



Ektron DMS400 Manual

Version 1.1, Revision 2

*Includes:
Setup Section
Administration Section
Users Section*

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What's New In This Manual

In this Ektron DMS400 manual, Version 1.1, you will find the following new information:

- The **installing Ektron DMS400** section has been reworked to match the new Install procedure. See "[Installing Ektron DMS400](#)" on page 6.
- **PDF Generation** - You can have your Office documents converted to PDF by Ektron, Inc. or locally on your own network. See "[PDF Generation](#)" on page 68.
- **Drag and Drop support for uploading files** - you can now upload Office and Managed files via drag and drop. See "[Importing Files via Drag and Drop](#)" on page 104.

Ektron DMS400 Setup

Introduction

This section of the manual is dedicated to setting up **Ektron DMS400**. It includes the following chapters:

- "License Keys," on page 3
- "Installing Ektron DMS400," on page 6
- "Registering Add Ons in Ektron DMS400," on page 32
- "Troubleshooting," on page 38

License Keys

Ektron controls the use of **Ektron DMS400** through a license key, a unique code assigned to your **Ektron DMS400**. Your license key is included as an attached .txt file to the email that Ektron sends when you request or purchase **Ektron DMS400**.

Typically, the AssetManagement.config file in the *webroot/AssetManagement* folder stores the license key.

License Key Format

A license key consists of the following components:

- base URL of the server that communicates with **Ektron DMS400** (domain name, computer network name, or IP address)
- descriptor tags
- a question mark
- a series of numbers
- a hyphen
- one or two digits signifying release number

For example:

```
<Licenses>  
  
<License>yourdomain(exp-2005-04-30)(DMS)(users-10)?nnnnnnnnnnnnnnnnnnnnnnnnnnnn-10</License>  
  
<License>yourdomain(exp-2005-04-30)(UNK)(users-10)?nnnnnnnnnnnnnnnnnnnnnnnnnnnn-10</License>  
  
</Licenses>
```

Where the n's appear above, you see digits.

Note that license keys cannot contain spaces or line breaks.

Inserting the License Key

If you download the executable (.exe) file, you are prompted to enter a license key during installation.

WARNING!

If you install a test version of **Ektron DMS400**, and later purchase it, Ektron sends you email with license keys for the purchased product. When you receive new license keys, replace the old keys with new ones. If you do not, when the test license key expires, users cannot access **Ektron DMS400**.

Replacing License Key after Installation

Sometimes, you need to change a license key after installation. For example, you made a mistake when copying it into the license dialog screen of the installation.

If you need to change the license key after installation, navigate to your Web root directory. Within that, open `assetmanagement.config` and insert the correct license key within the `<License>` elements.

License Key Check

When you access **Ektron DMS400**, it uses a Web service to check the license key(s) against the domain where your CMS is located.

- If the URL of any valid license key matches the URL of the CMS server making the call, the DMS400 works.
- If no valid license key is found for the URL of the CMS server making the call, the DMS400 is disabled.

Domains in which You Can Use the License Key

The license key is assigned to the base URL of your CMS, which is typically your domain name. For example, if your domain name is `www.mycompany.com`, the license key follows this pattern: `www.mycompany.com?1234567890`. The key also works with `mycompany.com`, that is, without the `www`.

Each domain name requires its own license key. For example, to support the domain names, www.mycompany.com, sales.mycompany.com and support.mycompany.com, you need three license keys.

More Information

Additional information about licenses is available on Ektron's web site at the following address:

<http://www.ektron.com/products.aspx?id=1143>

Installing Ektron DMS400

System Requirements

Before you install **Ektron DMS400**, make sure your system meets the requirements.

WARNING! It is important to make sure your Microsoft® Windows® Server 2003 is updated with the latest fixes from Microsoft, before installing **Ektron DMS400**.

Server Requirements

Component	Requirements
Recommended hardware configuration	<ul style="list-style-type: none"> • Microsoft® Windows® Server 2003 • Intel® Pentium Hyper-Threaded or Intel® Xeon™ processor Processor (with 800MHz Bus) • 1 GB RAM or higher • RAID Array for hard drives • MS SQL Server (If you are using an Ektron CMS, install on a separate server.)
Operating System	<ul style="list-style-type: none"> • Microsoft Windows Server 2003 (recommended) • Microsoft Windows 2000/XP Professional
Web application server	<ul style="list-style-type: none"> • Microsoft ASP .NET Framework 1.1
Web server	<ul style="list-style-type: none"> • Microsoft IIS 4.0 or higher

Client Requirements

Component	Requirements
Operating System	<ul style="list-style-type: none">Any IBM-PC compatible system. <i>suggested: 166 MHz or faster with at least 64MB RAM</i> <hr/> <p>For issues when using Microsoft Windows Server 2003 as a client, see "Using Microsoft Windows Server 2003 as a Client" on page 53.</p> <hr/>
Browser for Editing or Viewing	<ul style="list-style-type: none">Microsoft Internet Explorer 5.0 or higherNetscape 7 (IE 5.0 or later must also be installed)Mozilla FireFox 1.0

Performing the Install

This section explains how to setup **Ektron DMS400** on servers and clients. It includes the following topics:

- "Files Used to Perform the Install" on page 8
- "Running Ektron DMS400 Server Setup" on page 8
- "Web Folders Setup for Microsoft Windows Server 2003" on page 21
- "Installing on a non-NTFS Server or Client" on page 25
- "Installed Folders and Files" on page 27

Files Used to Perform the Install

The table below explains the files that are available to install **Ektron DMS400**.

File	Description
dms400.exe	Installs the Ektron DMS400 server files, sets up permissions for folders, and creates a connection to your CMS. It can also launch the client installation file (dms400client.exe), if that option is chosen during the install.

Running Ektron DMS400 Server Setup

You can install **Ektron DMS400** on the server that hosts your Ektron CMS400.NET or on a separate server.

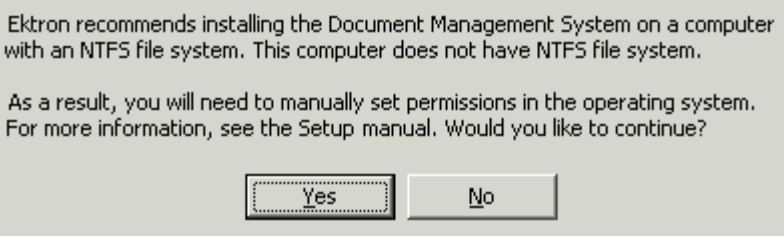
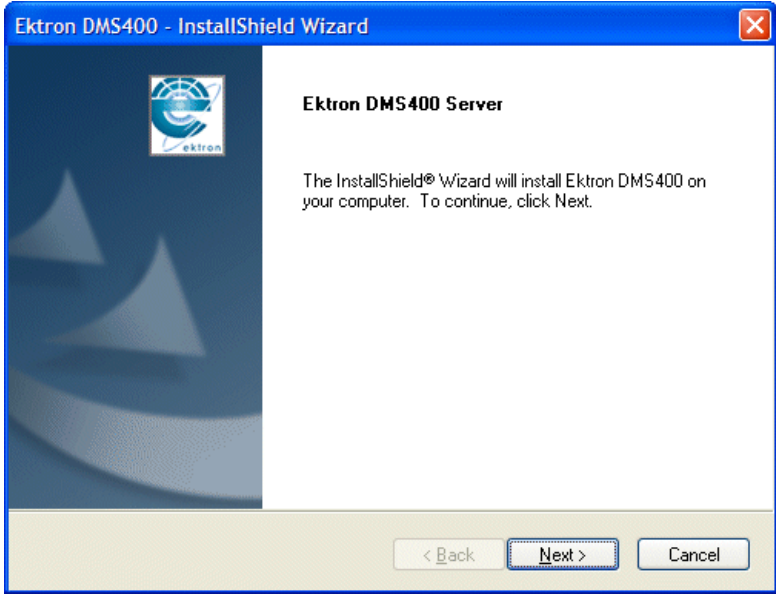
WARNING!

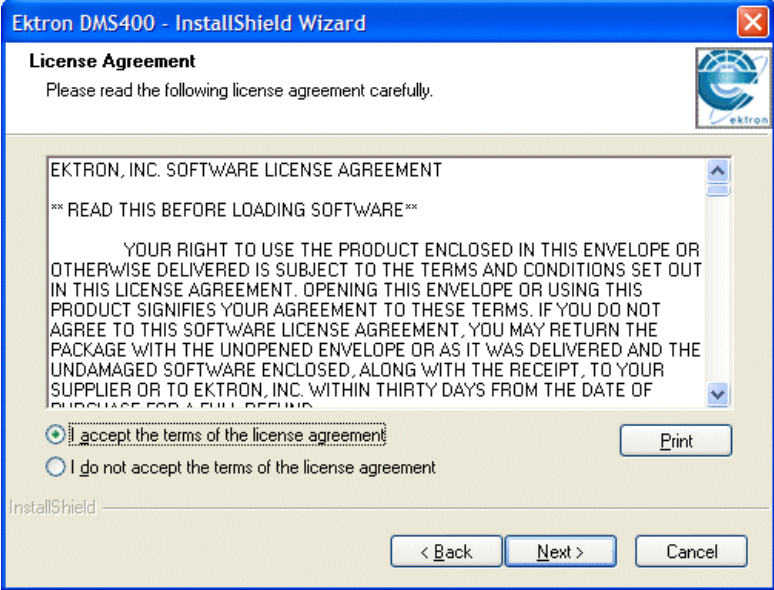
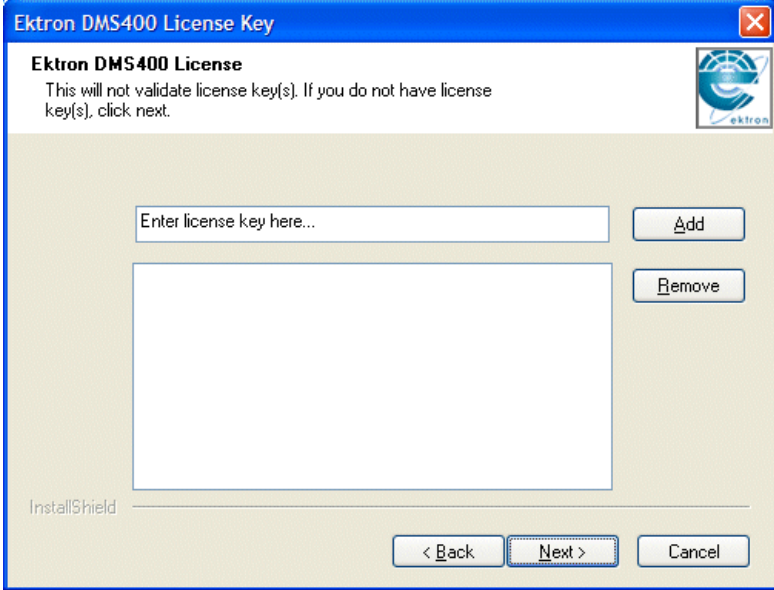
If your server has antivirus software and its script blocking feature is enabled, you must disable script blocking before installing **Ektron DMS400**.

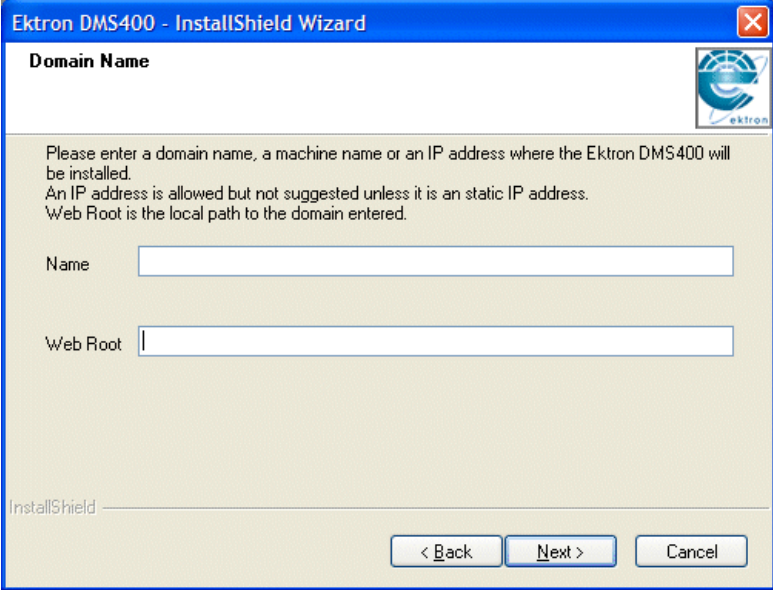
Best Practices

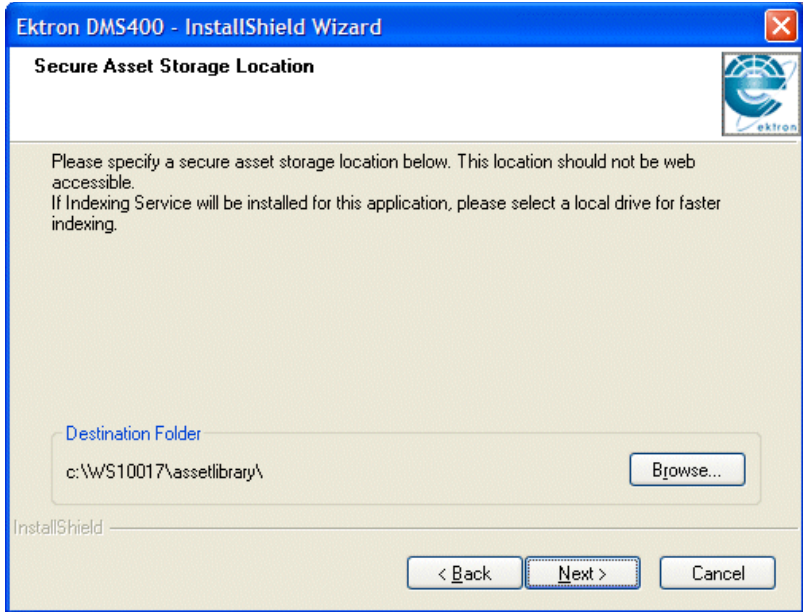
Ektron recommends Installing the **Ektron DMS400** on a separate server for the following reasons:

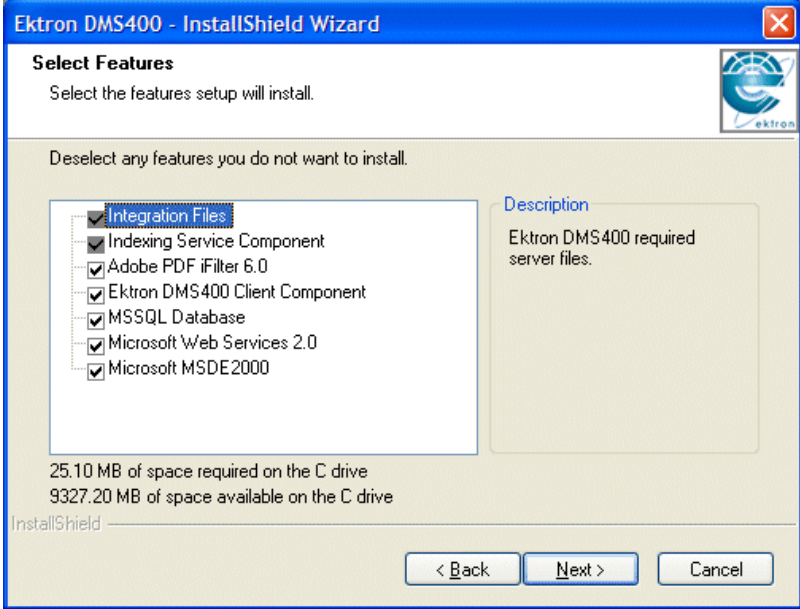
- The size of the data files are typically large
- You want to keep a history of data files
- Managing security concerns

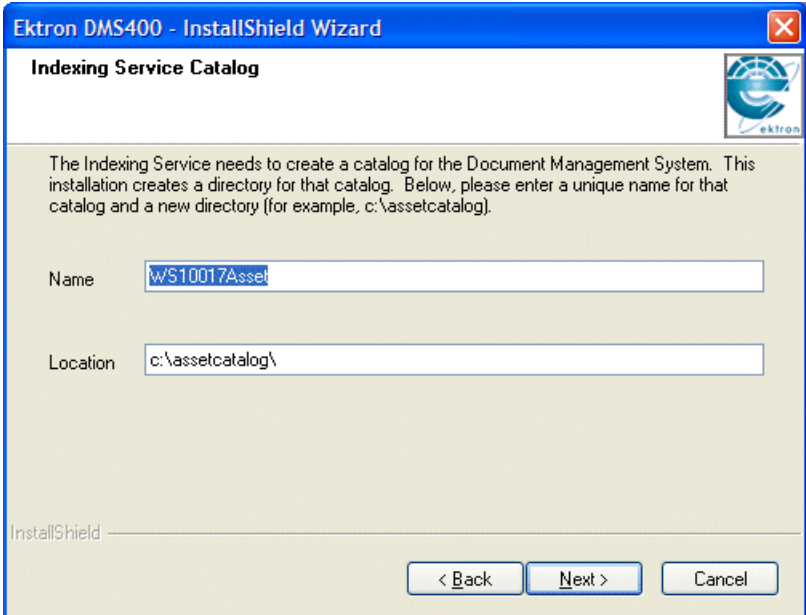
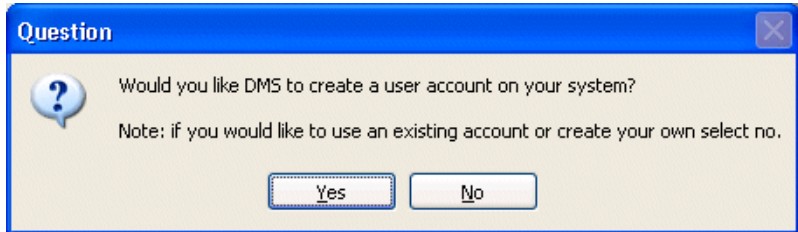
Step	Setup Screen
1. Double click the executable file that was downloaded from the Ektron Web site.	
2. The installation program checks your file system. If you do not have an NTFS file system (for example, your system is FAT32), the following warning appears. For more information, see "Installing on a non-NTFS Server or Client" on page 25.	
3. The following screen appears. Click Next to proceed.	

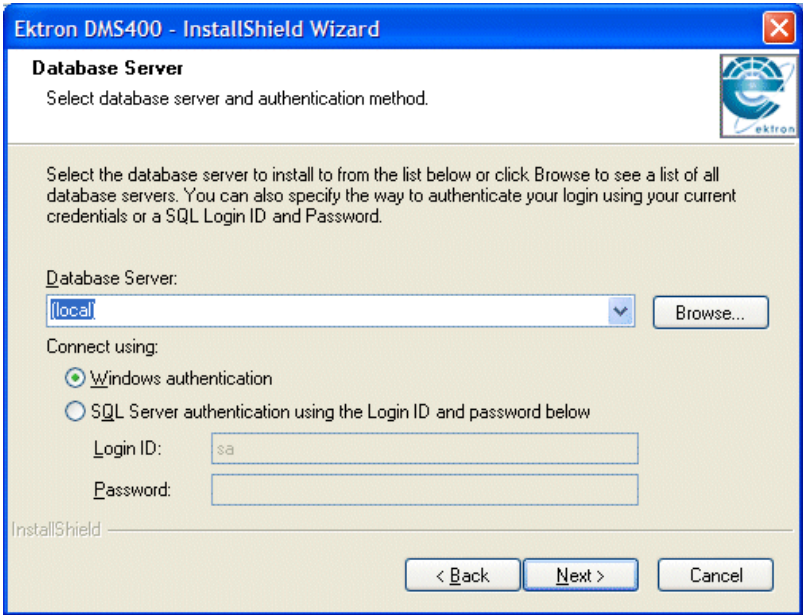
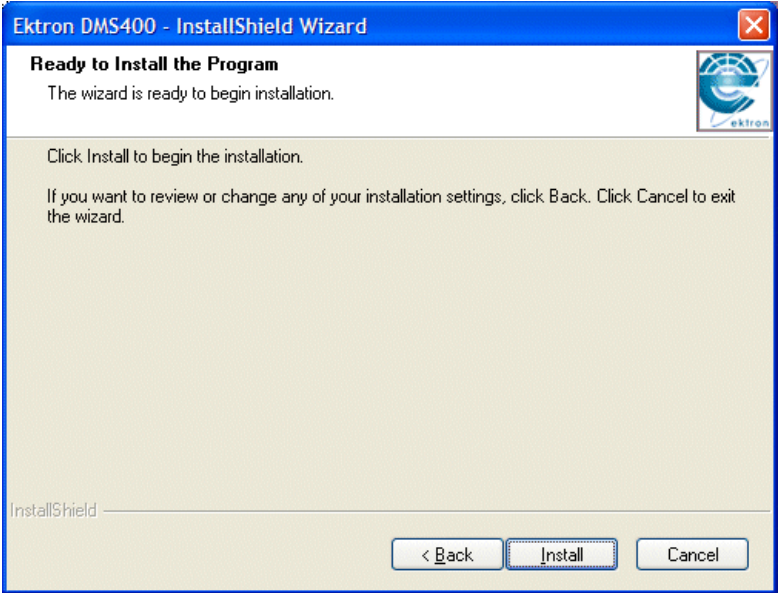
Step	Setup Screen
<p>4. A screen displays the Ektron License Agreement. Please read it.</p> <ul style="list-style-type: none"> Click the I accept the terms of the license agreement radio button to accept the agreement and click Next. Click the I do not accept the terms of the license agreement radio button if you do not accept the terms of the agreement. You can print the license agreement by pressing the Print button <hr/> <p>Note: If you click the I do not accept the terms of the license agreement radio button, you cannot continue the setup program. Click Cancel to exit.</p> <hr/>	
<p>5. Enter license keys into the field next to the Add button. Enter one license key for every kind of file being managed by DMS. For example, one key for Office documents and another for all other kinds of files.</p> <p><SeeAlso>See Also: : "License Keys" on page 3</p> <p>Click Add to add the license key to the list of license keys.</p> <p>To remove a license key, click it, then click Remove.</p> <p>Click Next to proceed.</p> <p><SeeAlso>See Also: : "Replacing License Key after Installation" on page 4</p>	

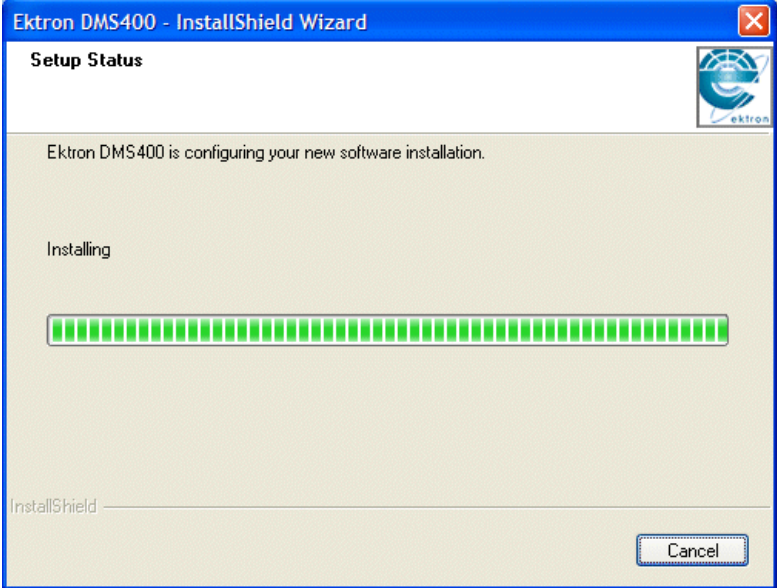
Step	Setup Screen
<p>6. On the Domain Name screen, enter one of the following in the Name field.</p> <ul style="list-style-type: none"> • Domain Name - The Domain where DMS400 will be installed. • IP address - The IP address of the machine DMS400 will be installed on. <hr/> <p>Warning: An IP Address is allowed, but not suggested unless you have a static IP address.</p> <hr/> <ul style="list-style-type: none"> • Machine Name - The machine name DMS400 will be installed on. <hr/> <p>Note: If did not enter a license key, localhost is entered in the Name field.</p> <hr/> <p>Then enter your Web Root in the Web Root Field.</p> <ul style="list-style-type: none"> - The Web Root is the local path to the Domain Name. 	

