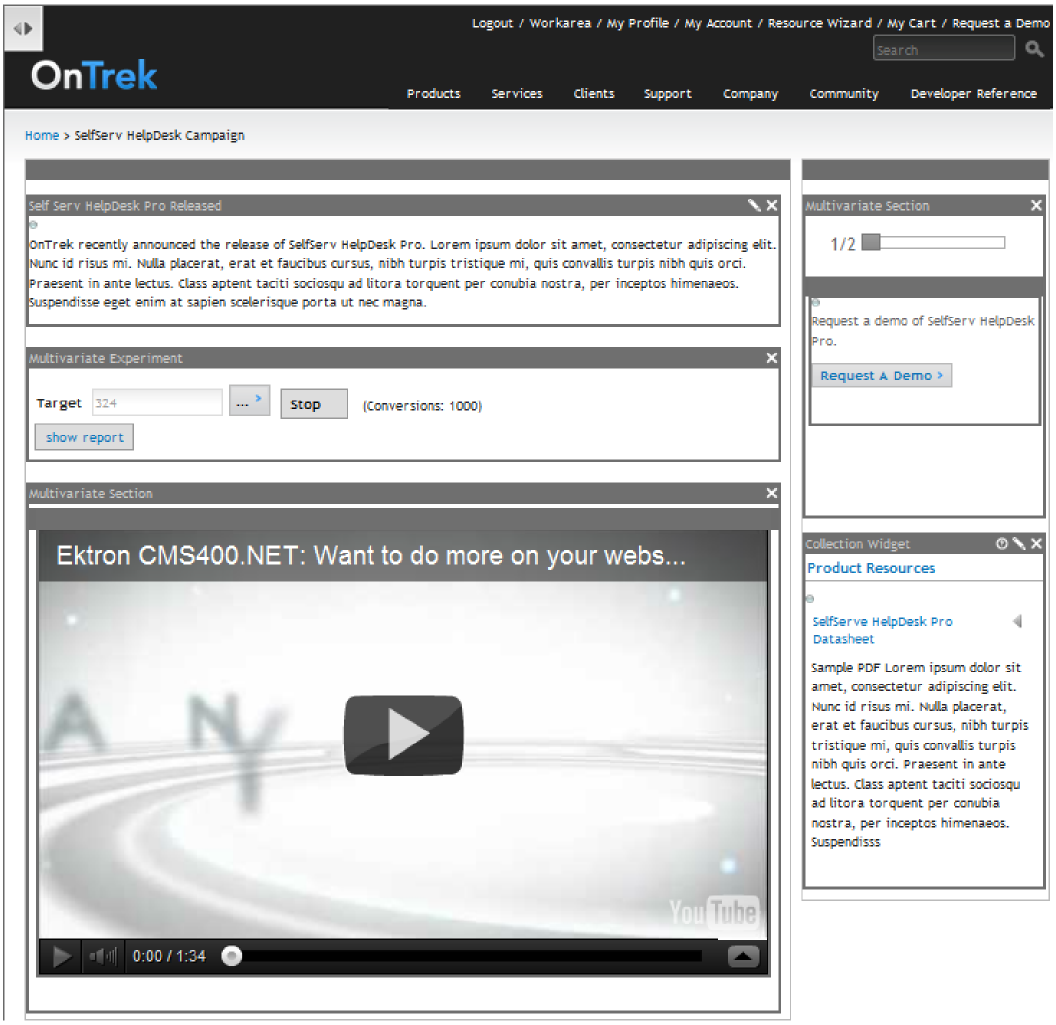


Viewing the Default Multivariate Experiment Page

OnTrek has a default multivariate experiment page set up.

1. While logged in, choose **Company > News**. The Company News page appears.
2. Click on **OnTrek Releases SelfServ Helpdesk Pro**. The news item appears.
3. Click on the **Learn More >** button. A new page appears with more information.

4. Open the PageBuilder menu and choose **File > Edit**. The Multivariate widgets appear.



The target page for the multivariate experiment is the **Request a Demo** page.

For information about how to set up a multivariate experiment, see the *Ektron Reference*.

Modifying the Community Pages

The Community pages let people engage in social networking. To see the default page, see . The default Community page provides access to the following areas:

- Introduction—Content that you enter to introduce the page.
- My Profile—Manage your online persona. See *Modifying the My Profile Page* on page 91 for information about personalizing a user experience on a social networking site.
- Corporate Blogs—The Corporate Blogs page contains unmanaged content, but when you click on the "Visit Blog" link, a blog-specific page appears where you can modify the managed content. For more information, see *Modifying the Corporate Blogs Page* on page 90.
- Find Connections—Look for colleagues and friends to connect to or add to your social network. For more information, see *Finding Connections* on page 90.

To create your own Community page, you must modify or create templates and user controls, which is not described in this *OnTrek in Ektron Reference*. Developers of .NET templates and user controls can find product templates and user controls at the following locations.

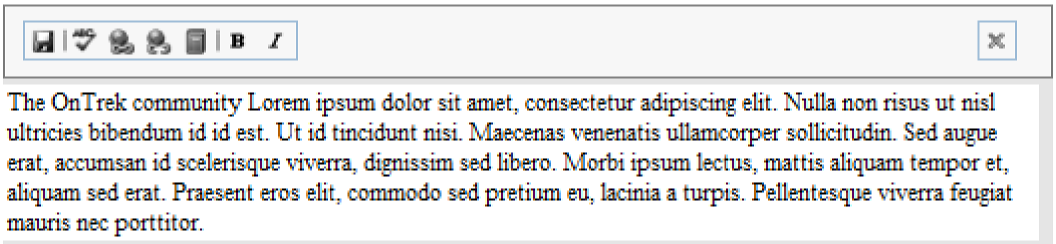
- Template files (`.aspx`), PageBuilder template files (`.pb.aspx`), and c# code behind files (`.cs`) in the [*siteroot*] folder of the installation.
- Master pages—**[*siteroot*] > OnTrek > Components > Templates**.
- User controls—**[*siteroot*] > OnTrek > Components > userControls**.

For additional information, see the *Ektron Users Guide: Building an Ektron Powered Website* and the *Ektron Reference*.

Editing the Community Page Introduction In Context

OnTrek preloads the introduction to the Community page with *Lorem ipsum* text to give you an example of what a Community page introduction can look like. You can edit this content from the page by following these steps after logging in:

1. Open the access point ( ) above the content.
2. Choose **Edit in Context**. An editor window appears.



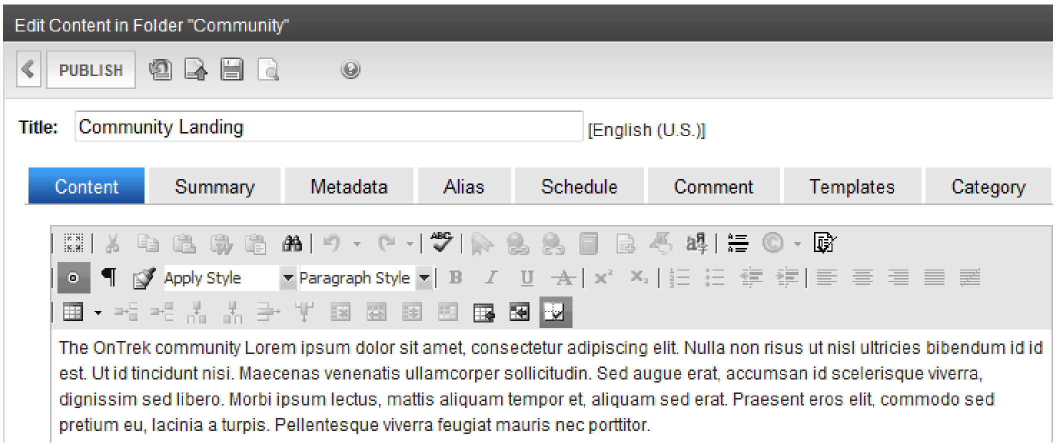
3. Edit the text, and click **Save**. The text is changed on the page.

Editing the Community Page in the Workarea

You can access the Community page introductory content in the Workarea, where you can create additional information about the content (such as Metadata). To do this, follow these steps:

1. Login to the Workarea and choose the Content tab.
2. Choose **Folders > MainSite > Content > Community**.
3. Choose **Community Landing** from the content list.

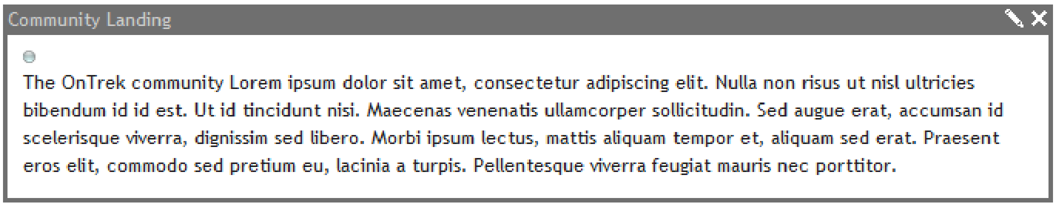
4. Choose **Edit**.



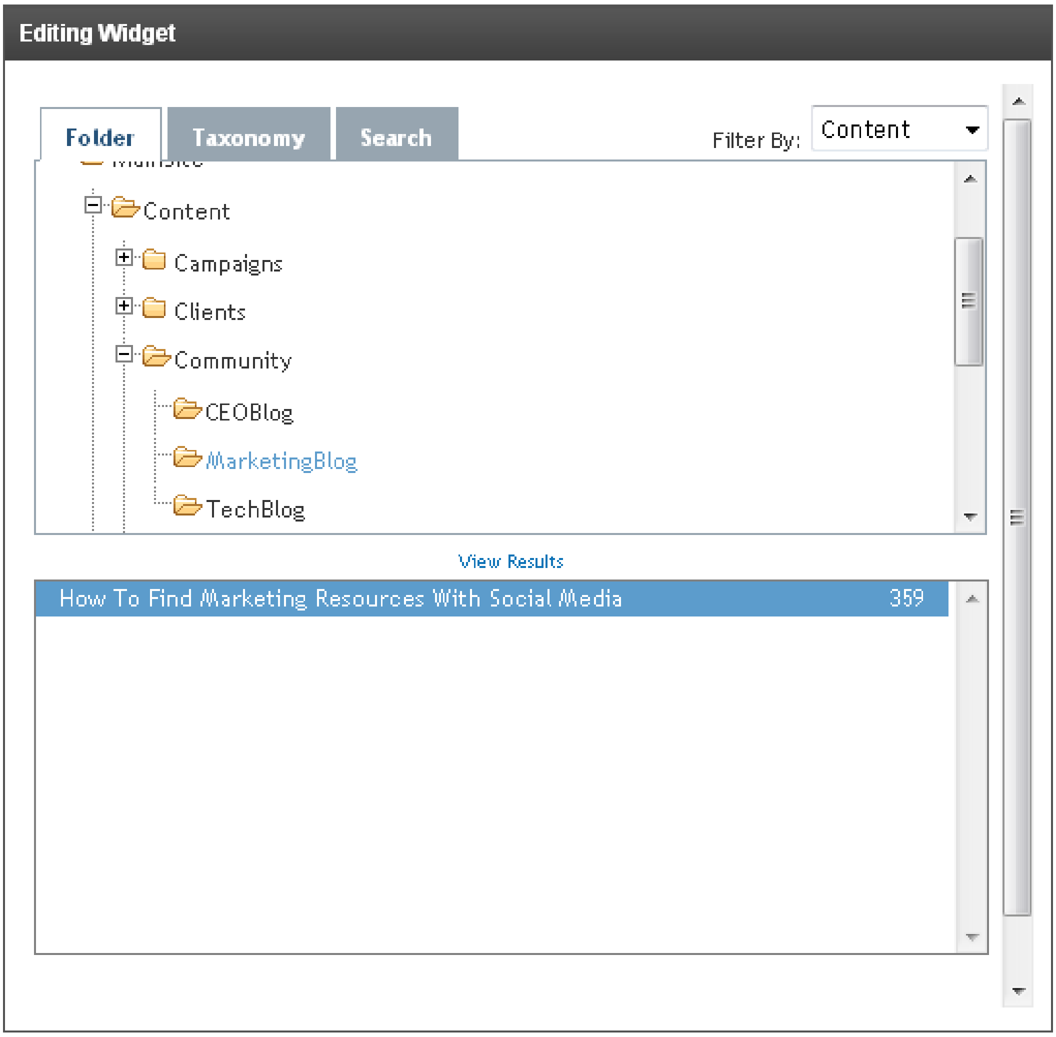
Selecting a Content Block for the Community Introduction

To change the Community page introduction by selecting an existing piece of content, follow these steps:

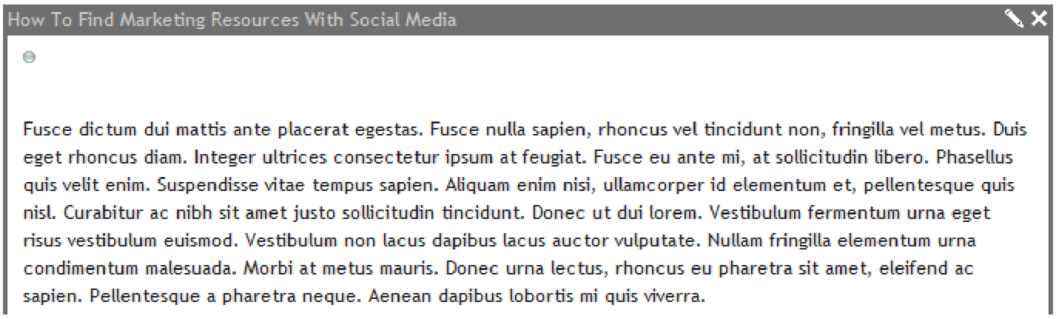
1. While logged in to the Community page, open the PageBuilder menu and choose **File > Edit**. The widget spaces appear on the page.



2. Click **Edit** ( ) in the Community Landing widget. The Editing widget dialog box appears.
3. Navigate the folder hierarchy to find a piece of content. When you click on a folder, valid content appears in the View Results panel.



4. Double click on a content item. The content appears on the page.



5. Choose **File > Publish** from the PageBuilder menu.

Managing Groups

Community groups provide common interest areas for people to collaborate. You can create groups, join groups, maintain documents, calendars, discussion boards, blogs, and photos. A group moderator creates a group and determines whether the group is restricted or public. OnTrek provides an example group called *SelfServ HelpDesk User Group*.

To create a new group, see *Creating a Group* below.

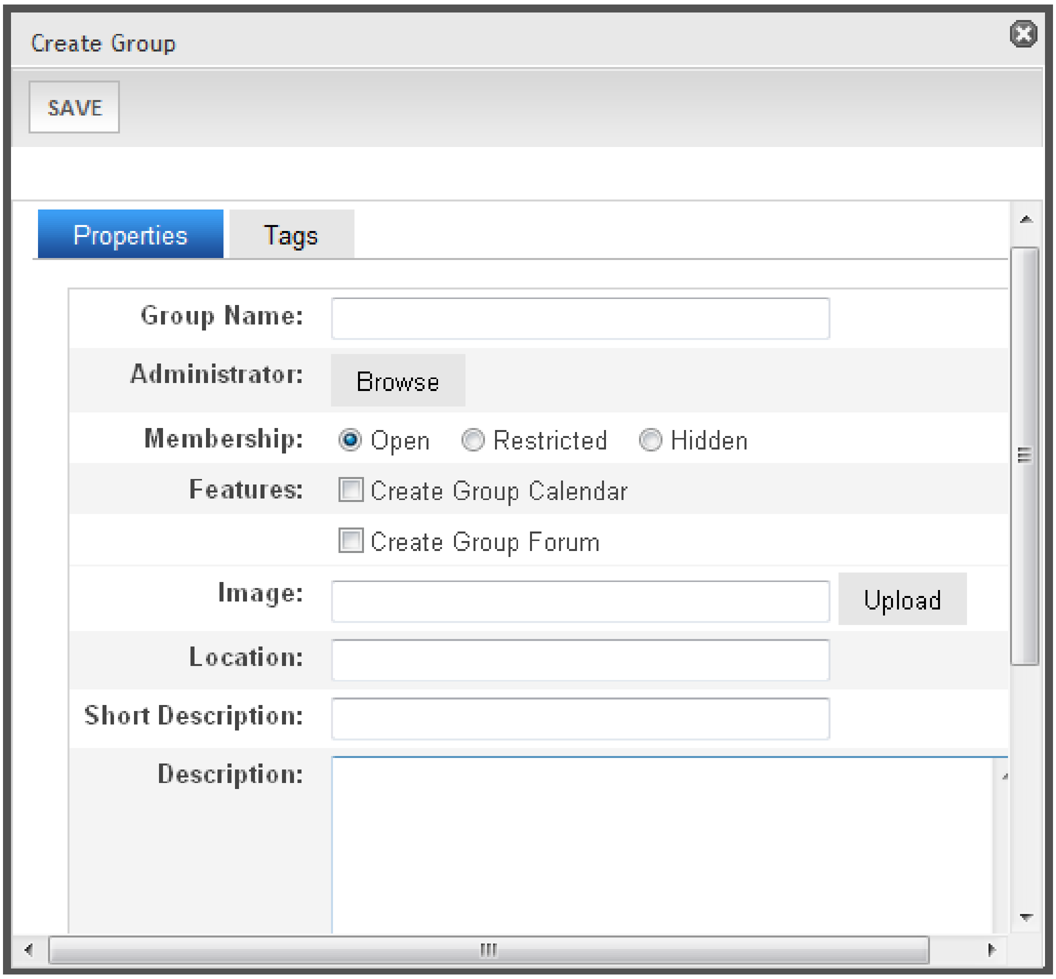
To see what the example group lets you do with a group, see *Moderating a Group Message Board* on page 86

To access groups in the Workarea, open the Settings tab and choose **Settings > Community Management > Community Groups**. For information about Community Groups, see the *Ektron Reference*.

Creating a Group

1. Choose **Community > Find Groups**. The Find groups screen appears.
2. Click the **Create Group** button.

NOTE: Administrators also can create a group from the **My Profile > Group** area.



- **Group Name**—The name of the group.
- **Administrator**—A group administrator has privileges to delete a group or edit its properties. By default, the person who created the group is the group administrator. Click **Browse** if you want to select a different group administrator.
- **Membership**—Select whether the group is
  - **Open**—open to the public.
  - **Restricted**—members can only join if invited.
- **Features**—Check the applicable options.
  - **Create Group Calendar**—Let members of the group add events to keep other members informed.
  - **Create Group Forum**—Start a groups discussion board.
- **Image**—Upload an image to use as an avatar for the group.
- **Location**—The geographical location associated with the group.
- **Short Description**—A brief description of the group.
- **Description**—A fully detailed description of the group.
- **Enable Distribute**—Check this box if you want the group and system administrator to be able to distribute content to any folder. For more information, see *Distributing Content to Another Folder* in the Ektron Reference.

