Ektron

what do you want your website to do?

Ektron CMS400.NET Administrator Manual

Version 6.1 for .Net 2.0, Revision 5

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Securing Ektron CMS400.NET

Security Checklist

The following is a checklist of things an Administrator must do to secure **Ektron CMS400.NET**.

☐ Change Admin user password

☐ Change builtin user password

IMPORTANT! If you changed the builtin user password during the site setup, you do not need to change it again. See "Editing Builtin" on page ii for additional information.

☐ Remove Sample users

IMPORTANT! Some users in this list might not appear in your User list. This depends on which version of the software you have installed.

- ☐ **Admin2**
- ☐ **jedit**
- ☐ **tbrown**
- ☐ **jsmith**
- ☐ **vs**
- ☐ **EkExplorerUser**
- ☐ **Explorer**

Additional Information

You *do not* need to make these changes if you are using the CMS400.NET for demonstration or evaluation purposes. These changes should be completed once the decision is made to purchase the product and go live with your site.

IMPORTANT! Ektron recommends creating your own Administrator user and deleting the Admin user.

IMPORTANT! Ektron recommends deleting any users from the CMS400.NET that are not needed on the system.

IMPORTANT! By default, when the Ektron Explorer client is installed, the Explorer or EkExplorerUser username and password are also installed. Client-side users should use their Ektron CMS400.NET username and password when using the Ektron Explorer. To learn how to change this information, see the Administrator Manual section “Ektron Explorer” > “Configuring Ektron Explorer.”

Editing Builtin

IMPORTANT! The “builtin” user does not appear in the Users list. This user appears on the application setup screen.

To change the builtin account information, follow these steps.

1. In the Workarea, click **Settings** > **Configuration** > **Setup**.
2. Click the Edit button (📝).
3. Locate the **Built In User** field.
4. Edit the built in user information by changing the username and password.
5. Click the Update button (💾).

NOTE If you cannot sign in to **Ektron CMS400.NET** because the builtin user password was changed and you don’t know the new password, use the BuiltinAccountReset.exe utility. This resets your **Ektron CMS400.NET** user \ password to Builtin \ Builtin. This utility is located in `C:\Program Files\Ektron\CMS400v6x\Utilities`.

What's New in the 6.1 Release

- You can now personalize a screen so that it only contains that content you want. You can also design the screen's layout. See "Personalization Feature" on page 487
- Several new features are available while designing a Smart Form
    - You can preview the form in five formats, including data as XML and XSLT. See "Previewing the Screen" on page 200
    - When entering a group box, you can specify that the surrounding tag is something other than `<root>`. See "Using a Tag Other Than <Root>" on page 216
    - You can now create a predefined list of responses. See "Creating Your Own Predefined List" on page 245
    - A new dialogs lets you generate XML microformats made up of standard XHTML tags and attributes that contain a specific structure and values. See "Advanced Button" on page 268
- Enhanced Unicode support. See "Appendix A: Unicode Support" on page 882
- You can associate folders with a Smart Menu. As a result, the menu can display relevant content items whenever any item in the folder is displayed. See "Assigning Folders and /or Templates to a Menu" on page 493.
- You can validate content against XHTML and accessibility standards. See "Validating XHTML Content" on page 87.
- A new wizard makes it easier to install the Web Alerts feature. See "Setting Up the Message Queue and Asynchronous Processor" on page 771.

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Introduction to Ektron CMS400.NET

Thank you for purchasing Ektron CMS400.NET, the best and most affordable solution for Web content management. We welcome you to use Ektron CMS400.NET to maintain, update, and modify the contents of your Web site. All these efforts are easily achieved while preserving the look and feel that you originally designed for your site. With Ektron CMS400.NET, the tasks of maintaining your site and updating content are passed on to subject experts. Based on the page layouts and processes that you create, the highest level of quality is preserved and maintained throughout the life cycle of the site.

See Also:

- ”About Ektron CMS400.NET” on page 1
- ”Who Should Read This Documentation?” on page 2
- ”Online Learning Center” on page 2
- ”Sample Site Used in this Document” on page 2
- ”Types of Users” on page 2
- ”Management of Content” on page 3
- ”Conventions of the Documentation” on page 4

About Ektron CMS400.NET

Ektron CMS400.NET is a powerful, easy-to-use, and affordable XML content management solution that empowers anyone to take an active role in managing Web content and optimizing online strategies. It streamlines site management, automates workflow processes, and supports collaboration. **Ektron CMS400.NET** reduces costs, saves time and makes Web sites, extranets, and intranets more effective – while generating rapid ROI.

Business users, like marketing or PR pros, can author, manage and publish Web content, build and deploy Web forms, and collect and leverage visitor info. Our browser-based editor, eWebEditPro+XML, supports the industry's best in-context editing environment – ensuring user adoption and project success.

Ektron CMS400.NET also helps to move paper-based forms processes to the Web. Our editor lets users create Web forms such as expense reports, health records, and insurance forms, deploy them to internal users, collect data, apply validation and math functions, and run forms through workflow – all within a browser.