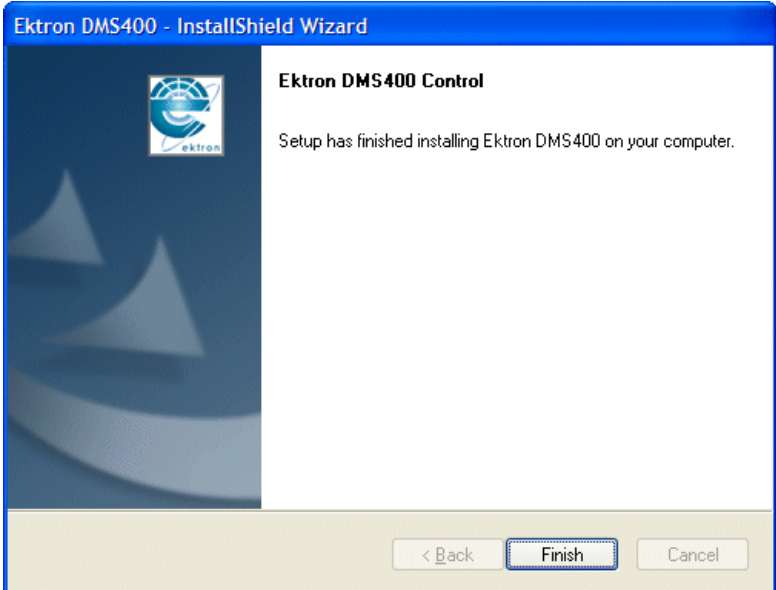
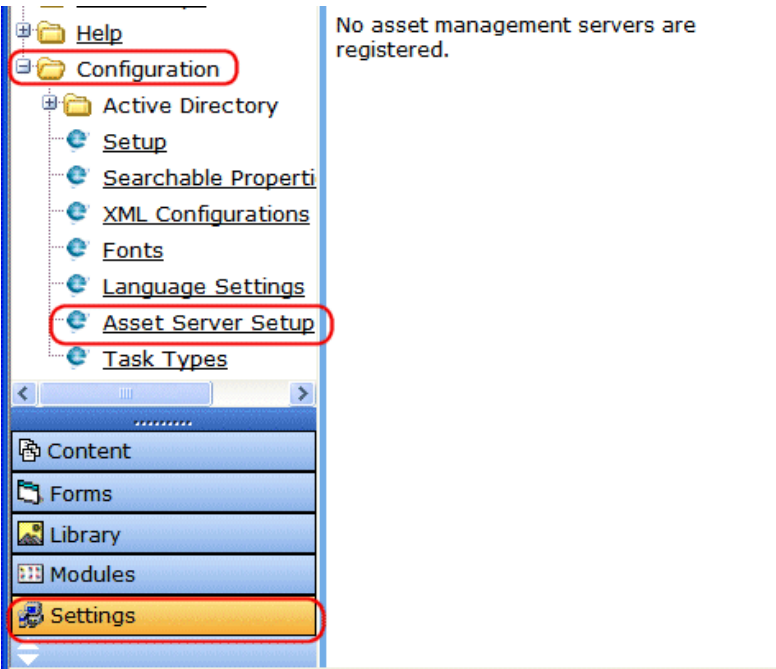
Step	Setup Screen
7. On the Secure Asset Storage Location screen, select a destination folder or use the default.	 <p>Ektron DMS400 - InstallShield Wizard</p> <h3>Secure Asset Storage Location</h3> <p>Please specify a secure asset storage location below. This location should not be web accessible. If Indexing Service will be installed for this application, please select a local drive for faster indexing.</p> <p>Destination Folder c:\WS10017\assetlibrary\ Browse...</p> <p>InstallShield</p> <p>< Back Next > Cancel</p>


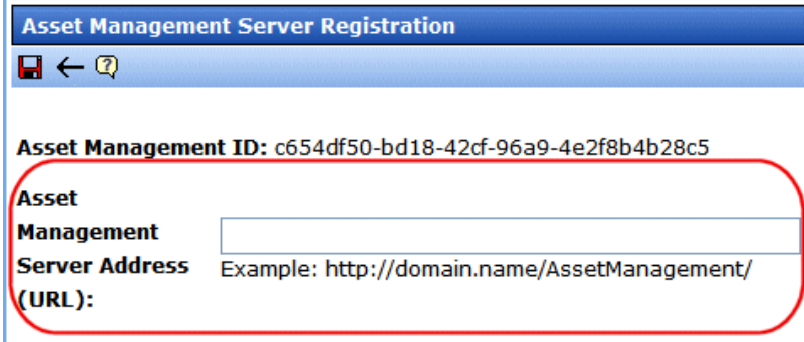

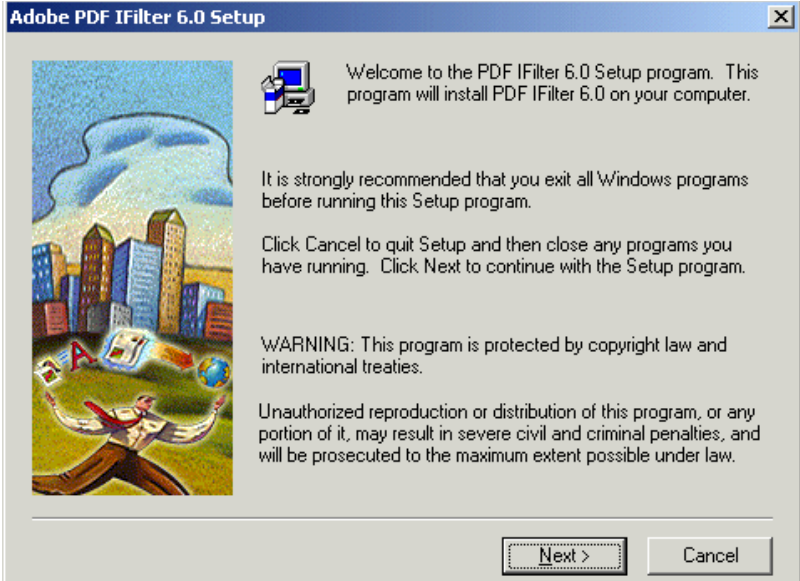
Step	Setup Screen
<p>8. At the Select Features screen, choose the features you want to install.</p> <ul style="list-style-type: none"> • Integration Files: Ektron DMS400 required server files. This check box cannot be changed. • Indexing Service Component: This feature supports rapid searching of file contents and properties. • Adobe PDF iFilter 6.0: Indexes PDF documents using the Indexing service. <p><u>Note: Ektron DMS400 launches the Adobe PDF iFilter 6.0 executable during the install. Follow the onscreen steps when the installation screen appears.</u></p> <ul style="list-style-type: none"> • Ektron DMS400 Client Component: Installs the client -side control on this server. • MSSQL Database: The script for creating the DMS400 database. • Microsoft Web Services version 2.0 • Microsoft MSDE2000: Used to run the DMS400 database. 	

Step	Setup Screen
<p>9. On the Indexing Service Catalog Screen, enter the following.</p> <ul style="list-style-type: none"> • Name - The name of the Asset Catalog. It must be unique. • Location - The folder where the asset catalog will reside. 	
<p>10. The create a DMS user account question box appears.</p> <ul style="list-style-type: none"> • Would you like DMS to create a user account on your system? <ul style="list-style-type: none"> - Click Yes, Ektron DMS400 creates a user for you. - Click No to use an existing account. <p>Note: If you click NO, go to "Adding a User Account" on page 19. When finished, return and continue with next step.</p>	

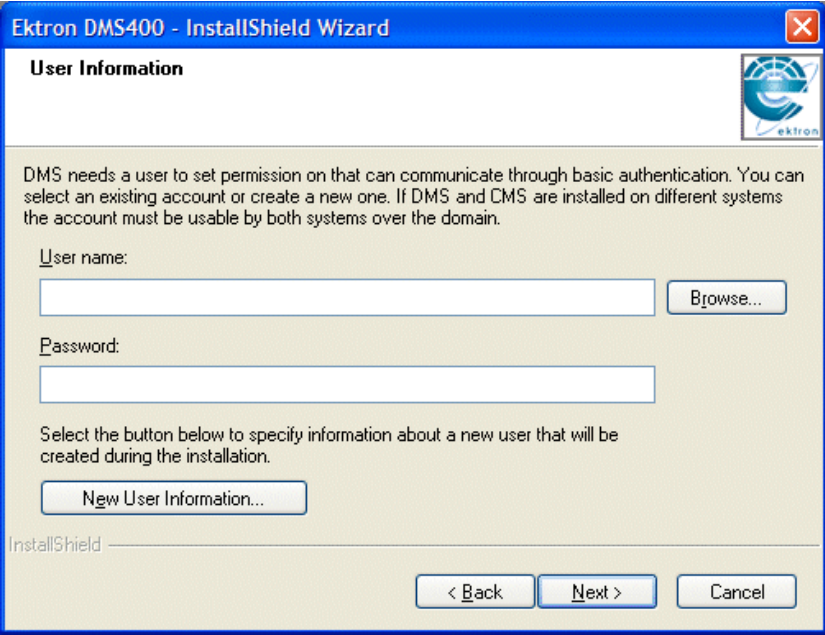
Step	Setup Screen
<p>11. The Database Server screen appears.</p> <ul style="list-style-type: none"> • Database Server: Choose a database server from the drop-down box or click Browse to choose from a list of all database servers. • Connect Using: The method of authentication for using the database server. <ul style="list-style-type: none"> - Windows Authentication - SQL Server Authentication <p>Login ID: Enter the login ID for SQL server authentication.</p> <p>Password: Enter the password associated with the login ID.</p> <p>Click Next</p>	
<p>12. At the Ready to Install the Program screen, your choices are:</p> <ul style="list-style-type: none"> • Click Install to Install the program • Click Back to change any installation settings • Click Cancel to cancel the setup 	

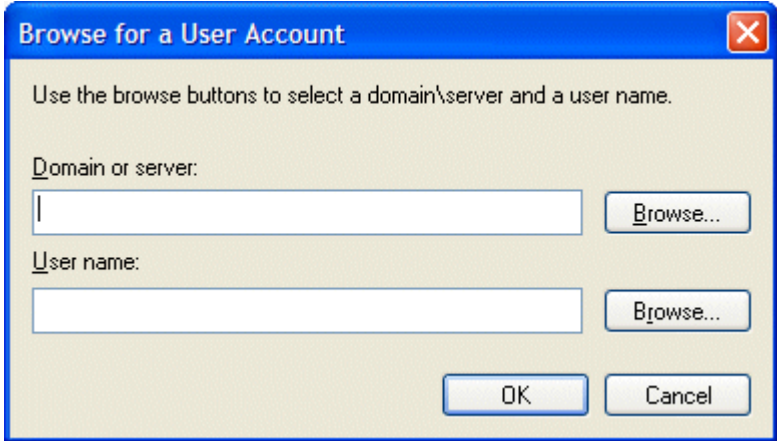
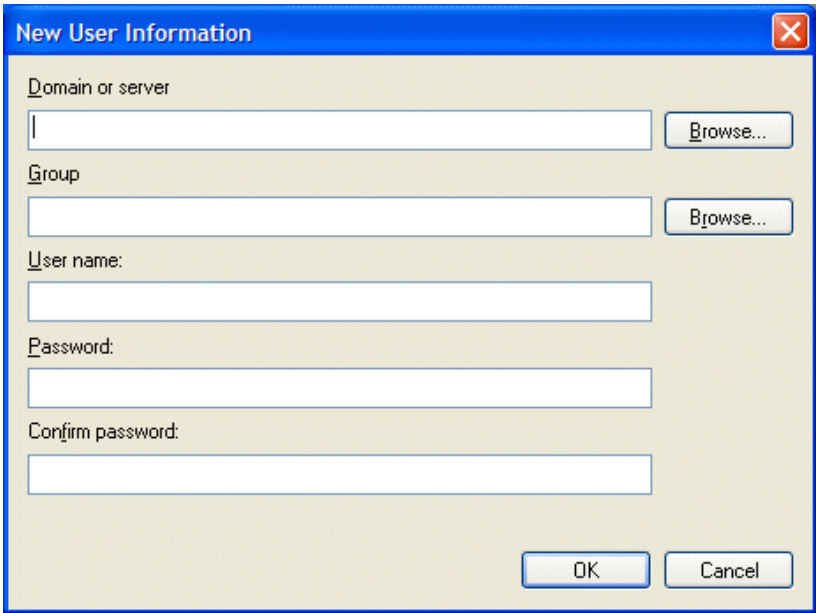
Step	Setup Screen
<p>13. The setup program installs all necessary files and sets the proper permissions for users.</p>	
<p>14. If installing on Microsoft Windows Server 2003, the Web Folders install starts. See "Web Folders Setup for Microsoft Windows Server 2003" on page 21. After finishing the Web Folders setup, return to the next step.</p> <p>If you are not installing on Microsoft Windows Server 2003, continue to the next step.</p>	

Step	Setup Screen
15. A completion message is displayed. Click Finish .	
16. Enter the CMS400.NET Workarea, click Settings > Configuration > Asset Server Setup .	

Step	Setup Screen
17. Click the Edit button.	
18. Add the location of the AMS in the Asset Management Server Address (URL) field.	
19. Click Save .	
<p>20. The Adobe iFilter Setup screen appears. Click Next if you want to install the ability to search through PDF documents.</p> <p>Otherwise, click Cancel.</p> <p>If you proceed, you are asked to agree to Adobe's license agreement and to select a destination folder.</p> <p>Then, the filter is installed.</p>	
<p>The Ektron DMS400 is now installed and connected to the CMS400.NET</p>	

Adding a User Account

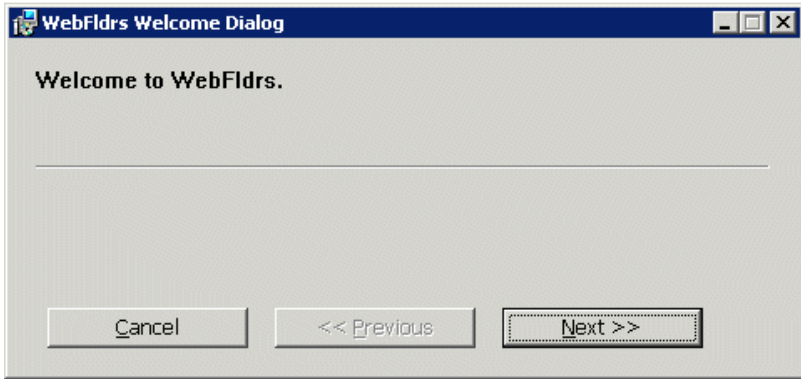
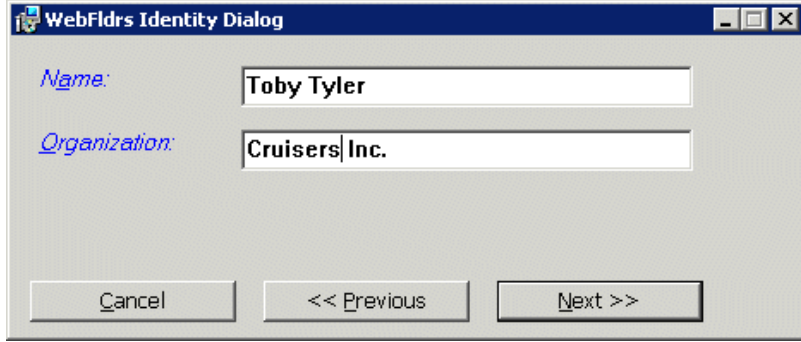
Step	Description
<p>1. The user information screen appears.</p> <hr/> <p>Important: Ektron DMS400 needs a user to set permission on that can communicate through basic authentication. You can select an existing account or create a new one. If Ektron DMS400 and CMS400.NET are installed on different systems, the account must be usable by both systems over the domain.</p> <hr/> <ul style="list-style-type: none"> • User Name: Type in a user name or click Browse to find a user. If you click browse continue to "Browse for a User Account." on page 20. Then return, enter a password and click Next. • Password: Type the password for the user. • New User Information: Select this button to create a new user. If you click the New User Information button, see "New User Information" on page 20 <p>Click Next to continue. Return to "The Database Server screen appears." on page 15</p>	

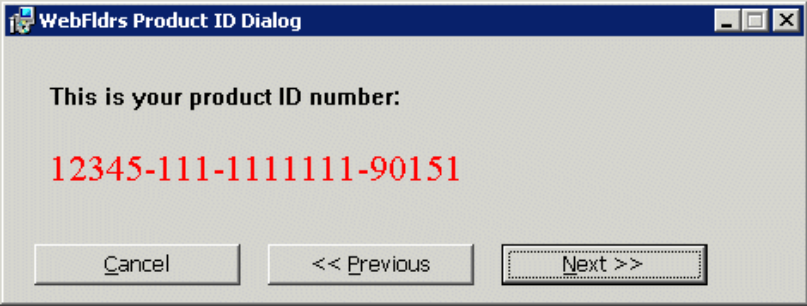
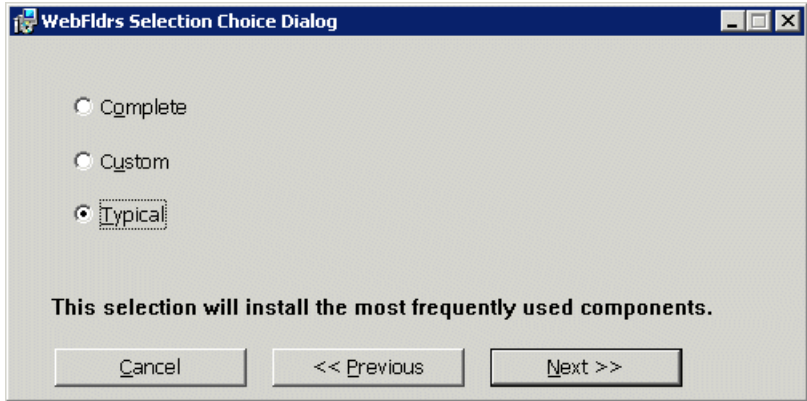
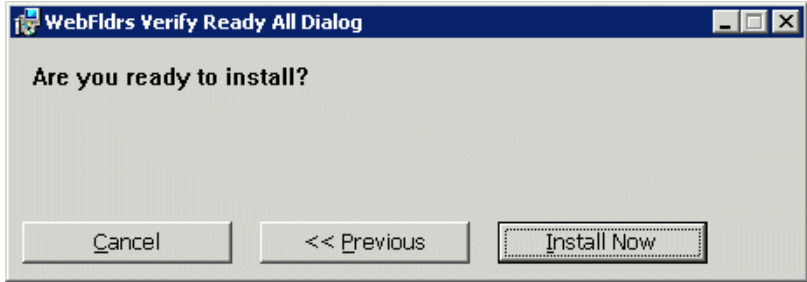
Step	Description
<p>Browse for a User Account.</p> <ul style="list-style-type: none"> • Domain or Server: Enter a domain or server name or click Browse to choose one from a list. • User name: Enter a user name or click Browse to choose one from a list. <hr/> <p>Note: You must specify a domain or server before browsing to a user.</p> <hr/> <p>Click OK, return to "The user information screen appears." on page 19</p>	
<p>New User Information</p> <ul style="list-style-type: none"> • Domain or Server: Enter a domain or server name or click Browse to choose one from a list. • Group: Enter a group in which to add the user or click Browse to choose one from a list. • User name: Enter a user name. • Password: Enter a password for the user. • Confirm Password: Confirm the password <p>Click OK, return to "The Database Server screen appears." on page 15</p>	

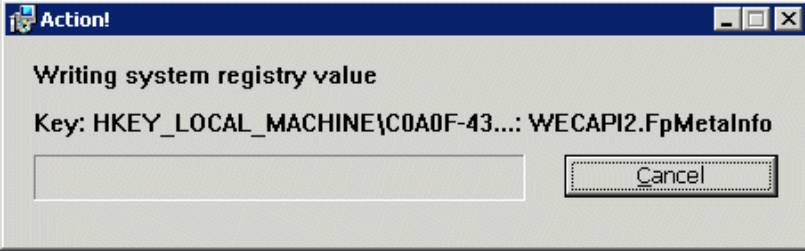
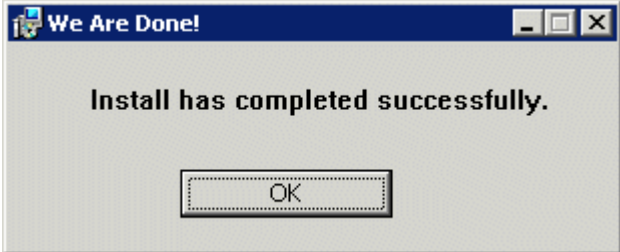
Web Folders Setup for Microsoft Windows Server 2003

The MSDAIPP.DLL is no longer shipped with Microsoft Windows Server 2003 making communication with Web folders impossible. To correct this, **Ektron DMS400** setup runs the Web folder setup when it detects Microsoft Windows Server 2003.

The following steps explain installing Web Folders. These steps assume that the install was started by **Ektron DMS400** setup.

Step	Setup Screen
<p>1. The Web Folders install screen appears. Click Next to continue.</p>	
<p>2. The Web Folders Identity dialog box appears.</p> <ul style="list-style-type: none"> • Add your Name • Add your Organization • Click Next. 	

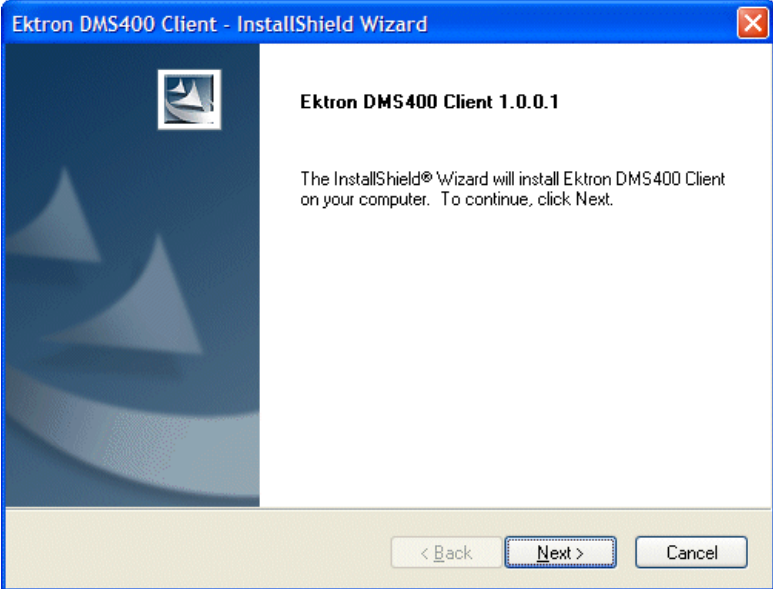
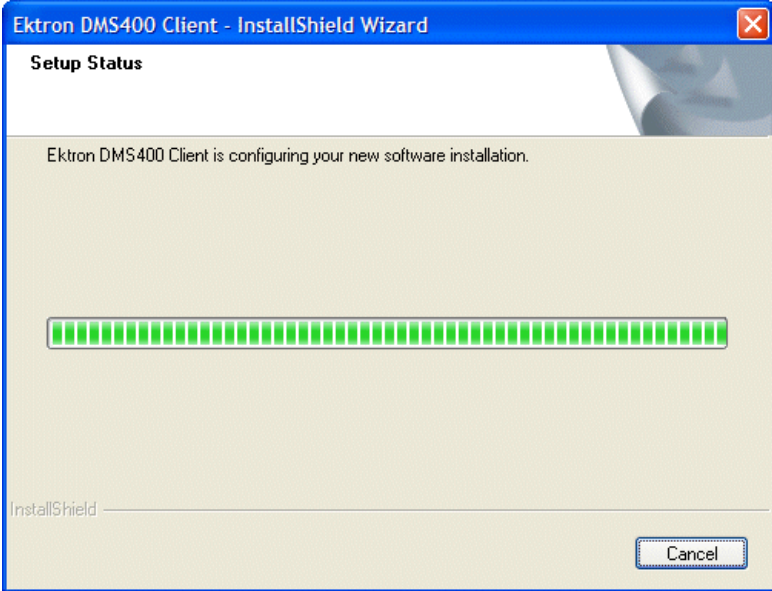
Step	Setup Screen
<p>3. The Web Folders Product ID dialog box appears. This dialog box displays the your product ID number.</p> <ul style="list-style-type: none"> Click Next. 	
<p>4. The Web Folders Selection Choice dialog box appears.</p> <ul style="list-style-type: none"> Complete - installs all components. Custom - you choose the components to install. Typical - installs the most frequently used components. After making a selection, click Next. 	
<p>5. The Verify Ready All dialog box appears.</p> <ul style="list-style-type: none"> Click Install Now. 	

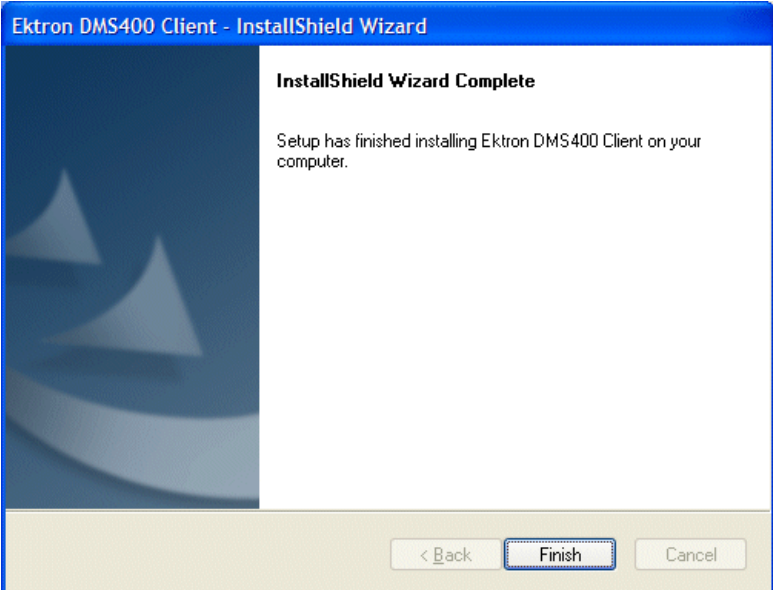
Step	Setup Screen
<p>6. The Action dialog box appears. The Setup is installing Web folders.</p>	
<p>7. The We Are Done dialog box appears.</p> <ul style="list-style-type: none"> Click OK. <p>If you are installing Web Folders as part of the Ektron DMS400 setup, return to "The Adobe iFilter Setup screen appears. Click Next if you want to install the ability to search through PDF documents." on page 18 to continue the setup.</p>	

Client Setup

If you have a large client base to deploy, you should use deployment software. A good Web site for deployment software information and links is <http://appdeploy.com/>.

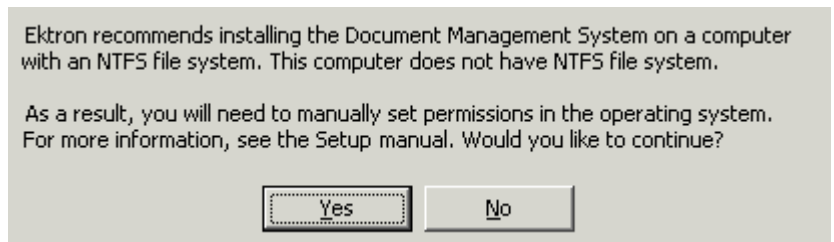
Step	Setup Screen
<p>1. Double click the executable file <code>dms400client.exe</code>. The file's default location is <code>\webroot\AssetManagement\ektasset\clientinstall\</code></p> <hr/> <p>Note: This step is not necessary if the install was launched from the server setup. If you are using Netscape Navigator or Mozilla Firefox as a client, you need to run this install.</p> <hr/>	

Step	Setup Screen
2. The following screen appears. Click Next to install Ektron DMS400 client.	
3. The setup program installs all necessary files.	

Step	Setup Screen
<p>4. A completion message is displayed.</p> <p>Click Finish to complete the installation.</p>	

Installing on a non-NTFS Server or Client

If you install **Ektron DMS400** on a non-NTFS server, the following warning message appears at the beginning of the server installation.



After completing the installation, you must manually set permissions on the following folders.

NOTE When using Windows Server 2003, you need to give the same permissions to `machinename\IIS_WPG` that you do for ASP .NET User.

Folder	Local Machine User	Permissions
<code>\\(Domain Name or IP Address or Machine Name)\assetlibrary</code>	<ul style="list-style-type: none"> ASP .NET User <SeeAlso>See Also: : "The ASP.NET User Account" on page 27 <code><machinename>\IIS_WPG</code> (Windows Server 2003 only) 	<ul style="list-style-type: none"> Read Write Create Delete
<code>\\inetpub\wwwroot\assetmanagement\</code>	<ul style="list-style-type: none"> ASP .NET User <code><machinename>\IIS_WPG</code> (Windows Server 2003 only) 	<ul style="list-style-type: none"> Read Write Create Delete
<code>\\inetpub\wwwroot\assets\</code>	<ul style="list-style-type: none"> ASP .NET User <code><machinename>\IIS_WPG</code> (Windows Server 2003 only) 	<ul style="list-style-type: none"> Read Write Create Delete
<code>\\inetpub\wwwroot\dmdata</code>	<ul style="list-style-type: none"> ASP .NET User <code><machinename>\IIS_WPG</code> (Windows Server 2003 only) 	<ul style="list-style-type: none"> Read Write Delete Subfolders and Files
<code>\\inetpub\wwwroot\dmdata</code>	EKT_ASSET_USER Contact Ektron technical support for the password	<ul style="list-style-type: none"> Write

The ASP.NET User Account

The ASPNet user account in a .NET system is created by the following Microsoft file.

```
<WINDIR>\Microsoft.Net\Framework\[Current Version]\aspnet_regiis.exe
```

Run the executable file to set up the user account.

Installed Folders and Files

Here is a list of the folders and files that are created after the install is complete.

