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Global Settings

Replace License Key

1. Choose **Workarea > Settings > Configuration > Setup**.
2. Click **Edit**.
3. Add the key to the **License Key(s)** field.
4. Click **Update**.

If adding new keys to old ones (for example, you have multiple domain names), insert a comma between keys.

Configure System Notification Email

Prerequisite: System administrator enabled SMTP email service on a server and in your Ektron web.config file.

1. Choose **Workarea > Settings > Configuration > Setup**.
2. Click **Edit**.
3. In the **System E-Mail Address** field, enter the `From` email address.
4. Check the **Enable Sending of System Notification Email** box.
5. Click **Update**.

Metadata Definitions

Metadata Types

HTML tag type metadata—useful for title tags, outputs an HTML-style tag using the title of the metadata definition as the tag name, and the value set on a content block as its contents (e.g., <tagname>Tag value</tagname>).

To enable this type of metadata, add a Metadata server control to every Web form on which the content will appear.

Meta Tag type metadata—outputs meta-HTML tags for consumption by search engines.

Searchable Property metadata—assigns searchable text to content; you can find the content by searching for the text.

Selector type—Defines a 1-to-1 relationship.

Apply to/Require for a Folder

1. Choose **Workarea > Content**.
2. Right-click the folder.
3. Click **View Properties**.
4. Click **Edit Properties**.
5. Click the **Metadata** tab.
6. Uncheck **Inherit parent configuration**.
7. Check **Metadata fields** to assign (and optionally require content in) the metadata tag to the folder.
8. Click **Update**.
9. To assign metadata to content in the folder: edit the content, click the **Metadata** tab and complete the metadata fields.

Document Management System (DMS)

Supported Types of Assets

- Microsoft Office 2000 or later documents—Word, Excel, PowerPoint, Project, Publisher, Visio.
- Managed files—.zip, .pdf, .txt
- Graphic files—.gif and .jpeg
- Multimedia files—.swf, .mp3, .wav, .avi

  WARNING! Ektron does not support double extensions, such as *filename*.aspx.vb.

Administrators can add or delete file types at the **Settings > Configuration > Asset Server Setup** screen's **File Types** field.

Add One Asset

1. Choose **Workarea > Content** tab.
2. Select a folder in which to place the asset.
3. To import an asset in a different language, click **View > Language** and select it.
4. Choose **New > DMS Document**.
5. Click **Browse** to find the file.
6. Enter a **Title**.
7. (Uncheck **Content Searchable** if you do not want the content to be searchable.)
8. Optionally add a summary, metadata, schedule, comments or category.
9. Check in, submit, or publish the content.

Add Several Assets

NOTE: Requires MS Office 2003 and Internet Explorer 7 or greater

1. Choose **Workarea > Content** tab.
2. Select a folder in which to place the assets.
3. To import assets in a different language, choose **View > Language** and select it.
4. Choose **New > Multiple DMS Documents**.
5. Select Office version (first time only).
6. Select folder then files within it.
7. (Uncheck **Content Searchable** if you do not want the content to be searchable.)
8. Optionally add a summary, metadata, schedule, comments or category.
9. Check in, submit, or publish the content.

Check Out, Save, Replace Asset

1. Navigate to the asset.
2. Click the triangle ( ) to its right.
3. Click **Check out and Save As**.
4. Click **Save**.
5. Select a Windows folder for the asset. (Status changes to *checked out* (O).)
6. Edit the asset and save it.
7. In the Workarea, go to the asset and click **Check In**.
8. Click **Submit** or **Publish**.

Folder Management

Assign Style Sheet to Folder Content

1. Place style sheet file (.css) in any site folder.
2. Choose **Workarea > Content** tab.
3. Select folder.
4. Choose **View > Properties**.
5. Click **Edit Properties**.
6. In the **Style Sheet** field, enter the CSS file and path.
7. Click **Update**.

Assign Templates

1. Choose **Workarea > Content** tab.
2. Select folder.
3. Choose **View > Properties**
4. Click **Edit Properties**.
5. Click **Templates** tab.
6. Uncheck **Inherit parent configuration**.
7. Choose from **Select Template** dropdown list, then click **Add** ( ). (If desired template is not in dropdown because it's new, click **Add a New Template**, then select new template; add it to the site root folder.)
8. Check radio button next to default template.
9. Click **Update**.