Who Should Read This Documentation?

This document introduces all the concepts, features, and instructions for using Ektron CMS400.NET as a Web administrator.

The Web administrator is the person who is responsible for adjusting the setup of the Web site, and alters the site as institutional changes require. New areas needing to be added to the Web site, the changing of personnel and processes over time may cause these adjustments.

Online Learning Center

Much of the information in this documentation is also presented in a tutorial, animated format on Ektron's Web site. To access Ektron's CMS400.NET Web Training, go to http://www.ektron.com/cms400-web-cms.aspx?id=922.

Sample Site Used in this Document

This documentation uses the sample ASPX Web site installed with Ektron CMS400.NET to explain and demonstrate functionality in a Ektron CMS400.NET controlled Web site.

Types of Users

Ektron CMS400.NET lets you control the content of your Web site. The tasks of creating and maintaining your Web site are allocated among different types of users. The types of Ektron CMS400.NET users are:

User	Job
Developer	Builds templates
Administrator	Sets up the site, adds users and user groups, sets permissions, and maintains the library
Content Contributor	Maintains Web site by adding, modifying, and publishing content.

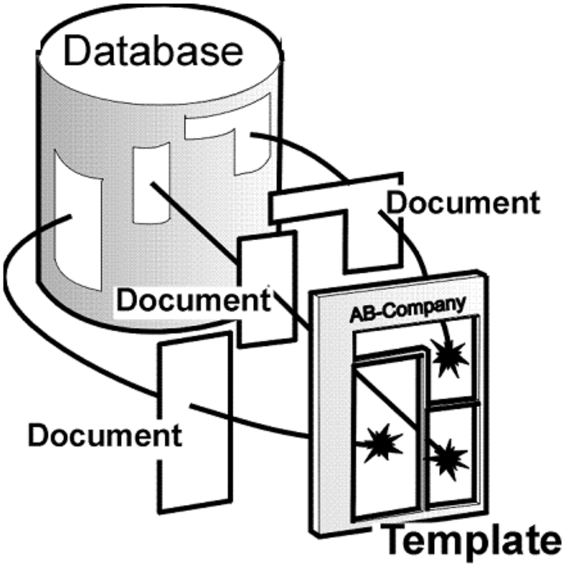
You assign privileges to Ektron CMS400.NET users based on the actions for which they are responsible. Each user may be assigned any or all types of privileges. Users without administrative permissions are known as content contributors.

This document describes features and actions available to a user with administrative privileges. Information about Ektron CMS400.NET's editing and publishing features may be found in the Ektron CMS400.NET User Documentation.

Management of Content

The Ektron CMS400.NET content manager uses database technology to store, build, and retrieve Web page content. The placement of the content on a Web page is determined by templates, which you can build with external tools. Ektron extends VisualStudio to support the template design process.

Templates can be thought of as mechanical layouts of your Web pages. They incorporate powerful custom functions that Ektron CMS400.NET uses to manage your content. Each content item is assigned a unique ID. Ektron CMS400.NET uses the ID to retrieve content from the database.



If during the evolution of your site the need for a new template arises, you simply create a new one, store it in a directory accessible to Ektron CMS400.NET, and create new content that uses the new template. You can even modify the layout of an existing template, reincorporate it, and the content automatically flows into and adjusts to the new layout.

Conventions of the Documentation

This document‘s typographic styles and conventions are explained below.

Convention	Explanation
Bold	Bold type indicates a menu selection, field or text that you must select.
`Courier New`	Courier New font indicates code that you may enter.
Note:	Notes indicate special conditions or issues that the reader should be aware of.
WARNING!	A warning indicates very important information that should be followed. Inattention to a warning can produce undesirable results.

Convention	**Explanation**
Italic	Italic text indicates either a title that is being cited or a special use of a word that might be confused with common world terms.

Getting Started

Now that you have installed Ektron CMS400.NET, what's next? This chapter explains several resources supplied by Ektron to help get your Ektron CMS400.NET Web site up and running.

Logging Into an Ektron CMS400.NET Web Site

See "Logging In and Out" in the **Ektron CMS400.NET** User Manual.

Note

If needed, you can adjust the width of the login screen. This may be necessary if you use Active Directory and have long database names. Use the `ek_LoginScreenWidth` element of the web.config file to adjust the width.

Making Passwords Case Sensitive

By default, passwords are case *insensitive*. So for example, if the password is TOKEN and the user enters **token**, the signon is successful.

If you want to make passwords case *sensitive*, change the value of the `ek_passwordCaseSensitive` element of the web.config file from `false` to `true`. (The web.config file is located in your site's root directory.)

If you do, and the password is TOKEN and the user enters **token**, the signon is unsuccessful. The user would have to enter **TOKEN** to successfully sign on.

