Administrator Quick Reference

Quick Reference Card

ektron
What do you want your website to do?

Global Settings

License Keys

Modify a CMS400.NET License Key

1. From the Workarea, click **Settings** ▶ **Configuration** ▶ **Setup**.
2. Click **Edit**.
3. Copy and paste a new key into the **License Key** field (Separate multiple keys with a comma).
4. Click **Update**.

Configure System Notification Emails

1. From the Workarea, click **Settings** ▶ **Configuration** ▶ **Setup**.
2. Click **Edit**.
3. In the **System E-Mail Address** field, enter the address to appear in the From field of the notification emails.
4. Check the **Enable Sending of System Notification Email** checkbox.
5. Click **Update**.

Limit Content Summary Size

1. From the Workarea, click **Settings** ▶ **Configuration** ▶ **Setup**.
2. Click **Edit**.
3. In the **Maximum Summary Size** field, enter the maximum number of characters allowed in a summary.
4. Click **Update**.

URL Aliasing

Automatic, Manual, RegEx

- **Automatic URL Aliasing** creates the URL string based on a format you choose. Formats can include Folder structure names or Taxonomy nodes.
- **Manual URL Aliasing** lets you apply a unique URL page name to any content item. You can assign several aliases to an item and then pick one to be the primary one.
- **Regular Express URL** alias allows you to create an alias based on patterns in your content name - like product numbers or SKU numbers. Also, content indexed by a Date can look like this - http://server/site/blog/July/2009.

Enable URL Aliasing

1. From the Workarea, click **Settings** ▶ **Configuration** ▶ **URL Aliasing**
2. Choose **Settings**.
3. Click **Edit**
4. **Enable** the type of Aliasing you wish to use.
5. **Save** your changes.
6. Select **Automatic**, **Manual** or **RegEx** and to configure the type you are using.

Add/Update Manual Alias

1. Navigate to **content** item to be aliased.
2. Click **Edit**.
3. Click the **Alias** tab.
4. **Enter** the alias.
5. Click **Publish**.

Active Directory

Active Directory vs. LDAP

Active Directory integrates users, groups and permissions previously set up through Windows Active Directory into CMS400.NET.

LDAP (Lightweight Directory Access Protocol) is a set of protocols that arranges corporate directory entries in a hierarchical structure that reflects geographic and organizational boundaries. Active Directory is Microsoft's version of LDAP.

Setup Active Directory

Prerequisite: Your system administrator/CMS developer must prepare IIS and enable Active Directory in the CMS web.config file.

1. From the **Workarea**, click **Settings** ▶ **Configuration** ▶ **Setup**.
2. Click **Edit**.
3. Make sure your CMS400.NET license key includes AD (Active Directory requires a separate license key).
4. Enable the desired features of the following:
   - Active Directory Authentication
   - Active Directory Integration
   - Automatic addition of user from AD
   - Automatic addition of user to groups
5. Scroll down to **Domain** and select your domain. If it is not there, refresh the screen. Also, make sure you saved your web.config file.
6. Still no luck? Go back through your IIS set-up instructions.
7. Under **CMS Administrator Group Association**, click **Search**.
8. Click **Search** again.
9. Add the group you want to administer CMS400.NET.

Resolve CMS User/Group ▶ AD User/Group Relationships

1. From the Workarea, click **Settings** ▶ **Configuration** ▶ **Setup**.
2. Click **Edit**.
3. Click **CMS Users need to be associated with Active Directory groups**.
4. If the group already exists in AD, the fields are filled in.
5. If the group does not exist, enter the AD group name and Domain.
6. Click **Save**.

Folder Management

Assign Style Sheet to Folder Content

1. From the Workarea, open the **Content** tab.
2. Select folder to be modified.
3. From the **View** menu, select **Folder Properties**.
4. Click **Edit**.
5. In the **Style Sheet filename** for this folder field, enter the CSS file to be used.

Assign Templates

1. From the Workarea, open the **Content** tab.
2. **Right Click** on the folder to be modified.
3. Select **View Properties**.
4. Click **Edit Properties**.
5. Click **Templates Tab**.

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6. Uncheck the **Inherit Parent Template Configuration** checkbox.
7. **Select template** from Select Template dropdown list, then click Add.
8. If desired template doesn't appear in dropdown list, click **Add a New Template**, then select new template (it must reside in the site root folder).
9. Select the radio button next to the default template.
10. Click **Update**.