Folder/ Description	Files
<p>\assetcatalog Catalog location of Indexing Service</p> <hr/> <p>Important: The catalog.wci folder is created when the index service runs the first time.</p> <hr/> <p>Note: The catalog.wci folder contains files for the indexing service. These files vary depending on what is being indexed.</p> <hr/>	<ul style="list-style-type: none"> • catalog.wci

Folder/ Description	Files
<p>\\(Domain Name or IP Address or Machine Name)\assetlibrary\</p> <p>Secure storage location for DMS400 assets</p> <p>This subfolder location depends on the name you used in the Domain Name screen during the install.</p> <p>For example, If you use:</p> <ul style="list-style-type: none"> ● Domain Name: www.mydms.com The subfolder is: \wwwmydmscom ● IP Address: 193.123.321.123 The subfolder is: \193123321123 ● Machine Name: WorkSys1 The subfolder is: \WorkSys1 	<ul style="list-style-type: none"> ● This is where your DMS assets are stored. File names are encrypted.
<p>\\intetpub\wwwroot\ASMFileDownload</p>	<ul style="list-style-type: none"> ● Log4Net.Config ● PdfFileCopier.asmx ● Web.Config
<p>\\intetpub\wwwroot\ASMFileDownload</p>	<ul style="list-style-type: none"> ● Ektron.ASM.PdfFileCopier.dll ● log4net.dll

Folder/ Description	Files
<p>\\inetpub\wwwroot\AssetManagement Web application folder</p>	<ul style="list-style-type: none"> ● AssetManagement.asmx ● AssetManagement.Config ● AssetManagementData.config ● AssetManagementData.config_oracle ● cmslocation.js ● DownloadAsset.aspx ● EktronSLA.txt ● Global.asax ● ifilter60.exe (This file installs the Adobe iFilter) ● ReadmeAdobeiFilter6.htm ● RegistrationPage.html ● Manual.pdf (This Manual) ● Web.config
<p>\\inetpub\wwwroot\AssetManagement\backups</p>	<ul style="list-style-type: none"> ● This folder contains backup information for Ektron DMS400
<p>\\inetpub\wwwroot\AssetManagement\bin DLLs for DMS</p>	<ul style="list-style-type: none"> ● AssetManagement.dll ● CsharpZipLib.dll ● Ektron.ASM.AssetConfig.dll ● Ektron.ASM.AssetSecurity.dll ● Ektron.ASM.Configuration.dll ● Ektron.ASM.Data.dll ● Ektron.ASM.PluginManager.dll ● Ektron.ASM.XmlUtility.dll ● log4net.dll ● Microsoft.Web.Services2.dll

Folder/ Description	Files
\\inetpub\wwwroot\AssetManagement\ektasset Core JavaScript and the test script	<ul style="list-style-type: none">● dms400.cab● dms.js● dms.vbs● dmsutil.js● ektasset.js● ektassetdefaults.js● ektassetevents.js● ektassetincludes.js● ektassetmedia.js● ektassetmessages.js● ektmassupload.js● ektunknowndefaults.js● ektunknownevents.js● ektunknownincludes.js● packed_ektasset.js● packed_ektmassupload.js● testdms.htm● testevents.htm● testpagefn.js● testunk.htm● testunkevents.htm● unk.js● unktutil.js

Folder/ Description	Files
\\inetpub\wwwroot\AssetManagement\ektasset\clientinstall Client install files	<ul style="list-style-type: none"> ● dms400client.exe ● dmsinstallnow.htm ● dmsintro.htm ● dmsintroxpsp2.htm ● ieoptions2.gif ● installactivex.gif ● loading.gif ● parseinstallparams.js ● securitywarning_ewebeditpro.gif ● verisign2.gif
\\inetpub\wwwroot\AssetManagement\images Icon images	<ul style="list-style-type: none"> ● adobe-pdf.gif ● HTML.gif ● Image.gif ● ms-access.gif ● ms-excel.gif ● ms-frontpage.gif ● ms-notepad.gif ● ms-powerpoint.gif ● ms-project.gif ● ms-publisher.gif ● ms-visio.gif ● ms-word.gif ● SWF.gif ● WinZip.gif
\\inetpub\wwwroot\AssetManagement\license	<ul style="list-style-type: none"> ● Ektron.ASM.AssetLicense.dll

Folder/ Description	Files
inetpub\wwwroot\AssetManagement\plugins Plugin files that define the type of file a user is working with	<ul style="list-style-type: none"> ● Ektron.ASM.OfficeDocuments.dll (Lets you work with Microsoft Office documents.) ● Ektron.ASM.UnkownDocuments.dll (Lets you work with files other than Office documents.)
inetpub\wwwroot\assets Published assets	
inetpub\wwwroot\dmdata Temporary data files that are waiting to be checked in, saved, or published	
\Program Files\Ektron\DMS400\	<ul style="list-style-type: none"> ● ektaasset.ocx ● EktExplorer.ocx ● ekversion.dll

The EKT_ASSET_USER

During the installation of **Ektron DMS400**, a user named **Ekt_Asset_User** is created. The user is authenticated to write to **C:\inetpub\wwwroot\dmdata**. If your computer has Windows XP, you see this user on the log-in window (illustrated below).



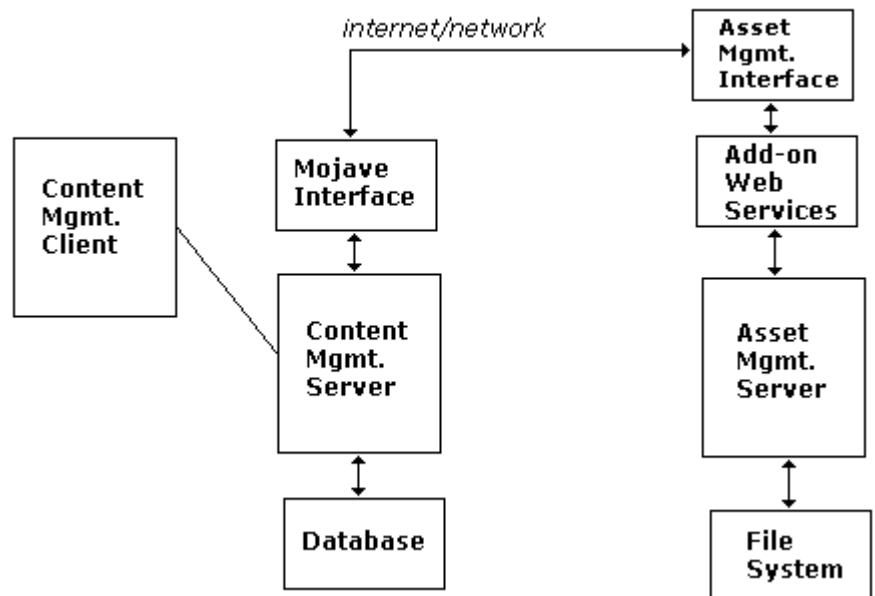
Registering Add Ons in Ektron DMS400

This section explains how an asset management server is registered to work with an Ektron Content Management System (CMS).

As illustrated below, when the Asset Management System (AMS) is integrated with a CMS, three computers are involved.

- Asset management server
- Content management server
- Content management client

NOTE Although the same computer can function as all three, we assume they are different for the purposes of this explanation.



This system uses two interfaces to facilitate communication among computers.

- Mojave interface - handles communications from the CMS server to asset management server
- Asset Management interface - handles communications from the asset management server to CMS

This section provides two scenarios for establishing communications between the servers:

- ["Registration is Initiated from Asset Management Server" on page 33](#)
- ["Registration is Initiated from Content Management Server" on page 35](#)

Registration is Initiated from Asset Management Server

To set up the interface between Asset Management and CMS systems, follow these steps.

1. Install a CMS
2. On the CMS server, set up a receiving page that calls the Register Server function. For more information, see ["RegisterServer API Definition" on page 35](#).
3. On the Asset Management server, install the add-on files.
4. On the Asset Management server, set up security.
5. On the Asset Management server, run the installation program, DMS400.exe. The installation program prompts you to identify the CMS and the receiving page (illustrated below).

Ektron DMS400 - InstallShield Wizard

Add-on Registration Page

Before Ektron DMS400 can communicate with your CMS server, DMS400 needs to register to your CMS server. Below, please enter the CMS site and page for this registration. To register it later, go through the Ektron DMS400 from the Start Menu.

Site:

Page:

Connection Type: (HTTP or HTTPS)

InstallShield

6. The receiving page calls the Register Server function (set up in Step 2). This function generates an Integrator ID number, which uniquely identifies the CMS to the AMS server.
7. The Mojave interface sends the Integrator ID number to the AMS server.
8. Upon receiving the Integrator ID number from the CMS server, the AMS server assembles information about its add-ons and connection information.
For the details of this packet, see ["Registration Packet Format" on page 37](#).
9. The Mojave interface receives the registration packet and gives it to the CMS. This information is used by the client CMS when connecting to the AMS server.
10. The CMS server retrieves the registration packet from the Asset Management interface. The server uses this information to handle the add-ons and communicate with the AMS server.

Registration is Initiated from Content Management Server

You would follow this procedure if the CMS site were moved and the Asset Management server needs to be informed of the new location, or if the previous registration needs to be corrected.

1. On the CMS system, the user is offered a page to re-register the Asset Management. The page should use the Reregister Server Web service and prompt the user to enter information, such as:
 - protocol
 - server location
 - port
 - application name

NOTE The receiving page calls the Register Server function. See "RegisterServer API Definition" on page 35.

2. The Mojave interface sends the CMS information to the AMS server.
3. The Asset Management interface extracts information from AMS server about the add-ons. It also assembles connection information, which is used by the client CMS when connecting. <SeeAlso>See Also: "Registration Packet Format" on page 37
4. The CMS server retrieves the registration packet from the Asset Management interface. The server uses this information to handle the add-ons and communicate with the AMS server.

RegisterServer API Definition

This definition is sent to the Mojave interface, which registers the integrating application (CMS) with the Asset Management server.

```
Boolean RegisterServer(ServerData* pServerData, BSTR* errMsg);
```

The `serverdata` is:

```
struct ServerData
{
    BSTR Identification; // Integrator ID Number
};
```

At this time, only the Integrator ID number is provided.
<SeeAlso>See Also: "Integrator ID Number" on page 36.

Integrator ID Number

The Integrator ID number is the ID of the integrating application, in this case the CMS. It is geographically unique among all instances of clients that interface with Asset Management.

IMPORTANT! The generation of the ID *must* be guaranteed to be unique.

Integrator ID number is

- generated by the integrating application, such as CMS
- how the CMS wants to identify itself
- always used to refer to the integration site
- should not be the site address

If the site moves, it must use the ID and re-register with the Add-Ons.

Validation is performed for any Web Service calls against this ID.

HTTP Get Page Call Format

The call to the receiving page supplies the following information either as URL parameters or calling parameters.

- integrator (CMS) protocol (HTTP/HTTPS)
- integrator server or IP address
- integrator port
- integrator registration receiving page (page that calls Mojave registration)
- asset Management communication protocol
- asset Management server or address
- asset Management port
- asset Management web application name

Here is an example:

```
https://192.168.0.33:777/cms400example/addonreg.aspx?url=http://192.168.0.22:8080//  
assetmanagement
```

Registration Packet Format

The registration packet contains information from the Asset Management interface. It is passed to the integrating client.

Below is the general format of the data returned. The details can be worked out during implementation, but the following information *must* be included.

Global Connection Information

- Connection and other information
- Format only supported by the Asset Management interface
- No client integration can know how to use this information
- The packet is passed to the SetURL call in Mojave

Information for Each Add On

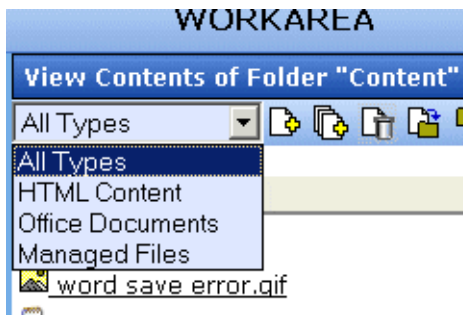
The data for each add on should be given in sequence.

- plug-in type (the CMS uses this as the supertype)
- plug-in ID
- mime types supported by the plug-in

Troubleshooting

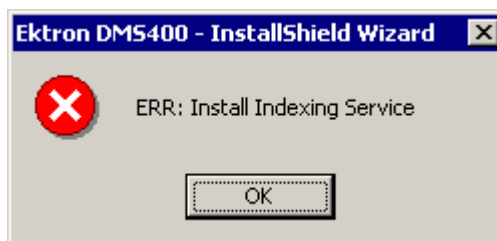
This section explains how to fix problems that may occur with **Ektron DMS400**.

Symptom	See this section
Error message: Install Indexing Service	"Setting Up the Indexing Service" on page 39
A search of PDF files on Ektron CMS returns no results	"Installing the Acrobat PDF iFilter" on page 48
A search of asset files does not find an asset on your Web site	"Turning on the Asset Indexing Service" on page 52
The server running Ektron DMS400 is running slowly; much of the resources are being used even though the computer is idle	"Disabling the System Indexing Service" on page 49
Error message: Windows Server 2003 no longer ships MSDAIPP.DLL, thus connecting to an FPSE server through Webfolders, is no longer possible.	"Using Microsoft Windows Server 2003 as a Client" on page 53
No content type dropdown list on the View Contents of Folder screen. (An example of the list is below.)	It is possible that you entered the license key incorrectly during installation. The license key is stored in <code>webroot/assetmanagement.config</code> . To see a description of the correct format, go to "License Key Format" on page 3 . To replace the license key after installation, see "Replacing License Key after Installation" on page 4 .



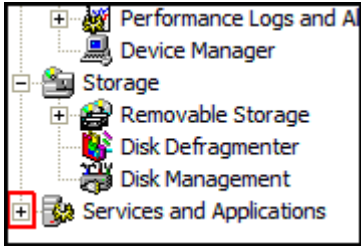
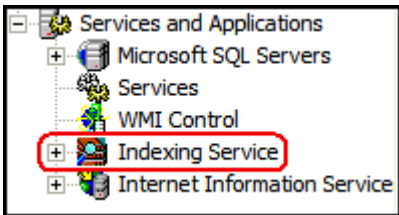
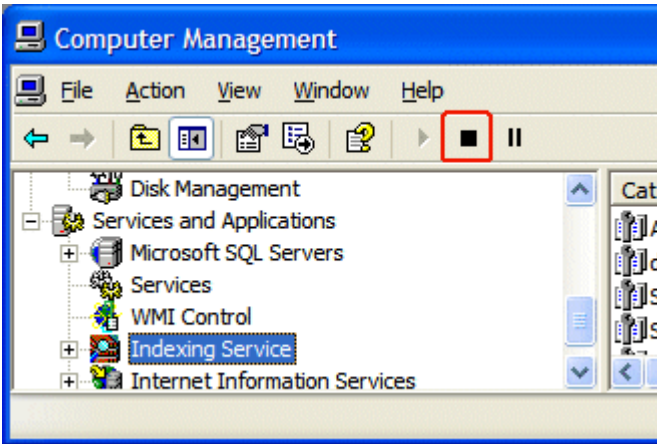
Setting Up the Indexing Service

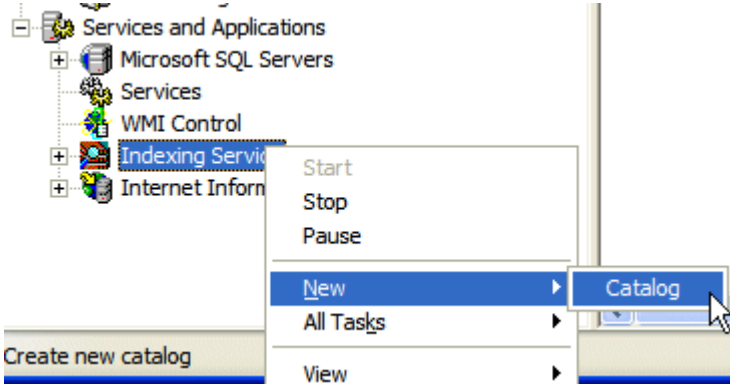
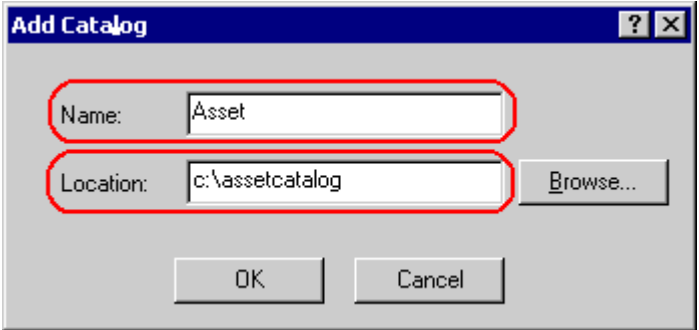
If you see the following error during installation, you need to set up the indexing service manually.

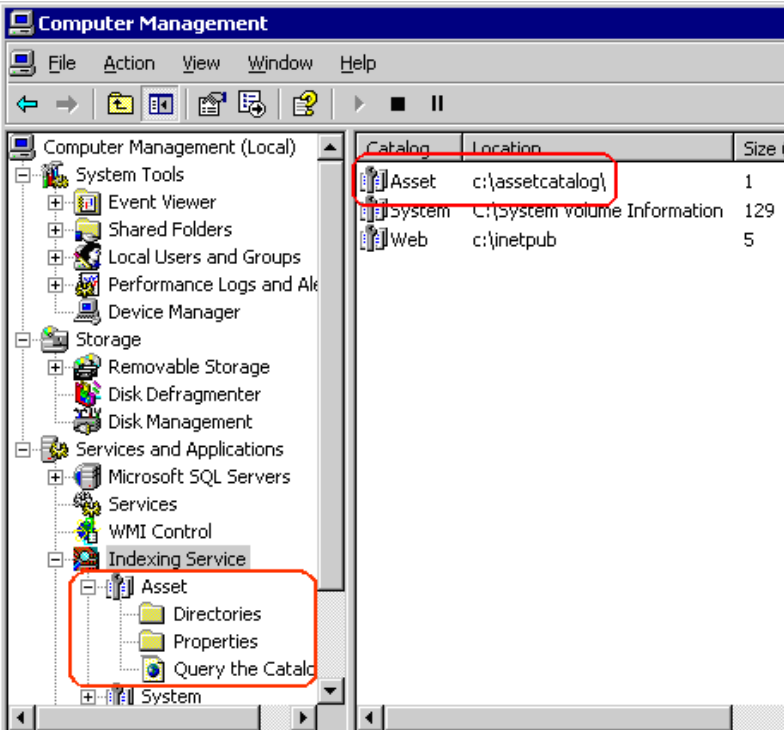
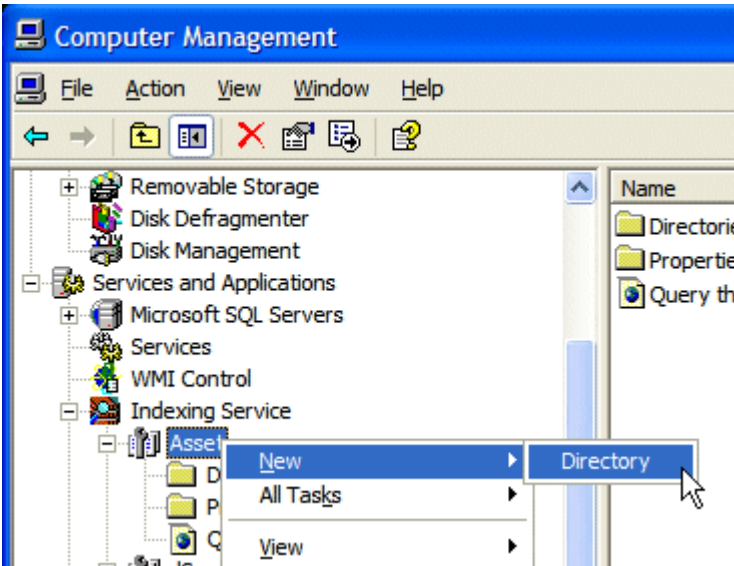


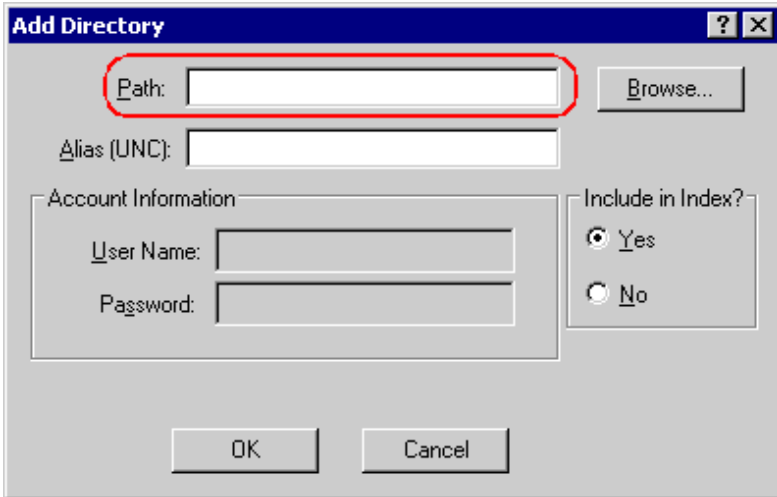
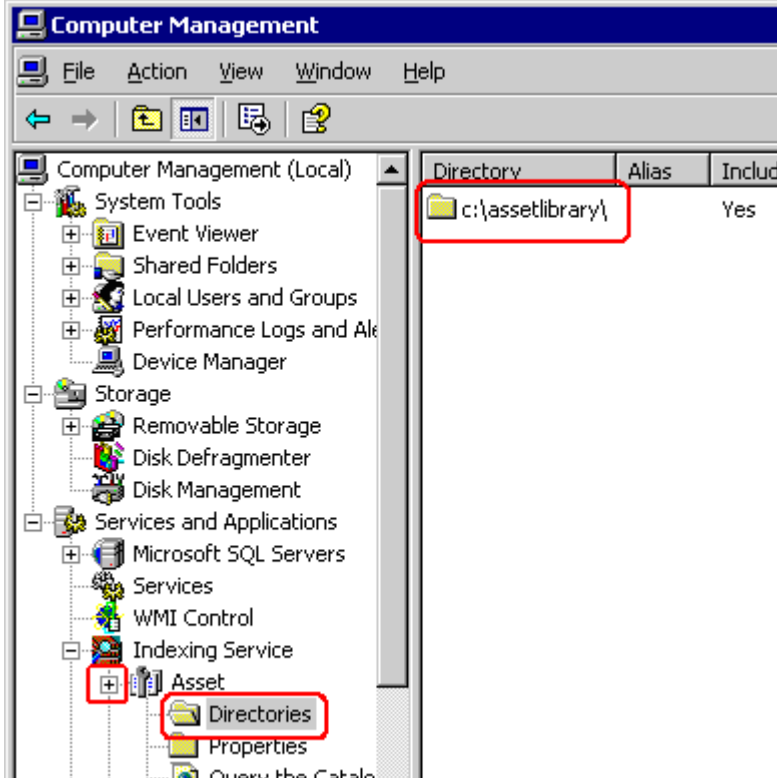
The following steps explain how to do that.