Restricting Login Attempts

Ektron CMS400.NET has a login security feature that, by default, locks out a user after five unsuccessful attempts to log in by a user on one computer. This section explains the flexibility you have in controlling this feature.

You can control the following capabilities.

- ”Changing the Number of Unsuccessful Login Attempts” on page 7
- ”Disabling the Login Attempts Feature” on page 9
- ”Unlocking a Locked Account” on page 8
- ”Preventing CMS Users from Signing On” on page 9
- ”Preventing All Users from Signing On” on page 9

You control login security feature by changing the value of the `ek_loginAttempts` element in the web.config file. The following table summarizes your options.

Value	Description
any number between 1 and 254	The number of times a user can try to log in before he is locked out.
0	Lock out all users
-1	Disable feature; unlock all locked users
-2	Lock out CMS users only; membership users can still log in

Changing the Number of Unsuccessful Login Attempts

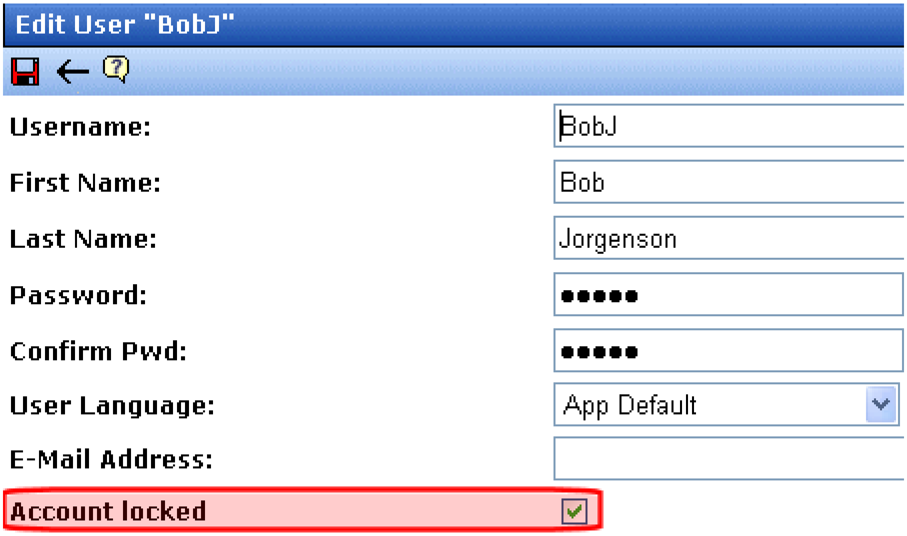
By default, if a user unsuccessfully tries to log in five times, the following error message appears: **The account is locked. Please contact your administrator**. Afterwards, even if the user enters the correct password, he is locked out, and the error message reappears.

You can change the text of the error message in the resource file. To learn about editing the resource file, see ”Procedure for Translating Workarea Strings” on page 678

To change the number of unsuccessful login attempts that occur prior to lockout, edit the value of the `ek_loginAttempts` element in the web.config file. (The web.config file is located in your site's root directory.) For example, to allow only three unsuccessful logins, change the `value` to **3**. You cannot enter a value greater than **254**.

Unlocking a Locked Account

Once an account is locked out, the **Account Locked** field is checked in the user settings.



Edit User "BobJ"

Username:	BobJ
First Name:	Bob
Last Name:	Jorgenson
Password:	●●●●●
Confirm Pwd:	●●●●●
User Language:	App Default
E-Mail Address:	
Account locked	☑

To unlock the account, an administrator user (or a user assigned to the user-admin role) accesses the Edit User screen and unchecks the box. At this point, the user can attempt to sign in again.

NOTE If you want to unlock *all* locked users at once, set the value of the `ek_loginAttempts` element in the web.config file to **-1**. For more information about the effects of this setting, see "Disabling the Login Attempts Feature" on page 9.

Manually Locking a User from Signon

You can use the **Account Locked** field (described above) to manually lock a user out of **Ektron CMS400.NET**. To do so, go to the Edit User screen, identify the user, and check the **Account Locked** field.

That user cannot sign in until either you reverse the above procedure and uncheck the box, or you change the value of the `ek_loginAttempts` element in the web.config file to **-1**.

Disabling the Login Attempts Feature

To disable the Login Attempts feature, set the value of the `ek_loginAttempts` element in the web.config file to **-1**. If you do, any user can try to log in as many times as he wants. The error message never appears, and he is not prevented from entering a password.

NOTE Setting the value of the `ek_loginAttempts` element in the web.config file to **-1** automatically unlocks all locked accounts.

Preventing CMS Users from Signing On

If you want to lock out all CMS users, set the `ek_loginAttempts` element in the web.config file to **-2**. If you do, only membership users can sign in.

NOTE The builtin user cannot sign in if `ek_loginAttempts` is set to **-2**.

Preventing All Users from Signing On

If you want to lock out all users (including membership users), set the `ek_loginAttempts` element in the web.config file to **0**. If you do, no one can sign in to **Ektron CMS400.NET** until you change the value.