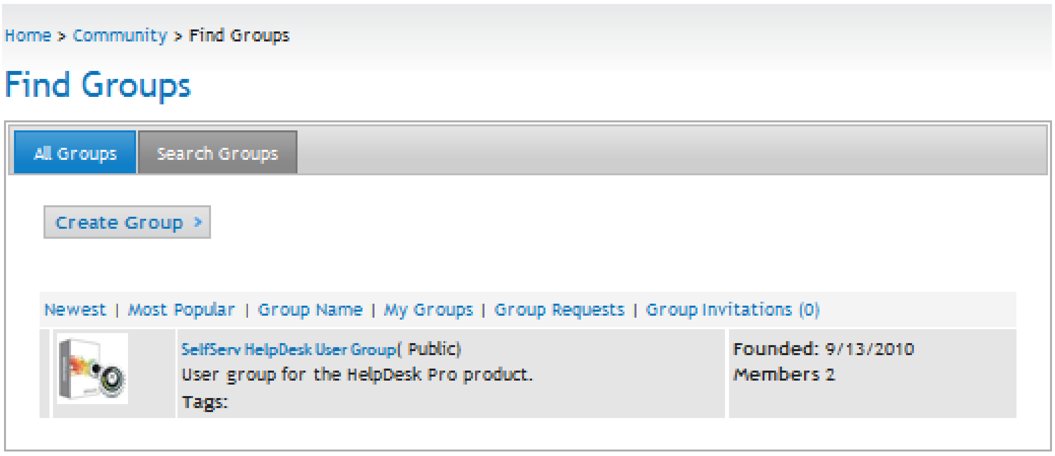
- **Allow member to manage photo/workspace folders**—Check this box if you want to allow members to add, remove and control the sharing of folders in a community group’s Photo Gallery or Document’s Workspace. For more information, see *Authorizing Group Documents and Photos* on page 88.
- **Group MessageBoard Moderation**—Check this box if you want to this groups message board to be moderated. For more information, see *Moderating a Group Message Board* below.
- **Attach Documents in Email Notifications**—Check this box if you want email notifications of connected user activity to include attached documents, if applicable.
- **Tags Tab—**From this screen, you can either create a new tag or select from a default list of community group tags. For more information, see *Assigning Tags to a Community Group* in the Ektron Reference.

3. Click **Save** to create the group.

Moderating a Group Message Board

1. Choose **Community > Find Groups**. The Find groups screen appears. If you have many groups, use the Search tab to find the group that you want to manage.
2. Click the group that you want to edit.
3. Click **Manage > Edit Group**.

—Image—



4. The Edit Group dialog box appears. For information about the properties, see *Creating a Group* on page 84.
5. Check the **Group MessageBoard Moderation** box so that any group member must approve a post before it appears on the group message board. Inappropriate posts may be deleted before they appear on the message board (although they will appear to reviewers/approvers).

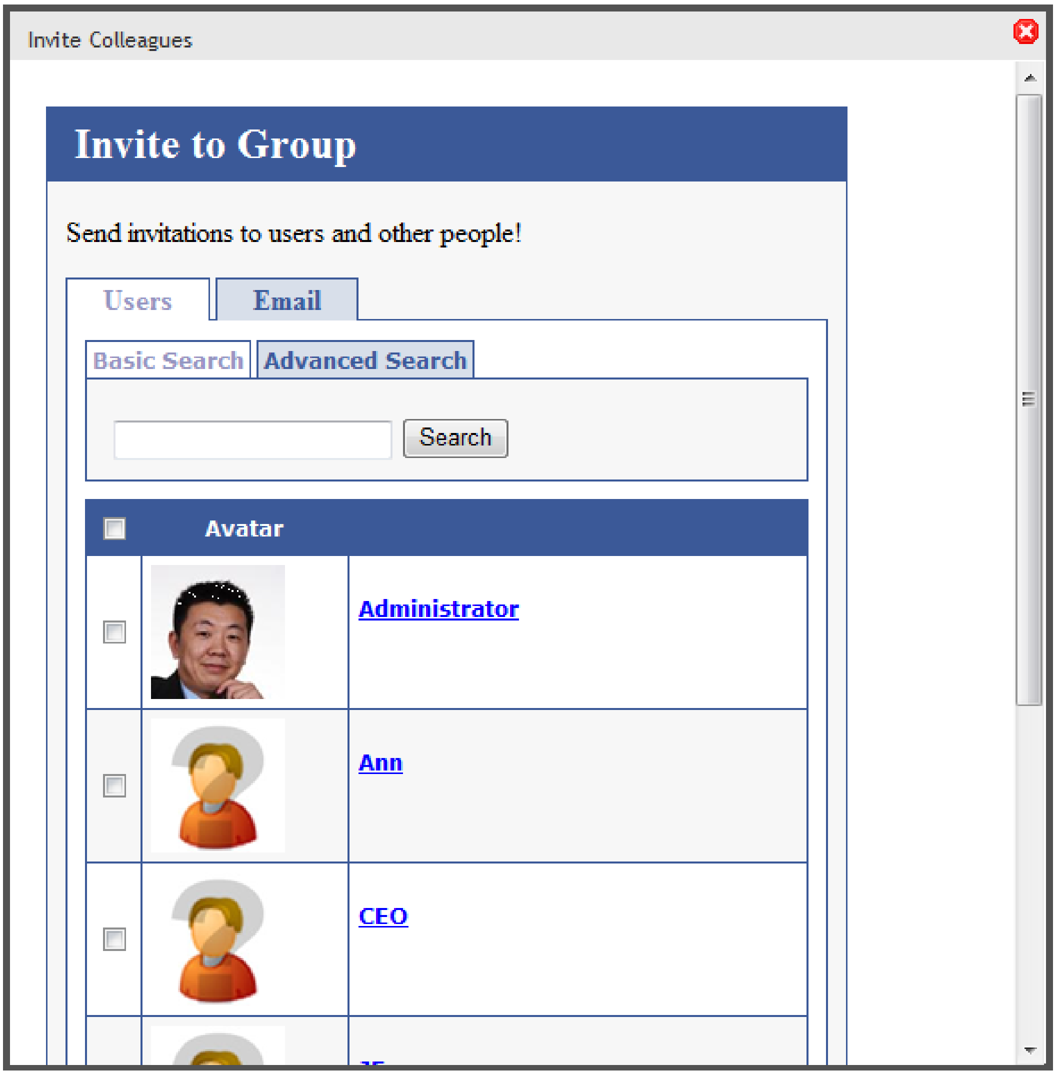
Adding Members to a Group

When you create a group, you can determine if its membership policy is open or restricted. An *open* policy lets anyone join the group. A *restricted* policy requires the group's administrator to approve new members.

Inviting Users to Join a Group

To invite colleagues to join a group:

1. Choose **Community > Find Groups**. The Find groups screen appears. If you have many groups, use the Search tab to find the group that you want to manage.
2. Click the group that you want to edit. The group page appears.
3. On the left, choose **Manage > Invite Colleagues**. The Invite Colleagues dialog box appears.



4. Check the box next to the colleagues you want to invite to the restricted group. (You can also specify email addresses on the Email tab.)
5. Optionally modify the default message.
6. Click **Send Invitations** to send the message to the selected colleagues. Your colleagues will have to accept the invitation to appear in the group.

The invited member receives notification of the invitation and chooses the **Invitation** menu to accept or decline it.

Joining a Group

To request joining a group, find the group you want and click on the **Join Group** link. If the group is restricted, the moderator will have to approve your membership.

Authorizing Group Documents and Photos

You can authorize Community Group members to access the right-click menu options on the Group's **Documents** and **Photos** folders.

1. From your group page, click **Manage > Edit Group**.
2. On the **Properties** tab, check the **Allow member to manage photo/workspace folders** box.

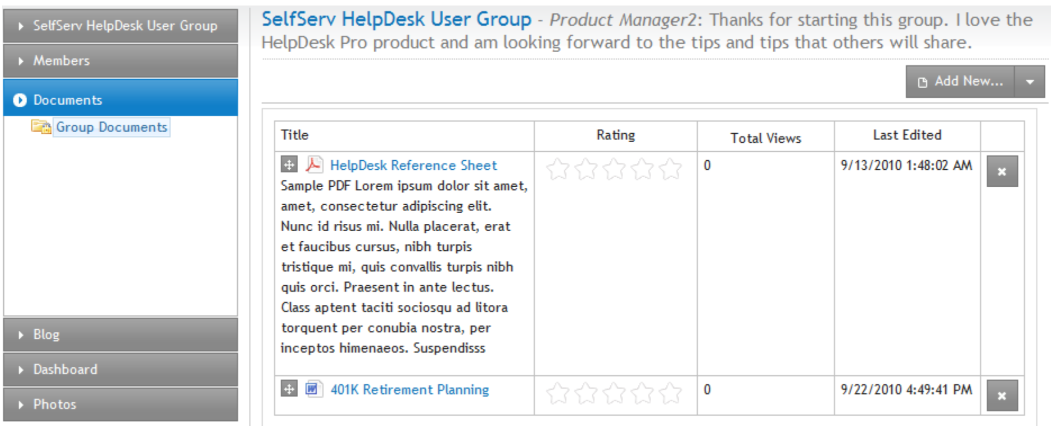
Managing Group Documents

Group Documents let you store and share documents that are relevant to the group. Group members can create their own documents and folders in the common place, without having to create a file-sharing folder on a file server. Additionally, you can add important information such as history (for archive purposes), metadata, and work flow.

To create new HTML content, choose **Add New > Content**.

To add Microsoft Office documents and other file types (including multimedia files):

1. Choose **Add New > Asset**.
2. Click **Browse...** and find the document you want to add.
3. Click **Upload**. The document appears in the table.



For information about adding assets using different browsers, see *Adding Assets* on page 30.

Managing a Group Blog

Group blogs let you post important comments, instructions, procedures, policies, or any type of communication. Blog functionality includes reply, edit, post, RSS feeds, and subscribe.

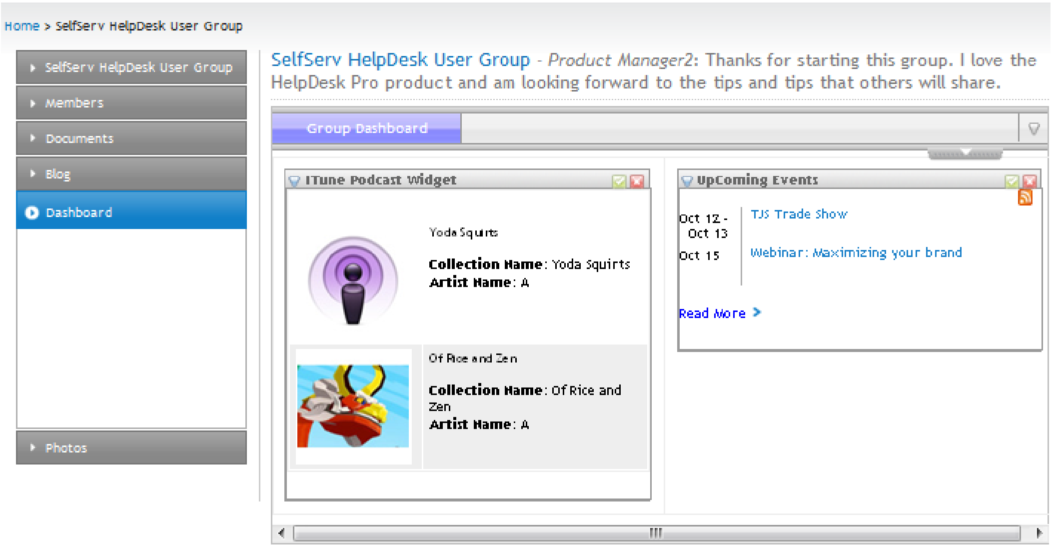
Managing a Group Dashboard

The Dashboard lets you customize a group page to include content for your group, such as a list of content, a collection of links, documents, or images.

To customize your dashboard, follow these steps:

1. If you do not already have a tab, you must create one by opening the Option menu () and choosing **Add Tab**. The Add Tab dialog box appears.
   a. Enter a **Tab Label**.
   b. Select a **Tab Scope** (Public or Private).
   c. Click **OK**.
2. Open the widget bar ().
3. Drag and drop a widget onto your dashboard.

The following figure shows a group dashboard with an iTune Podcast widget and an upcoming Events widget in the dashboard space.



To change the contents of a widget, click **Edit** ( ).

To dismiss the widget from the Dashboard, click **Close** ( ).

Modifying the Corporate Blogs Page

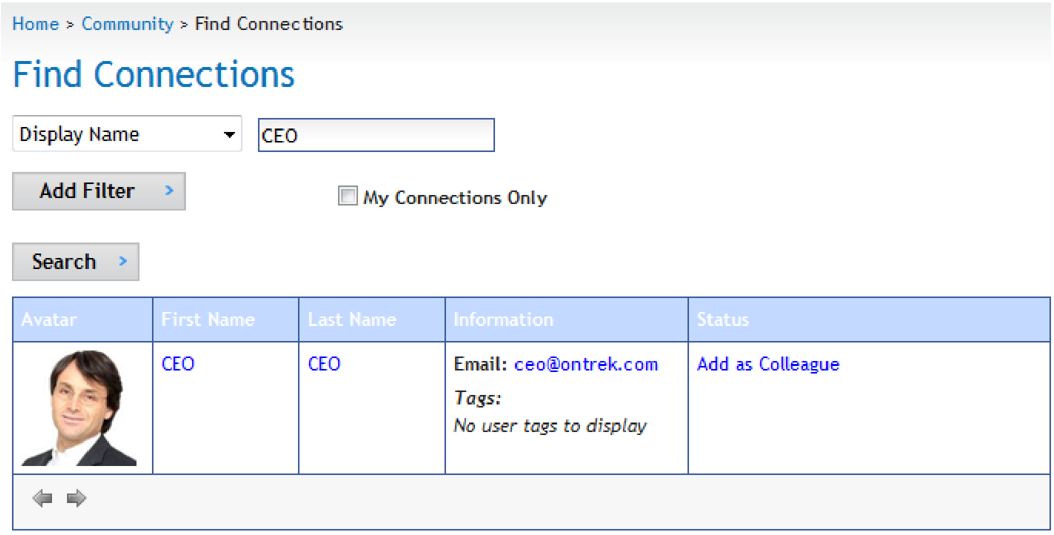
1. While logged into the Workarea in the Content section, choose **Folders > MainSite > Content > Community**.
2. In the View Contents panel, choose **New > Blog**. The Add Blog screen appears.
3. Name the new blog and give it a title, then click **Add Blog**. The blog appears as a subfolder under the Community Folder.
4. To add the new blog to the Corporate Blogs page, you must modify the user controls, which is at ***[siteroot]*** **> OnTrek >Components > User Controls > community.corporateBlogs.aspx**.

   NOTE: This *OnTrek in Ektron Reference* document does not describe how to modify templates. Developers of .NET templates and user controls can refer to *Ektron Users Guide: Building an Ektron Powered Website* and the *Ektron Reference*.

For more information about blogs, see *Creating a Blog* on page 98.

Finding Connections

To find a connection, type the name of a colleague or friend in the Display Name search field, as shown in the following figure.



You can search by one or more of the following criteria. Click **Add Filter** to search by more than one criterion.

- Display name
- First name
- Last Name
- Tags
- Email
- User Properties

Modifying the My Profile Page

The My Profile page is where registered users can personalize their experience and lets them connect and collaborate with other people on your Web site.

You can modify the following items in My Profile:

Editing My Profile

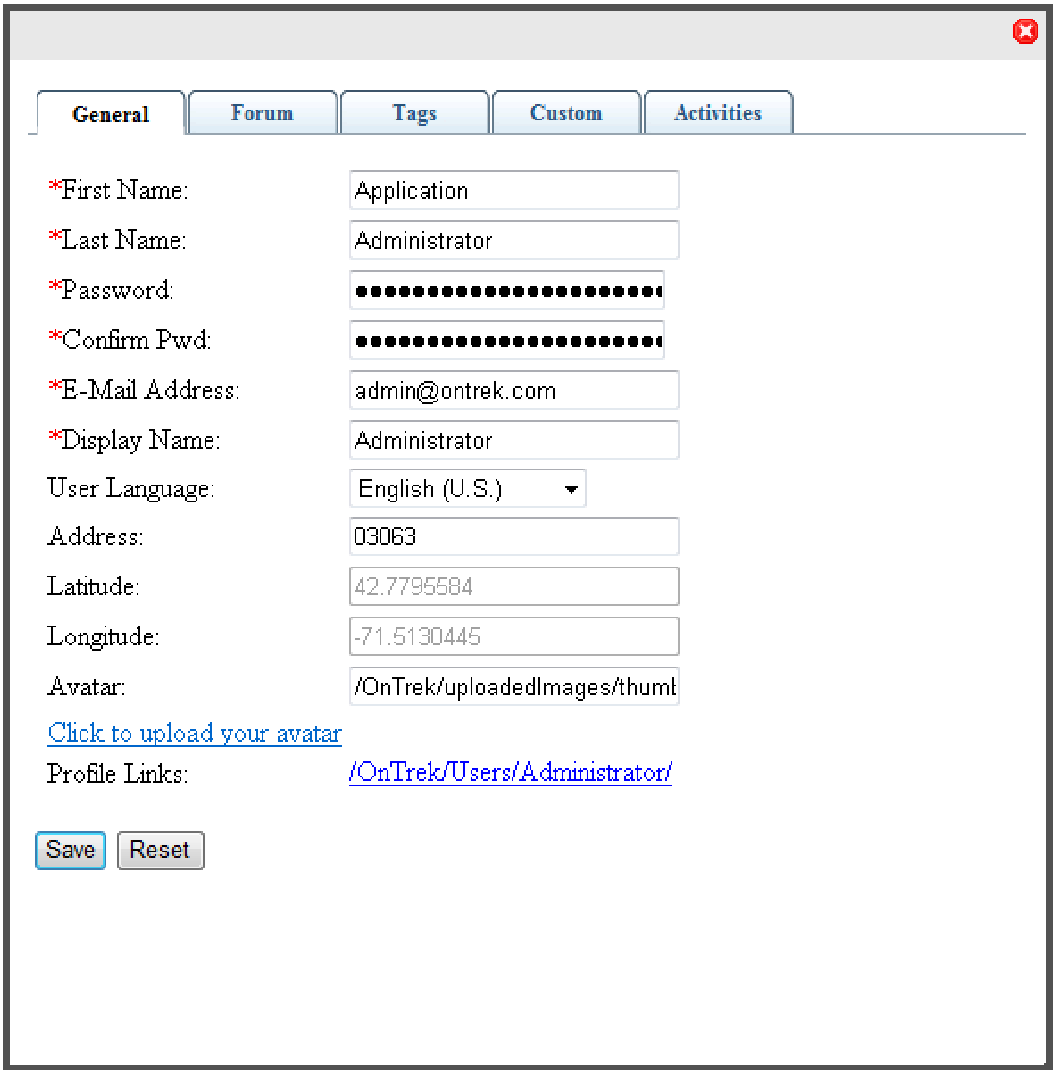
You can specify the following information on the Edit Profile tabs:

General

The following list and figure describe the information you can set. Fields with a red asterisk (*) are required fields.