Set Permissions

1. From the Workarea, open the **Content** tab.
2. **Right Click** on the folder to be modified.
3. Select **View Properties**.
4. Click **View Permissions**.
5. Uncheck **Allow this object to inherit permissions**.
6. If the user is a membership user, click **User Type Dropdown and Select Membership Users**.
7. Click a user or group to modify. If you don't see the user/group, click **Add Permission** and select one.
8. Check or uncheck boxes to limit permissions. Click **View Advanced** tab to view permissions for folders, collections, and menus.
9. Click **Save or Update**.

Private Content

All content in CMS400.NET is meant for display on your public-facing website by default. In cases where this is not true (e.g., extranets or pay-for-content), content can be marked private so that only those authenticated with the CMS as users or members with sufficient permissions can view it.

1. From the Workarea, open the **Content** tab.
2. **Right Click** on the folder or specific content to be modified.
3. Select **View Properties**.
4. Click **View Permissions**.
5. Uncheck **Allow this object to inherit permissions**.
6. Check **Content in this folder is private and can only be view by authorized users and members**.
7. Add permissions for users and members to view the content.

Permission Descriptions

Read Only - Only view content

Edit - Edit content

Add - Add content

Delete - Delete content

Restore - Restore previous version of content

Library Read Only - View items in the corresponding library folder

Add Images - Upload images to corresponding library folder

Add Files - Upload files to the corresponding library folder

Add Hyperlinks - Add hyperlinks to the corresponding library folder

Overwrite Library - Overwrite images and files in the corresponding library folder

Collections - Manage collections and menus

Add Folders - Add sub folders

Edit Folders - Edit folder properties

Delete Folders - Delete the current folder or its subfolder

Traverse Folders - View the subfolders under the main content folder. By default, the "everyone" user group has permission to view all subfolders

Modify Pre-approval - Set or update group to review content entering the approval chain.

Approval Chain

Update List of Approvers

A user must have permissions on the folder level before he can join an Approval Chain.

1. From the Workarea, open the **Content** tab.
2. **Right Click** on the folder to be modified.
3. Select **View Properties.**
4. Click **Edit Properties**.
5. Click **View Approvals**.
6. Use the **Add**, **Edit**, **Delete** and **Reorder** buttons.

Find & Review Content Awaiting Approval

These steps require the Content Awaiting Approval Widget to be installed on the Desktop.

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

Membership vs. CMS User

Membership users managed in the Ektron CMS400.NET system can be granted permission to view private content, participate in moderated discussions and maintain a user profile. They can be restricted from most content management tasks. There is no limit on the number of membership users.

CMS users can be granted permission to control the CMS through the Workarea and perform all CMS tasks. The maximum number of CMS users is specified by your site license.

CMS User Management

Update Password

1. From the Workarea, click **Settings** ▶ **Users**.
2. Select the user getting a new password.
3. Click **Edit**.
4. Enter the password into the **Password** and **Confirm Password** fields.
5. Click **Update**.

Add User

1. From the Workarea, click **Settings** ▶ **Users**.
2. Click **Add User**.
3. Enter the user information.
4. Click **Save**.

Delete User

1. From the Workarea, click **Settings** ▶ **Users**.
2. Check the box next to each user to be deleted.
3. Click **Delete**.

Lock User

1. From the Workarea, click **Settings** ▶ **Users**.
2. Click the user to be locked out.
3. Click **Edit**.
4. Click the **Account Locked** checkbox.
5. Click **Update**.

Define Custom User Properties

1. From the Workarea, click **Settings** ▶ **Configuration** ▶ **User Properties**.
2. Click **Add**.
3. Enter the custom property details.
4. Click **Save**.

Metadata Definitions

Metadata Types

HTML Tag type metadata - Outputs an HTML-style tag. It uses 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>). Useful for title tags.

Meta Tag type metadata - Outputs Meta HTML tags for consumption by search engines.

Searchable Property/Selector type metadata - Used to assign values to content. Content can be searched for the values.

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Apply to/Require for a Folder

1. From the Workarea, select **Content**.
2. **Right Click** on the folder to be modified.
3. Click View Properties.
4. Click **Edit**.
5. Click the **Metadata** tab .
6. Uncheck the **Inherit parent configuration** checkbox.
7. Check **Metadata fields** to assign and possibly require for content in that folder.
8. Click **Update**.

Library Management

Quicklinks

A **Quicklink** is a special kind of hyperlink that jumps to another content item on your website (a regular hyperlink jumps to a web page on the Internet). Whenever content is created, a Quicklink is created for it.

Update Quicklinks

1. Click the **Library** tab.
2. Click the folder containing Quicklinks you want to update.
3. Select **Quicklinks** from the dropdown menu.
4. Click **Update Quicklink**.
5. In the To: field, enter the template to apply to the Quicklinks.
6. Check the box next to each Quicklink you want to update.
7. Click **Update Quicklink**.