NOTE The builtin user cannot sign in if `ek_loginAttempts` is set to **0**.

Changing Images Used for Logging In and Out

You can change the images used for the login and logout buttons. To do so, follow these steps.

1. Move the new images to the following folder: *webroot\your site's root directory*\Workarea\images\application.
2. Open the web.config file in your Web site's root directory.
3. Change the images referenced in this section of the file:

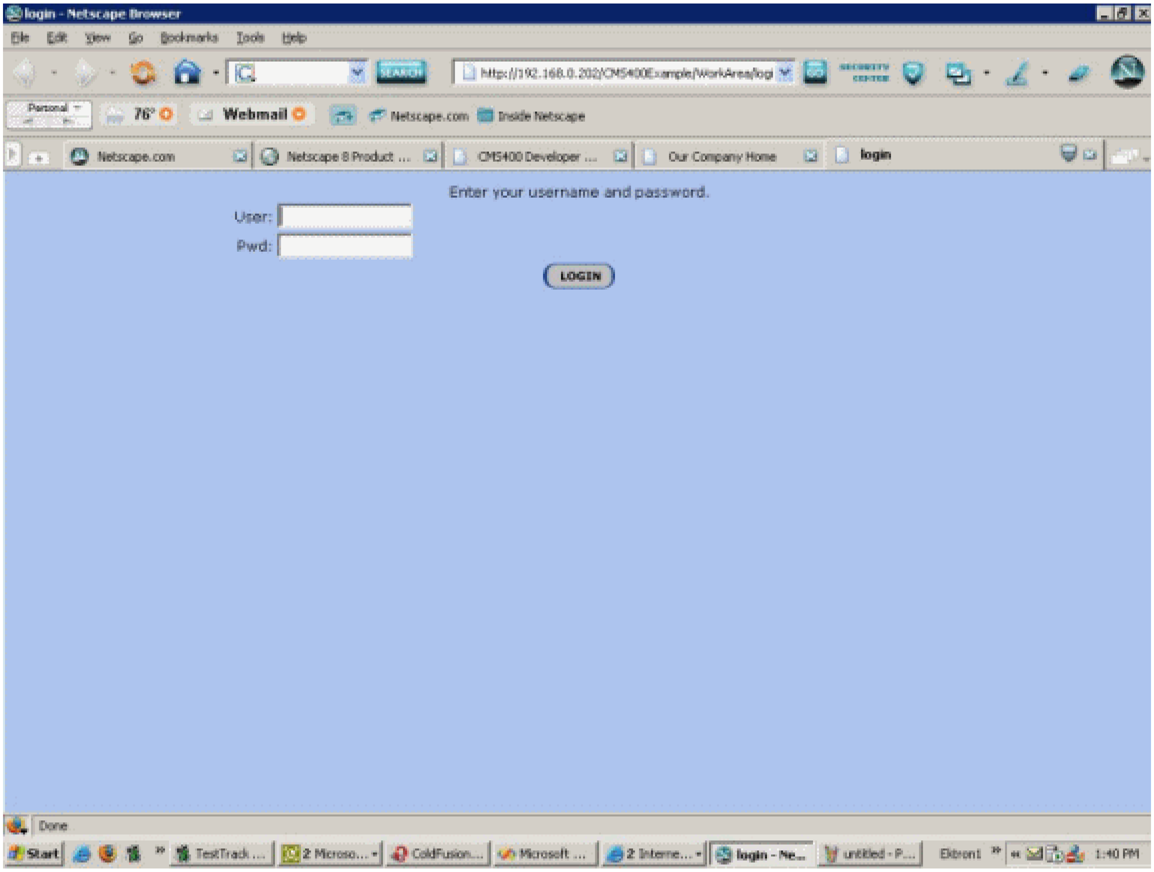
```
<add key="ek_Image_1" value="btn_close.gif" />

<add key="ek_Image_2" value="btn_login.gif" />
```

```
<add key="ek_Image_3" value="btn_login_big.gif" />
```

NOTE You must update the images and web.config each time your system is updated.

Resolving Problem with Sign in Screen

You may find that in certain browsers, the login screen occupies the entire browser window instead of just a small box (see illustration below).


login - Netscape Browser
File Edit View Go Bookmarks Tools Help
SEARCH
http://192.168.0.202/CMS400Example/WorkArea/logi
GO
SECURITY CENTER
Personal
76°
Webmail
Netscape.com
Inside Netscape
Netscape.com
Netscape 8 Product ...
CMS400 Developer ...
Our Company Home
login
User:
Pwd:
LOGIN
Done
Start
TestTrack ...
2 Microso...
ColdFusion...
Microsoft ...
2 Interne...
login - Ne...
untitled - P...
Ektron1
1:40 PM

Enter your username and password.

Browsers such as Netscape 8 and Firefox have a feature called tabs. When the login window pops up, it appears as a new tab as shown above.