- ***First name**—Enter your first name.
- ***Last Name**—Enter your last name.
- ***Password**—Enter a password.
- ***Confirm Password**—Re-enter the same password.
- ***E-Mail Address**—Enter your email address.
- ***Display Name**—Enter the name you want to display to others, which can be a nickname or title.
- **User Language**—Select from available languages.
- **Address**—Enter the address (or just the zip code) of where you are located.

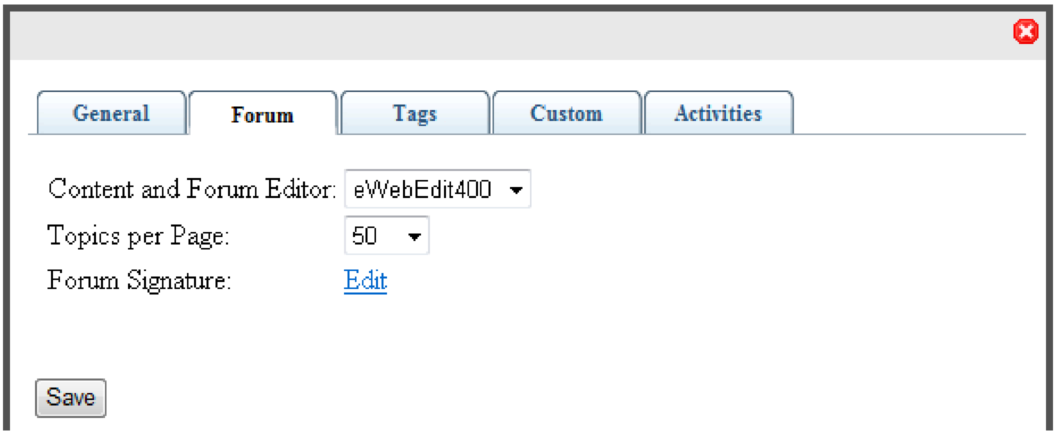
- **Latitude**—This field is automatically determined by the address.
- **Longitude**—This field is automatically determined by the address.
- **Avatar**—Click on "Click to upload your Avatar" and choose an image file that you want to associate with your profile.
- **Profile Links**—This field is automatically determined by your profile.



Forum

The following list and figure describe the information you can set.

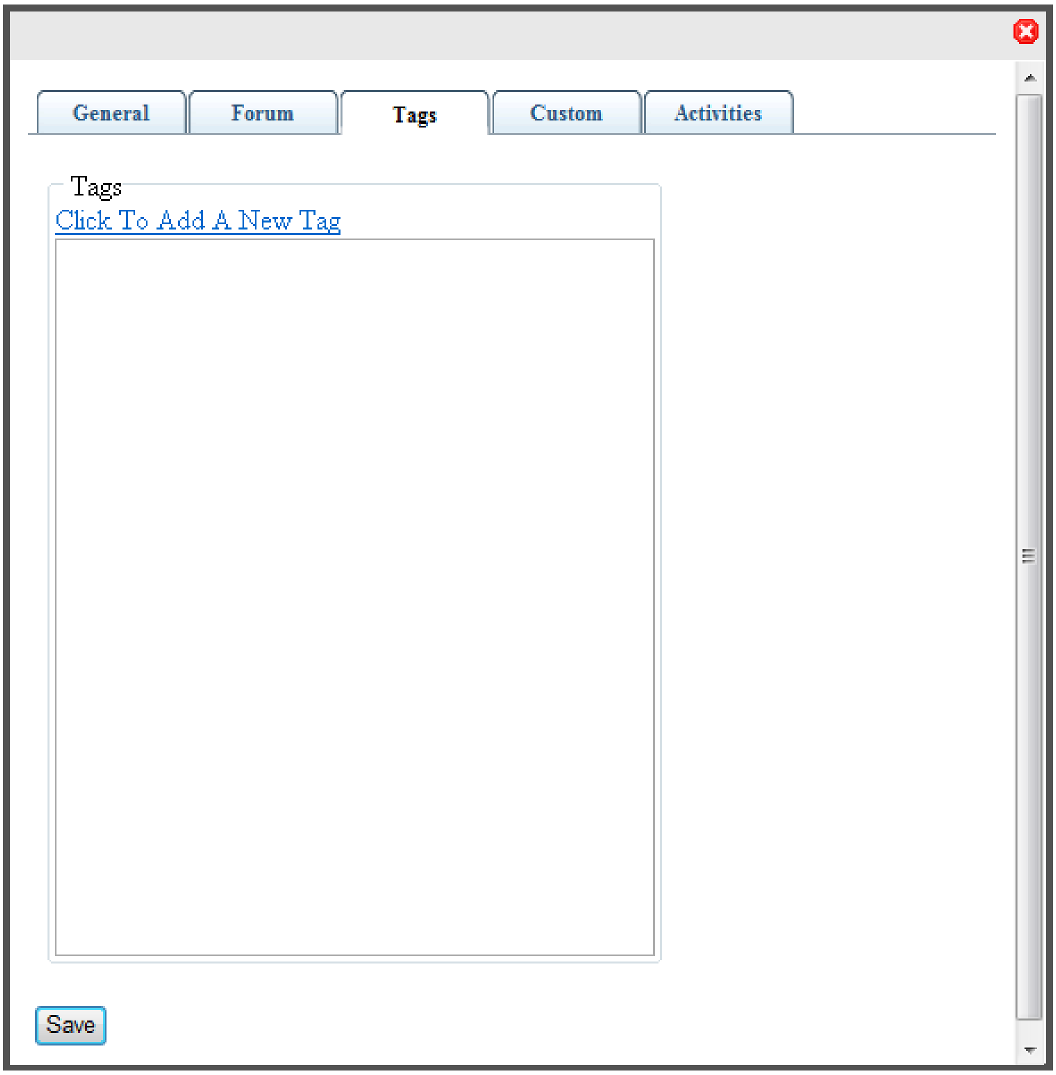
- **Content and Forum Editor**—Choose **eWebEdit400** or **eWebEditPro**.
- **Topics per Page**—Select the number of topics you want to display on a page. If the number of available topics exceeds the number you select, a scroll bar lets you see the additional topics. For example, if you select 10, and there are 25 topics, you can scroll to see all the topic, but only 10 will be displayed at one time.
- **Forum Signature**—Click **Edit** to enter or modify an automatic signature that appears at the bottom of each post you make to a forum topic.



Tags

The following property and figure describe the information you can set.

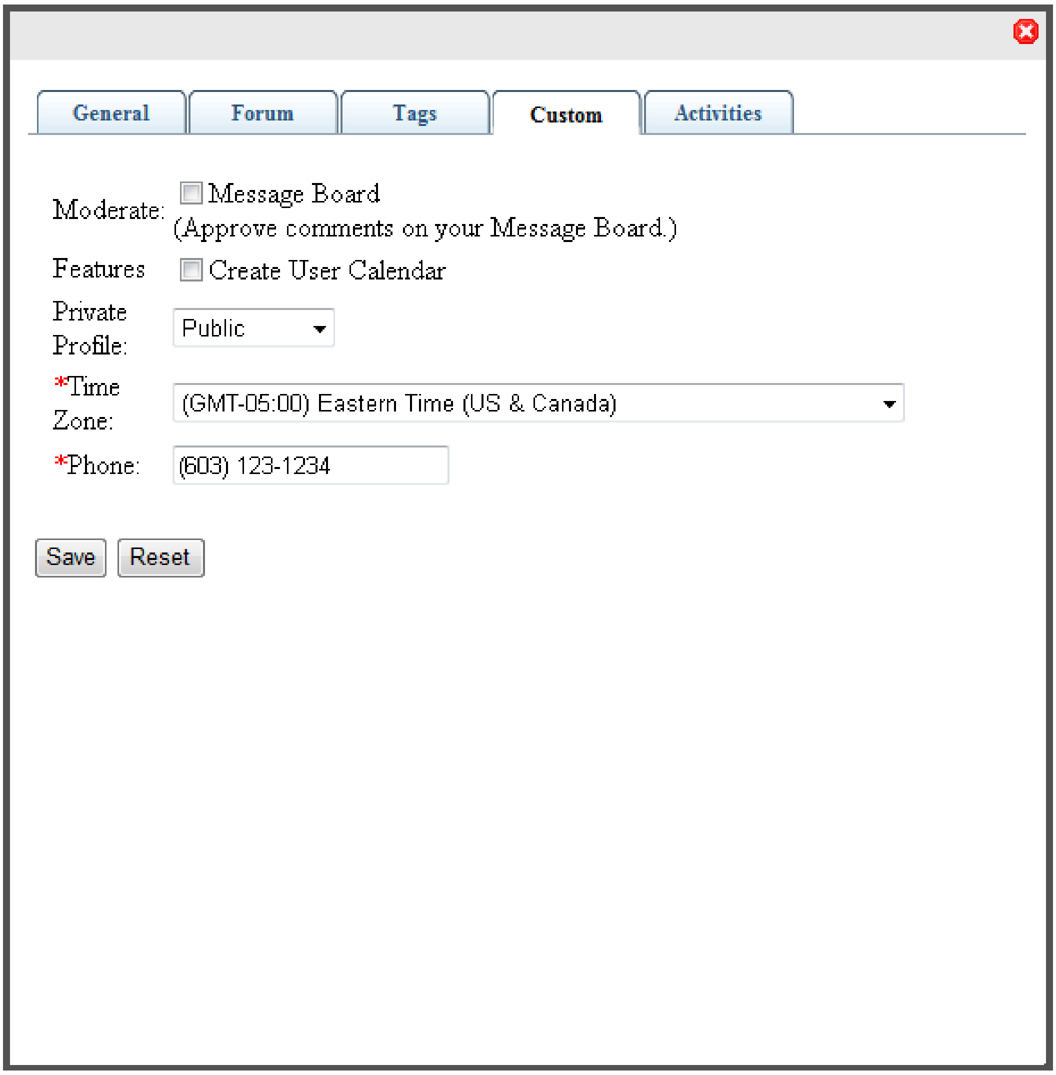
Tags—Keywords that you can assign to content and library items, which allows for tag-based searching. For example, you can add the tag **Electronics** and tag content that is related to the electronic devices, so that people can search for the content using the **Electronics** tag.



Custom

The following list and figure describe the information you can set. Fields with a red asterisk (*) are required fields.

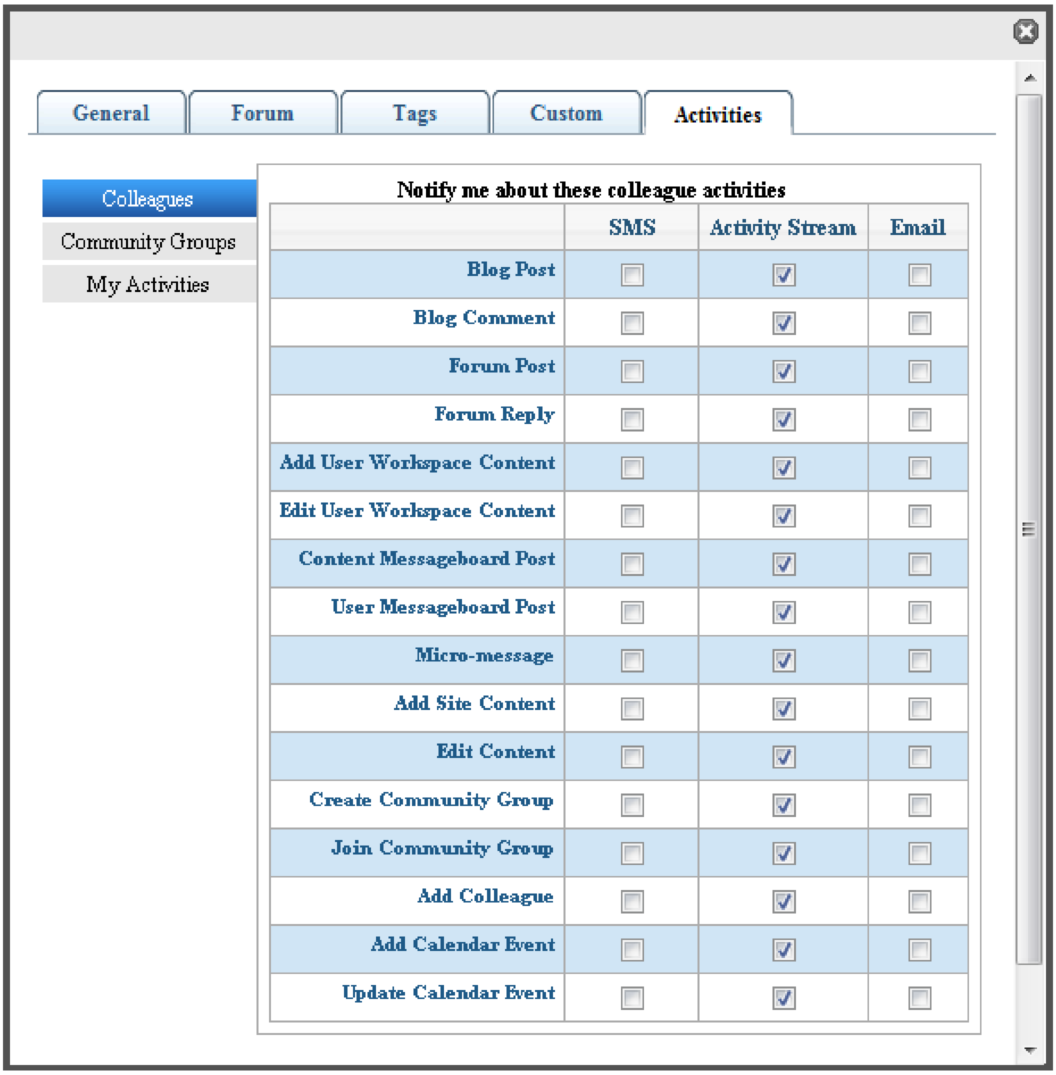
- **Moderate**—Check the Moderate box to give this user privileges on a message board to approve and delete posts. Regular users in a group message board can create and delete only their own posts.
- **Features**—Check the Features box to give the user an individual calendar. (There may be other features to grant, also.)
- **Private Profile**—Choose from one of the following options:
  - **Public**—The user information is accessible by others on the eIntranet.
  - **Private** —The user information is not accessible by others on the eIntranet.
  - **Colleagues**—The user information is accessible only by people on the eIntranet that are connected as colleagues.
- **Time Zone**—Select the time zone where the user works.
- **Email**—Enter a valid email address.
- **Phone**—Enter the user's company telephone number.



Activities

The following list and figure describe the information you can set. By default, all activity is checked to display in the Activity Stream widget. By checking the boxes, you can select criteria for the types of content you want to see when colleagues or community groups create the content. You can also select (publish) the types of content that you want colleagues to see under the **My Activities** category.

- **SMS**—A checked box indicates that the type of content will be sent to your cell phone Short Message Service (SMS).
- **Activity Stream**—A checked box indicates that the type of content will be displayed in the Activity Stream widget on the eIntranet pages.
- **Email**—A checked box indicates that the type of content will be sent to your Email address, which is specified in the General tab of your profile.



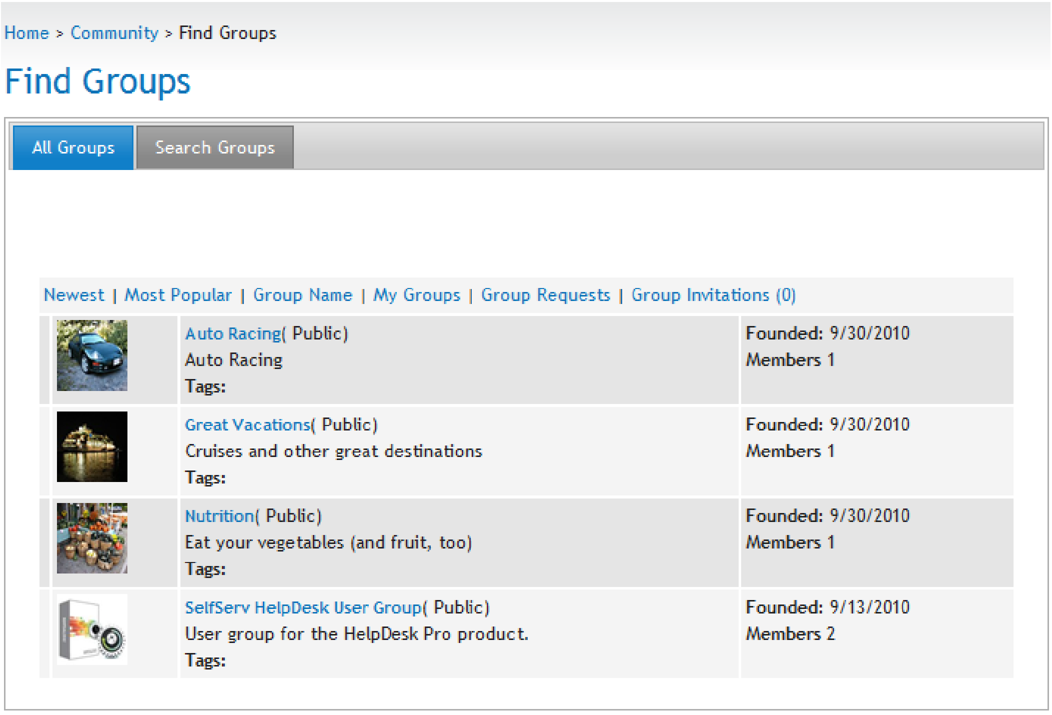
Joining a Community Group

Community groups are online places where people can discuss similar interests (such as car racing, or product reviews). In the Group section of My Profile, you can view or hide the tags associated with your groups, or click on a group to go to the group page. If you have administrator privileges, you also can do the following:

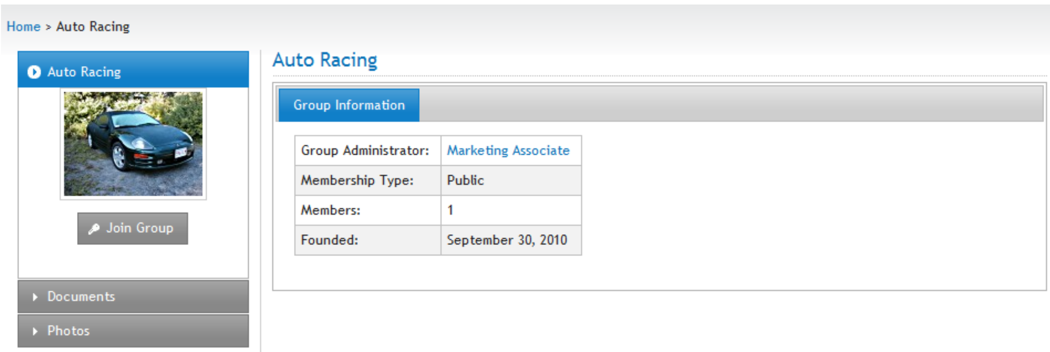
- Create a new group by clicking **Create Group**. For information about creating new groups, see *Managing Groups* on page 83.
- View and approve requests to join the groups for which you are a moderator.
- View the requests that you have made of other moderators to join another group.