Make Content Private

To hide content from your public-facing Web site, mark it private. Only users with at least Read-Only permission can view it.

1. Choose **Workarea > Content** tab.
2. Right click a folder or content item and select **View Properties**.
3. Click **View Permissions** ( ).
4. Uncheck **Allow this object to inherit permissions**.
5. Check **Content in this folder is private and can only be view by authorized users and members**.
6. Assign read-only or higher permissions for appropriate users, groups and members.

Library Management

Access the Library

1. Choose **Workarea > Library**.
2. Use the dropdown to select a type of library file to appear.
3. To work with any library file, click it. Now you can:
   - **Edit** its title, **Summary**, or **Metadata**
   - find content linked to it
   - delete it

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Update Allowed File Types

1. Choose **Workarea** > **Library**.
2. Click **View Properties** ( ).
3. Click **Edit**.
4. Add or remove file extensions from the **Image Extensions** and **File Extensions** lists (separate by commas).

Quicklinks

A special kind of auto-generated hyperlink that jumps to another Ektron content item. (A regular hyperlink jumps to an external Web page). Every content item has a default quicklink, which includes its default template and a query string parameter that includes the content ID.

Update Quicklinks

1. Choose **Workarea** > **Library**.
2. Click the folder that contains Quicklinks you want to update.
3. Select **Quicklink** from the dropdown.
4. Click **Update Quicklink** ( ).
5. In the **To:** field, enter the template to apply to the Quicklink.
6. Check the box next to each Quicklink you want to update.
7. Click **Update Quicklink**.

Taxonomy

A taxonomy is a content-level categorization system that uses one-to-many relationships to create a scalable organization of content. A taxonomy lets you create a navigation system that is independent of the folder structure.

Create Taxonomy

1. Choose **Workarea** > **Content > Taxonomies > Taxonomies > Add Taxonomy**.
2. Add properties (Title, Description, Image, Template, etc).
3. Decide if taxonomy will be applied to content, users, or user group.
4. Assign to the taxonomy individual content or entire folders, users, or user groups.

NOTE: If you assign a category to a folder, when new content is added to the folder, the category is assigned to that content.

5. If you apply a taxonomy category to a folder, authors can apply only those categories to the folder's content while editing it.
   You may require an author to assign a designated category to content.
6. Add a taxonomy directory control to a template to let site visitors view or select content by category.

URL Aliasing

Types of URL Aliasing

Manual—lets you apply a unique URL to any content item, or several aliases to an item and pick a primary one.

Automatic—creates rules for taxonomy, folder, user, and community group types.

RegEx—based on patterns in content name.

Site—resolve a URL from www.bionics.com to www.newgen.com, for example.

Redirect—lets customers find your Web site when you add or change your Web site URLs

Enable URL Aliasing

1. Choose **Workarea > Settings > Configuration > URL Aliasing > Settings**.
2. Click **Edit**.
3. **Enable** the types of Aliasing you want to use.
4. Click **Save**.

Add or Update Manual Alias

1. Go to **content** item to be aliased.
2. Click **Edit**.
3. Click the **Alias** tab.
4. Click **Add Manual Alias**.
5. Click **Submit** or **Publish**.

Authorized users also can add/ update manual aliases at **Workarea > Settings > Configuration > URL Aliasing > Aliases**.

Automatic Taxonomy Alias

1. Choose **Workarea > Settings > Configuration > URL Aliasing > Aliasing Rules > Automatic**.
2. Click **Add Aliasing Rule**.
3. Specify the rule name and select **Taxonomy** as the Source Type.
4. Click **Next** to specify the rules, then **Save**.

Create a Redirect

1. Choose **Workarea > Settings > Configuration > URL Aliasing > Settings**.
2. Click **Edit** and check **Enable URL Redirects**.
3. Choose **Workarea > Settings > Configuration > URL Aliasing > Redirects**.
4. Click **Add Redirect** and specify original and new URLs, then **Save**.

Email Verification

To have new membership enrollees verify their email address:

1. Choose **Workarea > Settings > Configuration > Setup**.
2. Click **Edit**.
3. Click **Workarea** tab.
4. Check the **Enable Verify Email** checkbox.
5. Click **Update**.