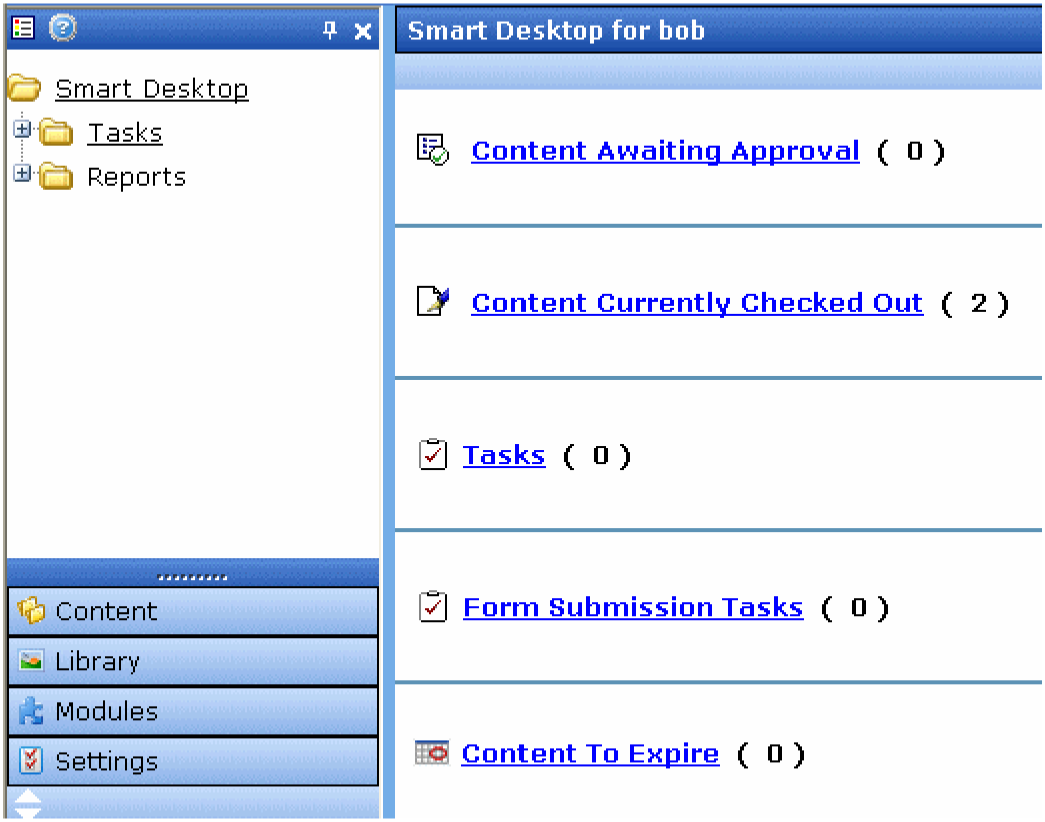
You can fix this problem by turning off tabs within the browser.

Accessing the Workarea

Once logged into Ektron CMS400.NET as an administrator, you can edit content by navigating to the page (like a business user) or access the Workarea. From there, you can perform all system activities, such as configuring and viewing every setting of Ektron CMS400.NET. To access the Workarea, follow these steps.

1. Log in to your Web site, as described in ”Logging Into an Ektron CMS400.NET Web Site” on page 6.
2. Click the Workarea button (Workarea) on a login page or a **Workarea** toolbar button ().

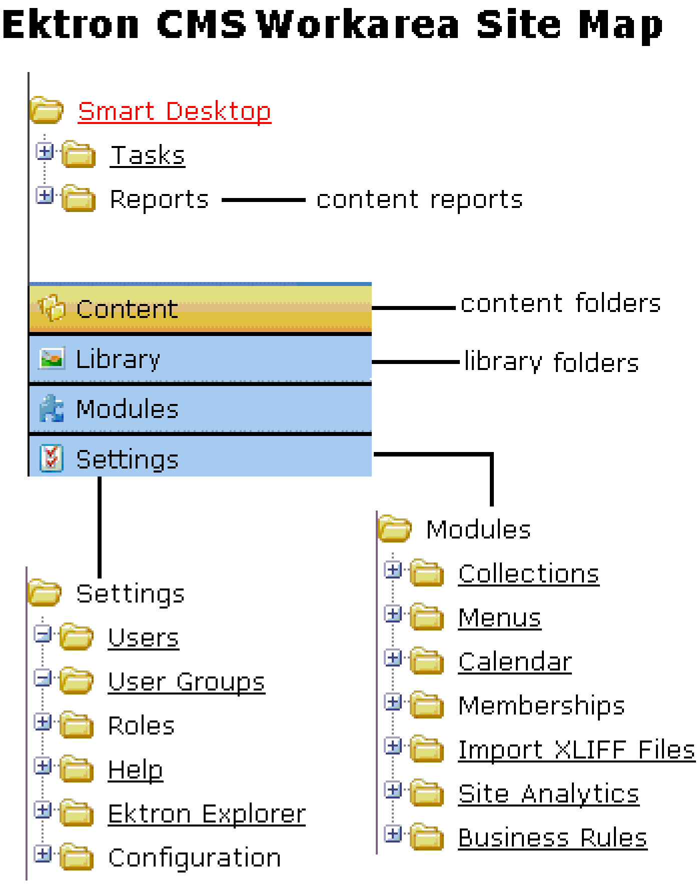
   The Workarea has a Windows Explorer-like interface.