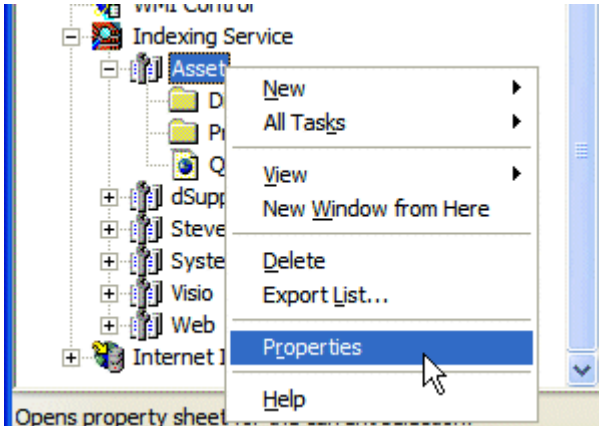
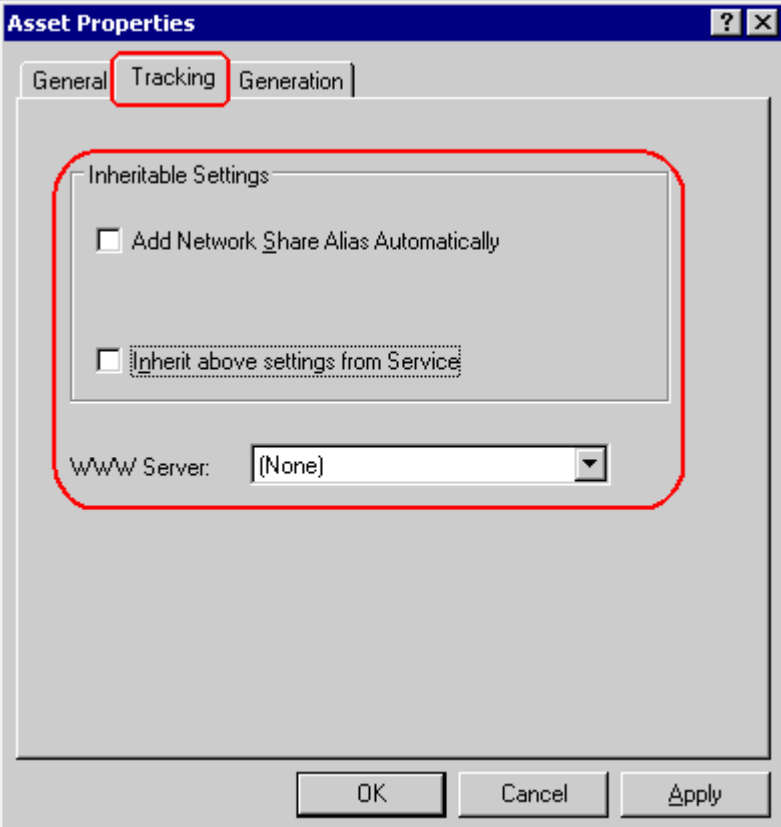
Step	Screen
<p>1. Click Start > Control Panel > Administrative Tools > Computer Management. The Computer Management screen appears.</p>	

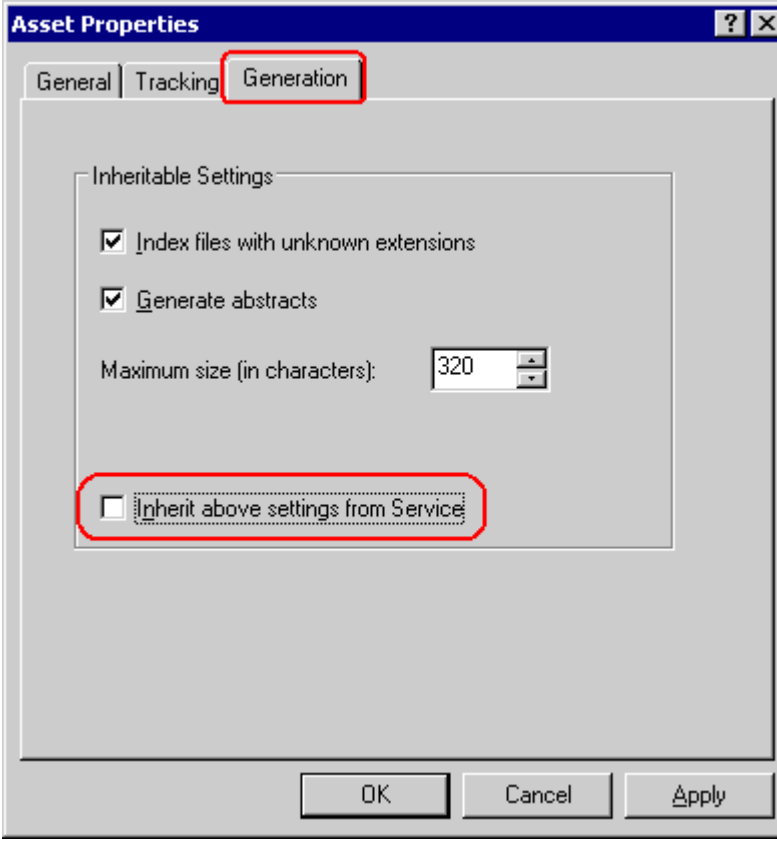
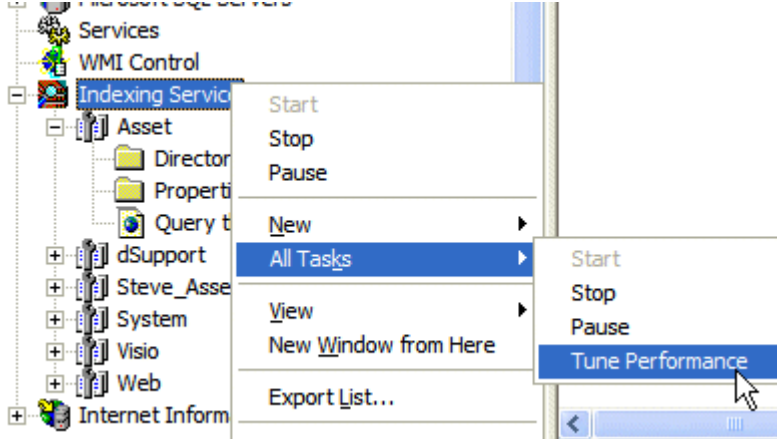
Step	Screen
<p>2. Click the plus sign (+) next to Services and Applications.</p>	 <p>A screenshot of the Windows Computer Management console. The tree view on the left shows 'Performance Logs and Alerts', 'Device Manager', 'Storage', 'Removable Storage', 'Disk Defragmenter', 'Disk Management', and 'Services and Applications'. The 'Services and Applications' folder is highlighted with a red rectangular box.</p>
<p>3. Click Indexing Service.</p>	 <p>A screenshot of the 'Services and Applications' folder in the Computer Management console. The tree view shows 'Microsoft SQL Servers', 'Services', 'WMI Control', 'Indexing Service', and 'Internet Information Service'. The 'Indexing Service' folder is highlighted with a red rectangular box.</p>
<p>4. Click the stop button to halt the indexing service, if it is running.</p> <p><u>Note: If the Index service is running, the start button ▶ is grayed out.</u></p>	 <p>A screenshot of the Windows Services console. The title bar reads 'Computer Management'. The menu bar includes 'File', 'Action', 'View', 'Window', and 'Help'. The toolbar contains several icons, including a stop button (a black square) which is highlighted with a red rectangular box. The tree view shows 'Disk Management', 'Services and Applications', 'Microsoft SQL Servers', 'Services', 'WMI Control', 'Indexing Service', and 'Internet Information Services'. The 'Indexing Service' is selected and highlighted in blue.</p>

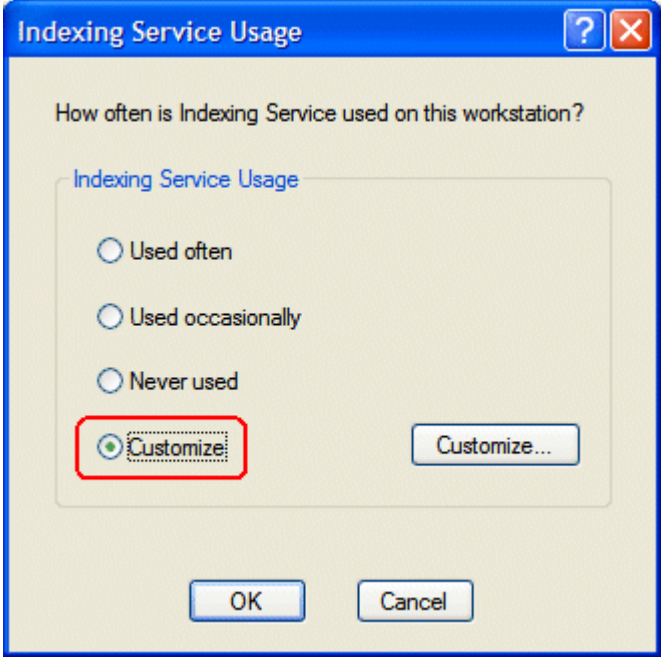
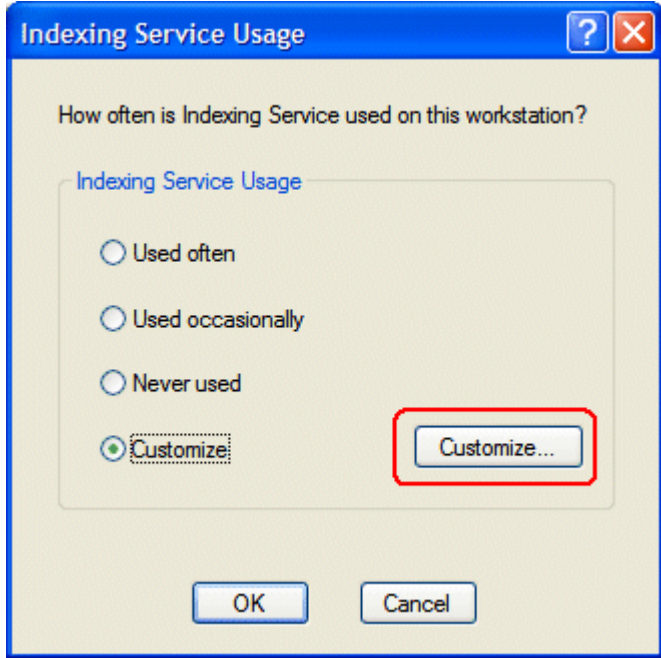
Step	Screen
<p>5. Right click Indexing Service, then click New > Catalog.</p>	
<p>6. At the Add Catalog Screen:</p> <ul style="list-style-type: none"> • In the Name text box, add the catalog name. • In the Location text box, identify the folder that will store the asset catalog. <p><u>Note: By default, during installation Ektron DMS400 names the catalog Asset and associates it with the location <code>c:\assetcatalog</code>. The installer can change the default location.</u></p>	

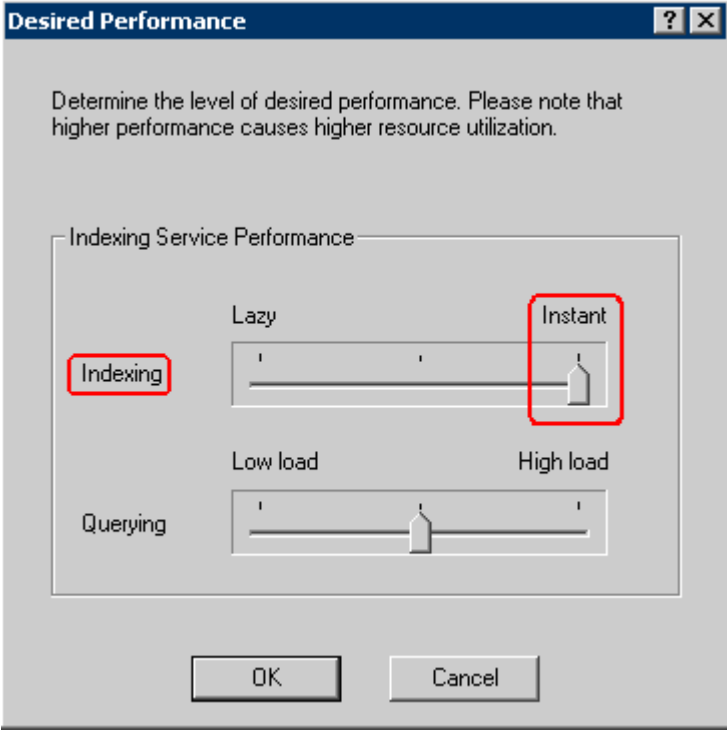
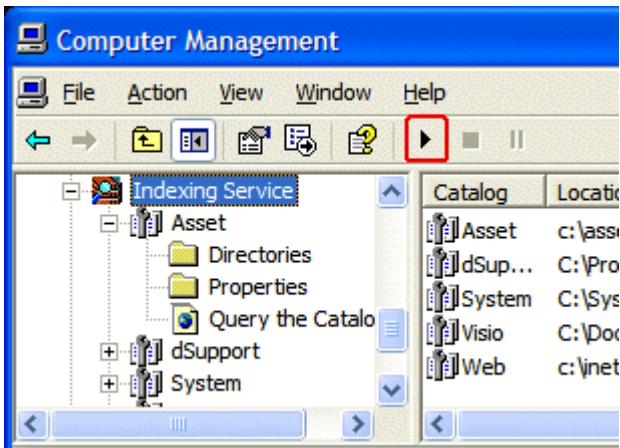
Step	Screen												
<p>7. Click OK.</p> <p>The Computer Management screen shows your new Indexing Service.</p>	 <p>The screenshot shows the Computer Management console. In the left-hand tree view, the 'Indexing Service' is expanded, and its 'Asset' sub-item is selected and highlighted with a red box. In the right-hand pane, a table lists the catalogs:</p> <table border="1" data-bbox="885 391 1313 518"> <thead> <tr> <th>Catalog</th> <th>Location</th> <th>Size (KB)</th> </tr> </thead> <tbody> <tr> <td>Asset</td> <td>c:\assetcatalog\</td> <td>1</td> </tr> <tr> <td>System</td> <td>C:\system volume information</td> <td>129</td> </tr> <tr> <td>Web</td> <td>c:\inetpub</td> <td>5</td> </tr> </tbody> </table>	Catalog	Location	Size (KB)	Asset	c:\assetcatalog\	1	System	C:\system volume information	129	Web	c:\inetpub	5
Catalog	Location	Size (KB)											
Asset	c:\assetcatalog\	1											
System	C:\system volume information	129											
Web	c:\inetpub	5											
<p>8. Right click the Asset catalog, then click New > Directory.</p> <ul style="list-style-type: none"> This is the directory the service indexes. 	 <p>The screenshot shows the Computer Management console with the 'Indexing Service' expanded. The 'Asset' catalog is selected, and a context menu is open over it. The 'New' option is selected, and the 'Directory' sub-option is highlighted by the mouse cursor.</p>												

Step	Screen
<p>9. In the Path text box, add the folder of the secure storage location. Make sure the Include in Index radio button is marked Yes.</p> <hr/> <p>Note: By default, during installation, Ektron DMS400 uses <code>c:\(Domain Name, IP Address or Machine Name)\assetlibrary</code>.</p>	 <p>The screenshot shows the 'Add Directory' dialog box. The 'Path' text box is highlighted with a red circle. The 'Include in Index?' section has the 'Yes' radio button selected. The 'User Name' and 'Password' fields are empty. The 'Alias (UNC)' field is also empty. The 'OK' and 'Cancel' buttons are at the bottom.</p>
<p>10. Click OK. Then, click the plus sign (+) next to Asset to view the Directories folder.</p> <p>In the Directories folder, the new directory is displayed.</p>	 <p>The screenshot shows the 'Computer Management' console. The 'Asset' folder is expanded, and the 'Directories' folder is highlighted with a red circle. The 'Directories' folder contains a new directory named 'c:\assetlibrary\' which is also highlighted with a red circle. The 'Include' column for this directory is set to 'Yes'.</p>

Step	Screen
<p>11. Right click Assets, then click Properties.</p>	 <p>Opens property sheet</p>
<p>12. On the Tracking tab, uncheck all boxes and choose None for WWW Server.</p>	

Step	Screen
<p>13. On the Generation tab, uncheck Inherit above settings from Service. Then click OK.</p> <ul style="list-style-type: none"> • The Index files with unknown extensions and Generate abstracts check boxes can be checked or empty. It is the administrators choice. 	 <p>The screenshot shows the 'Asset Properties' dialog box with the 'Generation' tab selected. The 'Inheritable Settings' section contains the following options:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Index files with unknown extensions <input checked="" type="checkbox"/> Generate abstracts Maximum size (in characters): 320 <input type="checkbox"/> Inherit above settings from Service (highlighted with a red box) <p>Buttons for 'OK', 'Cancel', and 'Apply' are visible at the bottom.</p>
<p>14. Right click Indexing Service, then click All Tasks > Tune Performance.</p>	 <p>The screenshot shows the 'Services' console with the 'Indexing Service' selected. The context menu is open, showing the following options:</p> <ul style="list-style-type: none"> Start Stop Pause New All Tasks <ul style="list-style-type: none"> Start Stop Pause Tune Performance (highlighted) View New Window from Here Export List... Properties

Step	Screen
<p>15. Click the Customize radio button.</p>	 <p>The screenshot shows a dialog box titled "Indexing Service Usage" with a question mark and close button in the title bar. The main text asks "How often is Indexing Service used on this workstation?". Below this, there is a section titled "Indexing Service Usage" containing four radio button options: "Used often", "Used occasionally", "Never used", and "Customize:". The "Customize:" option is selected and highlighted with a red rectangular box. To the right of the "Customize:" option is a "Customize..." button. At the bottom of the dialog are "OK" and "Cancel" buttons.</p>
<p>16. Click the Customize button.</p>	 <p>This screenshot is identical to the one above, showing the "Indexing Service Usage" dialog box. In this step, the "Customize:" radio button is still selected, but the "Customize..." button to its right is highlighted with a red rectangular box. The "OK" and "Cancel" buttons remain at the bottom.</p>

Step	Screen
<p>17. Change Indexing to Instant.</p>	 <p>The screenshot shows a dialog box titled "Desired Performance". It contains two sliders. The top slider is labeled "Indexing Service Performance" and has "Lazy" on the left and "Instant" on the right. The "Instant" label is highlighted with a red box. The slider itself is also highlighted with a red box. Below it is another slider labeled "Querying" with "Low load" on the left and "High load" on the right. The "Indexing" label is also highlighted with a red box. At the bottom are "OK" and "Cancel" buttons.</p>
<p>18. Click OK and OK again to close both dialog boxes.</p>	
<p>19. Click the Start button to start the service again.</p>	 <p>The screenshot shows the "Computer Management" console. In the left pane, "Indexing Service" is selected. In the right pane, the "Start" button is highlighted with a red box. Other buttons like "Stop" and "Restart" are also visible.</p>

Installing the Acrobat PDF iFilter

This section describes how to install the Acrobat PDF iFilter. PDF iFilter is a free downloadable application which lets you index PDF documents with Microsoft® indexing clients, so that users can easily search for text within PDF documents.

Symptom

While trying to search Adobe Acrobat PDFs on Ektron CMS, your search returns no results.

Cause

The Acrobat PDF iFilter is either not installed, or is installed incorrectly on your server.

Resolution

To resolve the issue, follow these steps to make sure that the Adobe PDF iFilter is installed correctly.

Step	Screen
<p>1. Ensure your server meets one of the following requirements.</p>	<ul style="list-style-type: none"> • Microsoft Windows 2000 Professional, Service Pack 2 • Microsoft Windows XP Professional, Service Pack 1 • Microsoft Windows 2000 Server, Service Pack 3 • Microsoft Windows 2003 Server <p>Each environment must contain Microsoft Indexing Services.</p>
<p>2. Download the PDF iFilter from http://www.adobe.com/support/downloads/detail.jsp?ftpID=2611 to the machine where you wish to install it.</p>	

Step	Screen
<p>3. Stop all appropriate clients, using one or more of the following methods.</p>	<ul style="list-style-type: none"> • Windows XP and 2003 Server: Click Start > Control Panel > Administrative Tools > Computer Management. In left-side Console Tree, highlight Indexing Service under Services and Applications. Under Action Menu, choose Stop. Close window. • Windows 2000 and 2000 Server: Click Start > Settings > Control Panel > Administrative Tools > Computer Management. In left-side Console Tree, highlight Indexing Service under Services and Applications. Under Action Menu, choose Stop. Close window.
<p>4. Uninstall any previous version of PDF iFilter.</p>	
<p>5. Double-click the downloaded PDF iFilter 6.0 EXE file and follow the on-screen instructions.</p>	
<p>6. Start all appropriate clients, using one or more of the following methods.</p>	<ul style="list-style-type: none"> • Windows XP and 2003 Server: Click Start > Control Panel > Administrative Tools > Computer Management. In left-side Console Tree, highlight Indexing Service under Services and Applications. Under Action Menu, choose Start. Close window. • Windows 2000 and 2000 Server: Click Start > Settings > Control Panel > Administrative Tools > Computer Management. In left-side Console Tree, highlight Indexing Service under Services and Applications. Under Action Menu, choose Start. Close window.
<p>7. Re-index your system with the appropriate clients, using the following method.</p>	<ul style="list-style-type: none"> • Windows 2000/2000 Server/XP/2003 Server: Open the Computer Management Console (mentioned above). In the left-side Console Tree, open Services and Applications > Indexing Service. Open the Asset Catalog listed under Indexing Service by clicking on the plus sign (+) next to the Catalog name. Click on Directories. For each directory listed in the right pane that contains PDF files, right-click on it and select All Tasks > Rescan (Full).

For more information about troubleshooting and known issues with the Adobe Acrobat PDF iFilter, see the readme.htm file. The file's default location is C:\Program Files\Adobe\PDF iFilter 6.0\readme.htm.

Disabling the System Indexing Service

Symptom

The server running **Ektron DMS400** is running slowly; much of its resources are being used even when the computer is idle.

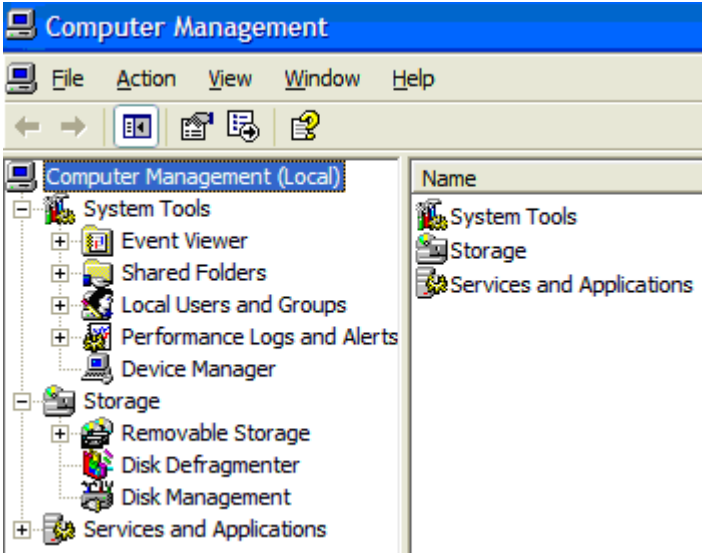
Cause


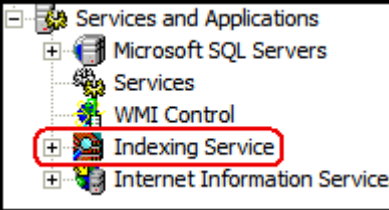
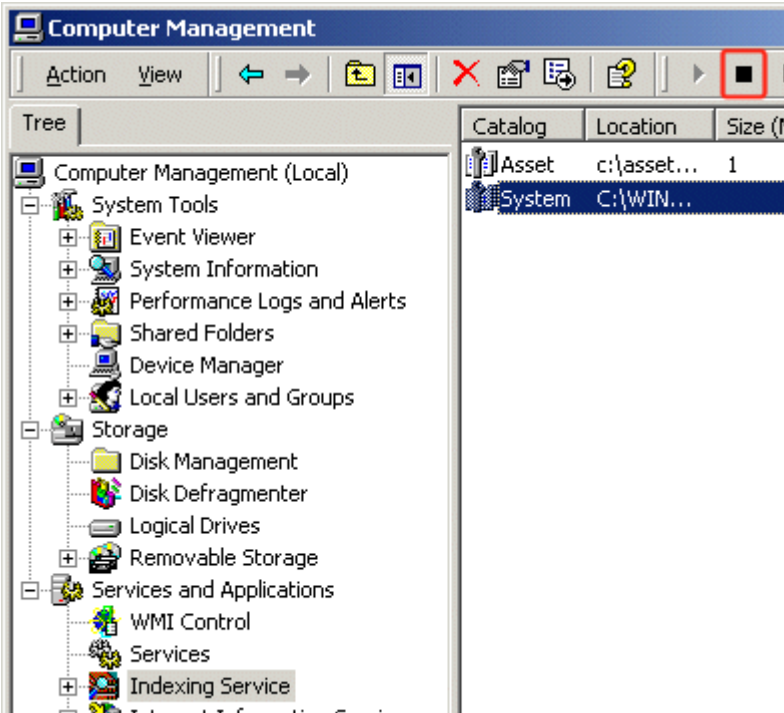
The Microsoft Windows Indexing service is turned on during installation. This service indexes every file on the server, and the resources required to carry out that task slow down other activities.

NOTE Ektron recommends turning off *all* indexing services other than the DMS Asset indexing service.

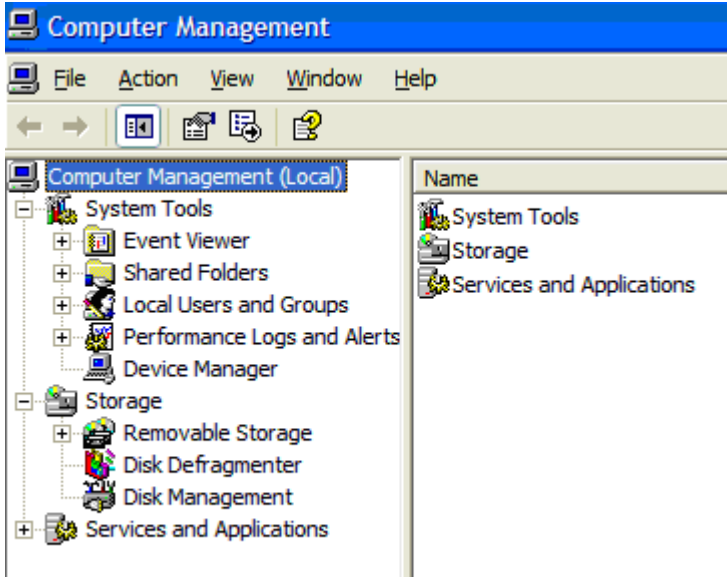
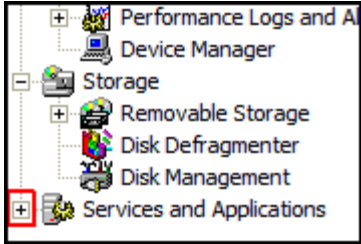
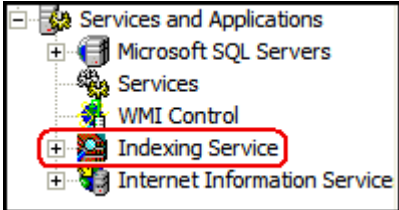
Resolution

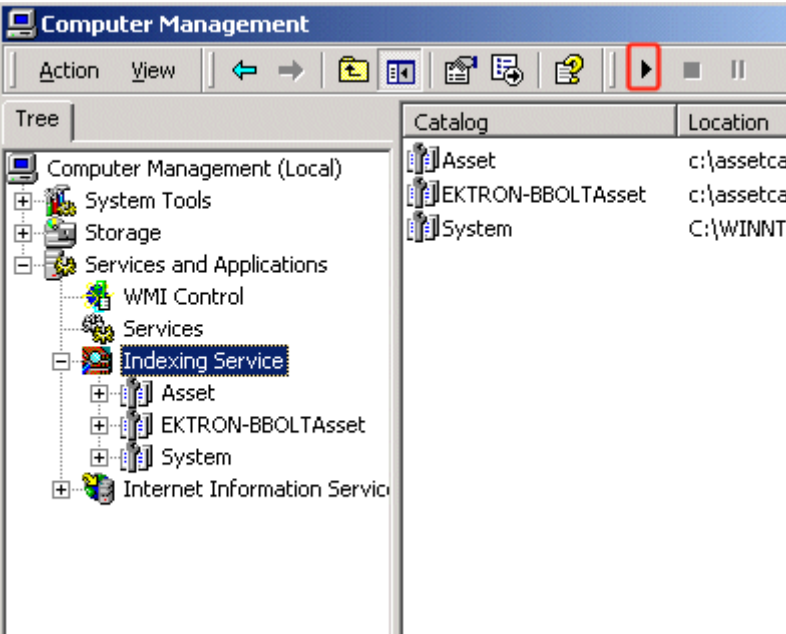
To resolve the issue, follow these steps to disable the Windows indexing service. This change does not affect DMS's ability to find files because it uses a different indexing service.

Step	Screen
<p>1. Click Start > Control Panel > Administrative Tools > Computer Management.</p> <p>The Computer Management screen appears.</p>	

Step	Screen
<p>2. Click the plus sign (+) next to Services and Applications.</p>	 <p>A screenshot of the Computer Management console. The tree view on the left shows 'Performance Logs and Alerts', 'Device Manager', 'Storage', 'Removable Storage', 'Disk Defragmenter', 'Disk Management', and 'Services and Applications'. The 'Services and Applications' folder is highlighted with a red rectangular box.</p>
<p>3. Click Indexing Service.</p>	 <p>A screenshot of the Services and Applications console. The tree view on the left shows 'Microsoft SQL Servers', 'Services', 'WMI Control', 'Indexing Service', and 'Internet Information Service'. The 'Indexing Service' folder is highlighted with a red rectangular box.</p>
<p>4. Click the Stop button to stop the indexing service.</p>	 <p>A screenshot of the Windows Control Panel window for the Indexing Service. The title bar reads 'Computer Management'. The 'Tree' view on the left shows 'Indexing Service' selected. The 'Action' menu is open, and the 'Stop' button (represented by a black square icon) is highlighted with a red rectangular box.</p>

Turning on the Asset Indexing Service

Step	Screen
<p>1. Click Start > Control Panel > Administrative Tools > Computer Management. The Computer Management screen appears.</p>	 <p>The screenshot shows the 'Computer Management (Local)' console window. The left pane displays a tree view with 'System Tools' and 'Storage' expanded. Under 'System Tools', 'Services and Applications' is expanded, showing 'System Tools', 'Storage', and 'Services and Applications' in the right pane.</p>
<p>2. Click the plus sign (+) next to Services and Applications.</p>	 <p>This is a close-up of the 'Services and Applications' folder in the tree view. The plus sign (+) next to the folder icon is highlighted with a red box.</p>
<p>3. Click Indexing Service.</p>	 <p>This is a close-up of the 'Indexing Service' folder in the tree view. The plus sign (+) next to the folder icon is highlighted with a red box.</p>

Step	Screen								
<p>4. Click the Start button to start the indexing service.</p>	 <p>The screenshot shows the 'Computer Management' console. In the 'Tree' view on the left, the 'Indexing Service' is selected under 'Services and Applications' > 'Services'. In the 'Action' menu at the top, the 'Start' button is highlighted with a red rectangle. The 'Catalog' pane on the right shows a list of services with their locations.</p> <table border="1" data-bbox="939 360 1319 500"> <thead> <tr> <th>Catalog</th> <th>Location</th> </tr> </thead> <tbody> <tr> <td>Asset</td> <td>c:\assetcal</td> </tr> <tr> <td>EKTRON-BBOLTAsset</td> <td>c:\assetcal</td> </tr> <tr> <td>System</td> <td>C:\WINNT</td> </tr> </tbody> </table>	Catalog	Location	Asset	c:\assetcal	EKTRON-BBOLTAsset	c:\assetcal	System	C:\WINNT
Catalog	Location								
Asset	c:\assetcal								
EKTRON-BBOLTAsset	c:\assetcal								
System	C:\WINNT								

Using Microsoft Windows Server 2003 as a Client

Symptom

You receive the following error message:

- Windows Server 2003 no longer ships MSDAIPP.DLL, thus connecting to an FPSE server through Webfolders, is no longer possible.