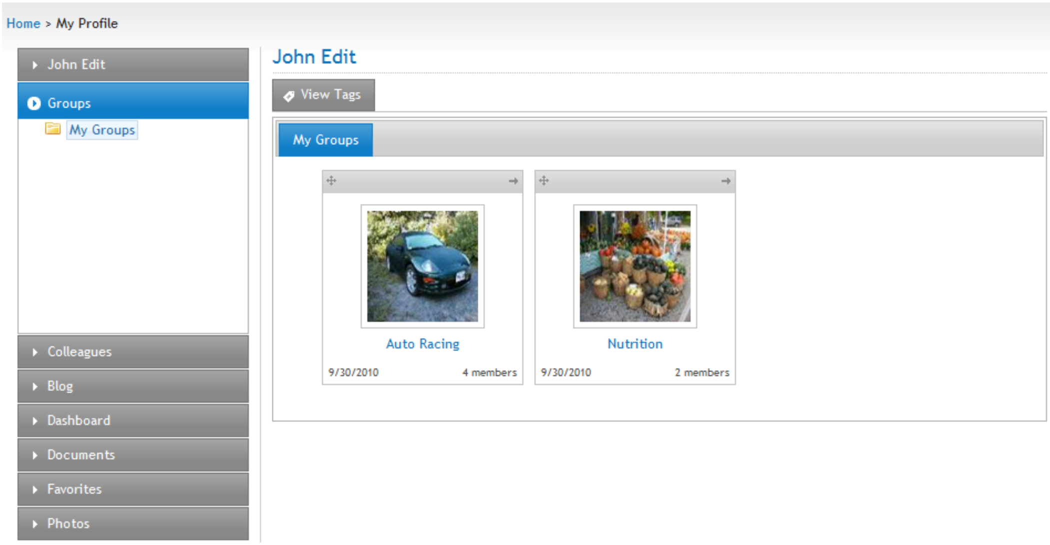
To join a group:

1. Choose **Community > Find Groups**. A list of available groups appears.

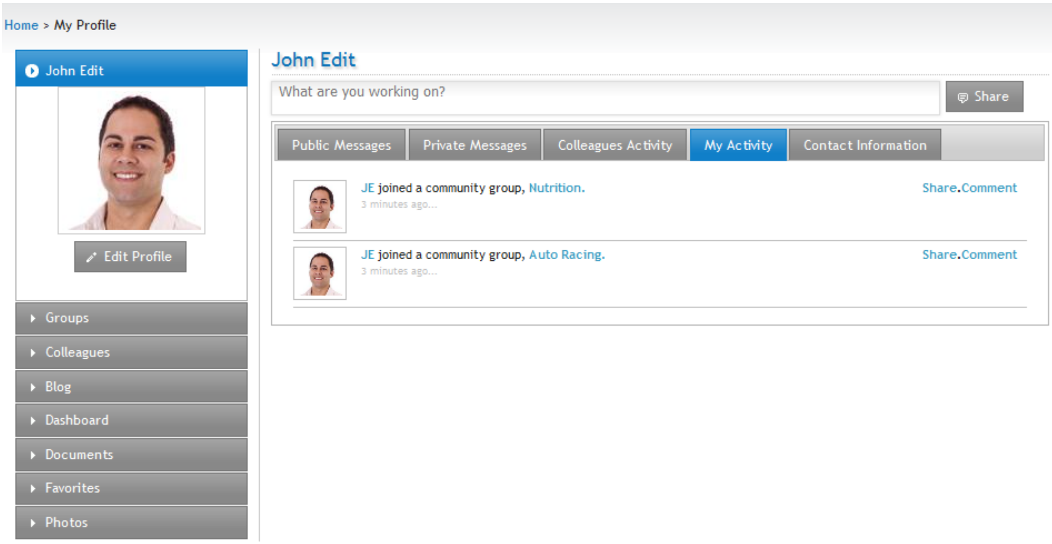


2. Click on the group you want to join. The Group page appears.
3. Click **Join Group**. The Group is added to the My Groups tab on My Profile.





The activity also shows up in My Activity tab of My Profile.

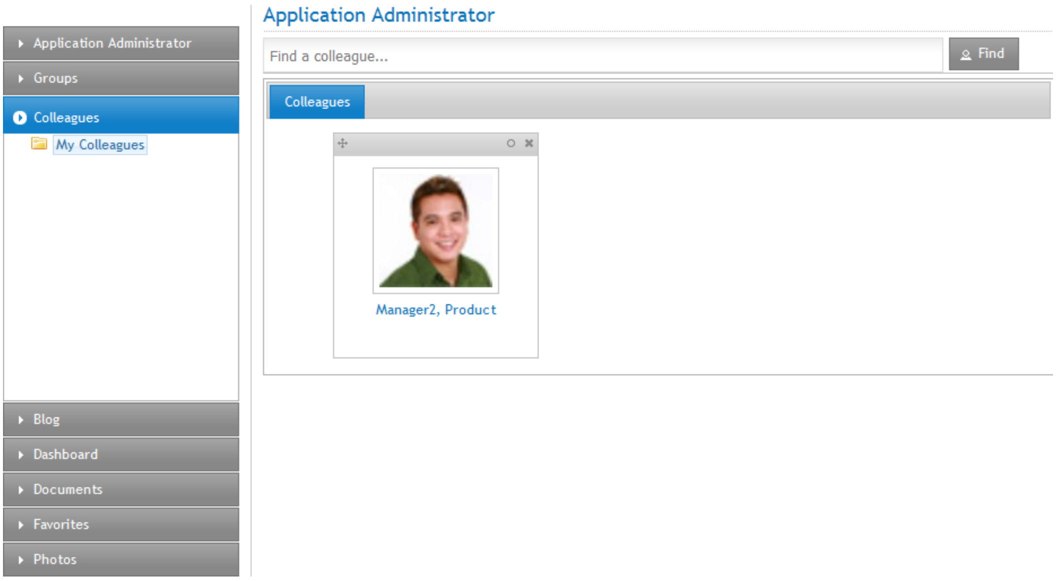


Connecting with Colleagues

Colleagues are people with whom you connect and who are connected to you, either through friendship or professional contact.

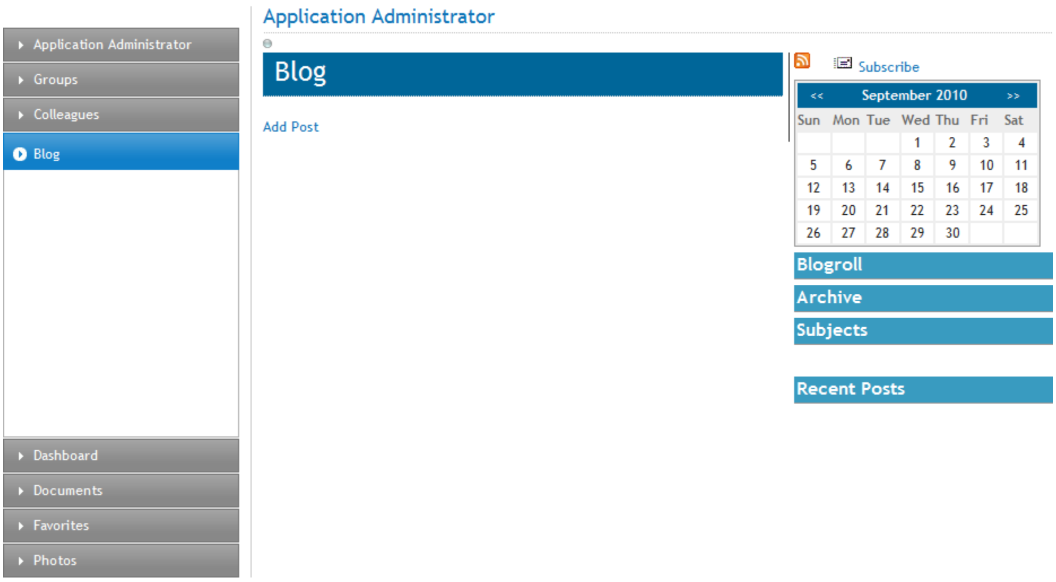
You can do the following in your Colleagues area.

- Display the people with whom you are connected.
- View requests of people who want to connect to you as a colleague.
- View the requests that you have made of others to connect as a colleague.



Creating a Blog

You can create your own Web log (blog) and colleagues can follow your blog entries automatically when you create them, when you make them public and your colleagues have set up their profile to follow your blog. See for information about setting up your profile.



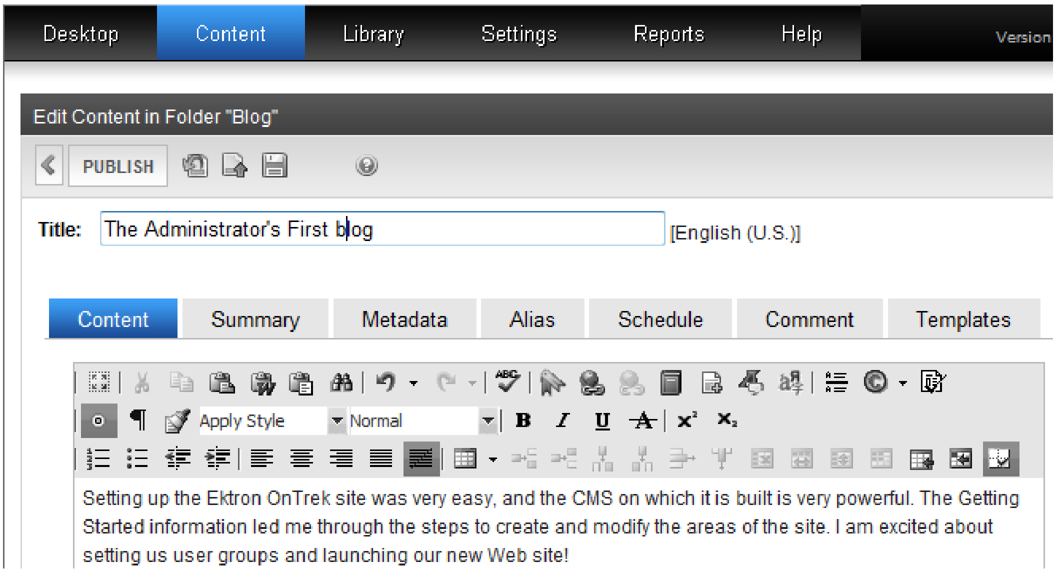
You can do the following in the Blog area.

- Add a new blog post.
- Edit an existing post.
- Delete an exiting post.
- Create a permanent link to a specific blog post that 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.)
- Subscribe to RSS or Email notifications.

- View highlighted and clickable days on the calendar indicating when a blog entry was posted.
- View an automatic roll of blog entries.
- View a list of archived blog entries.
- View a list of blog post subjects.
- View the most recent blog entries.

To create a blog:

1. Open the access point (◉) and choose **New Post** (or click on **Add Post**). An Ektron editor appears.
2. Enter a title and content for your blog.
3. Click **Publish** when ready. The following figure shows the Ektron editor with "The Administrator's First blog" ready to publish.



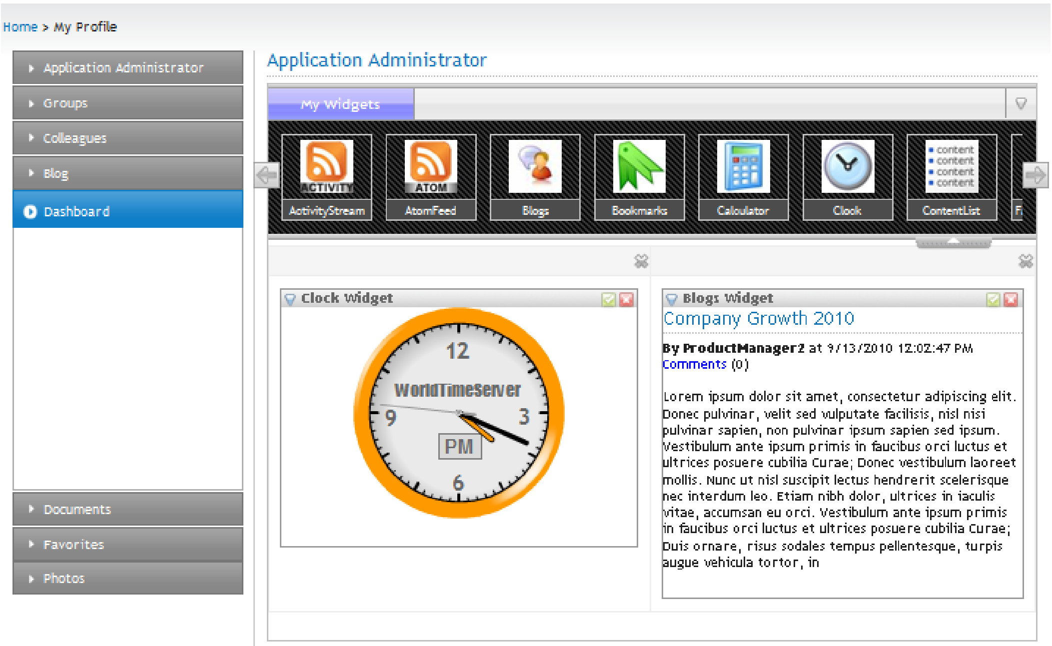
The following figure shows the published blog on the page.

Personalizing Your Dashboard

The Dashboard lets you personalize your own Web view of OnTrek.

1. If you do not already have a tab, you must create one by opening the Option menu ( ) and choosing **Add Tab**. The Add Tab dialog box appears.
   a. Enter a **Tab Label**.
   b. Select a **Tab Scope** (Public or Private).
   c. Click **OK**.
2. Open the widget bar ( ).
3. Drag and drop a widget onto your dashboard.

The following figure shows an open widget bar with a Clock widget and a Blog widget in the dashboard space.



To change the contents of a widget, click **Edit** ( ).

To dismiss the widget from the Dashboard, click **Close** ( ).

Uploading and Managing Documents

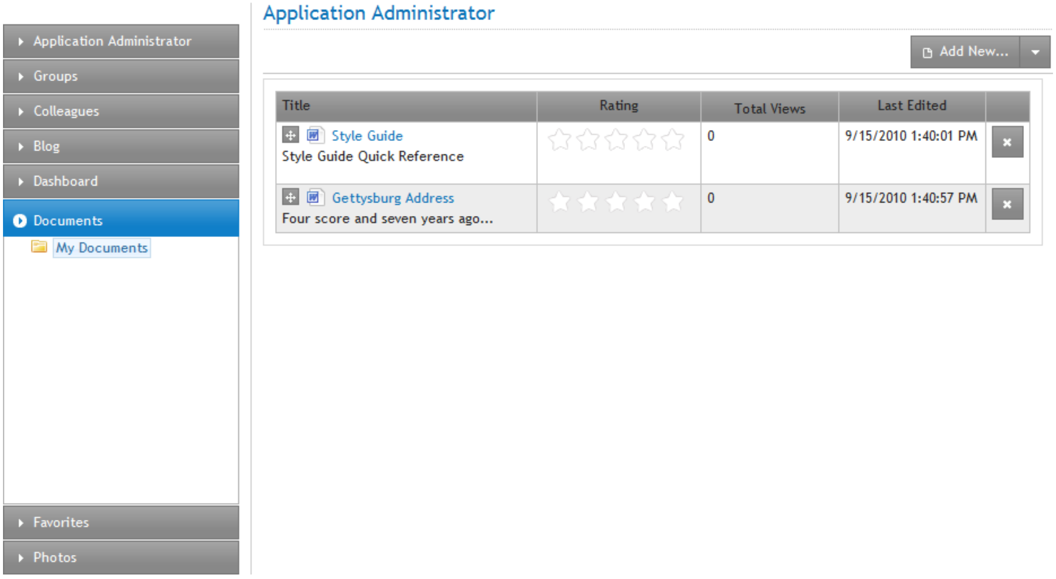
You can create or upload documents that you want to share with colleagues on your OnTrek. You can create new HTML content, or upload document assets (such as Word or PDF documents).

To create a new HTML document:

1. Open the **Add New** menu on the right side of the page and choose **Content**, an editor appears.
2. Enter a title and content, and any other data you want to associate with the content, and click **Publish** ( ) when done.

To upload one or more document assets:

1. Open the **Add New** menu on the right side of the page and choose **Asset**. The Add Document dialog box appears.

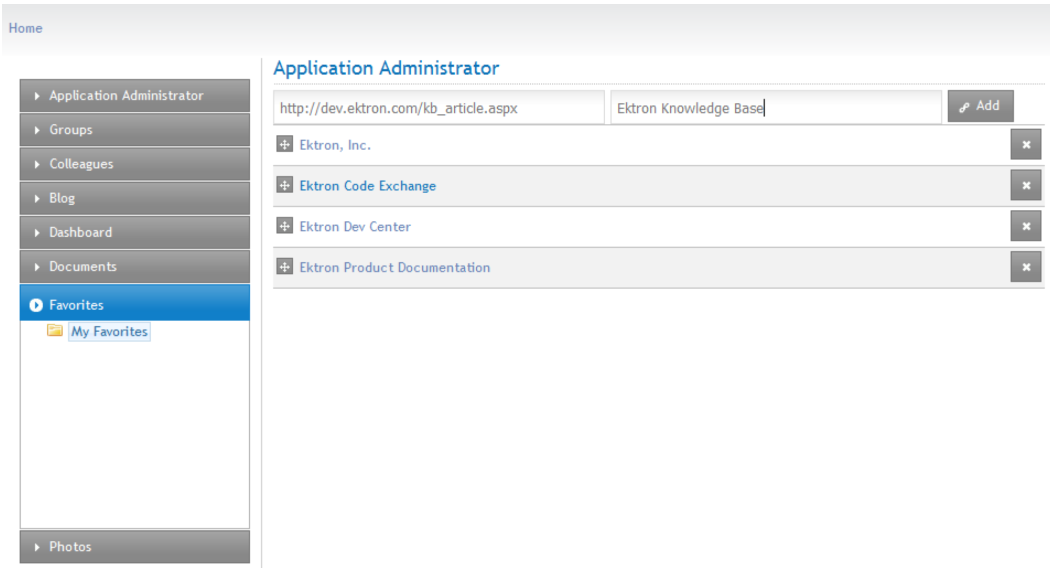


2. Do one of the following methods:
   - Click on the Multiple DMS Documents tab, then drag one or more files from a Windows Explorer to the dialog box.
   - Click the File Upload tab, then browse for a file and click **Upload** when ready.

Managing a List of Favorite Links

You can create a list of often-used or important links on the Favorites page.

1. Enter a URL in the field that is seeded with `http://`.
2. Enter the title of the link that you want to display in your Favorites list.
3. Click **Add**. The title appears in the list and you can click on it to display the specified URL.