Smart Desktop
Tasks
Reports
Content
Library
Modules
Settings
Smart Desktop for bob
Content Awaiting Approval (0)
Content Currently Checked Out (2)
Tasks (0)
Form Submission Tasks (0)
Content To Expire (0)

When you first access your Workarea, your Smart Desktop is displayed. The smart desktop contains useful information that pertains to you.

NOTE In the Application Setup screen, you can determine which screen appears when you access the Workarea. *See Also:* "Set smart desktop as the start location in the Workarea" on page 29

The following graphic illustrates the location of **Ektron CMS400.NET**'s major components in relation to the Smart Desktop display.


Ektron CMS Workarea Site Map
Smart Desktop
Tasks
Reports
content reports
Content
content folders
Library
library folders
Modules
Settings
Modules
Collections
Menus
Calendar
Memberships
Import XLIFF Files
Site Analytics
Business Rules
Settings
Users
User Groups
Roles
Help
Ektron Explorer
Configuration

Closing the Workarea

To close the Workarea, click the (❌) button in the upper right corner.

When you close the Workarea, you return to the Ektron CMS400.NET view of your Web site but do not exit Ektron CMS400.NET.

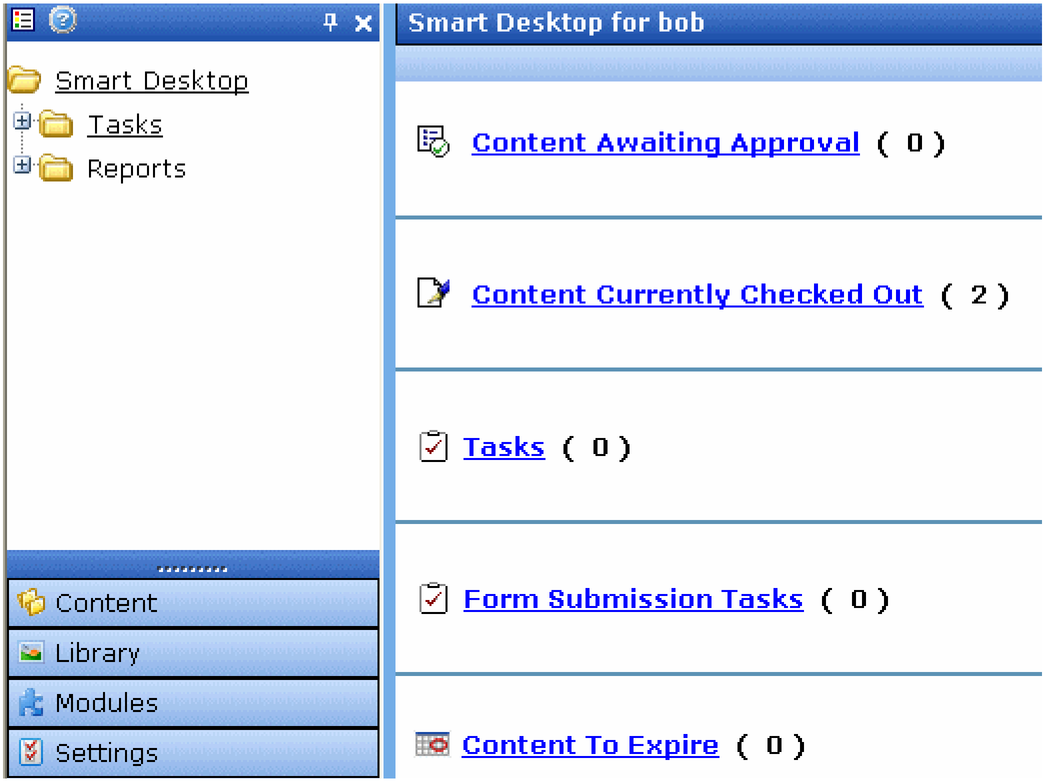
Workarea Navigation

The **Ektron CMS400.NET** administrator Workarea is divided into two frames:

- the left frame displays the system's folders
- the right frame displays common reports (For more information, see "Content Reports" on page 121)

NOTE Each category in the right frame is followed by a number indicating how many content items are in that status. **Content to Expire** lists how many content items will expire within ten days. By going to the report (**Smart Desktop > Reports > Content To Expire**) and changing the number of days, you can view a list of content to expire in that amount of time.

The number next to Tasks indicates how many open tasks are assigned to, or have been assigned by, you. Open tasks are those in one of the following states: not started, active, awaiting data, on hold, pending, reopened.