Update Allowed File Types

1. Click the **Library** tab.
2. Click the **Library** folder you wish to change.
3. Click the **View Properties** button.
4. Click the **Edit**.
5. Add or remove extensions from the **Image Extensions** and **File Extensions** lists (separate with a comma).

Update Library Folder Paths

1. Click the **Library** tab
2. Select the **Library** folder.
3. Click the **View Properties** button.
4. Click **Edit**.
5. Modify the upload directories.
6. Click **Update**.

Mirror Library Folder Tree on Disk

1. From the Workarea, **click Settings** ▶ **Configuration** ▶ **Setup**.
2. Click **Edit**.
3. Check the **Library Folder Creation** check box.
4. Click **Update**.

Language

Enable/Disable a Language

1. Click the **Settings** tab in the Workarea.
2. Expand the **Configuration** folder.
3. Click **Language Settings**.
4. Click **Edit**.
5. Check or uncheck languages for the Site or Workarea.

Export Content for Translation: Folder

1. Open the content folder that contains the content to be translated.
2. From the **Action** menu, select **Export for Translation**.
3. To include content in the folder's subfolders, check **Include Subfolders**.
4. Select the languages into which to translate the folder's contents.
5. Click **Create XLIFF Files for Translation**.
6. The zip files are accessible from the Export for Translation page.

Web Alerts and Email Verification

Create a Web Alert

1. From the Workarea, click **Settings** ▶ **Configuration** ▶ **Web Alert**.
2. Click **Messages**.
3. Create an **OptOut**, **Unsubscribe**, and **Default message**.
4. Click the **Subscriptions** link.
5. Create and enable a subscription.
6. Open the **Content** tab and navigate to the folder whose content will trigger the alert.
7. Click **View** ▶ **Folder Properties**.
8. Click **Edit**.
9. Click the **Web Alerts** tab.
10. Assign the Web Alert information.
11. Click **Save**.

Enable Email Verification

Use this to have new membership enrollments verify their email address.

1. From the Workarea, click **Settings** ▶ **Configuration** ▶ **Setup**.
2. Click **Edit**.
3. Check the **Enable Verify Email** checkbox.
4. Click **Update**.

Calendar Management

Add Calendar Folder

1. From the Workarea, **Right Click** the folder that you wish to add a Calendar.
2. Click **Add Calendar**.
3. Enter **Calendar Name**.
4. Enter any additional information such as Description, Style Sheet, Taxonomy, and Metadata.
5. Click **Save**.

Add events to the Calendar

1. **Double Click** on the date of the event.
2. Enter the **Event Title**, **Location** and **Description**.
3. Change **Start Time** and **All Day** option.
4. Set **Recurrences**.
5. Select **Taxonomy** Category.
6. Set **Metadata**.
7. Click **Save**.