Web Alerts

Prerequisite: SMTP and the message queue must be set up

1. Choose **Workarea > Settings > Configuration > Web Alerts**.
2. Click **Messages**.
3. Click **Add Email Message**.
4. Create **OptOut**, **Unsubscribe**, and **Default** messages.
5. Within **Web Alerts**, click **Subscriptions**.
6. Click **Add Subscription**.
7. Create and enable a subscription.
8. Click **Email From List**.
9. Click **New > Email From**.
10. Enter email address.
11. Click **Save**.
12. Open the **Content** tab and go to the folder whose content will trigger the alert.
13. Choose **View > Properties**.
14. Click **Edit Properties**.
15. Click the **Web Alerts** tab.
16. Assign the Web Alert information.
17. Click **Update**.

CMS vs. Membership User

CMS users (number specified by site licensing) can log into Workarea and perform CMS tasks. **Membership users** (no limit) can be granted permission to create, edit, and view content in a community folder after log in, view private content, participate in moderated discussions, and maintain a user profile; restricted from most Workarea tasks.

CMS User Management

Update Password

1. Choose **Workarea > Settings > Users**.
2. Select a user.
3. Click **Edit**.
4. Enter the password into the **Password** and **Confirm Pwd** fields.
5. Click **Update**.

Add User

1. Choose **Workarea > Settings > Users**.
2. Click **Add User**.
3. Enter the user information and click **Save**.

NOTE: Required fields are indicated by a red asterisk (*)

Delete User

1. Choose **Workarea > Settings > Users**.
2. Check each user to be deleted
3. Click **Delete** ( ).

Lock User

Locked out users cannot log in.

1. Choose **Workarea > Settings > Users**.
2. Check the user to be locked out.
3. Click **Lock** ( ).

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Language

Enable/Disable a Language

1. Choose **Workarea** > **Settings > Localization > Languages and Regions**.
2. Click **Language Settings**.
3. Click **Enable**.
4. Check languages for Workarea and site.
5. Click **Update**.

Export Content for Translation

1. Go to **Workarea > Settings > Localization > Translation Package** and click **Add Translation Package**.
2. Enter Name and Description; click **Save**.
3. Use **Add Items** or **Add Folders** to assign items to the package.
4. Click **Export** for translation.
5. Enter Job Title.
6. Select packages.
7. Select XLIFF version and ZIP file size.
8. Click **Create XLIFF Files for Translation**. For each language, Ektron creates one .zip file, which includes an XLIFF file for each content item. Zip files are stored at the Export for Translation page.
9. Transmit files to translation agency.

Import Translated Files into Ektron

1. Choose **Workarea** > **Settings > Localization > Import Translated Files**.
2. Click **Browse** and navigate to the folder with the translated files.
3. Select the files to import.
4. Click **Import Translated XLIFF Files**. Ektron creates new or updates existing foreign-language editions of the imported content/menu/taxonomy. Information about the imported file appears in the history area of the Import XLIFF Files screen. After you import the translation files, Ektron removes them from the file system.

For each new edition:

- If content title is the same as the source edition, the next available number is appended to distinguish it from the source.
- Its status matches the source content's status. Typically, its status is checked out.
- When imported, the content can enter the approval process just like other content.
- Its history indicates it was checked in at the time the report was run.
- For content, the following properties are inherited from the original content:
  - Smart Form
  - content searchable
  - approval method
  - date created and last edit date (when the content is imported)
  - the last user to edit

Approval Chain

An approval chain is a series of users or groups who must approve content before it is published on (or deleted from) your Web site.

Update List of Approvers

User must have read-only or higher permission for folder before joining Approval Chain. (May have to go to folder's Permissions screen and uncheck **Allow this object to inherit permissions** first.)

1. Choose **Workarea > Content** tab.
2. Right-click on folder and select **View Properties.**
3. Click **View Approvals** ( ).
4. Use **Add**, **Delete** and **Reorder** buttons.

Review Content Awaiting Approval

NOTE: Content only appears if you or a user group to which you belong is the current approver.

Via Content Awaiting Approval Widget

1. Add the Content Awaiting Approval Widget to the Desktop.
   - Click **Desktop**.
   - Select a **Tab** or **Add New Tab**.
   - Select **Toggle Widget Tray** and drag and drop Content Awaiting Approval Widget into Drop Zone.
2. In the **Content Awaiting Approval Widget**, click the content to be approved.
3. **Edit**, **Decline**, or **Publish** the content.