Smart Desktop for bob

Content Awaiting Approval (0)

Content Currently Checked Out (2)

Tasks (0)

Form Submission Tasks (0)

Content To Expire (0)

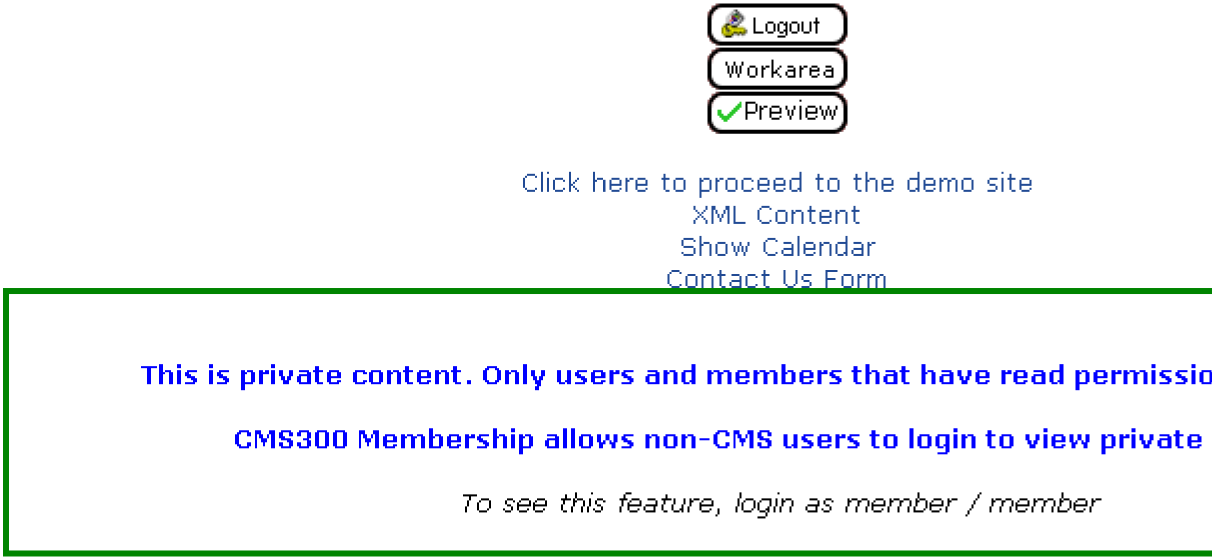
To learn more about the Workarea, see the section of the **Ektron CMS400.NET** User Manual titled “Understanding the Smart Desktop.”

Recognizing Content

After you sign in, notice that as you move the cursor, colored borders appears around areas of the page, as illustrated below. The border disappears when you move the cursor out of the area.

See Also: ”Returning to the Classic CMS Interface” on page 17

NOTE The colored borders only appear when you are not in site preview mode. To learn about Site Preview mode, see “Logging In and Out” > “Site Preview” in the Ektron CMS400.NET User Manual.


Logout
Workarea
✓Preview
Click here to proceed to the demo site
XML Content
Show Calendar
Contact Us Form

This is private content. Only users and members that have read permissio

CMS300 Membership allows non-CMS users to login to view private

To see this feature, login as member / member

Each surrounded area is a content item that can be edited independently.

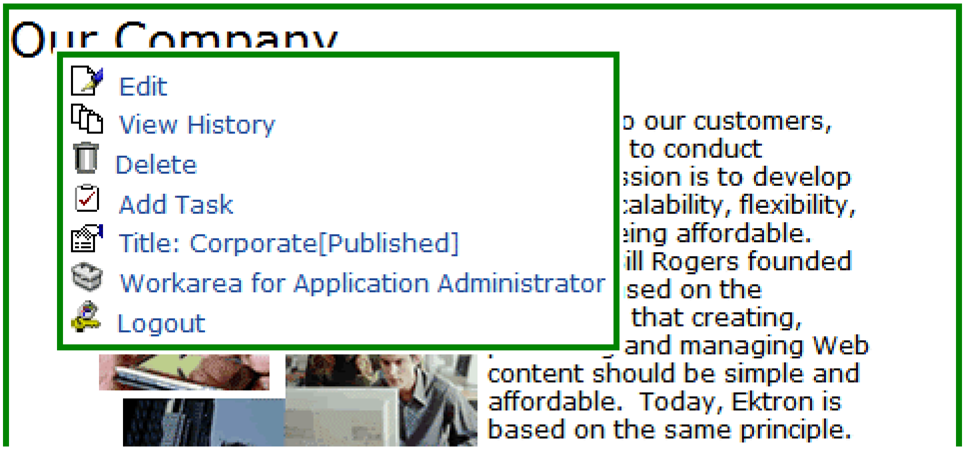
Meaning of Border Color

The table below describes the meaning of each border color.

Color	Meaning	Description
Green	Active	Content is active and ready to be edited
Red	Checked Out	Another user is editing the content
Yellow	Approval Process	Content has been submitted for publication, and is in the approval chain.
Grey	Pending Go Live	Content was approved, but the go-live date hasn’t occurred yet.