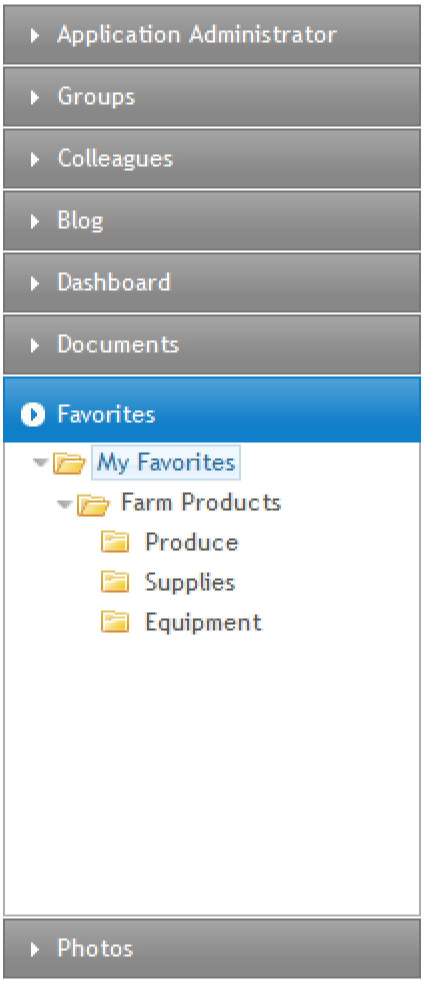
You can also create folders to categorize your favorite links.

To add folders to **My Favorites**:

1. Right-click on the **My Favorites** folder and choose **Add Folder**.
2. Enter the name of a subfolder in the Add Folder dialog box and click **Add**.

   The following figure shows subfolders created called **Farm Products**, **Produce**, **Supplies**, **Equipment**, and **Seasonal Jobs**.

   NOTE: The folders display in the order that you create them.



Uploading and Managing Photos

You can create and manage folders of photos.

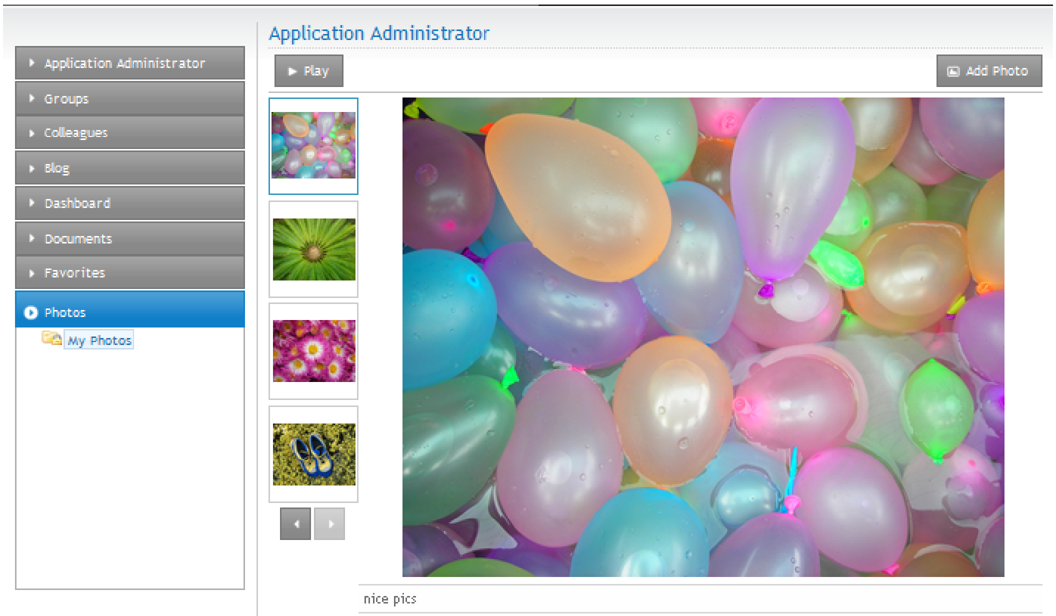
1. Click **Add Photo**.
2. Optionally describe the one or more photos that you want to add then click **Next**.
3. Depending on your browser, you can upload photos one at a time or more than one file at a time. For information about your browser's method, see .

You can also create folders to categorize your photographs.

To add folders to **My Photos**:

1. Right-click on the **My Photos** folder and choose **Add Folder**.
2. Enter the name of a subfolder in the Add Folder dialog box and click **Add**.

   The following figure shows the **My Photos** folder with several photos loaded.



Modifying the My Account Pages

The My Account page lets a registered user participate in eCommerce by specifying shipping and billing information. The My Cart page allows secure order processing. The Order History page offers secure viewing of purchase orders.

To create your own My Account page, you must modify or create templates and user controls, which is not described in this *OnTrek in Ektron Reference*. Developers of .NET templates and user controls can find product templates and user controls at the following locations.

- Template files (`.aspx`), PageBuilder template files (`.pb.aspx`), and c# code behind files (`.cs`) in the [*siteroot*] folder of the installation.
- Master pages—**[*siteroot*] > OnTrek > Components > Templates**.
- User controls—**[*siteroot*] > OnTrek > Components > userControls**.

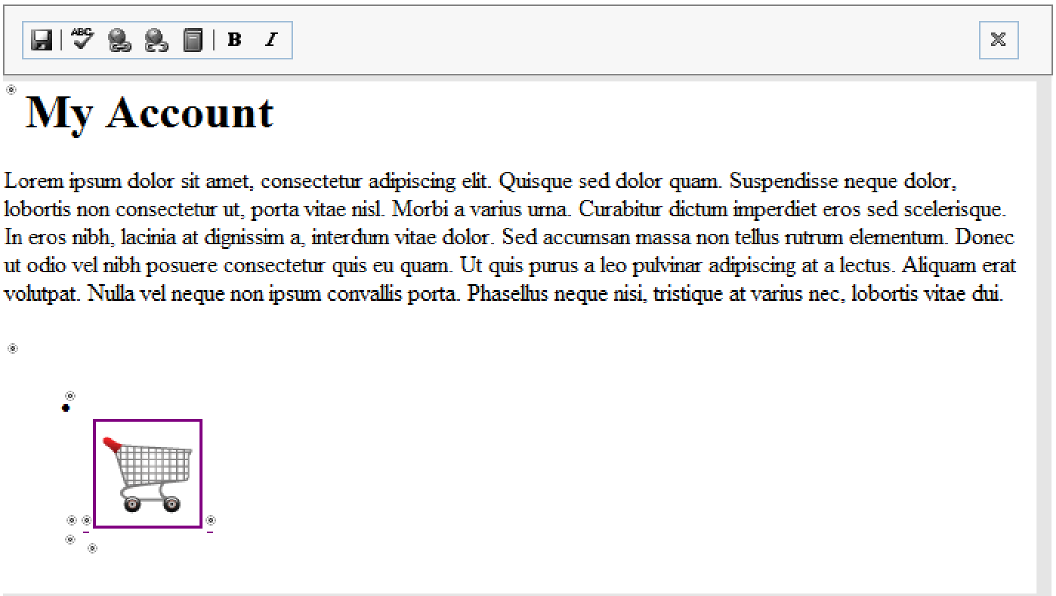
For additional information, see the *Ektron Users Guide: Building an Ektron Powered Website* and the *Ektron Reference*.

Editing the My Account Page Introduction In Context

OnTrek preloads the introduction to the My Account page with *Lorem ipsum* text to give you an example of what a My Accounts page introduction can look like.

You can edit this content from the page by following these steps after logging in:

1. Open the access point ( ) above the content.
2. Choose **Edit in Context**. An editor window appears.

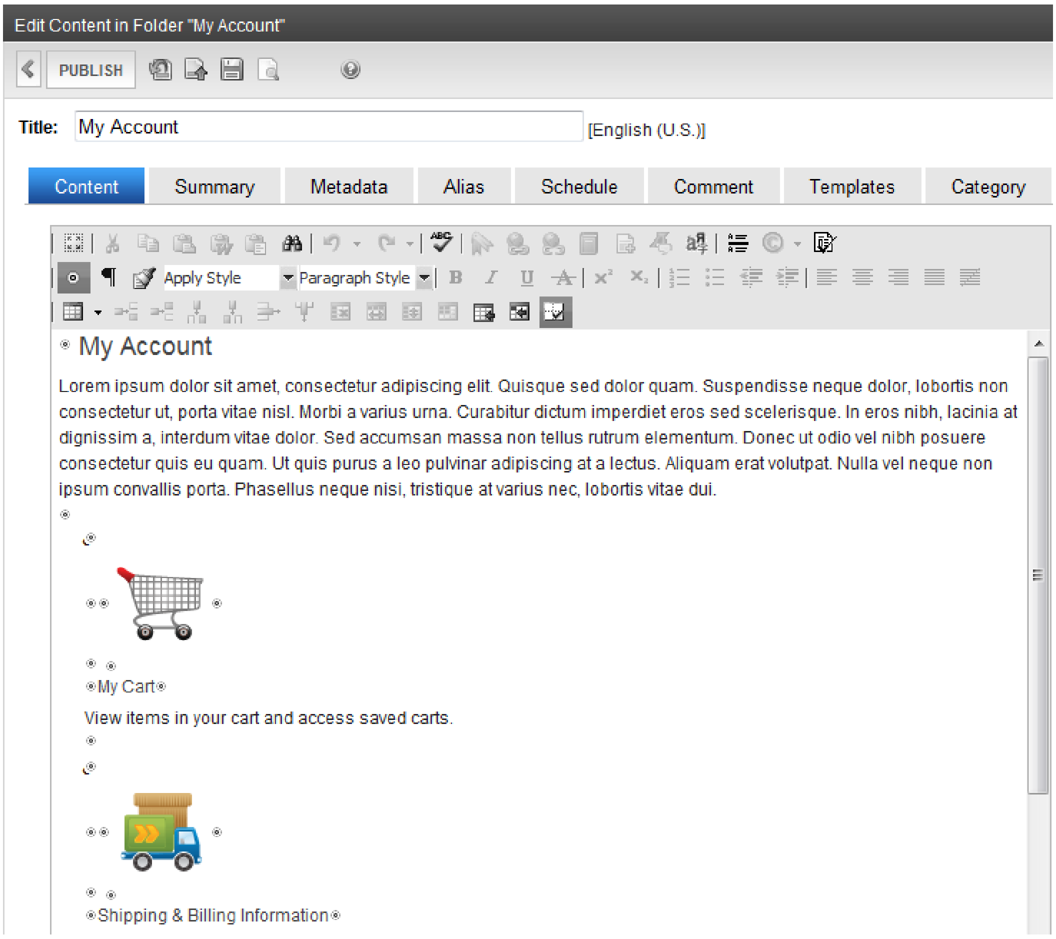


3. Edit the text, and click **Save** (). The text is changed on the page.

Editing the My Account Page in the Workarea

You can access the My Account page introductory content in the Workarea, where you can create additional information about the content (such as Metadata). To do this, follow these steps:

1. Login to the Workarea and choose the Content tab.
2. Choose **Folders > MainSite > Content > My Account**. The View Content panel displays the content.
3. Click on **My Account** in the View Content panel.
4. Click **Edit**. The content editor appears.



5. When you are finished editing, click **Publish**. The text changes on the page.

Creating an SSL Certificate

You must have a Secure Socket Layer (SSL) Certificate to engage in eCommerce. In OnTrek, you can use SSL when users log in to your Web site. SSL encrypts the username and password during transmissions to the server.

When you set up the SSL certificate, and configure OnTrek to use it, the login page launches in a Secure Socket Layer. The following topics explain how to set up SSL for OnTrek.

Setting Up the Secure Socket Layer (SSL) Certificate

Many articles on the Internet describe how to install a SSL Certificate. Use the proper procedure for the specific version of IIS you are using on your server.

- IIS 6.0—http://www.microsoft.com/technet/prodtechnol/WindowsServer2003/Library/IIS/56bdf977-14f8-4867-9c51-34c346d48b04.mspx
- IIS 7.0—http://learn.iis.net/page.aspx/144/how-to-set-up-ssl-on-iis-7/

Use a self-signed certificate for developer and testing servers.

Updating the web.config File

After you set up the Secure Socket Layer (SSL) certificate, configure OnTrek to use the SSL certificate.

1. Open the `web.config` file.
2. Locate the section of the file with these settings.

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

3. Set the `ek_UseSSL` value to **false**. (This setting differs from other Ektron sites that use eCommerce pages.)
4. Save and close the file.

Updating the application.security.config File

The `application.security.config`file determines which pages in the site require an HTTPS connection.

1. Open the `applicaton.security.config` file located in the [*siteroot*] with your editor.
2. Locate the code that looks like the following:

```
<ektron:template path="/checkout.aspx">
<ektron:template path="/account.orderHistory.aspx">
```

3. Add or change names of templates that you want to use HTTPS.

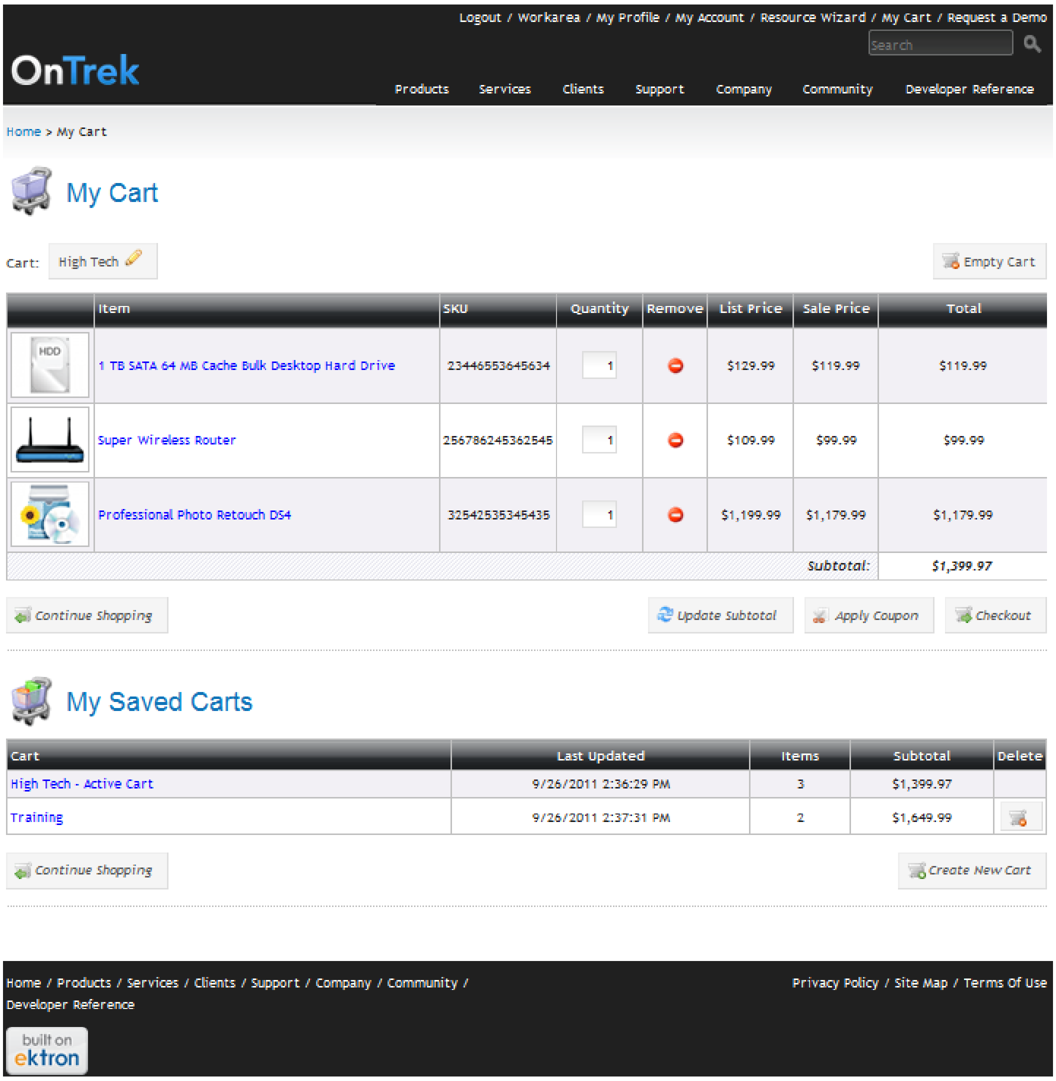
Viewing My Cart

OnTrek enables eCommerce, providing the building blocks you need to sell product on the Internet. You can do the following from the My Cart page:

- Create one or more named carts to organize your purchases. See *Creating a Named Cart* on the facing page.
- Empty the active cart to start over.
- Modify the quantity of the items you selected and click **Update Subtotal**.
- Enter a coupon code. See *Entering a Coupon Redemption Code* on the facing page.
- Continue shopping.
- Go to a secure checkout page.

IMPORTANT: You must have Secure Socket Layer (SSL) certificate to complete an eCommerce transaction. See .

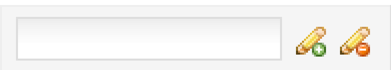
The following figure shows a My Cart page with 2 named carts (*Training* and *High Tech*). The active cart is *High Tech* which shows 3 items in the cart.



Creating a Named Cart

The default My Cart is all you need to shop. However, you can personalize or organize your cart by naming it. To do this:

1. Click on the **Rename Cart** icon ( ).
2. Enter the name of the cart in the **Cart** field.

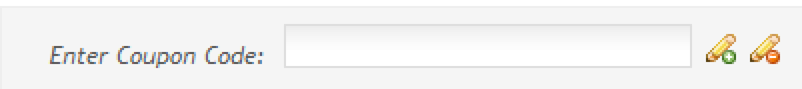


3. Click **OK** ( ). The new cart becomes active and appears in the My Saved Carts section.

Entering a Coupon Redemption Code

You can get additional discounts with a valid coupon code. To do this:

1. Click on **Apply Coupon**.
2. Enter a valid coupon code.



3. Click **OK** (). If the code is valid, the discount will be deducted from the subtotal and appear on the order form.

Viewing the Order History

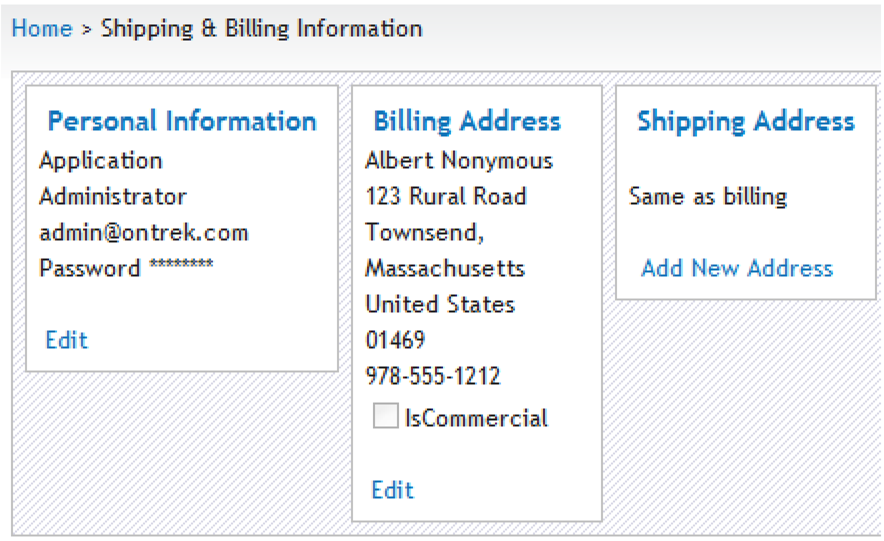
OnTrek securely displays order history. You secure the Order History page in the `Application.Security.config` file in the site's ***[siteroot]*** folder. See .