Resolution

Per MS Licensing, you can obtain webfldrs.msi from any down-level OS, or any office product that shipped before Win2K3 (not Office 2003) and install the WebFolders client. Doing so will keep you compliant with licensing.

Installing WebFolders from Office 2003 is only allowed if you have an Office 2003 license for each Win2K3 server you plan to install

WebFolders on.

For more information on installing Web Folders, see "[Web Folders Setup for Microsoft Windows Server 2003](#)" on page 21.

Ektron DMS400 Administration

Introduction

This section explains the Administration of **Ektron DMS400**. It includes the following chapters:

- "AssetManagement.Config," on page 56
- "Asset Management Server Registration," on page 62
- "PDF Generation," on page 68

AssetManagement.Config

Introduction

This section explains how to use the AssetManagement.Config file to help configure the **Ektron DMS400**. By making changes in the AssetManagement.Config file, you can:

- control what file types users can upload. For more information, see ["Allowing File Types," on page 57](#)
- control whether users automatically preview an asset when the link is clicked. If not the user needs to click the view preview button to view the asset. For more information, see ["Setting the View Type," on page 59](#)
- add license keys. For more information, see ["License Keys," on page 3](#)

For a description of the AssetManagement.Config file, see ["The AssetManagement.Config File" on page 56](#)

The AssetManagement.Config File

The following table describes the AssetManagement.Config file tags, and how they are used.<

Tag	Description
<WebAppPath>	The path of the Web application. This is the path to the AssetManagement folder. The default location is: C : / Inetpub/wwwroot / AssetManagement .
<WebApp>	The Asset Management folder. The default is /AssetManagement/.
<StorageLocation>	The location of the Asset Library. The default location is: C : / (Domain Name or IP Address or Machine Name) / assetlibrary/.

Tag	Description
<WebRoot>	The web root of the server. The default is: C : / Inetpub/wwwroot / .
<WebShareDir>	The folder where temporary data files that are waiting to be checked in, saved, or published are stored. The default is / dmdata / .
<CatalogName>	The name of the Asset Catalog. This name is used when setting up the index service.
<CatalogLoc>	The folder location of the Asset Catalog. This location is used when setting up the index service. The default is: C : / assetcatalog / .
<PublishStorageLoc>	The folder location where published assets are stored. The default is: C : / Inetpub/wwwroot/assets / .
<PublishStorageName>	The name of the folder where published assets are stored. The default is: / assets / .
<DomainName>	Can be Domain Name, IP Address or Machine Name. An example is: localhost. This is the address a web client system uses to open managed documents through HTTP.
<InstalledVersion>	The version number of the Ektron DMS400 installed.
<FileTypes>	Files types that users are allowed to upload to Ektron DMS400 . For more information, see "Allowing File Types" on page 57 . The default file types installed are *.doc, *.xls, *.ppt, *.pdf, *.gif, *.jpg, *.jpeg, *.txt, *.log, *.vsd, *.dot, *.zip
<Build>	The build number of Ektron DMS400
<ViewTypes>	View Types allows users to preview an Office document when a they click an Office document in the Workarea. For more information, see "Setting the View Type" on page 59 . The default is document.
<Licenses>	Your license key. See Also: "License Keys" on page 3

Allowing File Types

Administrators control what types of files are used with **Ektron DMS400** by editing the file types list in the

AssetManagement.config file. Reasons for limiting the file types include:

- Security - For example, you do not want users to load .exe files to **Ektron DMS400** server
- Ease of Management - For example, you want your **Ektron DMS400** server to store .doc files only

The <FileTypes> tags, in the AssetManagement.config file, contain the list of file types users can upload. The default file types are:

```
*.doc,*.xls,*.ppt,*.pdf,*.gif,*.jpg,*.jpeg,*.txt,*.log,*.vsd,*.dot,*.zip.
```

Steps to Add or Remove a File Type

To add or remove a file type from the list, follow these steps.

1. Open the AssetManagement.config file. The default location is (webroot)/AssetManagement.
2. Find the <FileTypes> Tags. All file types must appear between the two tags. For example, <FileTypes>*.doc,*.xls<FileTypes>.
3. Add or remove any file type.

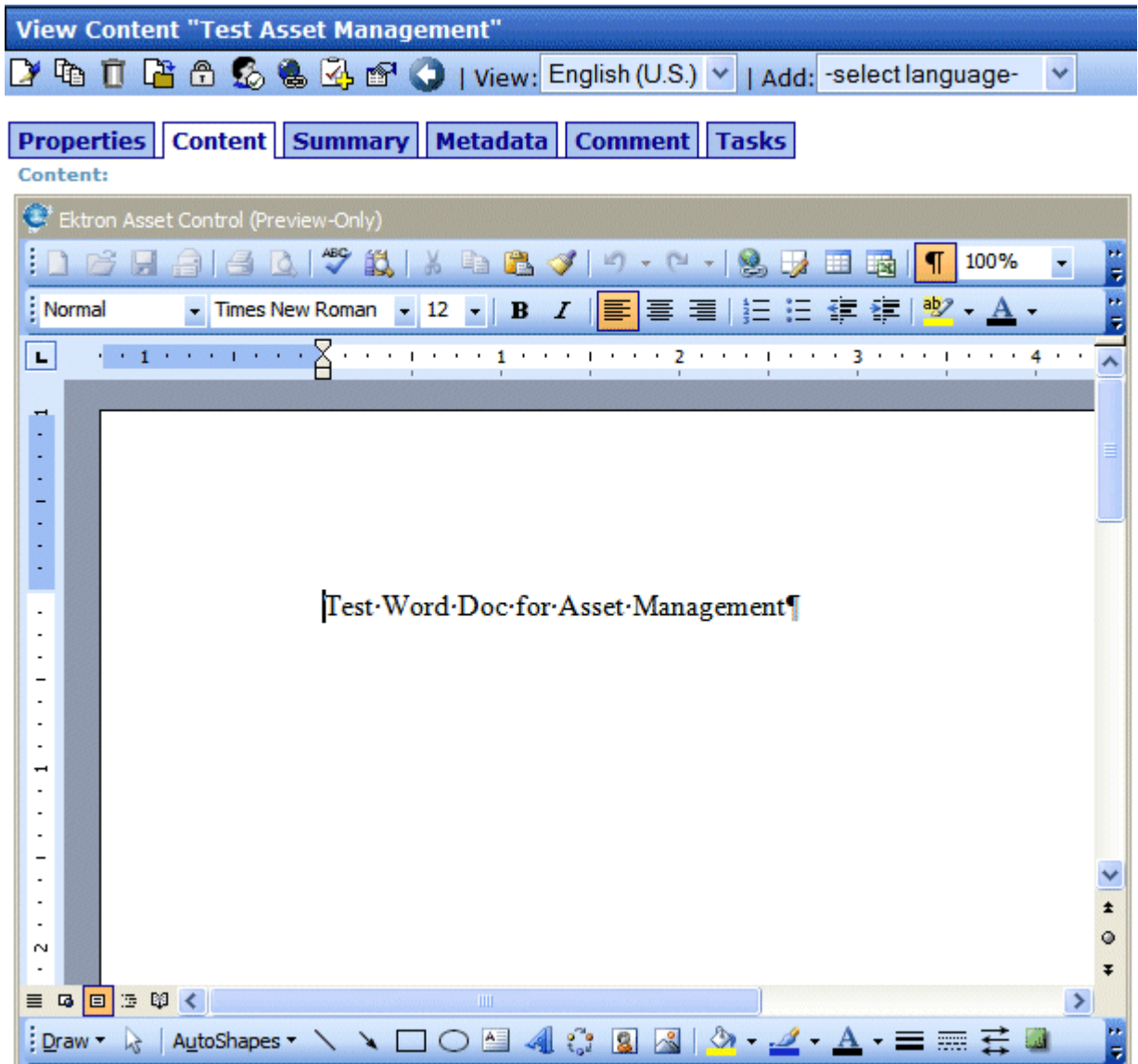
NOTE

Commas must separate the file types and file types must be formatted as wildcard.extension. For example, adding an .mp3 file type to the list after *.zip, looks like this: *.zip,*.mp3

4. Save and close the AssetManagement.config file.

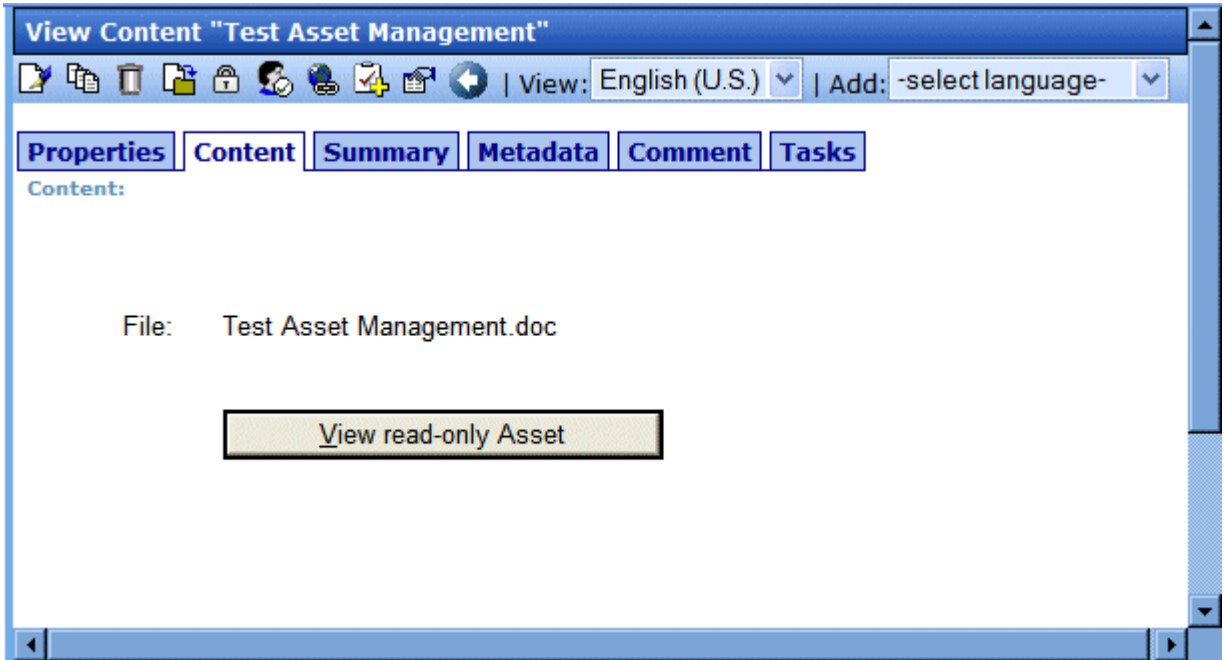
Setting the View Type

When users are in the Workarea of CMS400.NET, they preview an Office document by clicking on its link. The following is an example of the preview that appears when they click an Office document's link.



You might not want the preview to appear when a user clicks an Office document's link. Some reasons for this are Web page load speed and lowering bandwidth usage on your network.

By setting View Types to blank, a preview doesn't appear until it is asked for. The following is an example of what appears when a user clicks an Office asset's link and the preview is set to not appear.



You control the preview in the AssetManagement.config file, this setting is controlled by the <ViewType> Tag. The table below describes the two settings available for the <ViewType> Tag.

Setting	Description	Example
document	Allows the automatic preview when clicking an Office document's link.	<ViewType>document<ViewType>
blank	Disables the automatic preview when clicking an Office document's link.	<ViewType><ViewType>

Steps to Change Automatic Preview Setting

To change automatic preview setting for office document's follow these steps.

1. Open the `AssetManagement.config` file. The default location is `(webroot)/AssetManagement`.
2. Find the `<ViewType>` Tags. For example,
`<ViewType>document<FileType>`
3. Choose a setting as described in the table above, see ["Setting," on page 60](#)
4. Save and close the `AssetManagement.config` file.

Asset Management Server Registration



AMS Server Registration

For administrators, using **Ektron CMS400.NET** to initiate a connection to an AMS or change your AMS server registration information is easy. The following sections explain how to register and manage an AMS with **Ektron CMS400.NET**.

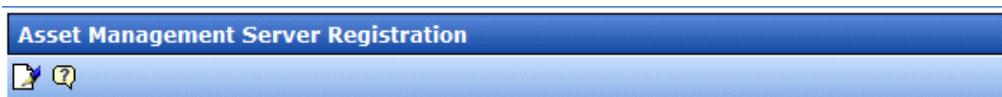
- "Steps to Setup a New AMS Server Connection" on page 62
- "Managing AMS Server Connections" on page 63

Steps to Setup a New AMS Server Connection

NOTE [These steps do not need to be completed if you completed the Setup Connection during the Ektron DMS400 install.](#)

1. From the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Edit** button ()
3. Add the location of the AMS in the **Asset Management Server Address (URL)** field.
4. Click **Save** (.

The following appears.



Asset Management ID: 55e05fc4-803d-4959-a818-3b70aa188a0b

Registered Asset Management Servers:

- <http://localhost/AssetManagement/>

[Show detailed registration information](#)

Clicking the **Show detailed registration information** link reveals which plug-ins and extensions are registered. The following is an example.

ID	NAME	PLUGIN	CONNECTIONINFO
101	Office Documents	Documents	http://localhost/AssetManagement/
	NAME	EXT MIME	ICON
	mword	doc application/mword	http://localhost/assetmanagement/images/ms-word.gif
	mword	dot application/mword	http://localhost/assetmanagement/images/ms-word.gif
	ms-excel	xla application/vnd.ms-excel	http://localhost/assetmanagement/images/ms-excel.gif
	ms-excel	xlc application/vnd.ms-excel	http://localhost/assetmanagement/images/ms-excel.gif
	ms-excel	xlm application/vnd.ms-excel	http://localhost/assetmanagement/images/ms-excel.gif
	ms-excel	xls application/vnd.ms-excel	http://localhost/assetmanagement/images/ms-excel.gif
	ms-excel	xlt application/vnd.ms-excel	http://localhost/assetmanagement/images/ms-excel.gif
	ms-excel	xlw application/vnd.ms-excel	http://localhost/assetmanagement/images/ms-excel.gif
	ms-powerpoint	ppt application/vnd.ms-powerpoint	http://localhost/assetmanagement/images/ms-powerpoint.gif
	ms-powerpoint	pot application/vnd.ms-powerpoint	http://localhost/assetmanagement/images/ms-powerpoint.gif
	ms-powerpoint	pps application/vnd.ms-powerpoint	http://localhost/assetmanagement/images/ms-powerpoint.gif
	ms-project	mpp application/vnd.ms-project	http://localhost/assetmanagement/images/ms-project.gif
	msaccess	mdb application/x-msaccess	http://localhost/assetmanagement/images/ms-access.gif
	mspublisher	pub application/x-mspublisher	http://localhost/assetmanagement/images/ms-publisher.gif
	visio	vsd application/vnd.visio	http://localhost/assetmanagement/images/ms-visio.gif
	ms-works	wdb application/vnd.ms-works	http://localhost/assetmanagement/images/ms-word.gif
	ms-works	wks application/vnd.ms-works wks	http://localhost/assetmanagement/images/ms-word.gif
	ms-works	wps application/vnd.ms-works wps	http://localhost/assetmanagement/images/ms-word.gif
102	Managed Files	Unknown	http://localhost/AssetManagement/



Managing AMS Server Connections

From **Ektron CMS400.NET**, you can manage your AMS server connections. The following sections describe the ways AMS is managed:

- "Updating Registration Information" on page 64
- "Register with an Asset Management Server (AMS)" on page 64
- "Update Registration with an AMS that has a New Address" on page 65
- "Unregistering an Asset Management Server" on page 65
- "Reregistering an AMS that has been Unregistered" on page 66



Updating Registration Information

Updating registration information is useful when your AMS registration information gets corrupted or lost. Follow these steps to update your registration information.

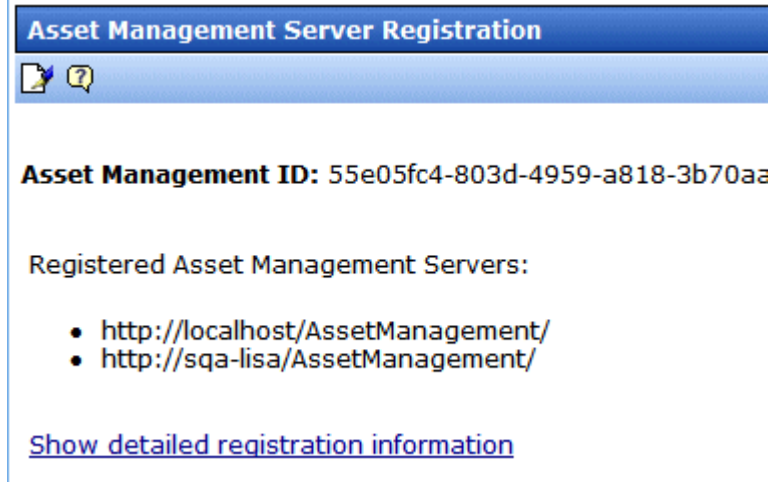
1. From the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Edit** button ()
3. Select the **Update registration information** radio button.
4. Select an asset management server to update from the dropdown list.
5. Click **Save** ()

Register with an Asset Management Server (AMS)

Use this option to register **Ektron CMS400.NET** with a second AMS. This allows you to keep separate servers for different types of assets. For example, you might want to keep all the Human Resource documents on a separate server.



1. From the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Edit** button ()
3. Select the **Register with an asset management server (AMS)** radio button.
4. Add the location of the AMS in the **Asset Management Server Address (URL)** field.
5. Click **Save** ()

The following appears.



Update Registration with an AMS that has a New Address



If you move your AMS to a new server or change the existing server's address, you can update the connection information by following these steps.

1. From the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Edit** button ().
3. Select the **Update registration with an AMS that has a new address** radio button.
4. Select the AMS to update by choosing it from the **Select asset management server** dropdown box.
5. Add the new location of the AMS in the **Asset Management Server Address (URL)** field.
6. Click **Save** ().

Unregistering an Asset Management Server

If you decide not to use an AMS, you can unregister it from **Ektron CMS400.NET**. Unregistering an AMS does not delete the information from the database nor the assets themselves. When you unregister an AMS, you are making it inactive. This provides a way to restore the AMS to **Ektron CMS400.NET** if you change your mind. See *Also: "Reregistering an AMS that has been Unregistered" on page 66*



The following steps explain how to unregister an Asset Management Server.

1. From the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Edit** button ()
3. Select the **Unregister an asset management server** radio button.
4. Select the AMS to update by choosing it from the **Select asset management server** dropdown box.
5. Click **Save** ()

Reregistering an AMS that has been Unregistered



You can reregister an AMS that has been unregistered in **Ektron CMS400.NET**. Doing this re-establishes the information contained in the database. Your assets are again available to your users with the original content ID numbers assigned to them.

The following steps explain how to reregister an AMS.

1. From the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Edit** button ()
3. Select the **Register with an asset management server (AMS)** radio button.
4. Add the location of the AMS in the **Asset Management Server Address (URL)** field.
5. Click **Save** ()

The following appears.

Asset Management Server Registration

Asset Management ID: 55e05fc4-803d-4959-a818-3b70aa

Registered Asset Management Servers:

- <http://localhost/AssetManagement/>
- <http://sqa-lisa/AssetManagement/>

[Show detailed registration information](#)

PDF Generation

Introduction

PDF (Portable Document Format) is a type of file developed as a means of distributing compact, platform-independent documents. Each document is self-contained, packing text, graphics, and fonts into a file.

Office documents stored in **Ektron DMS400** can be automatically converted to PDF format when used in conjunction with **Ektron CMS400.NET**. Then, when adding the Office document to a Web page, a visitor sees the PDF version of the document.

Why use PDF?

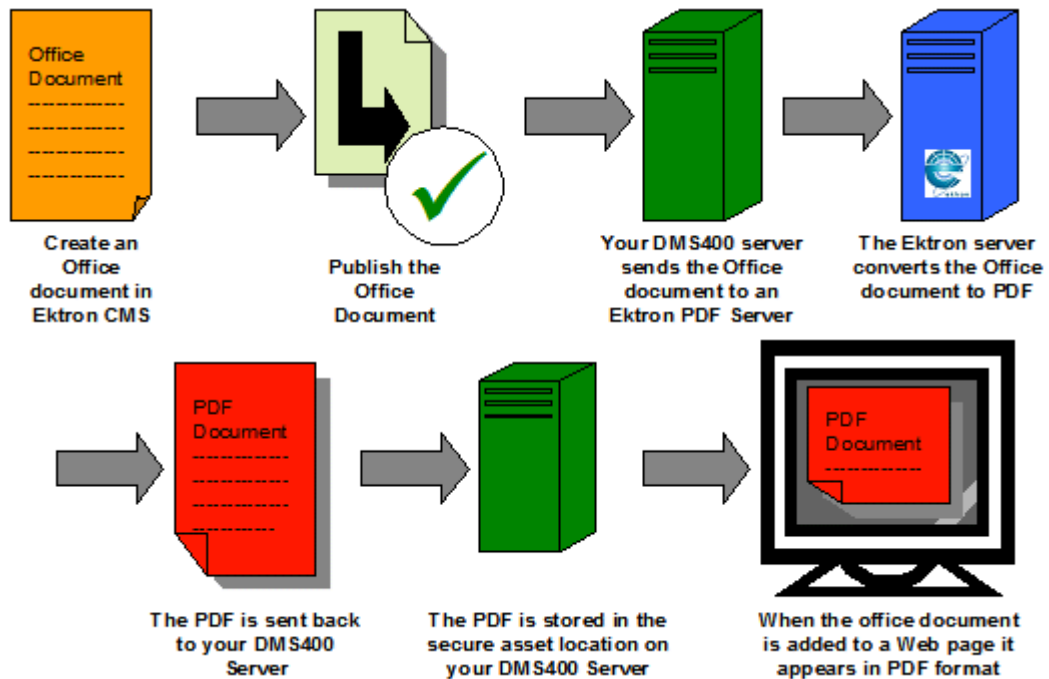
- Files easily cross multiple platforms, including Microsoft, Apple, Linux, and Unix.
- Documents keep their formatting and appear the same on a computer screen or when printing.
- File size is typically smaller, which means less bandwidth usage.
- Free viewing application that allows any Office documents, once converted, to be viewed by anyone with a PDF viewer.
- Eliminates the need for a different viewer for each file type.

PDF Conversion Process

The PDF conversion of an Office document starts when it is published. At that point, a copy of the file is sent to an Ektron server for PDF generation. After the server generates the PDF, it returns the PDF to the DMS400.

When the PDF returns, it doesn't appear in the CMS400.NET Workarea, only the original published Office document appears. The DMS400 stores the PDF file in its secure location. Subsequent

editing is done in the original Office document, and each time it's published, a new PDF is generated.



Once the Office document is added to a Web page, the Web page shows the PDF version of the it. This means visitors of the site only need a PDF viewer installed to view any Office document on your site.

Local PDF Generation

By purchasing a separate license for the PDF generation software, PDF documents can be created on a local network. Reasons for generating a PDF locally include:

- **Speed:** Office documents take less time to be converted to PDF format
- **Security:** Office documents never leave the local network
- **Quality:** You can configure the output quality of the Office documents

Setting Up a Local PDF Generator

This section describes setting up a local PDF generator. It includes:

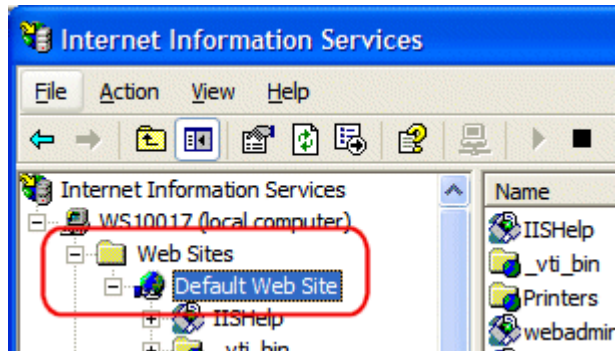
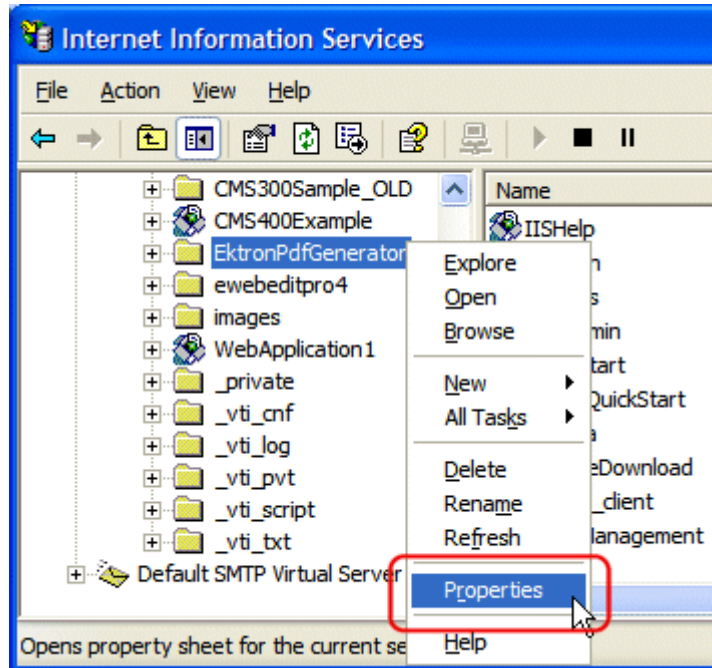
- Editing the Web.Config
- Setting up the EktronPDFGenerator folder
- Installing the PDF generation software
- Starting the PDF generation service on your server

Following these steps to set up a local PDF generator on your network.