Via Content Reports

1. Choose **Workarea > Reports > Contents > Approvals**.

Permissions

Add a User or User Group to Permissions Table

1. Choose **Workarea** > content folder.
2. Choose **View > Language** and select the language whose folder properties you want to update.
3. Choose **View > Properties**.
4. Click **Permissions** ( ).

   NOTE: Break inheritance before adding users or groups.
5. Select **CMS users** or **Membership users** from the **User Type** dropdown.
6. Click **Add Permissions**. Only users and groups not assigned to the Permissions Table appear.
7. Select users and groups and click **Save**.
8. Check Standard and Advanced permissions for user or group and click **Save**.

   NOTE: Check **Enable All** to assign all standard permissions. If you do, you still must assign advanced permissions.

Edit User or User Group Permissions

1. Access the Permissions Table for the content folder or content.
2. Select **CMS users** or **Membership users** from the User Type dropdown.
3. Click the user or group for which you want to edit permissions.
4. Check to assign permission; uncheck to remove permission.

   NOTE: Remember to toggle between standard and advanced permissions.
5. Click **Update**.

Delete User or User Group Permissions

1. Access the Permissions Table for the content folder or content.
2. Select **CMS users** or **Membership users** from the User Type dropdown.
3. Click **Delete** ( ).
4. Select the user or group to remove from the Permissions Table.
5. Click **Remove Permission for Folder**.

   NOTE: When you delete the permissions of a user or user group, that change is propagated to all subfolders and content, including approval chains (if folder permissions are inherited).

Roles

1. Go to **Workarea > Settings > Roles > Builtin** and choose **System-Wide**, **Folder Specific**, or **Custom Permissions**.

   NOTE: Create a name for a custom role.
2. Click the role you want to define.
3. Select the type of users from the Show drop-down menu then click **Add Role Member**.
4. Check the boxes for users or groups you want to add and click **Save**.

Search

Crawling is Microsoft Search Server's process that prepares the index files that enable searching. Go to **Workarea > Settings > Configuration > Search > Status** and choose **Request Incremental Crawl** or **Request Full Crawl**.

eSync

To sync a profile, go to **Workarea > Settings > Configuration > Synchronization** and click **Sync**. Use the **Force Initial Sync** button to reinitialize a server that was previously initialized.

Digital Experience Hub

1. Install DxH and save the URL at the end of the installation.
2. Go to **Workarea > Settings > Digital Experience hub > Connect to DxH**.
3. Insert URL and click **Test Connection**.
4. Click **Connect to DxH**.

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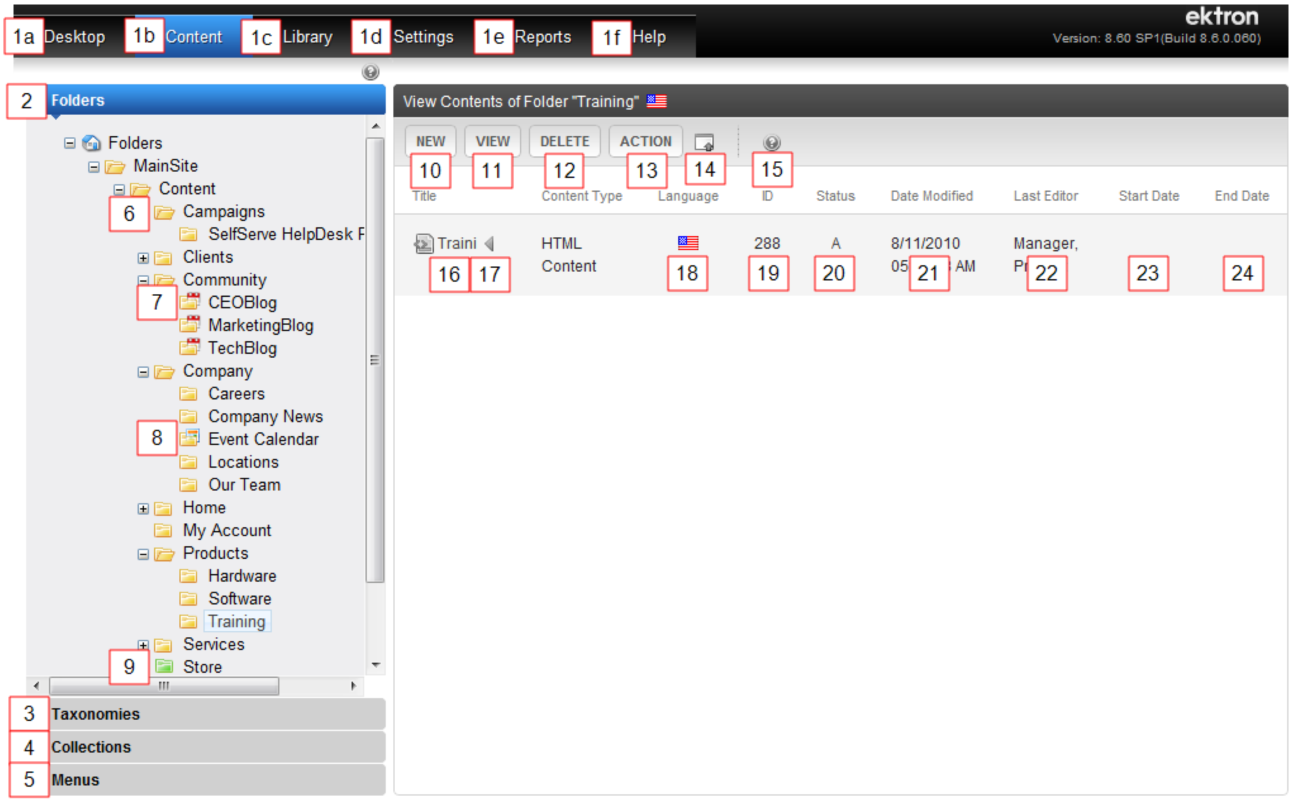