To change the Order History page, you must modify the `account.orderHistory` files that are located in the ***[siteroot]*** folder of the OnTrek installation.

WARNING! You are strongly recommended to have a Secure Socket Layer (SSL) certificate to complete an eCommerce transaction. Without SSL, your transaction will not be secure. See .

Modifying Shipping and Billing Information

OnTrek displays information about a registered user on the Shipping and Billing Information screen. To modify personal, billing, or shipping information, click **Edit**.



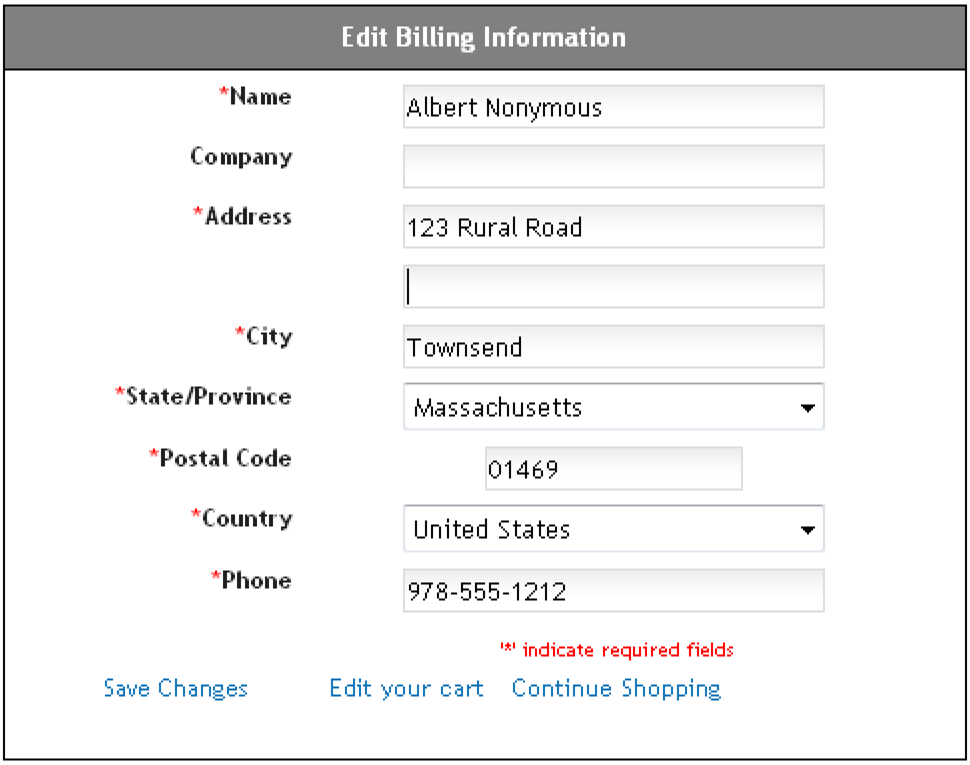
Checking Out Your Purchase

OnTrek comes with a checkout process. To change the checkout process, you must modify the templates that are located in the ***[siteroot]*** folder of the OnTrek installation. Developers of .NET templates and user controls can refer to *Ektron Users Guide: Building an Ektron Powered Website* and the [Ektron Reference] for information about modifying templates.

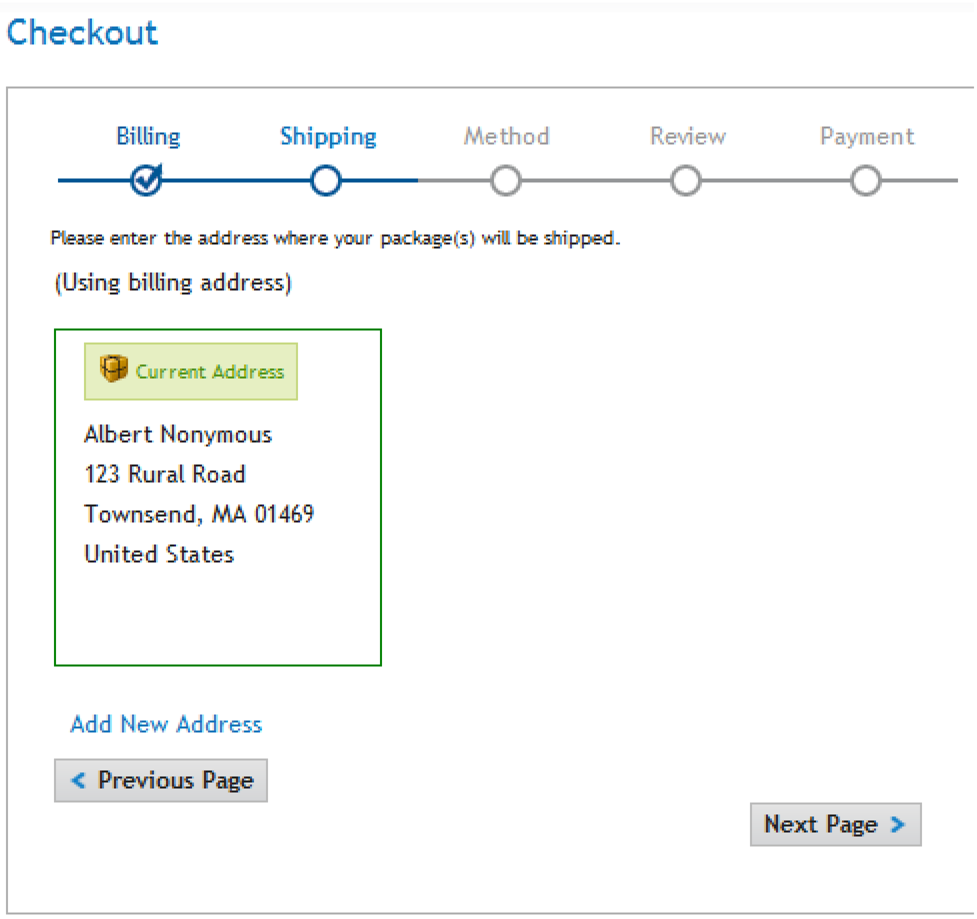
WARNING! You are strongly recommended to have a Secure Socket Layer (SSL) certificate to complete an eCommerce transaction. Without SSL, your transaction will not be secure. See .

The following figures show an example checkout process.

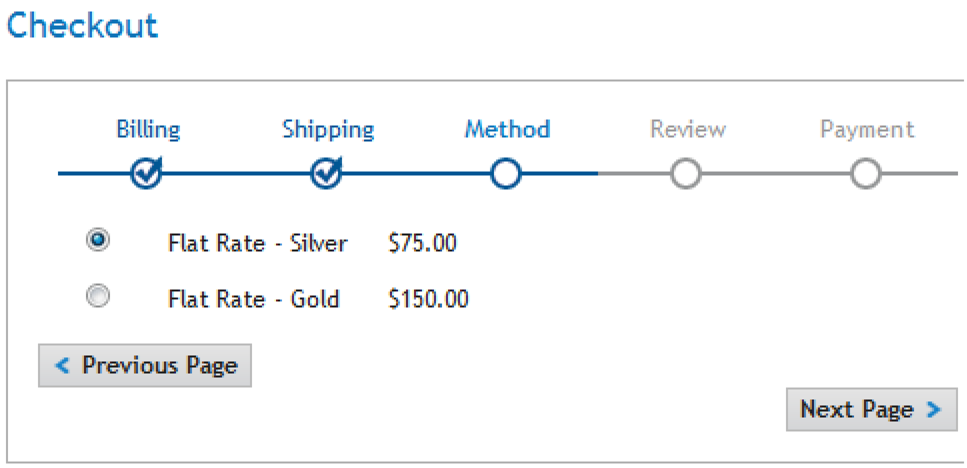
1. Enter the Billing information and then click **Save Changes**.



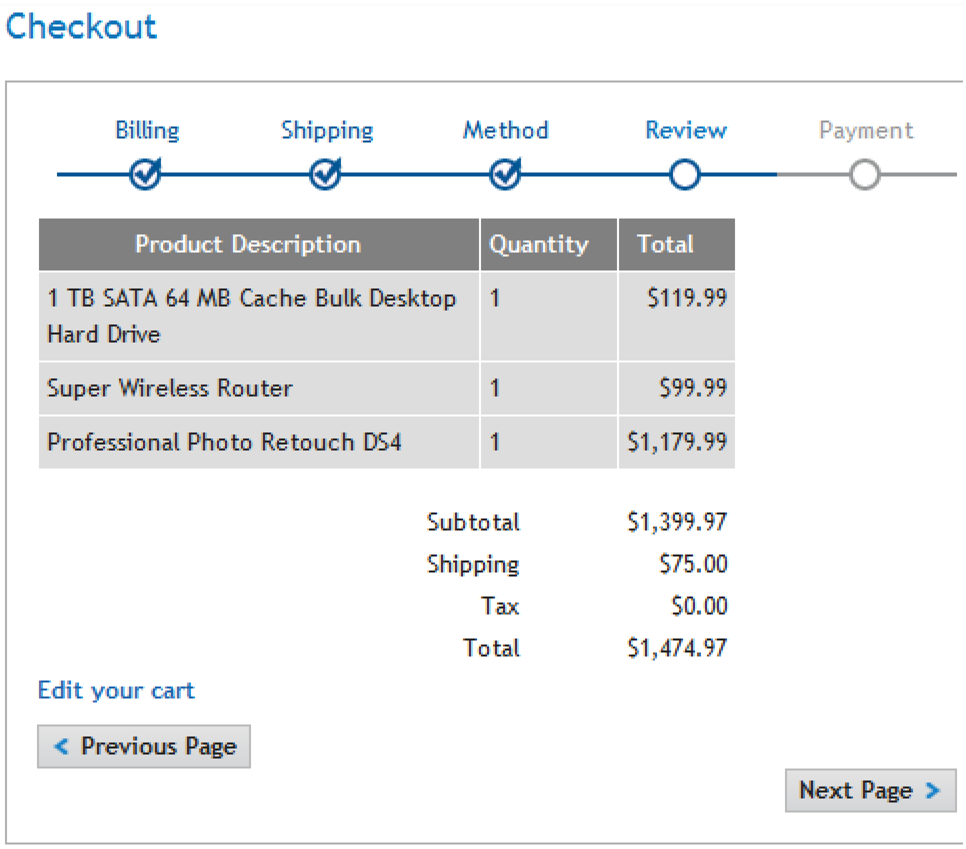
2. The Shipping Address screen appears. Verify the shipping information. If the shipping address is the same as the billing address, click **Next Page**. Otherwise, click **Edit Info** to change the information.



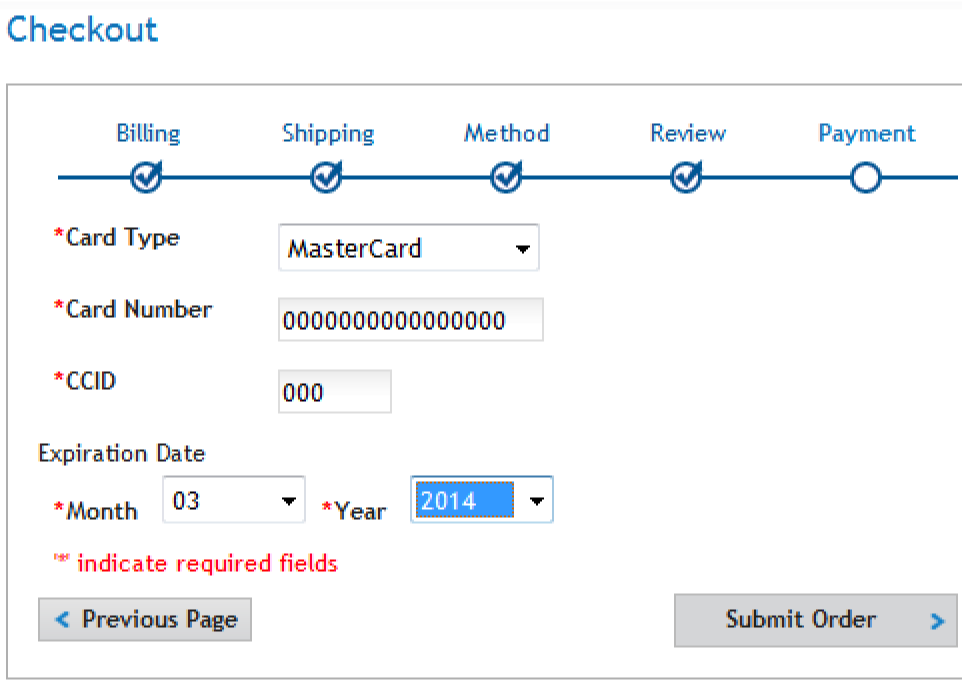
3. Choose the shipping rate, then click **Next Page**.



4. Review your order. You can edit your cart from this screen. If it is correct, click **Next Page**.



5. Enter your payment information. When complete, click **Submit Order**.



Modifying Site Styles

Developers who are familiar with cascading style sheets (CSS) can change OnTrek styles. This section shows how to use individual CSS files and sprites.

Style Sheets Used in The OnTrek Web Site

The following key style sheets produce the major user interface features that you can modify for your site.

- `jquery-ui-1.8.13.custom.css`

  Defines styles that are built on top of the jQuery JavaScript Library. Path: `[`*`siteroot`*`]/css/jquery-ui-custom-theme/`.

- `BlueprintCSS ie.css, print.css, screen.css`

  Defines key styles for columns and typography for overall page integrity. Path: `[`*`siteroot`*`]/css/blueprint/`

- `ektron-jQuery-Blueprint-overrides.css`

  Defines overrides to classes defined in the jQueryUI styles. Defining them in this file instead of the jQueryUI file allows for easier maintenance. Classes names defined in this file are preceded with `.ui-xxx`. Path: `[`*`siteroot`*`]/css/`.

- `ektron.ui.framework.css`

  Defines styles specific to basic Ektron site pages including definitions for header, footer, body, channel and others. Classes names defined in this file are preceded with `.ektron-ui-xxx`. Path: `[`*`siteroot`*`]/css`.

- `ektron.site.css`

  Defines the majority of the style changes needed for a specific site's appearance and style. Definitions for common elements like H1-H6, body, and form styles are defined here. Also, classes from the previous style sheets are further defined and extended.

  If you need to make specific style changes, make them in this css file.

Testing Your Styles Using the Messages Page

OnTrek includes a special page for examining style changes you make in various css files. Display this page in a browser by entering `http://[`*`siteroot`*`]/unittests/messages/ektron.messages.aspx`.

This page displays each of the styles as you check a style name.

NOTE: Apply changes to styles by modifying or adding specific style classes to the `ektron.site.css` file where practicle.

To see how styles are applied:

1. Uncheck all options
2. Check the styles you want. The text changes according to the style sheet cascading rules.

Understanding jQueryUI

jQueryUI provides basic style definitions that enhance a Web site visitor's experience and also provides a reliable development basis from which you can quickly construct pages.

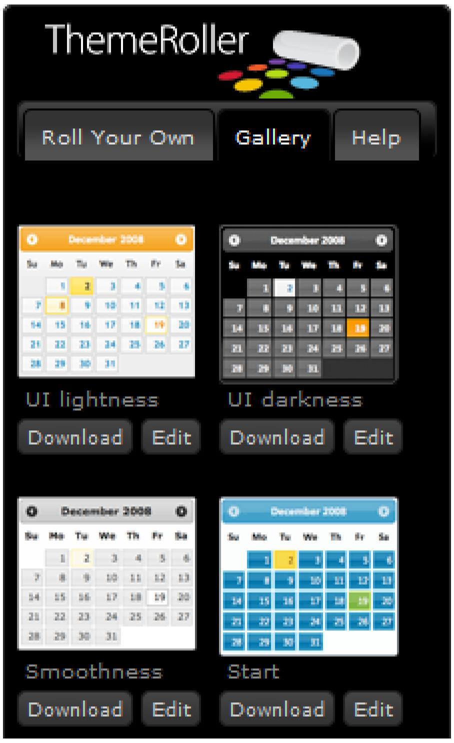
You can download jQueryUI definitions from the Web site `http://www.jQuery.com` and apply them to OnTrek.

Classes defined within jQueryUI CSS files define the appearance of various states and containers. In most cases, the classes contained in the jQueryUI CSS file begin with `.ui-`.

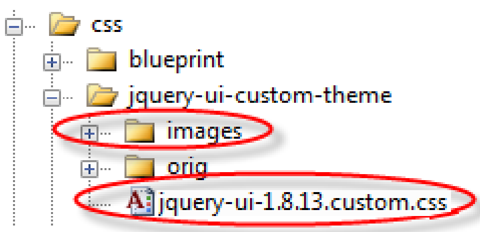
IMPORTANT: You must use version 1.8.13 jQuery UI in this version of OnTrek.

To change the style class definitions:

1. Browse to `http://www.jqueryui.com`.
2. Select **Themes** from the menu.
3. Click the **Gallery** tab.



4. Decide which theme you want to use and click **Download**.
5. Unzip the files.
6. Copy the `images` folder and *jquery-ui-1.8.13.custom.css* to the folder `[siteroot]/css/jquery-ui-custom-theme`.



Understanding BlueprintCSS

Ektron's best practice for styling Web sites include adopting a standard called BlueprintCSS. (http://www.blueprintcss.org) This standard defines an easy-to-use column and typography layout that provides ease-of-maintenance and reliable high-quality layouts. BlueprintCSS also provides cross-browser definitions to minimize your time to resolve these issues.

BlueprintCSS class names provide consistency between designers and developers when applying specific styles to the elements of a page.

Installing BlueprintCSS Files

To download `BlueprintCSS.css`:

1. Browse to http://www.blueprintcss.org.
2. Follow the directions to Download Now.
3. Unzip the files and place it in the folder `[siteroot]/css/blueprint`.
4. Link `ie.css, print.css, and screen.css` into your templates.

Using BlueprintCSS for Vertical Alignment

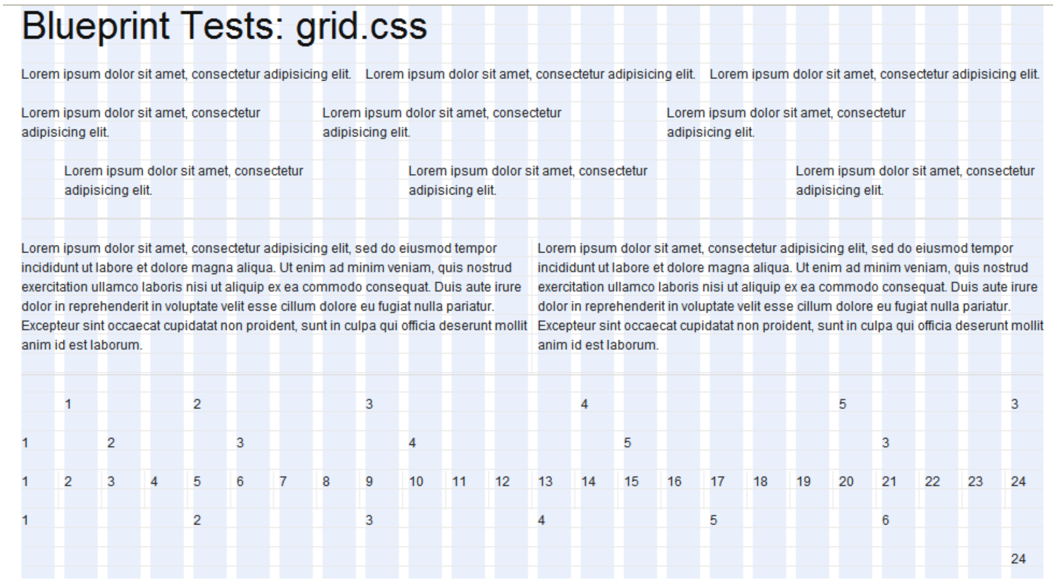
To understand how to use BlueprintCSS in OnTrek, look at the code for `default.aspx` in Visual Studio. Look for definitions like this.