1. Open the `Web.config` file located in `\webroot\ASMFileDownload`.
2. Find the following line and change `pdfgenerator.ektron.com` to `localhost`.

```
<add key="Ektron.ASM.PdfFileCopier.PdfFileGenerator.PdfGenerator"
value="http://pdfgenerator.ektron.com/EktronPdfGenerator/
PdfGenerator.aspx"/>
```

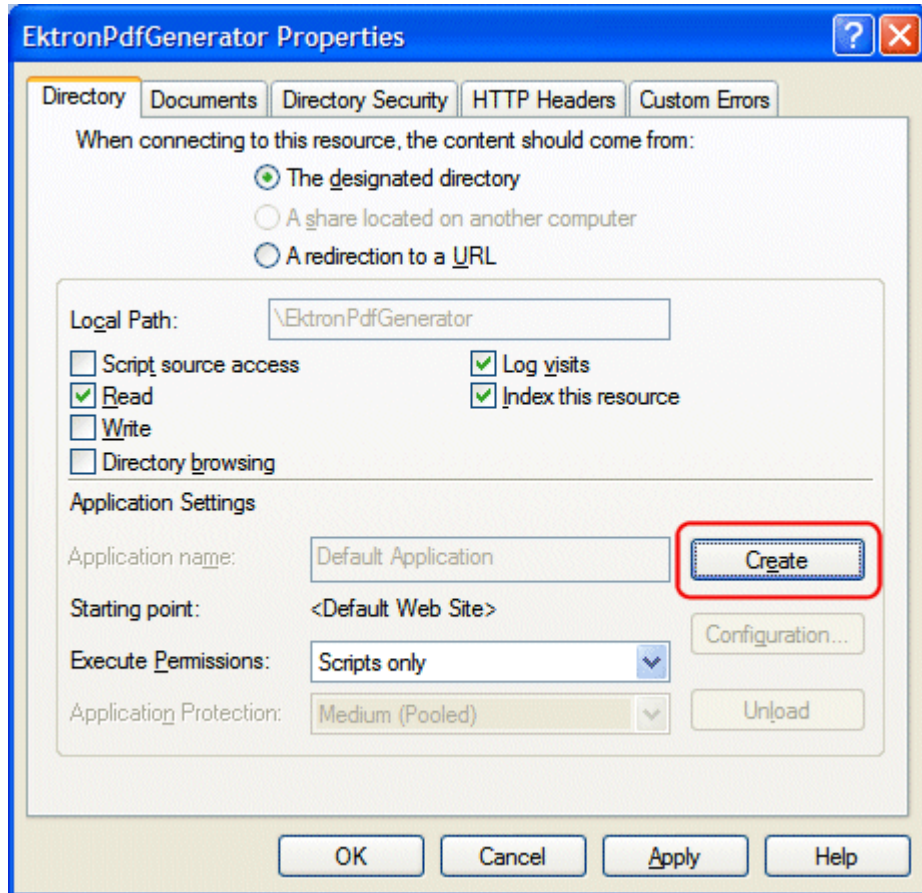
3. Save and close the file.
4. Extract the zip file you received for PDF generation from Ektron, Inc.
It creates two directories:
 - Pdf995
 - EktronPDFGenerator
5. Copy the **EktronPDFGenerator** folder to your webroot. For example, `\inetpub\wwwroot`.
6. Navigate to the **Control Panel > Administrative Tools > Internet Information Services**.

7. Click **Web Sites > Default Web Site**8. Right click the **EktronPDFGenerator** folder and choose **Properties**.9. Click the **Directory Security** tab.10. In the **Anonymous access and authentication control** area, click edit.11. Verify that **Anonymous access** is checked.

- If it is checked, click **OK**. Do not change any other settings in this dialog box.

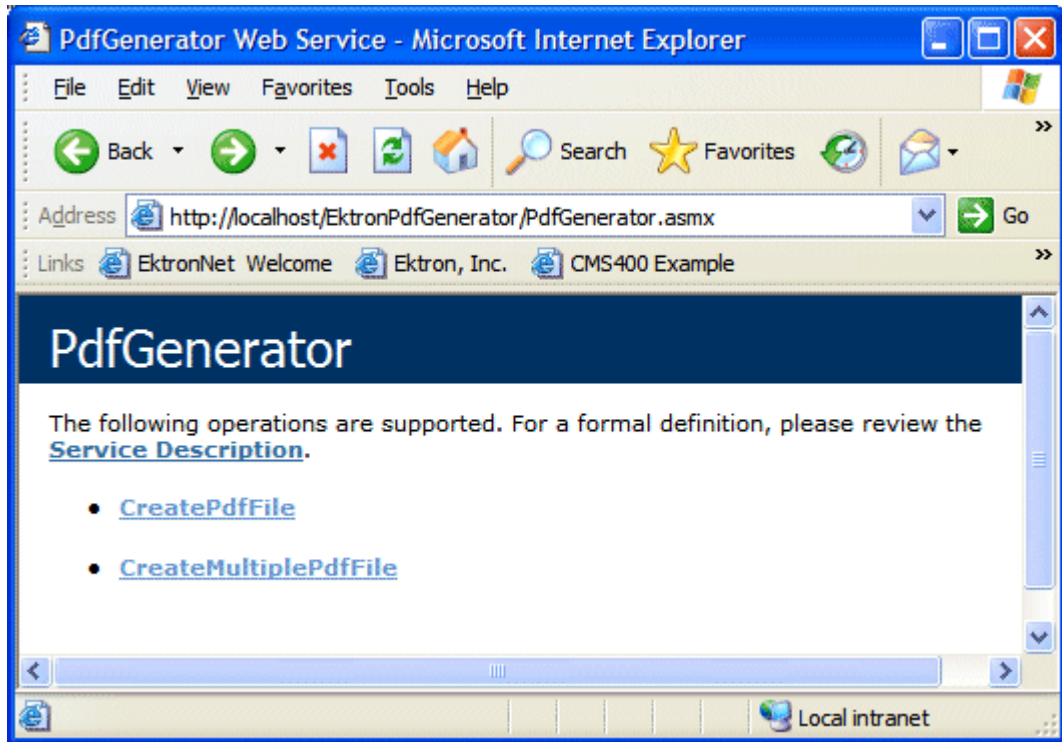
- If it is unchecked, click the checkbox to add a check. Then click **OK**. Do not change any other settings in this dialog box.

12. Click the **Directory** tab.
13. Click the **Create** button.



14. Click **OK**. Do not change any other settings in this dialog box.
15. Open a Web Browser.
16. In the **Address field**, insert the following line:
<http://localhost/EktronPdfGenerator/PdfGenerator.asmx>

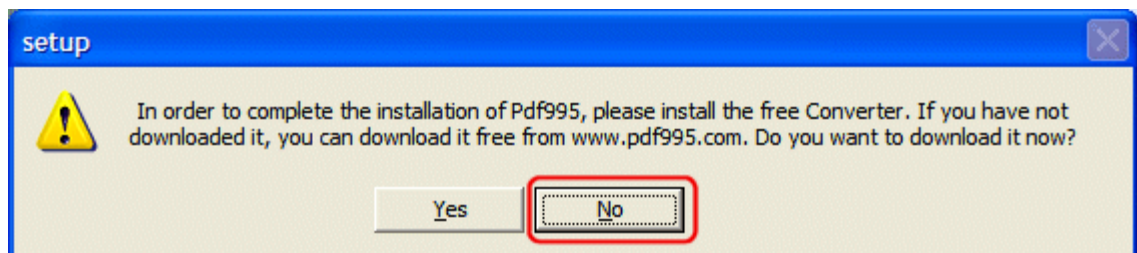
17. Verify the following page appears.



18. Navigate to the **pdf995** folder that was installed earlier.

19. Double click **pdf995s.exe**

If the following dialog box appears, click **No**.



20. Run **ps2pdf995.exe**.

21. Click **Accept** on the PDF995 User Configuration Screen.

22. Run **omniformat.exe**.

23. Click **Accept** to accept the OmniFormat End User Agreement.

24. Run **ToolsetKey.exe**

25. Enter your name in the **Name** text box.

26. Enter your license key in the **Key Value** text box.

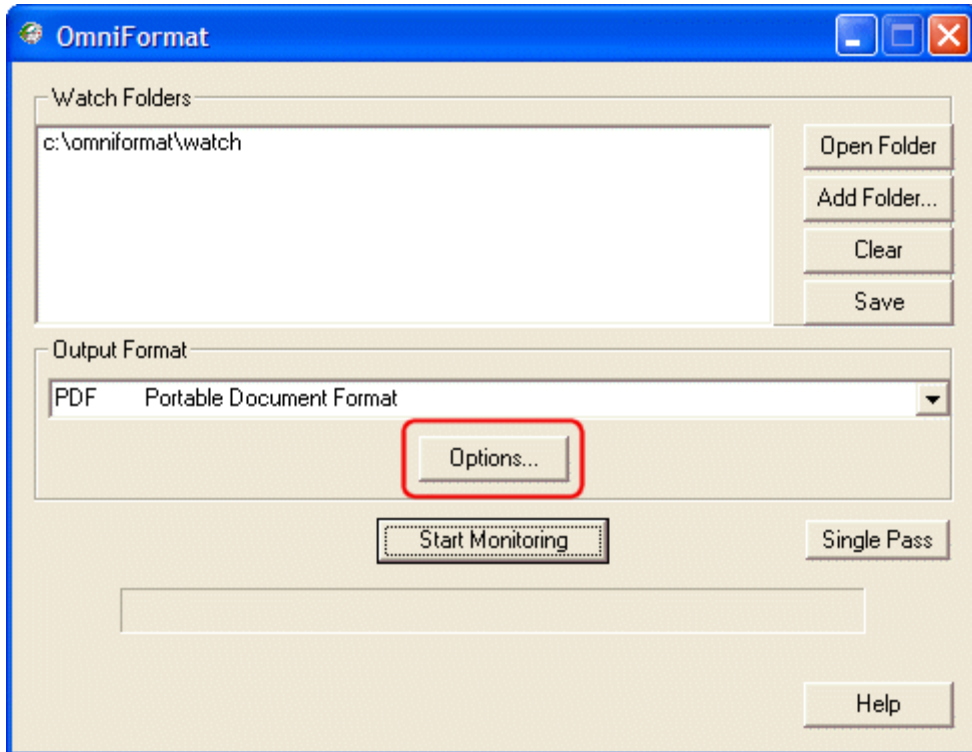
NOTE This license is separate from Ektron DMS400 and Ektron CMS400.NET. The license is provided to you when you purchase the PDF generation software.

27. Create new directory under **C:** called **pdfoutput**.

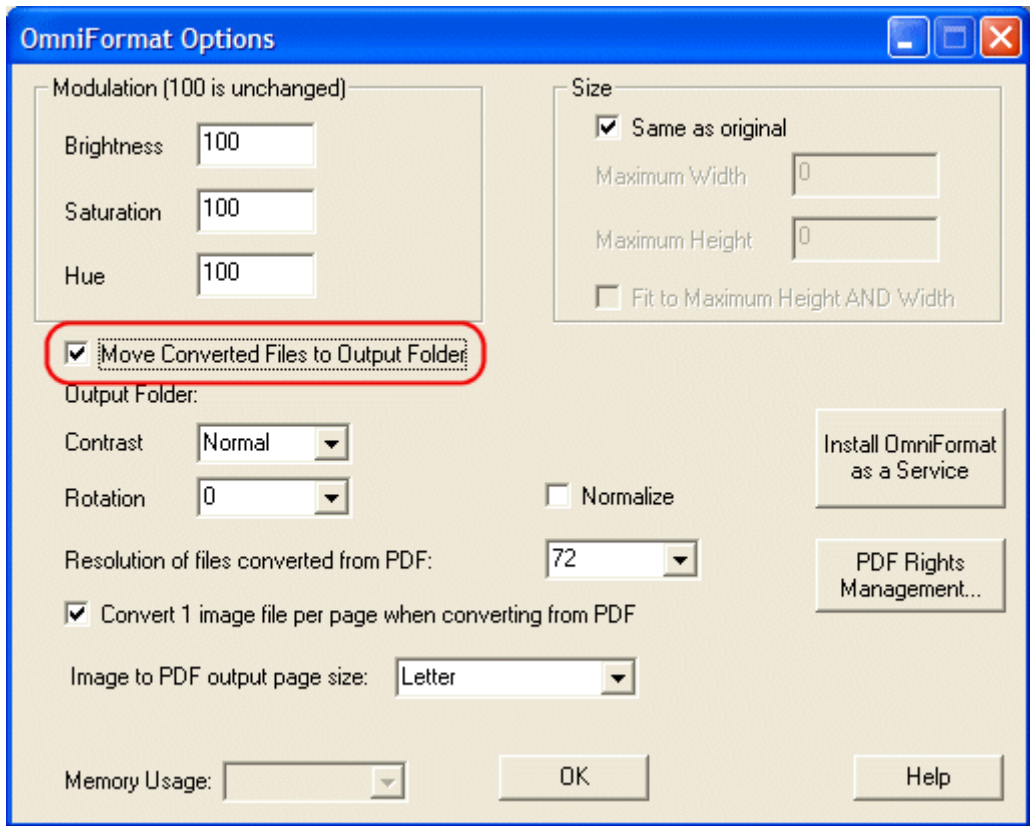
28. Navigate to **C:\omniformat**.

29. Double click **OmniFormat.exe**.

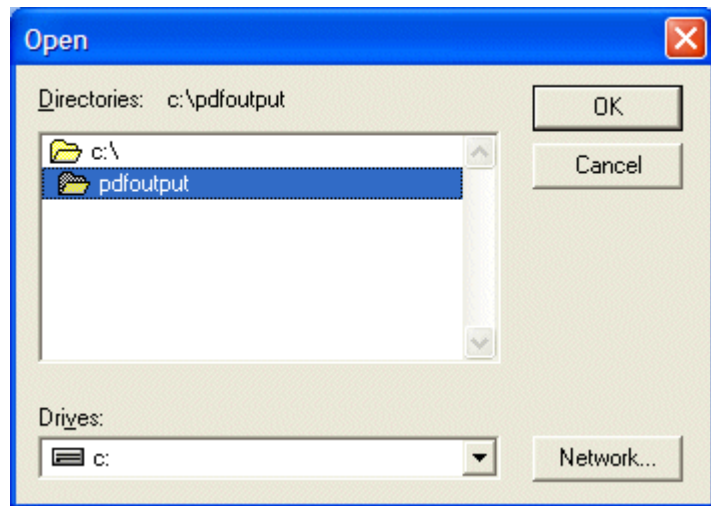
30. Click **Options**.



31. Check the **Move Converted Files to Output Folder** checkbox.

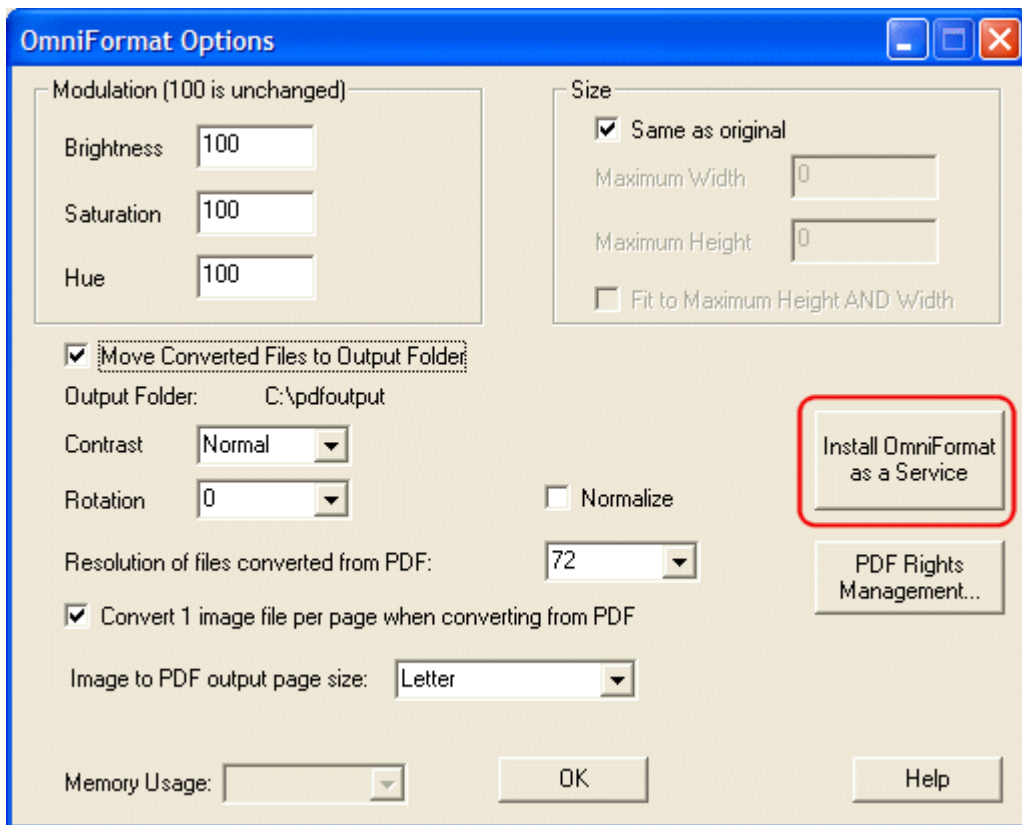


32. When the **Open** dialog box appears, select the **C:\pdfoutput** folder.

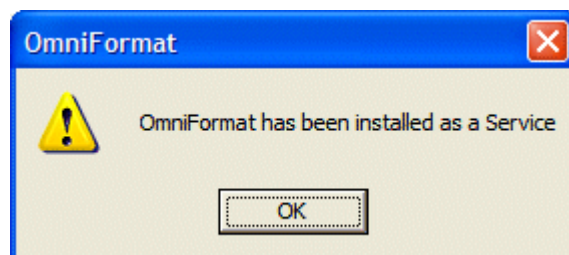


33. Click **OK**.

34. On the OmniFormat Options dialog box, click **Install OmniFormat as a Service**.

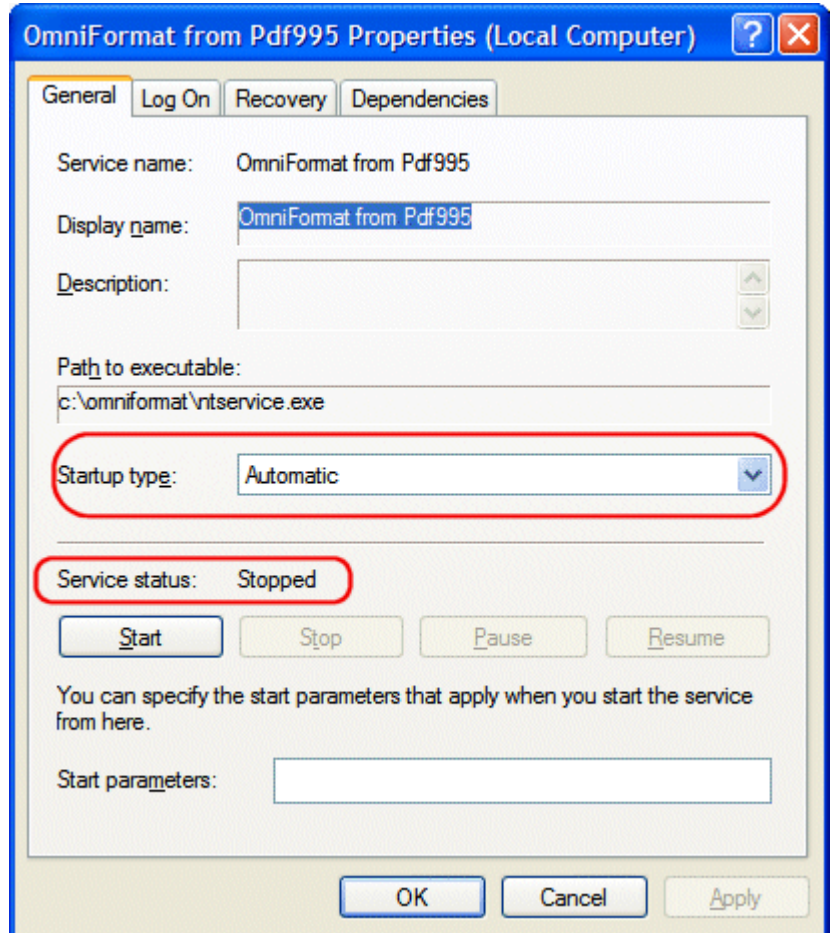


35. If the Install is successful, the following dialog box appears. Click **OK**.

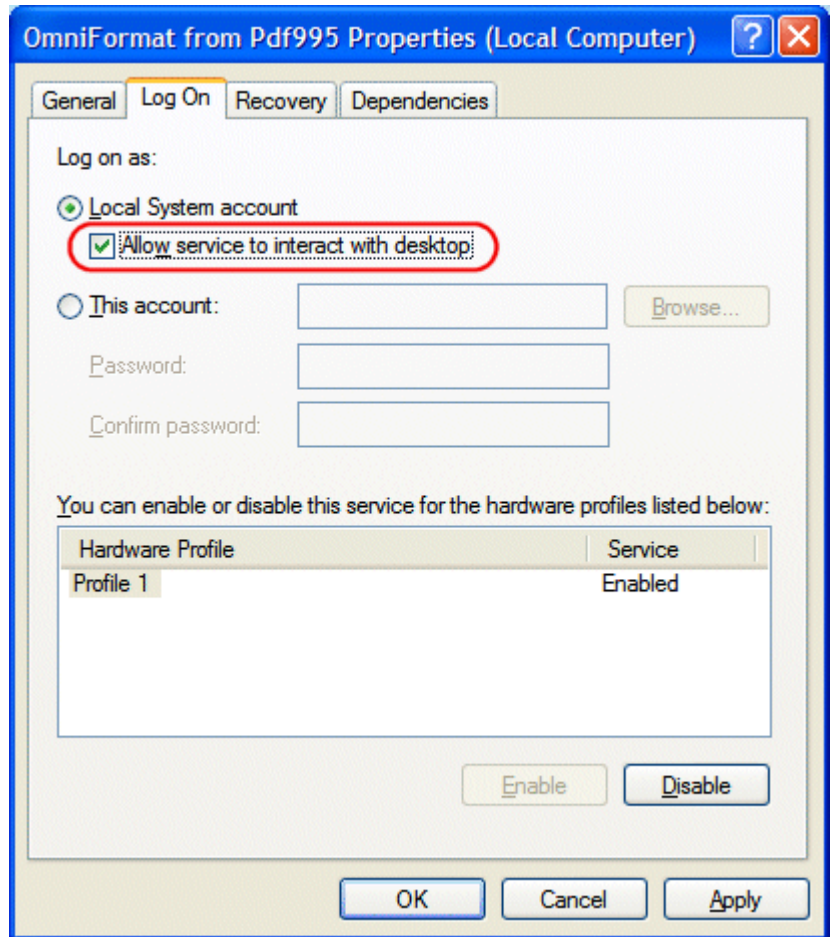


36. Click **OK** to close the **Options** box.
37. Exit OmniFormat.
38. Navigate to **Control Panel > Administrative Tools > Services**.
39. Right click the **OmniFormat from Pdf995** service and choose **Properties**.

40. On the **General** tab, make sure the **Startup type** is **Automatic** and that the **Service status** is **not disabled**. (Do not click **Start** now.)



41. On the **Log On** tab, check the **Allow Service to interact with desktop** checkbox.




42. Return to the **General** tab and click **Start** service.
 43. Click **OK**.
 44. Drag and drop a test word file on the **C:\omniformat\watch** folder. A PDF file appears in **C:\pdfoutput**

NOTE This might take a few minutes depending on the size of the document and the speed of the system.

Enabling or Disabling PDF Generation

Administrators decide if this feature is enabled and to which folders it applies. By enabling this feature for CMS400.NET,

administrators can change a folder's properties to allow PDF generation. The following steps explain how to enable or disable this feature.

1. In the CMS Workarea, click **Settings > Configuration > Setup**.
2. Click the **Edit Properties** button ().
3. Click the **Enable Office documents to be published as PDF** checkbox.





4. Click the **Save** button ().

Designating a Folder to Generate PDFs Automatically

By setting a folder's properties to allow PDF generation, all Office documents published in that folder have a PDF created for them. For an introduction to PDF generation, see ["Introduction" on page 68](#)

The steps below explain how to change the folder property for PDF generation.

NOTE Existing subfolders do not inherit PDF generation. Each subfolder needs to be set individually. However, when creating a new subfolder, it inherits the PDF generation setting from the parent folder. Administrators can change the setting while creating a new subfolder.

1. In the Workarea click the **Content folder button**.
2. Click the folder for which you want to enable PDF generation.
3. Click the **View Properties** button ().
4. Click the **Edit Properties** button ().

5. Click the **Publish Office Documents as PDF** checkbox.

<p>Should Office documents added to this folder be published as PDF?</p> <p><input checked="" type="checkbox"/> Publish Office documents as PDF</p>
--

6. Click the **Save** button ()

Using Ektron DMS400

Introduction

This section of the manual is dedicated to using **Ektron DMS400** Asset Management System. This section includes the following chapter:

- ["Using the Asset Management System" on page 80](#)

Using the Asset Management System

IMPORTANT!

This chapter references **CMS400.NET**. **CMS400.NET** is a separate product that requires its own license. Please contact Ektron Sales for details (sales@ektron.com).

The Asset Management System (AMS) lets you import Microsoft Office documents and any other kind of file into **Ektron CMS400.NET**. (Non-Office files are known as *managed files*.) Collectively, these files are known as *assets*.

After being saved in the **Ektron CMS400.NET**, asset files can be updated and tracked like HTML content blocks. If you're familiar with how content blocks are handled, much of what you already know applies to assets. For example, assets

- can be stored in folders with content blocks, or in separate folders that you create just for them
- are assigned content ID numbers
- capture summary, search data, comment, and schedule information
- inherit permissions and approvals from their folder properties
- progress through a workflow (check out, check in, publish)
- provide a history and let you restore an earlier version
- can be searched, including some Office document properties
- can have foreign language editions
- can have a task assigned to them
- appear on content reports
- update the Smart Desktop listing of files awaiting approval, checked out, tasks, to expire

When a file is imported to the CMS then saved, a copy of it is saved to the asset management server. From then on, whenever a

user edits and saves the file, a new copy is stored. In this way, you can review previous versions of any asset and restore a prior version if needed.

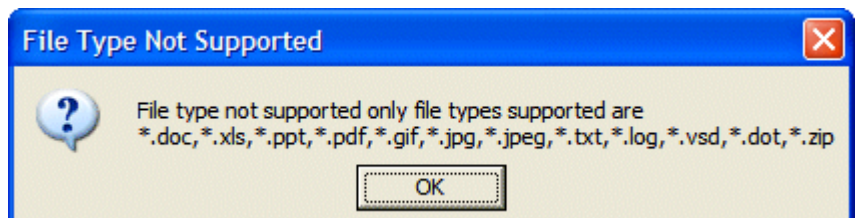
The rest of this chapter explains how to use the Asset Management System with **Ektron CMS400.NET** through the following topics.