Work Area Tabs

1a	Desktop	Display widgets, which can show content activity, eCommerce reports, etc.
1b	Content	Work with content, folders, taxonomies, menus, and collections.
1c	Library	Stores reusable images, files, quicklinks, and hyperlinks that can be inserted into content.
1d	Settings	Configure Ektron functionality: eCommerce, Community Management, localization, etc.
1e	Reports	Content reports, eCommerce reports, analytics, and configure task
1f	Help	Access reference documentation

Content Tab Types

2	Folder Tab	Create new content, forms, documents, folders, menus, and collections
3	Taxonomy Tab	Perform all taxonomy functions: add categories, content, folders, properties, etc.
4	Collections Tab	Perform all collection functions: add, delete, reorder items; edit properties, etc.
5	Menu Tab	Perform all menu functions: add, delete, reorder items; edit properties, etc.

Folder Types

6	Content	View content, forms, assets, folders, menus, and collections in folder.
7	Blog	View blog's posts and comments.
8	Calendar	View and plan calendar events.
9	eCommerce (Catalog)	View eCommerce catalogs and catalog entries.
	Forum (not shown)	View discussion forums, and their categories, topics, and replies.
	Community (not shown)	View content that membership users can edit.

Menus

10	New Menu	Create new content, forms, assets, folders, menus, and collections, etc.
11	View Menu	View language, properties and archived content. Can also select content type (e.g., HTML Content) then view only those items.
12	Delete Menu	Delete items. Administrators can delete folders.
13	Action Menu	Export for translation, Search, Move/cut/copy content, eSync.
14	DMS/Add Asset	Display window for drag and drop documents from local machine into Ektron.
15	In Context Help	Click to get in-context help anywhere in the Workarea.

Content Types

16	Content Items	HTML content, forms, DMS, or multimedia content.
17	Quick Edit Menu	View/edit content, properties; sync content
18	Language Flag	Content language.
19	Content ID	Automatically generated.
20	Content Status	Automatically generated.

- **(A) Approved**
- **(O) Checked Out**—Published on Web site. May only be edited by administrator and author who checked it out.
- **(I) Checked In**—Anyone may edit.
- **(S) Submitted**—In approval chain awaiting acceptance.
- **(M) Deletion**—Marked for deletion.
- **(T) Awaiting Tasks**—Awaiting completion of tasks.
- **(P) Pending**—Awaiting scheduled start date.
- **(D) Pending Deletion**—Content created with a future start date, then deleted. Deletion occurs on start date.

21	Date Modified	Last modified date of the content.
22	Last Editor	Editor who made the last modification.
23	Start Date	When the content appears on the Web site.
24	End Date	When the content is removed from the Web site.