`<div class="span-24">` or `<div class="span-8 last">`

With BlueprintCSS, the page is divided into 24 evenly spaced columns spanning 30px plus a 10px gutter between them. When you define an element with a `class="span-24"`, you set it to the full page width (950px). To define 3 equal columns across a page, all of the class spans must equal 24. Use the last class to indicate the last column. The HTML code looks like this.

```
<div class="span-24">
   (code inside full width column)
</div>
<div class="span-16">
   (code inside a large column)
 </div>
<div class="span8 last">
   (code inside small column, the last column on the right)
</div>
```

The following figure shows the 24-column definition used by BlueprintCSS.



To understand more about using BlueprintCSS, refer to the tutorials and forums that support it at `http://www.blueprintcss.org`.

Understanding Ektron UI Framework

`Ektron.ui.framework.css` (located in `[siteroot]/css`) defines specific class names for use within Ektron projects. This style definition file generally bridges the gaps BlueprintCSS and jQueryUI CSS with Ektron standard definitions and styles.

The namespaces standardize the class names that you use across multiple projects, thus unifying wireframe construction methods. Individual rules vary from one project to another, but the class names are standardized.

Class rules defined in the Ektron UI Framework include the following components.

- Page framework—header, body, footer
- Typography helpers - uppercase, lowercase, smallcaps
- Color helpers - background colors for even and odd rows
- Sprites
- Tables and Grids
- Forms
- Paging
- Wizards
- Calendars
- Breadcrumbs
- Sprites

The site designer applies designs to the site using these definitions in parallel to the work the developer does in coding the pages using these style classes.

The `ektron.ui.framework.css` file prefaces classes with `.ektron-ui`.

For more information, see `http://reference.ektron.com/developer/controls.aspx`.

Understanding Ektron Site CSS

The `ektron.site.css` style sheet contains the definition of classes at the most detailed or specific level. When you modify styles in this CSS, you have the largest impact on the appearance of elements on the Web page.

You can override class definitions by applying specific style rules. The following code shows a style for a special message that looks different from a normal paragraph.

```
div.ektron-ui-message > p {margin: .75em 0 .75em 20px; }
```

With this stylesheet, a developer and designer can work rapidly because classes and terms are (in most cases) self-defining.

Using Sprites for Icons

A sprite is an image file made up of icons used in a Web site. A stylesheet defines the size and location of individual icons within this file.

Using sprites improves Web site performance by reducing the number of images that are transmitted to a browser from a server. When you combine all of the icons used in a site into one larger image and add the definitions of the sprites into CSS styles, the images are loaded into memory once and rapidly rendered by the browser.

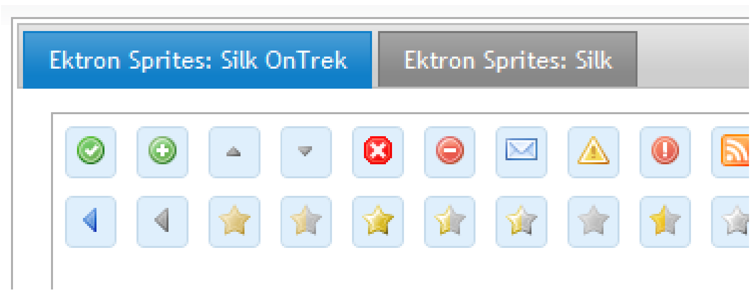
Locating the Sprite Files

The sprite files are located in folder `[`*`siteroot`*`]/css/sprites/silk`. You can change or replace this file as long as the dimensions are not changed and the filenames remain the same.

Viewing the Icons in a Sprite

The OnTrek Web site includes a special page to help you examine sprites. Display this page in a browser by entering `http://[`*`siteroot`*`]/unittests/sprites/ektron.sprite.silk.aspx`.

The tab called **Ektron Sprites: Silk OnTrek** shows a copy of the sprite file containing 36 commonly used icons found in the file `ektron.sprite.silk.OnTrek.png`. The tab called **Ektron Sprites: Silk** shows a copy of the sprite that contains all icons found in the `ektron.sprite.silk.png` file.



NOTE: If you modify the sprite file, copy it into the `unittests/sprites` folder to see your changes in this page.

Using the Sprite Generator

Create your own sprite by using the Sprite Generator located at http://spritegen.Website-performance.org/. Follow the instructions to upload your icons in a zip file, modify the tools configuration and generate the sprite. Be sure to use the same naming convention used in the sprite file that you are replacing.

(This page intentionally blank.)

Using Widgets in OnTrek

Widgets are mini-applications that can provide either specific functionality (such as calendar events) or areas into which you can add Ektron content (content blocks, list summaries, collections, and so on). You can drag and drop widgets onto a page using PageBuilder. You can find help about widgets anywhere you see and click **Help** ( ). To open the widget bar from the PageBuilder menu, click on the up/down controls ( ).

The following list shows the widgets that are specifically designed for OnTrek (in addition to the other widgets in the site. You can find more widgets at Ektron Exchange (http://dev.ektron.com/exchange/) where Ektron users create and share Ektron code.

- *Collection Widget* on page 121—Displays a collection that is a list of content that you choose from the content available in the Ektron.
- *Content Analytics List Widget* on page 122—Displays content based on how people rated the content, what were the most recently published content items, or how many people viewed the content .
- *Content Block Widget* on page 123—Displays any content on your Web page that you want from Ektron.
- *Featured Event Widget* on page 124—Displays a single event with a link to more information about the event.
- *List Summary Widget* on page 125 —Shows a list of content from a folder (and optionally its subfolders) on your Web page.
- *Product Analytics Widget* on page 128—Displays a list of content from a folder (and optionally its subfolders) on your Web page.
- *TabPlus Widget* on page 130—Displays items based on how customers rated the items, how many customers viewed the items, or what were the most recently viewed items.
- *Upcoming Events Widget* on page 132—Displays a list of scheduled calendar events.

If you cannot find the widget you are looking for, perhaps it is not enabled for the wireframe. To select the widgets that you want in a wireframe, see *Choosing Widgets for a Wireframe* below.

NOTE: Each landing page has a specialized OnTrek-specific widget. You may move these widgets between drop-zones or remove them from their host PageBuilder pages like any other widget. However, because these widgets were created specifically for OnTrek to fulfill OnTrek-specific design specifications, they do not have the standard Widget edit interface. To edit these widgets you must use a code editor like Visual Studio. The following are the specialized widgets: Site-ClientList, Site-CommunityLanding, Site-FeaturedProducts, Site-ProductSearchForm, Site-ServicesHome, Site-Slider, and Site-SupportLanding.

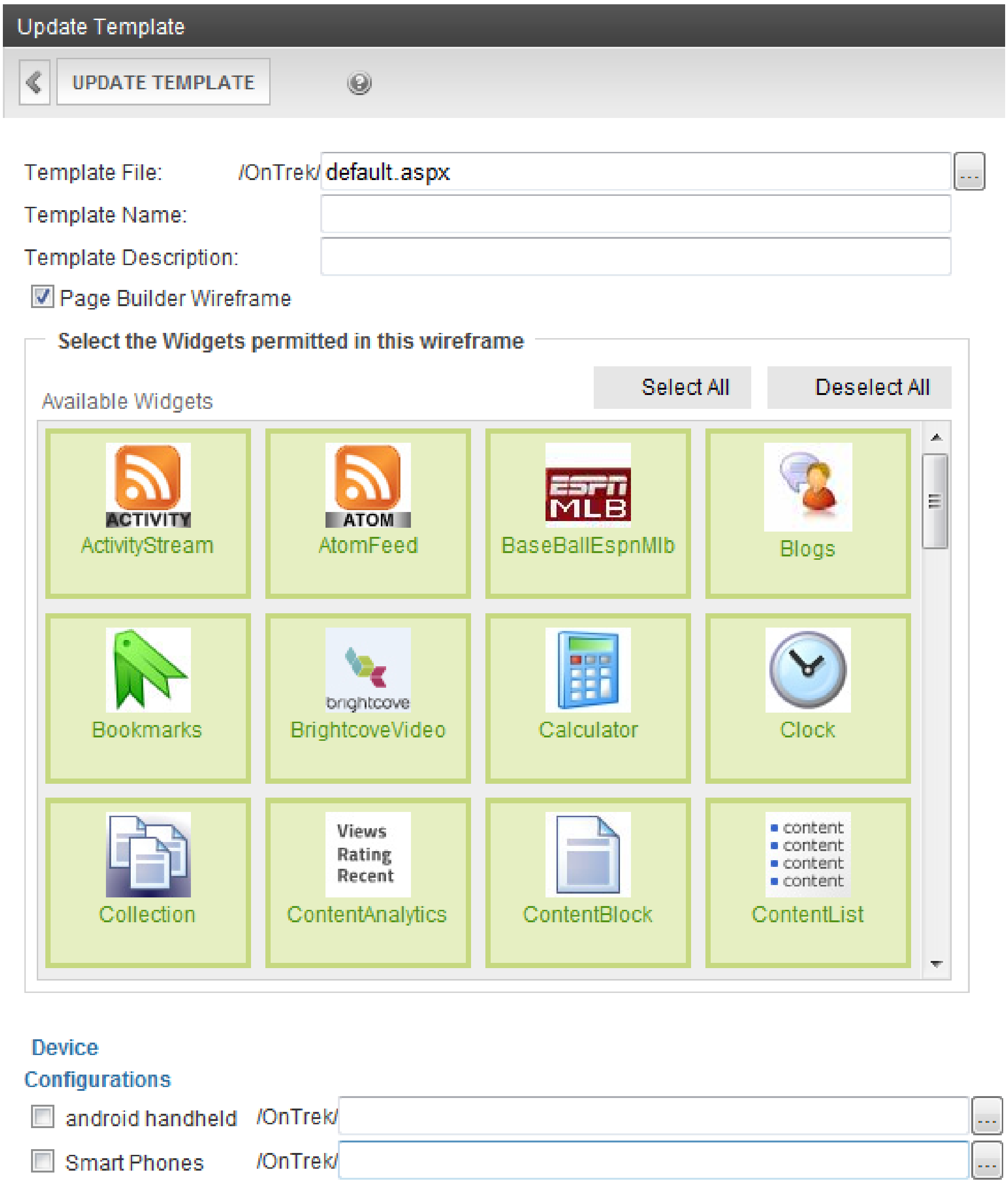
Choosing Widgets for a Wireframe

To select the widgets you want in a wireframe:

1. While logged into the Workarea in the Setting section, choose **Settings > Configuration > Template Configuration**. The Active System Templates screen appears.

2. Click on **default.aspx (Wireframe Template)**. A window of widgets appears.

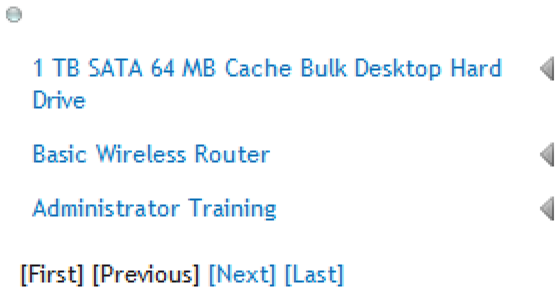
NOTE: You can select a different set of widgets for each wireframe. For example, click on **clients.pb.aspx (Wireframe Template)** and continue with these steps.



3. Click on the widgets you want (or click **Select All** or **Deselect All**). Highlighted widgets appear in the widget selection bar of pages that use the wireframe template; non-highlighted widgets do not appear there.
4. You can also indicate that these widgets are for other device configurations.
5. Click **Update Template**. The widgets appear in the widget bar of pages that use the wireframe you selected.

Collection Widget

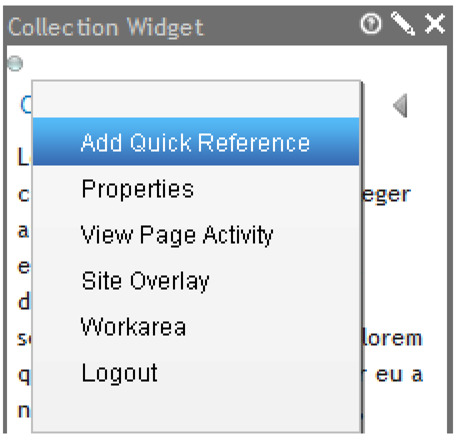
Shows a *collection* that is a list of content that you choose from the content available in the Collection section of the Workarea. The following figure shows a collection of *Featured Products*.



Properties

To change the properties, click **Edit** ( ).

- **Collection ID**—The drop down list is populated in the Workarea in the Collections area of the Content tab. If you add a new collection in the Collections Workarea, it displays in the Collection ID list.
- **Description**—Displays the description of the Collection ID, if one was written (otherwise blank).
- **Page Size**—Enter the number of items you want displays in the widget window.
- **Teaser**—Check to display text from the Summary of each item in the list, if one was written.
- **Enable Paging**—Check to see more content titles with forward and back buttons when more items are in a collection than were specified in the Page Size property.
- **IncludeIcons**—Check to display an icon if an item has an icon associated with it.
- **AddText**—Enter the menu item text to add more content. For example, if you enter "Add Quick Reference" it displays as follows in the editor menu.

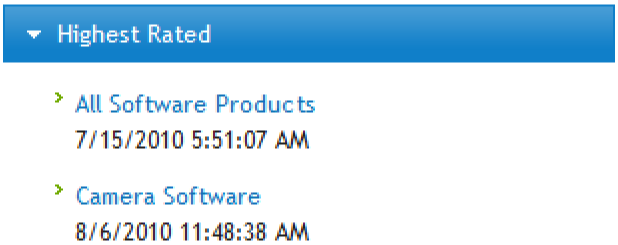


- **Random**—Choose **True** to list the collection items in random order; **False** to list them in the order appearing in the Workarea.

- **Get HTML**—Choose **True** to display the associated HTML content of each collection item; **False** to not display the HTML.
- **XSLT**—Enter the path to an EXtensible Stylesheet Language Transformation (XSLT) that you want to use on the collection.
- **CSS**—Enter the path to a cascading style sheet (CSS) that you want to use on the collection.
- **SelTaxonomyID**—Enter the ID of the taxonomy that is assigned to the new content when Add Items is chosen.
- **Display Selected Content**—Check to show content in this widget location when the site visitor selects the content link from the collection. This overrides the quick link normally associated to the content.
- **Display Header**—Check to show header text above the widget.
- **Header Text**—Enter text for the Header. Check the Enable Header property box to show this text. If no text is entered into the Header property, the collection name shows.

Content Analytics List Widget

Displays information about a set of content or products. The following figure shows the Highest Rated products in the default Software taxonomy.



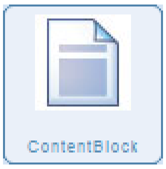
Properties

To change the properties, click **Edit** ( ).

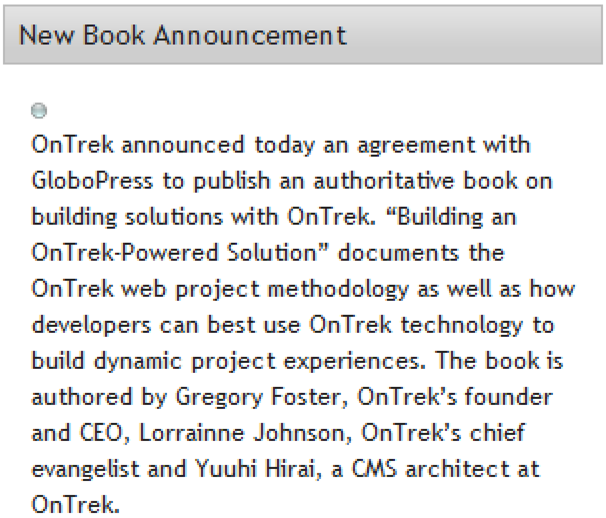
- **Folder ID**—Enter the ID of the folder that contains the items to appear in the list. You can also select the folder from the folder tab.
- **Header**—Enter text for the header.
- **Display Mode**—Select one of the following to determine how the content information displays.
  - **Accordion**—Displays vertical tabs for viewing Highest Rated, Most Recent, and Most Viewed items.
  - **Tabs**—Displays horizontal tabs for viewing Highest Rated, Most Recent, and Most Viewed items.
- **Enable Paging**—Check to show links to page forward or backward through the content list. The amount of content shown in each page is set by the *Items Per Page* property.
- **Items Per Page**—Enter the number of content items you want to display on a page. If blank, page forward/backward buttons do not show.
- **Taxonomy ID**—Enter the ID of the taxonomy that is assigned to the new content when Add Items is chosen.

- **Display Read More**—Check to display the Read More link.
- **Read More Link Text**—Enter text for the *Read More Hyperlink* set in the next property. For example: "Read More..."
- **Read More Hyperlink**—Enter the hyperlink used for the *Read More Text* set in the previous property. For example: "Content.aspx?id=168".

Content Block Widget



Shows any content on your Web page that you want from Ektron including html, text, documents and digital media. You can set the content block widget to show a specified content id. The following example shows the content called *OnTrek Announced New Book: Building an OnTrek-Powered Solution* located under the Content tab at **Folders > MainSite > Company > Company News** folder. A header was added from the Properties tab.



New Book Announcement

OnTrek announced today an agreement with GloboPress to publish an authoritative book on building solutions with OnTrek. "Building an OnTrek-Powered Solution" documents the OnTrek web project methodology as well as how developers can best use OnTrek technology to build dynamic project experiences. The book is authored by Gregory Foster, OnTrek's founder and CEO, Lorrainne Johnson, OnTrek's chief evangelist and Yuuhi Hirai, a CMS architect at OnTrek.

Properties

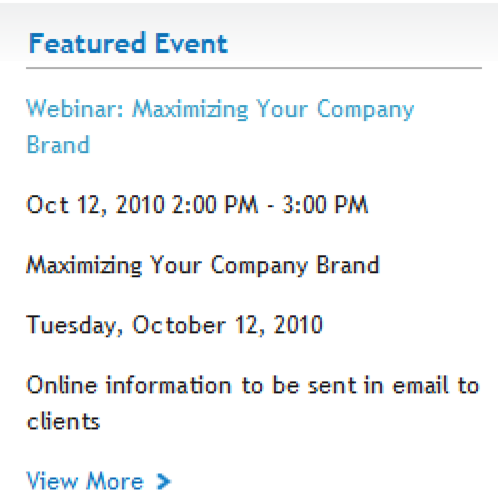
To change the properties, click **Edit** ( ).