- "Supported Types of Assets" on page 81
- "Security" on page 83
- "Working with Office Documents" on page 83
- "Working with Managed Files" on page 97
- "Importing Files via Drag and Drop" on page 104
- "Asset Workflow" on page 107
- "Viewing AMS Assets within the CMS" on page 107
- "Deleting an AMS Asset" on page 107
- "Approving AMS Assets" on page 108
- "Adding Assets to Collections and Menus" on page 108
- "Asset Reports" on page 108

Supported Types of Assets

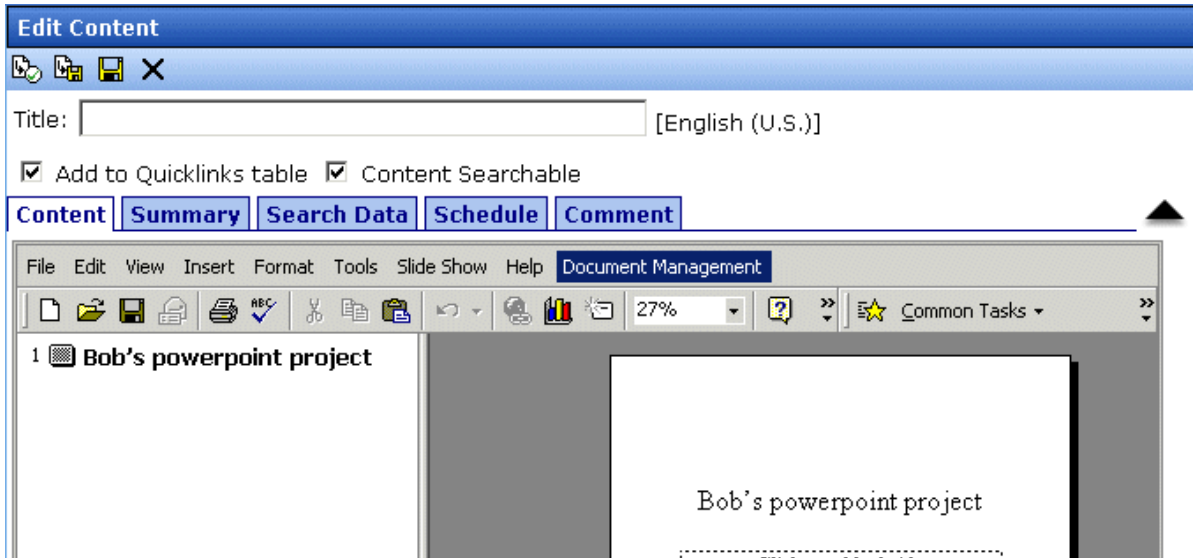
- Microsoft Office 2000 or later documents: Word, Excel, Powerpoint, Project, Publisher, Visio, etc.
- Managed files: any Windows-executable file such as .zip files, PDFs, .txt files, graphic files such as .gif and .jpeg, etc.

NOTE The file types available for upload are determined by your administrator. If you try to upload a file that is not available, you might see the following error message:



Office Documents

You can edit any Office document within the Content tab, just like an HTML content block. The host application's toolbar appears below **Ektron CMS400.NET**'s tabs on the Edit Content screen.

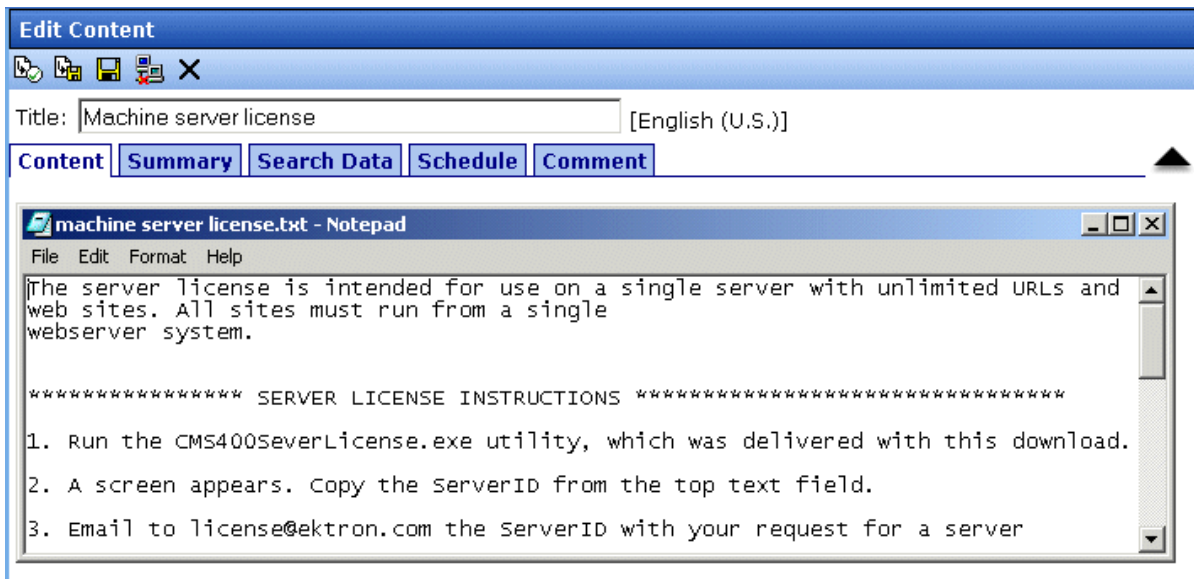


You can insert summary, search data, schedule, comment, and task information for the Office document. From the View Content screen, you can use standard toolbar buttons to perform actions such as view history, submit for publishing, and delete.

For more information, see ["Working with Office Documents"](#) on page 83.

Managed Files

Ektron CMS400.NET can track and control any non-Office type of file that runs on your computer (for example, .PDF, .gif and .zip). When editing these file types, the host application appears in a separate window. The **Ektron CMS400.NET** View Content screen appears in the background.



You can use the host application to edit the file, then switch to the View Content screen to insert information such as summary and search data. Use standard toolbar buttons to perform actions such as view history, submit for publishing, and delete.

For more information, see ["Working with Managed Files" on page 97](#).

Security

For the purposes of security, assets are treated like content blocks. Your system administrator applies security to each folder, determining which user groups can perform which tasks on the contents of the folder. For more information, see the "Setting Permissions" chapter of the **Ektron CMS400.NET Administrator Manual**.

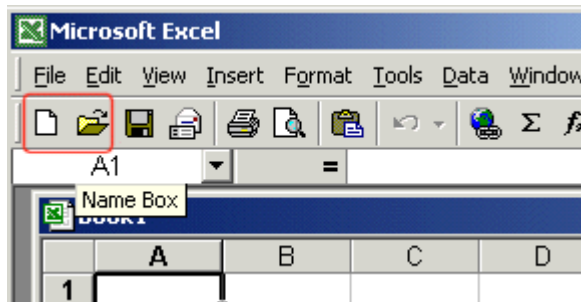
Working with Office Documents

This section explains how to work with MS Office documents through the following subtopics.

- "Notes on Working with Office Documents" on page 84
- "Creating a New Office Document" on page 84
- "Importing One Office Document into the AMS" on page 89
- "Importing Several Office Documents into the AMS" on page 92
- "Importing Files Individually vs. Several at Once" on page 94
- "The Work Offline Option" on page 94
- "Editing an Office Document" on page 95

Notes on Working with Office Documents

- If you have an Excel spreadsheet open outside the AMS then you open one within it, and navigate to another template page on your Web site, then return to the spreadsheet outside the AMS, a new, open worksheet appears. Close it.
- If you are working with an Excel spreadsheet, the File and Open toolbar buttons within Excel appear active (that is, not grayed out) but are not operable.



- If you access an Office document on a Web page, you must close that instance of the browser before proceeding to another Web page. If you do not close the browser and continue to add or edit assets, the original document continues to use up your computer's resources.

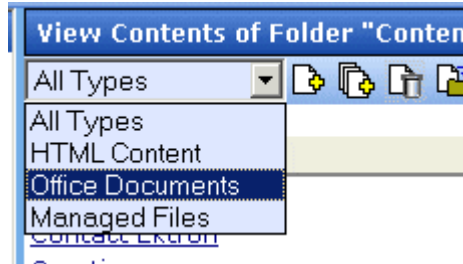
Creating a New Office Document

To create a new Office document, follow these steps.

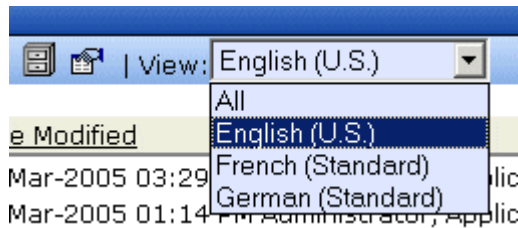
1. From the Workarea, select the **Content** folder.
2. Select the folder in which you want to place the document.

NOTE To learn about working with folders, see "Working with Folders and Content Blocks" in the **CMS400.NET** User Manual.

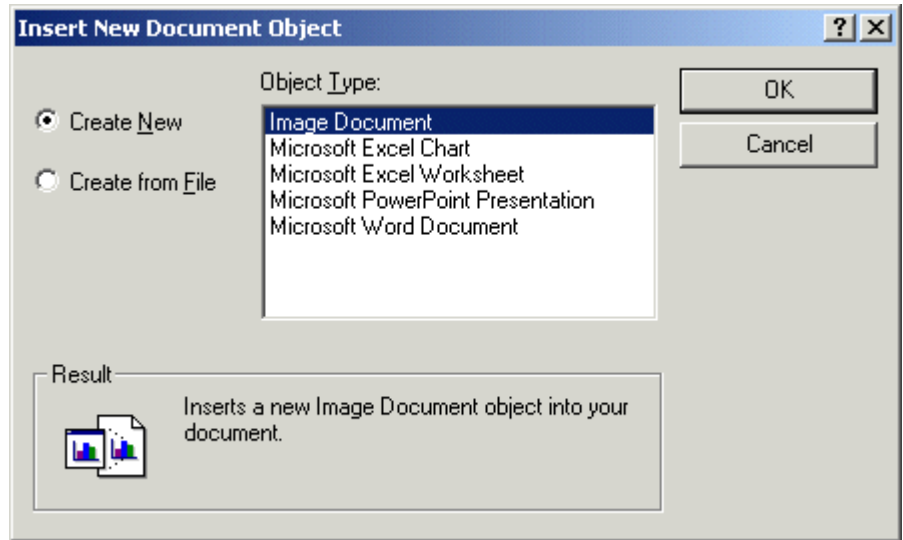
- Click the down arrow next to the add dropdown list to view a list of items you can add.



- Select **Office Documents**.
- The default language appears in the **View:** dropdown list. To save the document under a different language, click the dropdown list and select the language.



- Click the Add Content button (📄+).
- The Insert New Document Object screen appears.



NOTE The list of object types is determined by the applications installed on your computer. For example, an MS Project file type only displays if MS Project is installed.

8. If the document does not yet exist, check the **Create New** button. Then, select the type of document you want to create and press **OK**.
If the document already exists, see ["Importing One Office Document into the AMS" on page 89](#).
9. The application assigned to the document type appears within **Ektron CMS400.NET**.
10. Enter a **Title** and add content to the document.
11. Decide whether the content should be added to the **Quicklinks Table** and if the content should be searchable. See *Also*: "Add to Quicklinks Table" and "Content Searchable" in the **Ektron CMS400.NET User Manual**.
12. If desired, add a summary, search data, a schedule, and comments. See *Also*:
 - "Adding a Content Block Summary" in the **Ektron CMS400.NET User Manual**
 - "Adding or Editing Search Data" in the **Ektron CMS400.NET User Manual**
 - "Scheduling Content to Begin and End" in the **Ektron CMS400.NET User Manual**

13. If desired, you can edit the document's properties. See *Also*: "Editing a Document's Properties" on page 87
14. Check in or submit the content for publishing as you would a content block. See *Also*: "Save, Check in, and Publish" on page 88 and "Adding a Content Block" in the **Ektron CMS400.NET User Manual**.

Editing a Document's Properties

If the host application (such as Microsoft Word) has a Properties screen, you can access it by clicking **File > Properties** or the **Properties** option on the host application's **Document Management** menu.

NOTE **CMS400.NET** installs the Document Management menu on the Office application.

The screenshot shows a dialog box titled "Document1 Properties" with a blue header bar containing a help icon and a close button. Below the header are five tabs: "General", "Summary", "Statistics", "Contents", and "Custom". The "General" tab is selected. The dialog contains several text input fields and a checkbox:

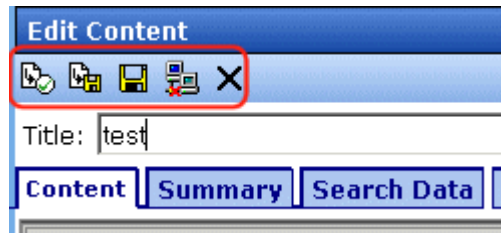
- Title:** Expense Report - January 2005
- Subject:** Travel expenses
- Author:** Jon Wu
- Manager:** Jim Beaner
- Company:** Ektron
- Category:** Expenses
- Keywords:** travel
- Comments:** Does not include trip to corporate headquarters in Cincinnati on 1/15/05.
- Hyperlink base:** (empty field)
- Template:** Normal.dot
- Save preview picture

At the bottom right of the dialog are two buttons: "OK" and "Cancel".

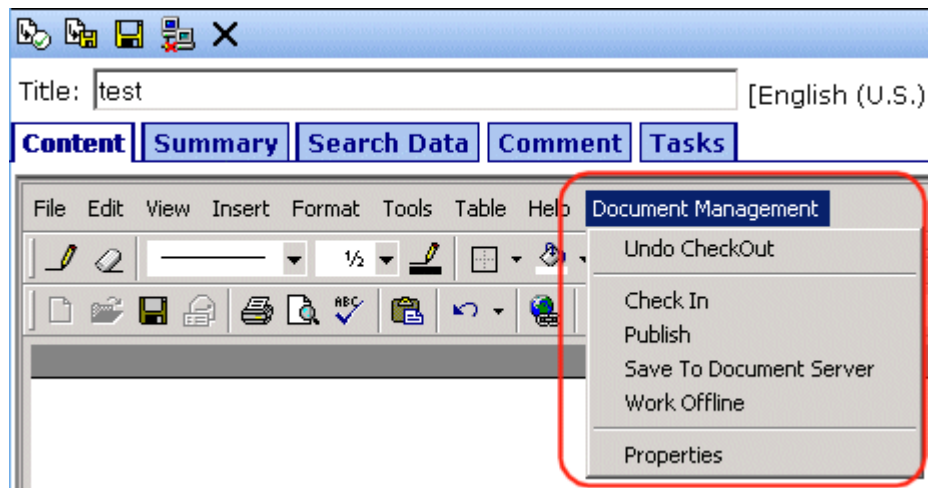
Save, Check in, and Publish







When you finish editing a document, you have four options for what to do next. They are explained in the following table.

You can carry out any option by clicking an **Ektron CMS400.NET** toolbar button.



or a **Document Management** menu option (illustrated below).



Action	Document Management Menu Option	Toolbar button
Check document in so you and others can continue to edit it.	Check in	
Submit document into approval chain. Upon approval, publish content to Web site.	Publish or submit for publishing	 or 
Save recent changes. Use to save latest changes before continuing.	Save to DocServer	
Save file to local computer. <i>See Also: "The Work Offline Option" on page 94</i>	Work Offline	
Discard changes made in current editing session.	Undo Check out	

Importing One Office Document into the AMS

Your computer or network may have Office documents that you want to manage using the AMS. Follow these steps to import any document into Ektron's AMS.

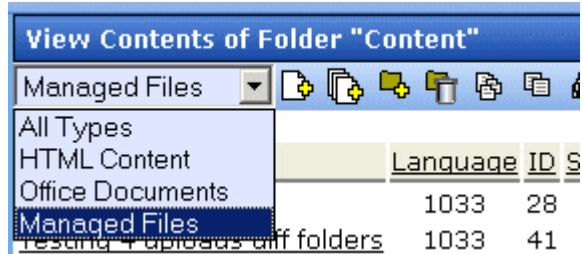
See Also: "Importing Files Individually vs. Several at Once" on page 94 and "Drag and Drop File Uploading Vs. the Add Content Buttons" on page 106


1. From the Workarea, select the **Content** folder.
2. Select the folder in which you want to place the document.

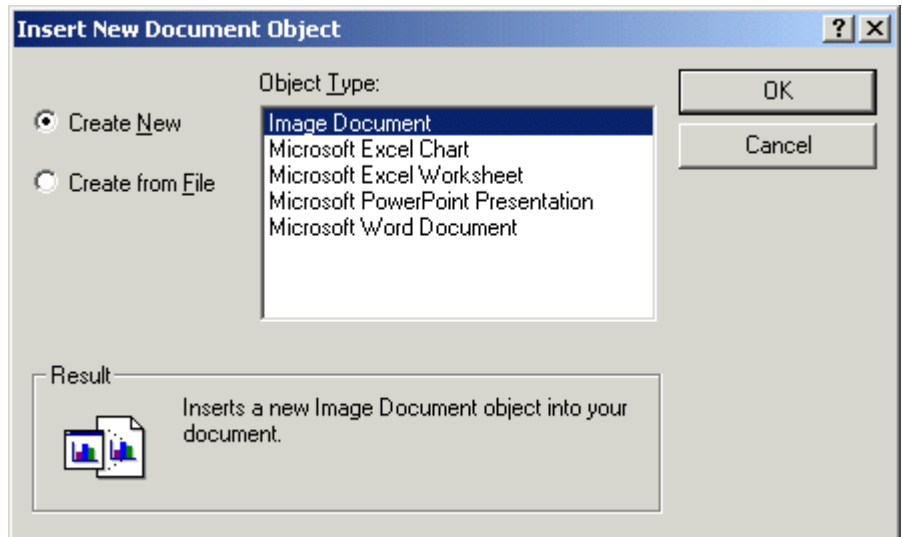
NOTE

To learn about working with folders, see "Working with Folders and Content Blocks" in the **CMS400.NET User Manual**.

3. Click the down arrow next to the add dropdown list to view the asset types you can add.

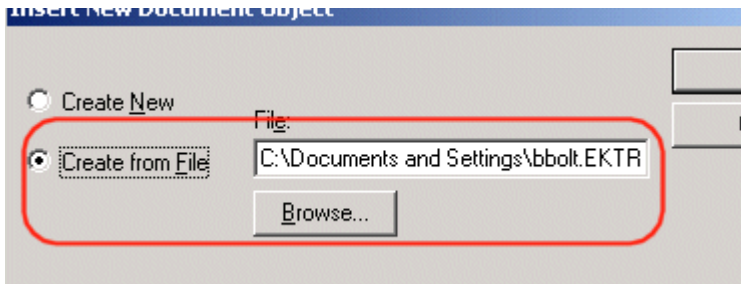


4. Select **Office Documents**.
5. Click the Add Content button ().
6. The Insert New Document Object screen appears.



NOTE The list of object types is determined by the applications installed on your computer. For example, an MS Project file type only displays if MS Project is installed.

7. Check the **Create From File** button.



8. Click the **Browse** button and browse to the file you want to import into AMS. Click **OK**.
9. The document appears within the host application.
10. Enter a **Title** and add content to the document.

NOTE

If you want to retain the original document name, insert the full filename into the **Title** field. For example, you could enter *mydocument.doc*.

11. Decide whether the content should be added to the **Quicklinks Table** and if the content should be searchable. See *Also: "Add to Quicklinks Table" and "Content Searchable" in the Ektron CMS400.NET User Manual*.
12. If desired, add a summary, search data, a schedule, and comments. See *Also:*
 - "Adding a Content Block Summary" in the **Ektron CMS400.NET User Manual**
 - "Adding or Editing Search Data" in the **Ektron CMS400.NET User Manual**
 - "Scheduling Content to Begin and End" in the **Ektron CMS400.NET User Manual**
13. If desired, you can edit the document's properties. See *Also: "Editing a Document's Properties" on page 87*
14. Check in or submit the content for publishing as you would a content block. See *Also: "Save, Check in, and Publish" on page 88 and "Adding a Content Block" in the Ektron CMS400.NET User Manual*.

Importing Several Office Documents into the AMS


Your computer or network may have several Office documents that you want the AMS to manage. Follow these steps to import several Office documents at once into Ektron's AMS.

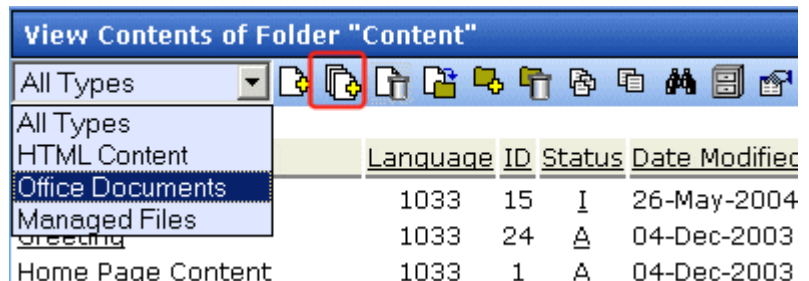
See Also: "Importing Files Individually vs. Several at Once" on page 94 and "Drag and Drop File Uploading Vs. the Add Content Buttons" on page 106

1. Place all files to be imported in the same folder on your computer or network.
2. From the Workarea, select the **Content** folder.
3. Select the CMS folder in which you want to place the documents being imported.

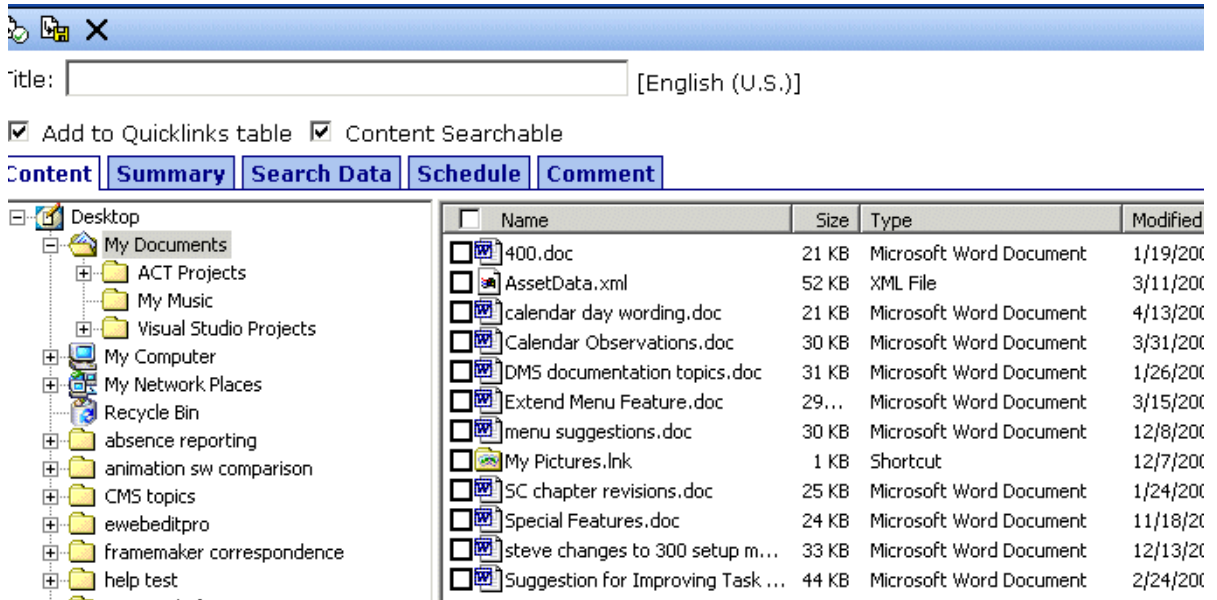
NOTE



To learn about working with folders, see "Working with Folders and Content Blocks" in the **CMS400.NET User Manual**.

4. On the View Contents of Folder screen, click the down arrow next to the add dropdown list to view a list of items you can add.
5. Select **Office Documents**.
6. Click the Add Several Files button (.



- The View Contents of Folder screen splits into two sections, resembling Windows Explorer. The left section displays the folder structure of your PC and its network drives. The right section displays the files in the selected folder.



- In the left frame, navigate to the folder that contains the files you want import.
- In the right frame, click the checkbox next to each file you want to import. You can only import files in the selected folder at this time.
- In the **Title** field, you can enter an optional title to apply to all imported documents. See Also: ["Importing Files Individually vs. Several at Once" on page 94](#)
- Decide whether the content should be added to the **Quicklinks Table** and if the content should be searchable. See Also: ["Add to Quicklinks Table"](#) and ["Content Searchable"](#) in the **Ektron CMS400.NET User Manual**.
- Click the Check in () or Submit for Publishing button (). See Also: ["Save, Check in, and Publish" on page 88](#) and ["Adding a Content Block"](#) in the **Ektron CMS400.NET User Manual**.
- The selected files are imported into AMS.

Importing Files Individually vs. Several at Once

If you import files one at a time, you can assign each file a unique title. Also, any summary, search data, schedule, comment and task information applies to that file only.

If you import several at once, you are not required to assign a title. If you *do not* assign a title, the file's title is the same as its name, including the extension. For example, Proposal for Town Manager .PDF.

If you *do* assign a title to several files, appended to the title, in parentheses, is the original file name including the extension. So for example, if you import three personnel forms at once, and assign them the title **Personnel**, the titles might look like this:

Personnel (Vacation Request.doc)


Personnel (Direct Deposit Form.doc)

Personnel (Absence Report Form.doc)

Also, any summary, search data, schedule, comment, or task information you enter applies to *all* files. So, it would be efficient to enter this kind of information if it applies to all or even most of the files. For example, if you are importing 10 files and eight have the same search data, insert the search data before checking them in. Then, change the search data for the remaining two.

After you check in or publish these files, you can edit the summary, search data, schedule, comment, or task information by selecting the files individually.

The Work Offline Option

After creating or editing an asset, you can save it to your local computer instead of the document server. To do so, click the Work Offline button ().

If you do, the asset remains in a checked-out state and only you or a system administrator can check it in to work on it again. When you check it in, the file on your local computer is loaded into the Workarea.

As a result, you can edit the asset on your local computer anywhere, without a network connection. When you are ready to return it to the document server, check it in, save it, or submit it for publishing.

You must check the asset in on the same computer on which you checked it out.