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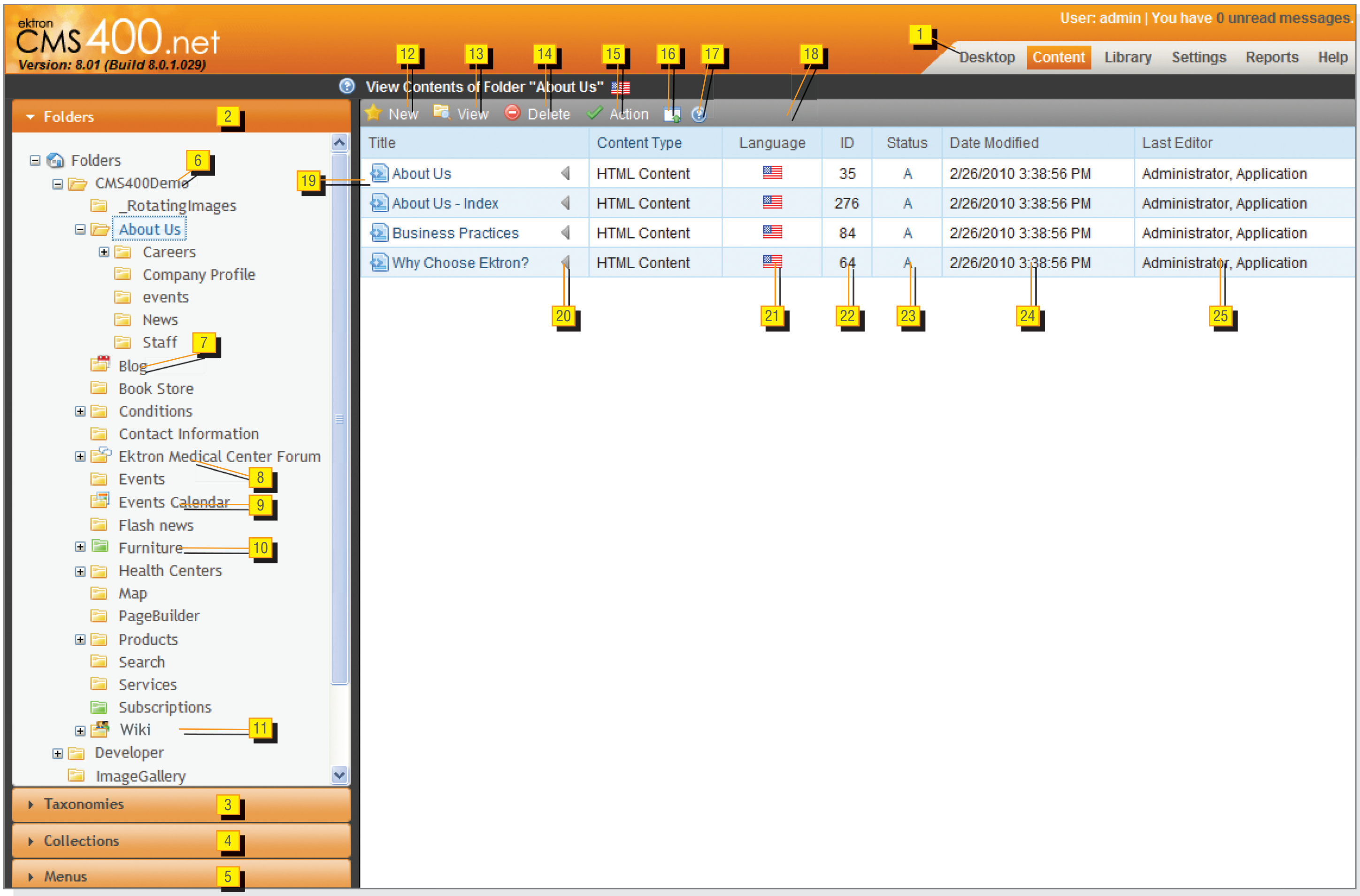

Work Area Tabs

1a.	**Desktop**	Create new content, forms documents, Folders menus and collections
1b.	**Content**	View Language, Properties and archived content and more.
1c.	**Library**	Used to delete multiple items. Administrators can delete folders.
1d.	**Settings**	Export for translation, Search, move/ copy content, eSync
1e.	**Reports**	Pop up the window for drag and drop documents from local machine.
1f.	**Hepl**	Click to get in context help anywhere in the workarea

Content Tab Types

2.	**Folder Tab**	Create new content, forms documents, Folders menus and collections
3.	**Taxonomy Tab**	View Language, Properties and archived content and more.
4.	**Collections Tab**	Used to delete multiple items. Administrators can delete folders.
5.	**Menu Tab**	Export for translation, Search, move/ copy content, eSync

Folder Types

6.	**Content Folder**	Regular folder for contents, select to view contents in that folder.
7.	**Blog Folder**	Select to view the posts and comments on this blog.
8.	**Forum Folder**	Select to view the discussion forums, categories, topics, and replies.
9.	**Calendar Folder**	Select to view and plan events on the calendar
10.	**eCommerce Folder**	Select to view the ecommerce items
11.	**Community Folder**	Folders for membership uses to edit content, select to view contents.

Dropdown Menus

12.	**New menu**	Create new content, forms documents, Folders menus and collections
13.	**View menu**	View Language, Properties and archived content and more.
14.	**Delete menu**	Used to delete multiple items. Administrators can delete folders.
15.	**Action menu**	Export for translation, Search, move/copy content, eSync
16.	**DMS/ Add asset**	Pop up the window for drag and drop documents from local machine.
17.	**In Context Help**	Click to get in context help anywhere in the workarea
18.	**Content Organization Bar**	Ability to sort content by the title

Content Types

19.	**Content Items**	Can be HTML Content, Forms, DMS, or Multimedia Content
20.	**Quick Edit Menu**	For content editing, properties and content eSync.
21.	**Language Flag**	Indicate the content language version.
22.	**Content ID**	Automatically generated by system.
23.	**Content Status**	Shows the current status of a piece of content.
	(A) Approved	Published and on the website.
	(O) Checked Out	Only available for editing by the content editor who checked it out.
	(I) Checked In	Available for editing.
	(S) Submitted	Currently in the approval chain. Waiting for acceptance.
	(M) Deletion	Marked for deletion.
	(T) Awaiting Tasks	Currently awaiting completion of tasks.
	(P) Pending	Awaiting scheduled start date.
	(D) Pending Deletion	Pending deletion but created with a future start date.
24.	**Date Modified**	Last modified date of the content.
25.	**Last Editor**	Editor who made the last modification.