- **Filter By:**—Choose **Content**, **Form**, or **Multimedia** and then click **View Results** on the bottom left of the dialog box to see the content items in the selected type.
- **View Result**—Click to display contents of the selected folder. Hover over a content item so see a summary of the content. You can filter the content as described in the previous table entry.
- **Cancel** button—Click to dismiss the dialog box without adding content.
- **Save** button—Click to save the changes you made and dismiss the dialog box.
- **New** button—Click to create new content (rather than selecting existing content).
- **Folder**tab—Use the Folder tab to navigate to content that you want to display in the content block. For example, the sample content in the figure above is located at **[*siteroot*] > MainSite > Content > Company > Company News**, and called **OnTrek Announces New Book:Building an OnTrek-Powered Solution** in the View Results pane.

- **Taxonomy**tab—Use the Taxonomy tab to navigate to content that you want to display in the content block. For example, select **OnTrek Site Navigation > Clients > Case Studies** and select one of the result to display in the widget.
- **Search**tab—Use the Search tab to find content to display. For example, type **acme** in the search box and select one of the result to display in the widget.
- **Properties**tab—Use the Properties tab to create a header text for the content.
  - **Display Header**—Check to display the header text on the Web page.
  - **Header Text**—Enter text that you want to display as the content header.

Featured Event Widget

Displays a single event with a link to more information about the event. The following figure shows an example event that was created at **[*siteroot*] > MainSite > Content > Company > Event Calendar**, and called **Webinar: Maximizing Your Company Brand**. A header was added from the Properties tab of the Featured Widget dialog box.



Properties

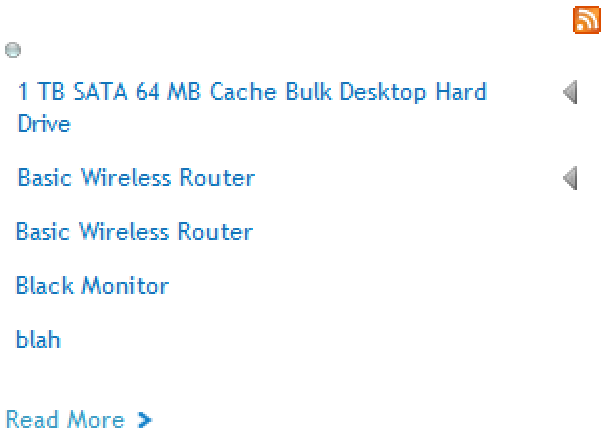
To change the properties, click **Edit** ( ).

- **Filter By:**—Choose **Content**, **Form**, or **Multimedia** and then click **View Results** on the bottom left of the dialog box to see the content items in the selected type.
- **View Result**—Click to display contents of the selected folder. Hover over a content item so see a summary of the content. You can filter the content as described in the previous table entry.
- **Cancel** button—Click to dismiss the dialog box without adding content.
- **Save** button—Click to save the changes you made and dismiss the dialog box.
- **New** button—Click to create new content (rather than selecting existing content).
- **Folder**tab—Use the Folder tab to navigate to content that you want to display in the content block. For example, the sample content in the figure above was created at **[*siteroot*] > MainSite > Content > Company > Event Calendar**, and called **Webinar: Maximizing Your Company Brand** in the View Results pane..

- **Taxonomy**tab—Use the Taxonomy tab to navigate to content that you want to display in the content block. For example, select **OnTrek Site Navigation > Clients > Case Studies** and select one of the result to display in the widget.
- **Search**tab—Use the Search tab to find content to display. For example, type **acme** in the search box and select one of the result to display in the widget.
- **Properties**tab—Use the Properties tab to create a header text for the content.
  - **Display Header**—Check to display the header text on the Web page.
  - **Header Text**—Enter text that you want to display as the content header.

List Summary Widget

Shows a list of content from a folder (and optionally its subfolders) on your Web page. The following example shows the list summary in the Content tab at **Folders > Mainsite > Content > Store > Hardware** folder.

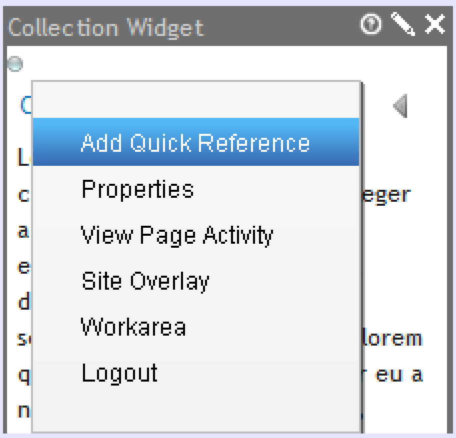


Properties

To change the properties, click **Edit** ( ).

Property	Description
Folder ID	Enter the ID of the folder that contains the items to appear in the list. Set the *Recursive* property to include subfolders under this folder.
MaxResults	Enter the number of content items you want to display on a page. If blank, page forward/backward buttons do not show.
Teaser	Check to display text from the Summary of each item in the list, if one was written.
Recursive	Check to include content in subfolders under the folder indicated by the *FolderID* property.

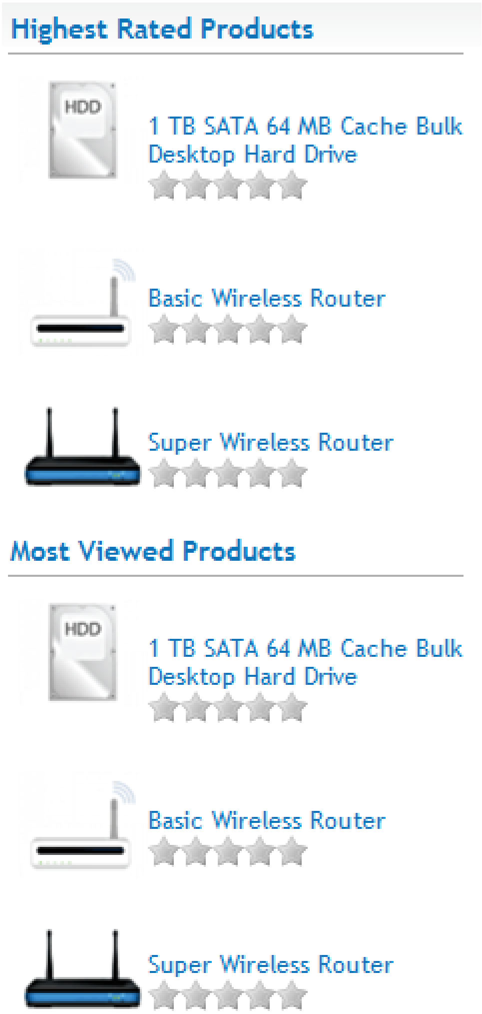
Property	Description
EnablePaging	Check to show links to page forward or backward through the content list. The amount of content shown in each page is set by the **Max Results** property.
Include Icons	Check to show icons that represent each content item's type in the ListSummary.
OrderByDirection	Choose **Ascending** (A-Z; first-last) or **Descending** (Z-A; last-first).
OrderKey	Choose one of the following options. **Title**—Sorts by the title of the content. **DateModified**—Sorts by the date the content was last edited. **DateCreated**—Sorts by the date the content was first published. **Last Editor's First Name**—Sorts by the first name of the person who last published the content. **Last Editor's Last Name**—Sorts by the last name of the person who last published the content.

Property	Description
Content Type	Choose the type of content to display in the ListSummary. **AllTypes**—Displays all types of content. **Content**—Displays only content. **Forms**—Displays only forms. **Archive_Content**—Displays only archived content. **Archive_Forms**—Displays only archived forms. **Assets**—Displays only assets. **Archive_Assets**—Displays only archived assets. **LibraryItem**—Displays only library items. **Multimedia**—Displays only multimedia file types. **Archive_Media**—Displays only archived media. **NonLibraryContent**—Displays only non-library content. **Discussion Topic**—Displays only discussion topics. **CatalogEntry**—Displays only catalog entries.
Add Text	Enter the text used in the editor's menu to add more content. For example: if you enter "Add Quick Reference" it appears in the Edit menu. 

Property	Description
SelTaxonomyID	Enter the ID of the taxonomy that is assigned to the new content when Add Items is chosen.
DisplaySelectedContent	Check to show content in this widget location when the site visitor selects the content link from the list. This overrides the quick link normally associated to the content.
XSLT	Enter the path to an EXtensible Stylesheet Language Transformation (XSLT) that you want to use.
CSS	Enter the path to a cascading style sheet (CSS) that you want to use on the collection.
Display Header	Check to show header text above the widget.
Header Text	Enter text for the Header. Check the Enable Header property box to show this text.
Display Read More	Check to display the Read More link.
Read More Link Text	Enter text for the *Read More Hyperlink* set in the next property. For example: "Read More..."
Read More Hyperlink	Enter the hyperlink used for the *Read More Text* set in the previous property. For example: "Content.aspx?id=168".
Enable RSS Syndication	Check to subscribe to RSS notification.

Product Analytics Widget

Displays information about a set of content or products. The following figure shows the Highest Rated and most Viewed products in the Hardware taxonomy.



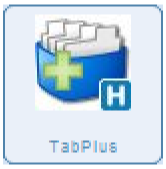
Properties

To change the properties, click **Edit** ( ).

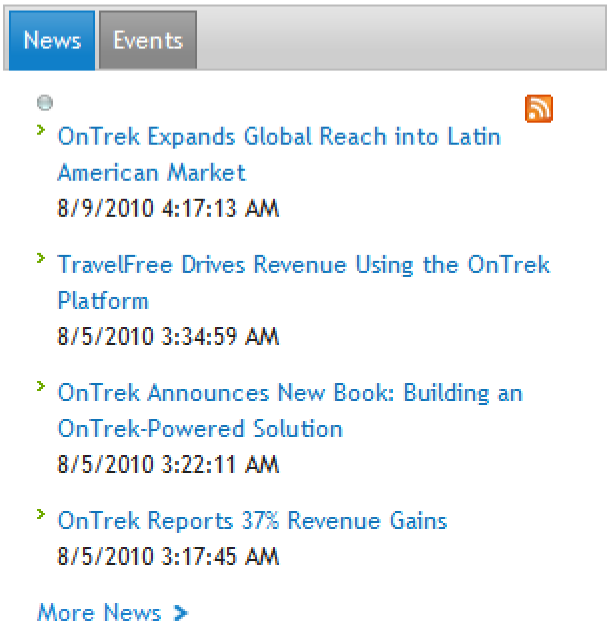
- **Folder ID**—Enter the ID of the folder that contains the items to appear in the list. You can also select the folder from the Folder tab.
- **Max Results**—Enter the number of content items you want to display on a page. If blank, page forward/backward buttons do not show.
- **Recursive**—Check to include content in subfolders under the folder indicated by the **FolderID** property.
- **Enable Paging**—Check to show links to page forward or backward through the content list. The amount of content shown in each page is set by the **Max Results** property.
- **Include Icons**—Check to show icons that represent each content item's type.
- **Add Text**—Enter the text used in the editor's menu to add more content. For example: if you enter "Add Quick Reference" it appears in the Edit menu.
- **SelTaxonomyID**—Enter the ID of the taxonomy that is assigned to the new content when Add Items is chosen.
- **Display Selected Content**—Check to show content in this widget location when the site visitor selects the content link from the collection. This overrides the quick link normally associated to the content.

- **XSLT**—Select one of the following to determine how the content information displays.
  - **BulletedList**—Displays the content titles as a bulleted list.
  - **CalendarEvents**—Displays a list of scheduled events.
  - **ecmNavigation**—Displays the titles of the content.
  - **ecmTeaser**—Displays the titles and summary of the content.
  - **ecmHtml**—Displays each content in the list summary.
- **CSS**—Enter the path to a cascading style sheet (CSS) that you want to use on the collection.
- **Header Text**—Enter text for the header.
- **Display Accordion**—Check to display vertical tabs for viewing Highest Rated, Most Recent, and Most Viewed items.

TabPlus Widget



Lets you display more than one type of content in a tabbed widget. You can display a tab for a Content Block, a List Summary, a Collection, or Upcoming Events. the following figure shows the default appearance of the TabPlus widget with News (a List Summary) and Events (Upcoming Events).



To add a tab, follow these steps:

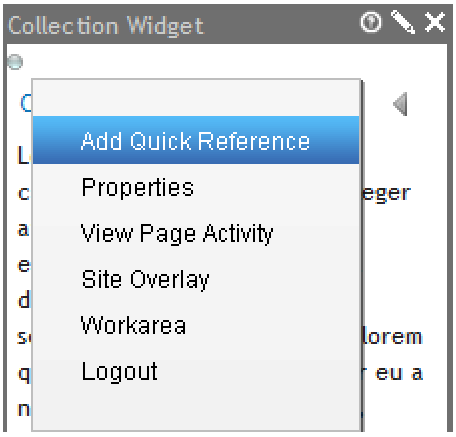
1. Choose **File > Edit** from the PageBuilder menu.
2. If you do not have the **TabPlus** widget on the page, open the widget menu ( ) and drag and drop the widget onto the page.
3. Click **Edit** ( ). The Tab Plus dialog box appears.
4. Click **AddNewTab**.
5. Choose one of the Tab Type options: **Content Block**, **List Summary**, **Collection**, or **Upcoming Event**. Fields appear that are the properties of each option's widget type.

Properties

To change the properties, click **Edit** ( ).

The properties table describes the properties you can fill out when you choose a tab option. Each tab option has its own set of properties.

- **Add New Tab**—Click to add a new tab to the widget. A Tab Type drop down list appears.
- **Tab Type**—Choose the type of content you want in the new tab: content block, list summary, collection, or upcoming event.
- **ID**—Enter the ID of the folder—or navigate to a folder using the folder tree—that contains the items to appear in the list. Set the *Recursive* property to include subfolders under this folder.
- **Tab Title**—Enter text for the tab header.
- **Add Text**—Enter the menu item text to add more content. For example, if you enter "Add Quick Reference" it displays as follows in the editor menu.
  —Image—



- **Items Per Page**—Enter the number of items you want displays in the widget window.
- **Enable Paging**—Check to see more content titles with forward and back buttons when more items are in a collection than were specified in the Page Size property.
- **Display Read More**—Check to display the Read More link.
- **Read More Link Text**—Enter text for the *Read More Hyperlink* set in the next property. For example: "Read More..."
- **Read More Link URL**—Enter the hyperlink used for the *Read More Text* set in the previous property. For example: "Content.aspx?id=168".
- **Enable RSS Syndication**—Click to allow RSS notifications.

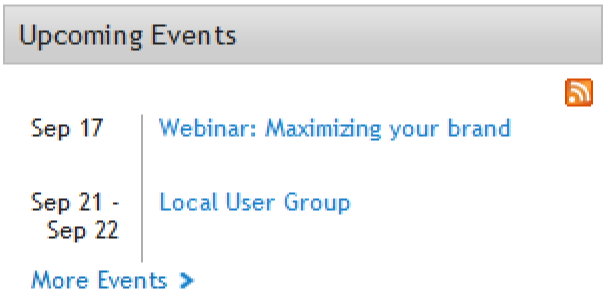
Additional properties for the List Summary option:

- **Display XSLT** —Select one of the following to determine how the content information displays.
  - **ecmNavigation**—Displays the titles of the content.
  - **ecmTeaser**—Displays the titles and summary of the content.
  - **ecmHtml**—Displays each content in the list summary.
  - **BulletedList**—Displays the content titles as a bulleted list.
- **Random** —Choose **True** to list the collection items in random order; **False** to list them in the order appearing in the Workarea.

- **Recursive**—Check to include content in subfolders under the folder indicated by the *FolderID* property.
- **Sort Order**—Choose **Ascending** (A-Z; first-last) or **Descending** (Z-A; last-first).
- **Order By**—Choose one of the following options.
  - **Title**—Sorts by the title of the content.
  - **DateModified**—Sorts by the date the content was last edited.
  - **DateCreated**—Sorts by the date the content was first published.
  - **Last Editor's First Name**—Sorts by the first name of the person who last published the content.
  - **Last Editor's Last Name**—Sorts by the last name of the person who last published the content.

Upcoming Events Widget

Shows a list of scheduled calendar events, similar to the following figure.



Properties

To change the properties, click **Edit** ().

—Properties—

- **Folder ID**—Enter the folder ID that contains the events you want to show in the list. You can use the Folder Tab to browse the content folders to set the Folder ID property. To select a folder or content:
  1. Click the Folder tab.
  2. Navigate to the folder you want and click it.
  3. If the View Results panel is showing, click the content you want.
  4. Click **Save**.
- **Enable Header**—Check to show the header above the widget.
- **Header**—Enter text to show a colored bar with text above the Search box. If you leave this blank, no text or colored bar shows above the search box. Text for the header is placed inside an <h3> tag and adopts the same styles as the column in which it's placed. (Optional)
- **Enable Paging**—Check to show links to page forward or backward through the content list. The amount of content shown in each page is set by the *Items Per Page* property.
- **Items Per Page**—Enter the number of content items you want to display on a page. If blank, page forward/backward buttons do not show.

- **Read More Link text**—Enter the string for the Read More Hyperlink set in the next property. For example: "Read More..."
- **Read More Hyperlink**—Enter the hyperlink used for the *Read More Link Text* property. For example: `Events.aspx`
- **Enable RSS Syndication**—Click to allow RSS notifications.

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Getting Support

Ektron has resources to help you.

- ektron.com—Ektron's home page has useful information, including additional contact information and services. You can find product documentation at http://www.ektron.com/Resources/Product-Documentation/.
- The Dev Center—The Ektron Dev Center (http://dev.ektron.com) has resources to help you find a solution to a problem or see what you can do with Ektron. The Dev Center also has Webinars for many of the features of Ektron Ektron. In the product forum, you can post tips or ask other users about how they use Ektron products more effectively.
- Professional Services—Ektron Professional Services (http://www.ektron.com/services/) is a complete services infrastructure that is customized to meet your specific needs.
- Implementation—Using Ektron's proven Implementation (http://www.ektron.com/Solutions/Services/Implementation/), expert application engineers can implement all or part of your Web site project,ensuring the success of your project.
- Training—Ektron's Training Services (http://www.ektron.com/Solutions/services/training/) ensures your Web project’s success by providing the right level of training to your team at the right stage of your Web project’s lifecycle.
- Synergy—The annual *Synergy Customer Conference* (http://synergy.ektron.com) is a great way for you to learn more about using Ektron and meet other Ektron users.
- Local User Groups—Ektron management meets with Local User Groups (LUG) to bring the latest news and products from Ektron. See http://usergroups.ektron.com/ for location and dates.
- Support**—Customer Support** (http://www.ektron.com/Resources/Support/)
  - United States: 1-603-594-0249 x7002
  - Europe: +44 (0) 1628 509 040
  - Australia: +61 2 9248 7222

For additional contact information, see http://www.ektron.com/About-Ektron/Contact-Us/.

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