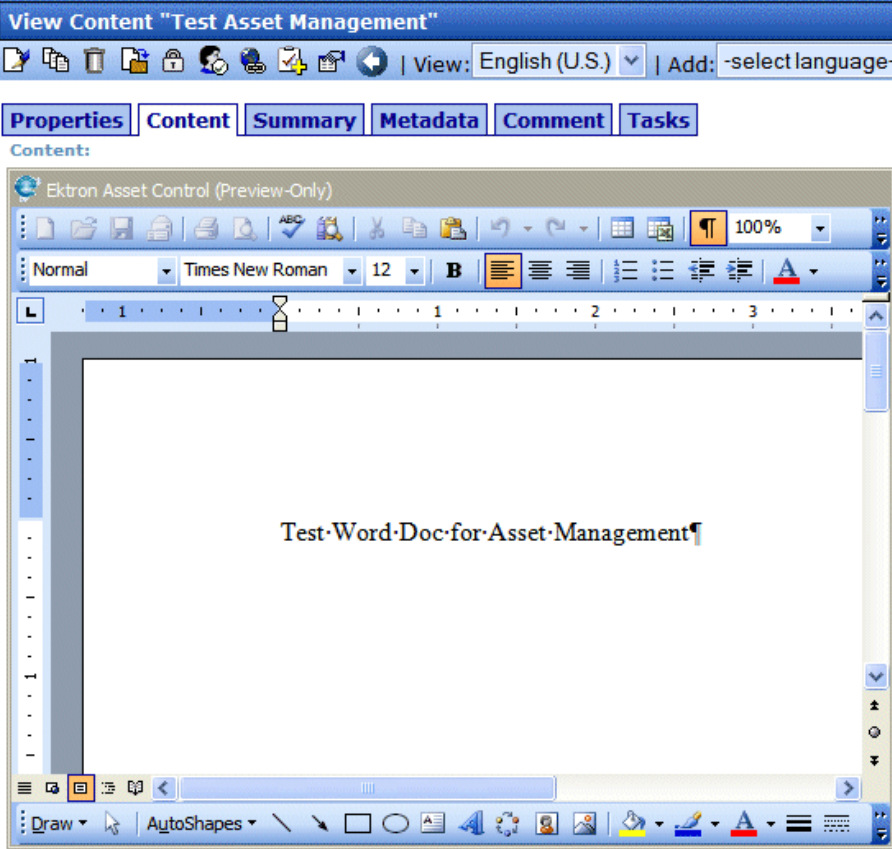
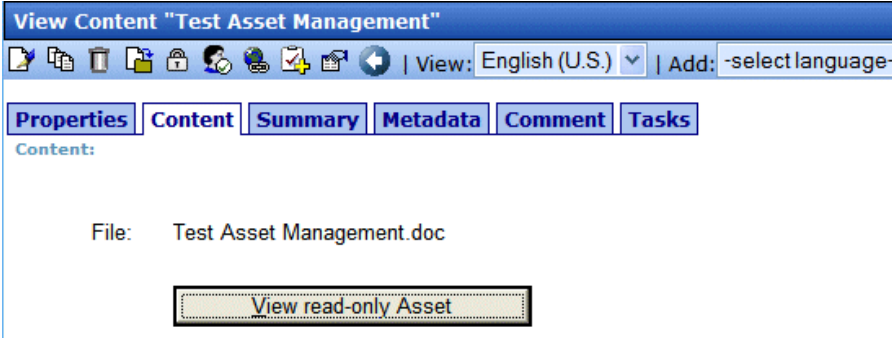
NOTE A system administrator can check in any checked-out asset. If he does, the most recently published asset gets checked in.


Editing an Office Document

After an Office document is stored in the AMS, follow these steps to edit it.

1. From the Workarea, select the **Content** folder.
2. Select the document's folder.
3. From the View Contents of Folder screen, click the document.
4. The View Content screen for the document appears. If the document is checked in, it appears on the **Content** tab in the Workarea but you cannot edit.

NOTE Your administrator controls the initial view you see when you edit a document. The following table shows the two different ways you can preview a document.

Mode	Image
Preview Turned on	 <p>The screenshot shows a web-based interface titled "View Content 'Test Asset Management'". It features a toolbar with various icons and a language dropdown set to "English (U.S.)". Below the toolbar are tabs for "Properties", "Content", "Summary", "Metadata", "Comment", and "Tasks". The "Content" tab is active, showing a preview of a Microsoft Word document. The document's title bar reads "Ektron Asset Control (Preview-Only)". The document content area displays the text "Test Word Doc for Asset Management" centered on the page. A ruler is visible at the top of the document area, and a drawing toolbar is at the bottom.</p>
Preview Turned off	 <p>The screenshot shows the same web-based interface as above. The "Content" tab is active, but the main content area is empty except for the text "File: Test Asset Management.doc". Below this text is a button with a dashed border labeled "View read-only Asset".</p>

5. Click the Edit button (.
6. The document opens in the host application.
7. Edit the document as well as its summary, search data, schedule, tasks, or comments.
See *Also*:
 - "Adding a Content Block Summary" in the **Ektron CMS400.NET User Manual**
 - "Adding or Editing Search Data" in the **Ektron CMS400.NET User Manual**
 - "Managing Tasks" in the **Ektron CMS400.NET User Manual**
 - "Scheduling Content to Begin and End" in the **Ektron CMS400.NET User Manual**
8. If desired, edit the document's properties. See *Also*: "[Editing a Document's Properties](#)" on page 87
9. Check in or submit the content for publishing, as you would any content block. See *Also*: "[Save, Check in, and Publish](#)" on page 88

Working with Managed Files

This section explains how to work with managed files through the following subtopics.

- "[Creating a New Managed File](#)" on page 97
- "[Importing One Managed File](#)" on page 98
- "[Importing Several Managed Files](#)" on page 100
- "[Editing a Managed File](#)" on page 102

Creating a New Managed File

Unlike an Office document, you cannot create a managed file within **Ektron CMS400.NET**. Instead, you must create it on your computer using the host application. After creating the file, import it into the AMS.

Importing One Managed File

To import a managed file into AMS, follow these steps.

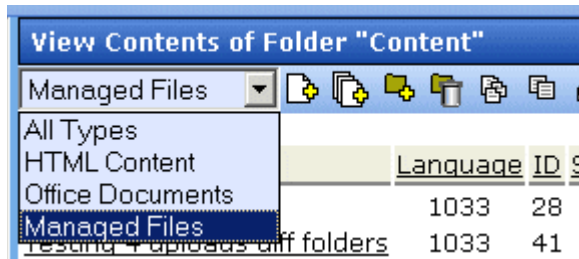
See *Also*: "Importing Files Individually vs. Several at Once" on page 94 and "Drag and Drop File Uploading Vs. the Add Content Buttons" on page 106

1. From the Workarea, select the **Content** folder.
2. Select the folder in which you want to place the file.

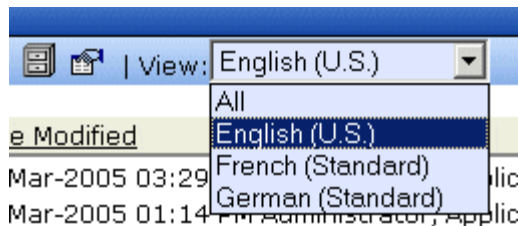
NOTE


To learn about working with folders, see "Working with Folders and Content Blocks" in the **CMS400.NET User Manual**.

3. Click the down arrow next to the add dropdown list to view the asset types you can add.





4. Select **Managed Files**.
5. The default language appears in the **View:** dropdown list. To save the managed file under a different language, click the dropdown list and select the language.



6. Click the Add Content button ().
7. The Edit Content screen opens, as shown below.

Select file to be uploaded

File

8. Click the **Browse** button.
9. Browse through your computer and network to the file you want to import. When you do, the file's path appears within the **File** field.
10. Insert a **Title**.
11. Decide whether the content should be added to the **Quicklinks Table** and if the content should be searchable. See *Also:* "Add to Quicklinks Table" and "Content Searchable" in the **Ektron CMS400.NET User Manual**.
12. If desired, add a summary, search data, a schedule, and comments. See *Also:*
 - "Adding a Content Block Summary" in the **Ektron CMS400.NET User Manual**
 - "Adding or Editing Search Data" in the **Ektron CMS400.NET User Manual**
 - "Scheduling Content to Begin and End" in the **Ektron CMS400.NET User Manual**
13. Click the appropriate button to either check in () or publish () the file. See *Also:* "Save, Check in, and Publish" on page 88 and "Adding a Content Block" in the **Ektron CMS400.NET User Manual**.
14. A window appears momentarily, indicating that the file is being uploaded to the AMS server.

Importing Several Managed Files

To import several managed files into AMS, follow these steps.

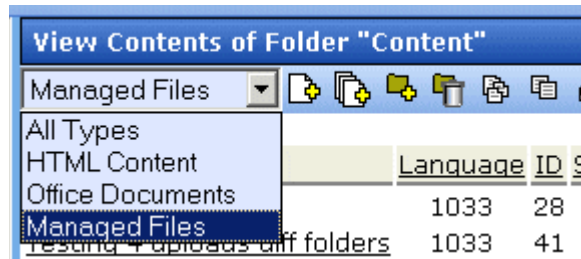
See *Also*: "Importing Files Individually vs. Several at Once" on page 94 and "Drag and Drop File Uploading Vs. the Add Content Buttons" on page 106

1. From the Workarea, select the **Content** folder.
2. Select the folder in which you want to place the files.

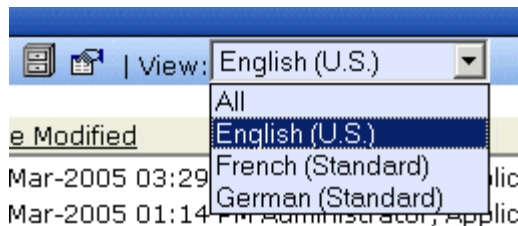
NOTE

To learn about working with folders, see "Working with Folders and Content Blocks" in the **CMS400.NET User Manual**.

3. Click the down arrow next to the add dropdown list to view the asset types you can add.

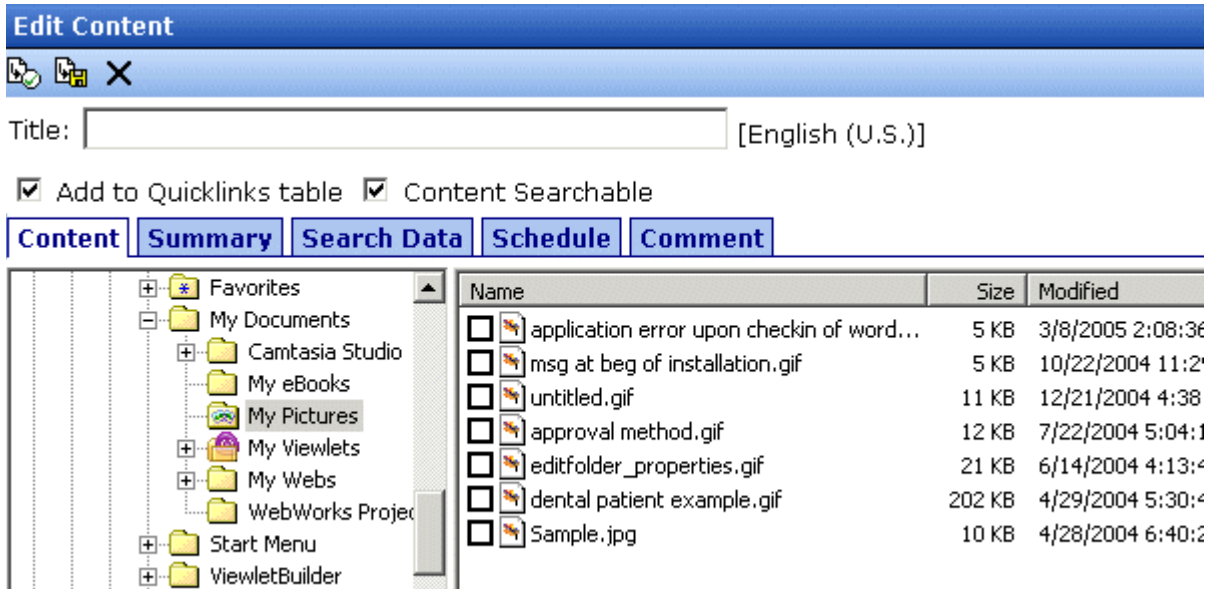


4. Select **Managed Files**.
5. The default language appears in the **View:** dropdown list. To save the managed files under a different language, open the dropdown list and select the language.



6. Click the Add Several Files button (📁➕).



- The View Contents of Folder screen splits in two, resembling Windows Explorer. The left section displays the folder structure of your PC and its network drives. The right section displays the contents of the current folder.



- In the left frame, navigate to the folder that contains the files you want import.
- In the right frame, click the checkbox next to each file you want to import. You can only import files in the selected folder.

NOTE

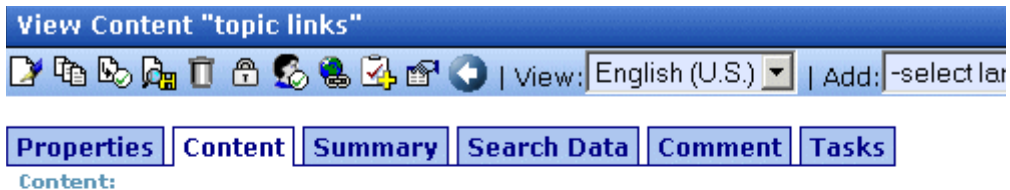
If you select both Office documents and managed files, the Office documents are imported as Office documents, and others are imported as managed files.

- In the **Title** field, enter a title for all imported files. See *Also:* "Importing Files Individually vs. Several at Once" on page 94
- Decide whether the content should be added to the **Quicklinks Table** and if the content should be searchable. See *Also:* "Add to Quicklinks Table" and "Content Searchable" in the **Ektron CMS400.NET User Manual**.
- Click the Check in () or Submit for Publishing button (). See *Also:* "Save, Check in, and Publish" on page 88 and "Adding a Content Block" in the **Ektron CMS400.NET User Manual**.
- The selected files are imported into AMS.

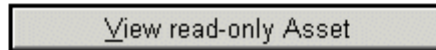
Editing a Managed File

After a managed file is stored in the AMS, follow these steps to edit it.

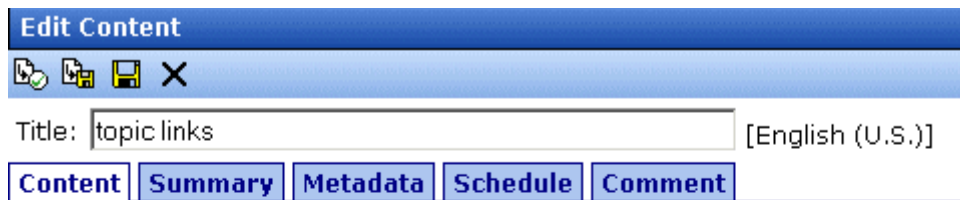
1. From the Workarea, select the **Content** folder.
2. Select the managed file's folder.
3. From the View Contents of Folder screen, click the managed file.
4. The **Content** tab displays the file name and a button to let you view the file within its host application.



File: links to topics in PDFs.txt





5. If you want to view the file before editing it, click the **View read-only Asset** button. If you do, the file opens for display purposes only.
6. To edit the file, click the Edit button (📄✎).
7. The following screen appears.



Select file to be uploaded

File:

8. To open the managed file in the host application, click **Edit in App**. Then make your changes, save it in the host application and click either the Check in () or Submit for Publishing button ().
 - If you want to save this version of the file to your computer, click **Save to Local**. If you do, a window appears. Navigate to the desired folder then click the **Save** button.
 - If you want to select another file on your computer or network and save it under this name in **Ektron CMS400.NET**, click **Browse**. If you do, a window appears. Navigate to the desired folder then click the **Open** button. The new file is saved under the old **Ektron CMS400.NET** name.
9. Edit the managed file as well as its summary, search data, schedule, tasks, or comments.

See Also:

- "Adding a Content Block Summary" in the **Ektron CMS400.NET User Manual**
- "Adding or Editing Search Data" in the **Ektron CMS400.NET User Manual**
- "Managing Tasks" in the **Ektron CMS400.NET User Manual**

- "Scheduling Content to Begin and End" in the **Ektron CMS400.NET User Manual**

10. Save the file within the host application.

11. Check in or submit the file for publishing, as you would any content block. See Also: "[Save, Check in, and Publish](#)" on [page 88](#)

Importing Files via Drag and Drop

You can import files to the AMS using drag and drop. A single file or multiple files can be added with this method. It doesn't matter whether the files are Office or Managed files.


NOTE

If you upload files using drag and drop whose types are not supported, the AMS skips over them and continues uploading the next file. There is no warning to tell you which files you are allowed to upload. See Also: "[Supported Types of Assets](#)" on [page 81](#)

When you drag and drop a file into the AMS, the file's name becomes its title. The file is assigned a content ID and submitted to the approval process. If any of the following occurs, the file's status is set to checked in:

- you are required to fill out a search property field when adding a file
- the folder in which you are adding the file is set to create PDF documents when a file is published. See Also: "[PDF Generation](#)" on [page 68](#)

If you add more than one file with the same name or the same file twice, the AMS assigns a number to the end of the title. For example, when adding a second test.doc file, the new file is named test.doc(1).

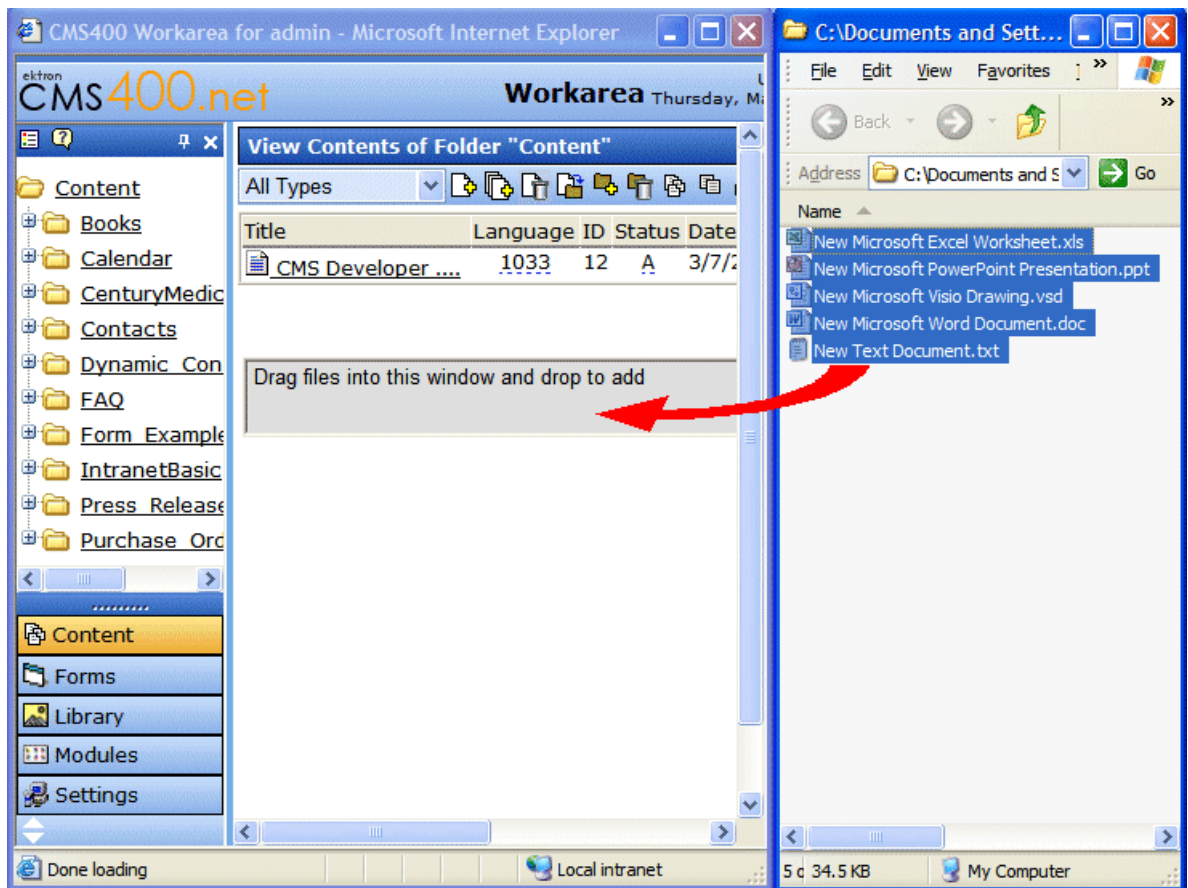
No information is added to Summary, Searchable Properties, or Comments when a file is added via drag and drop. You can edit these properties by clicking **Edit** () , then clicking the appropriate tab.

Steps to Adding Files via Drag and Drop

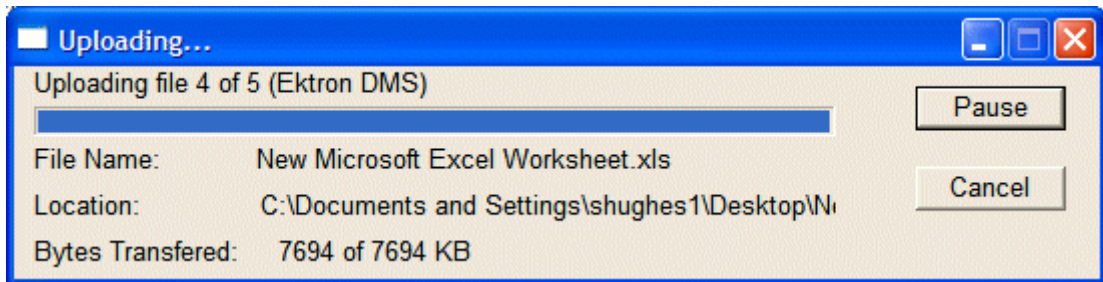
1. In the Workarea, click the **Content** folder button.
2. Select the folder in which you want to place the files.
3. Open Windows Explorer.
4. Find the files you want to upload.

NOTE You cannot drag and drop whole folders or subfolders. You can however grab all files within a folder and drag and drop them.

5. From Windows Explorer, drag and drop the files onto the Workarea drag and drop window.



After you drag and drop the files, the following screen appears.





When the AMS is finished uploading the files, they appear in the Workarea. If you do not see a file you wanted to upload, check the following:

- your administrator allows the file is to be uploaded to the AMS
- you have the Asset Types dropdown box set to the type of file you are looking for. Files upload to the right category no matter which one is selected when you upload via drag and drop.

Drag and Drop File Uploading Vs. the Add Content Buttons

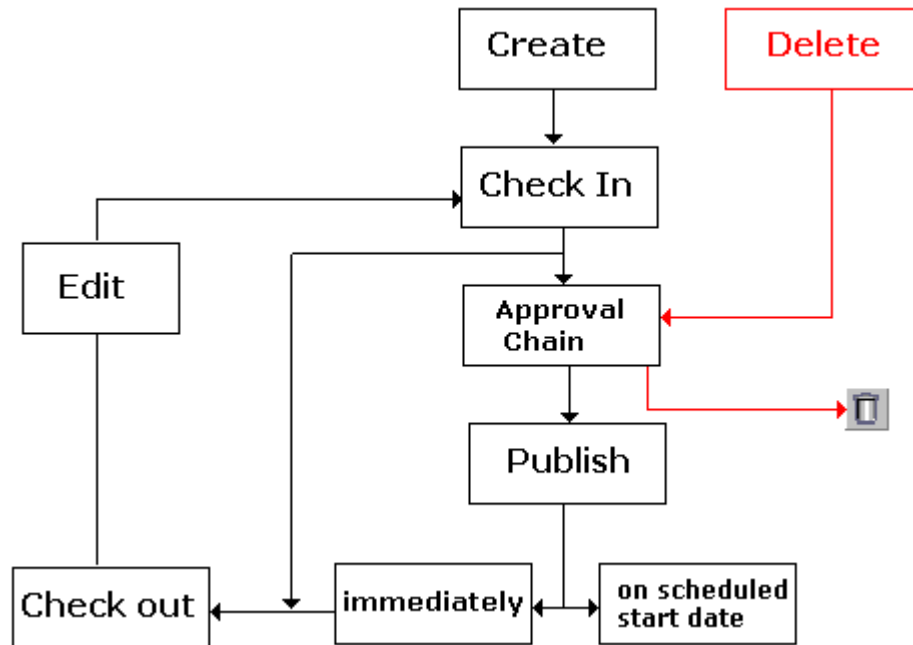
- Drag and drop file uploading allows you to add files quickly without having to fill in details. The details can be entered later.
- A file added via drag and drop is submitted into the approval process for that folder.
- Drag and drop requires fewer mouse clicks. You choose a folder, use Windows Explorer to find the files, and drag and drop them. The files are then added to the AMS.

Alternatively, by using the Add Content buttons () (), you can add detailed information such as summary, comment, and searchable properties at the time of upload. When adding files using the Add Content buttons, you have a choice whether they are published (submitted to the approval chain), checked in or saved. See *Also: "Save, Check in, and Publish" on page 88*

This process requires more mouse clicks than drag and drop. You choose a folder, an asset type, browse to the folder where the files are located, add the details, and publish the files. The files are then added to the AMS.

Asset Workflow

An AMS asset can proceed through the same workflow as a regular content block. A diagram of this workflow is below.




Viewing AMS Assets within the CMS

To view an asset, follow these steps.

1. From the Workarea, select the **Content** folder.
2. Select the asset's folder.
3. From the View Content screen, click the asset.
4. The View Content screen for the asset appears.

Deleting an AMS Asset

You can only delete an asset if its status is Checked In or Approved. To delete an asset from the AMS, follow these steps.

1. From the Workarea, select the **Content** folder.
2. Select the asset's folder.
3. From the View Content screen, click the asset.
4. The View Content screen for the asset appears.
5. Click the Delete button ()

Like a content block, an asset must go through the approval chain before it is removed.

Approving AMS Assets

Assets are placed into the approval chain just like content blocks. For more information, see "Approving/Declining Content Blocks" in the **Ektron CMS400.NET User Manual**.

Adding Assets to Collections and Menus

You can add an asset to a collection or a menu just as you would an HTML content block. For more information, see "Working with Collections" and "Working with Menus" in the **Ektron CMS400.NET User Manual**.

Asset Reports

Ektron CMS400.NET provides several reports that track assets by status.

Report	Displays assets in this status	For more information, see
Approvals	Requiring your approval	"Approvals Reports" in the CMS400.NET User Manual
Checked In Content	Checked in	"Checked In Report" in the CMS400.NET User Manual
Checked Out Content	Checked out	"Checked Out Report" in the CMS400.NET User Manual

Report	Displays assets in this status	For more information, see
New Content	New (that is, created and saved but never published)	"New Content Report" in the CMS400.NET User Manual
Submitted Content	Submitted for publication	"Submitted Report" in the CMS400.NET User Manual
Pending Content	Approved and pending a start date	"Content Pending Start Date Report" in the CMS400.NET User Manual
Refresh Reminder Report	End date has been reached	"Refresh Reminder Report" in the CMS400.NET User Manual
Expired Content	Expired date has been reached	"Expired Content Report" in the CMS400.NET User Manual
Content to Expire	Will expire within specified number of days	"Content to Expire Report" in the CMS400.NET User Manual

For more information, see "Content Workflow Reports" in the **Ektron CMS400.NET** User Manual.

Using the CMS/AMS Search

See "Search Content Folder" in the **Ektron CMS400.NET** User Manual.

Additional Information

Supporting Documents

You can find more detailed information about Administering **Ektron DMS400** in the following document:

- **Ektron CMS400.NET** Administration Manual > “Asset Management Server Registration”

Support

If you are experiencing trouble with any aspect of **Ektron DMS400**, please contact the Ektron Support Team via our Web Site, or by e-mail:

support@ektron.com

<http://www.ektron.com/support/index.aspx>

Sales

For questions and answers about purchasing **Ektron DMS400** from Ektron, contact the sales department by sending an e-mail to:

sales@ektron.com

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