The Floating Toolbar

When content’s border is visible, you can *right click* the mouse to display a floating toolbar (an example in the green box below).

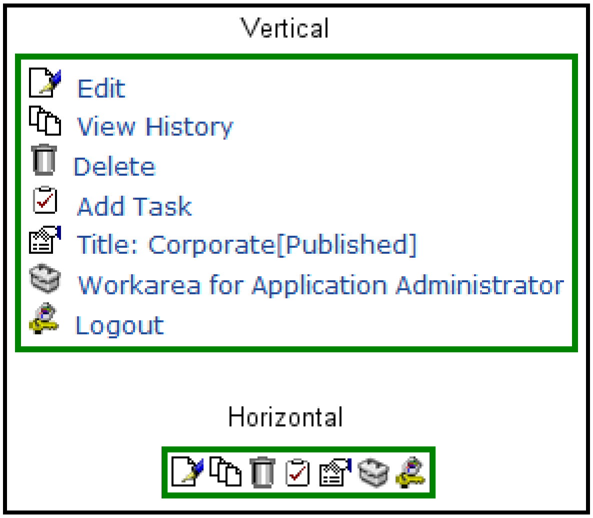

Our Company
Edit
View History
Delete
Add Task
Title: Corporate[Published]
Workarea for Application Administrator
Logout
o our customers,
to conduct
ssion is to develop
calability, flexibility,
eing affordable.
ill Rogers founded
sed on the
that creating,
and managing Web
content should be simple and
affordable. Today, Ektron is
based on the same principle.

Toolbar buttons let you act on the displayed content and display important information about it. For example, one toolbar button lets you edit the content, while another displays previous versions of it. The toolbar buttons change depending on the content's status or your permissions for the content.

Each button is described in "Floating Toolbar Buttons" on page 18.

Floating Toolbar Display Type

You can change the floating toolbar display type. The choices are vertical and horizontal. Vertical is the default. Below are examples of each.


Vertical
Edit
View History
Delete
Add Task
Title: Corporate[Published]
Workarea for Application Administrator
Logout
Horizontal

To change the display type, follow these steps.

1. Open web.config in your root folder.
2. Find the variable `ek_MenuDisplayType`.
3. Change its value.

   0 (zero) = Horizontal

   1 = Vertical

Returning to the Classic CMS Interface

Prior to Release 4.7, the colored borders and the toolbar menu always appeared on the screen, not only when the user moved the mouse over the area. To return to this display style, follow these steps.

NOTE If you switch to the classic interface, the page layout is not depicted accurately because of the fixed toolbars.

1. Open web.config in your root folder.
2. Find the variable `ek_UserMenuType`.
3. Change its value to **1**.

After you make this change, the colored borders and toolbar menu appear on a screen when it appears, and remain there.

Floating Toolbar Buttons

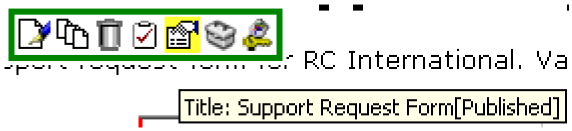
The following table describes buttons you might see on the floating toolbar. The buttons can vary depending on the status of the content, your permissions, etc.

Toolbar Button	Name	Description	More Information
	Add	Appears if you selected a language and the content is not available in that language. Use this button to copy existing content into new content and translate it to the new language.	”Translating Content” on page 649
	Approve	Approve or decline request for content to be published or deleted.	”Approve ()” on page 22
	Assign Task	Assign a task related to this content.	”Managing Tasks” on page 349
	Delete	Opens content’s View Content screen. From here, you can view important information about the content and perform all actions on it.	
	Edit	Checks out content to be edited by you.	”Edit ()” on page 20
	Logout	Log out of Ektron CMS400.NET view of Web site.	”Logout ()” on page 24
	Preview	Preview content before it is published.	”Preview ()” on page 23
	Properties	Opens content’s View Content screen. From here, you can view information about content and perform all actions on it.	”Content Status” on page 19; ”Managing HTML Content” on page 61
	View Content Difference	Displays differences between historical version and published versions of content.	”View Content Difference ()” on page 21

Toolbar Button	Name	Description	More Information
	View History	Displays historical versions of content. You can also restore older version if needed.	”View History ()” on page 22
	Workarea	Opens the Workarea. From here, you can perform all actions.	”Workarea ()” on page 23

Content Status

After seeing content’s border, you can get a more detailed status by hovering your cursor over the properties button ( ). When you do, the content’s title and current status appear, as shown below.


Title: Support Request Form[Published]

Below are the content statuses and their abbreviations.

Letter	Border Color	Meaning	Content state
A	green	**Approved**	Through workflow and published on the Web site
O	red	**Checked Out**	Currently being edited. Has not been checked in.
I	green	**Checked In**	Checked in for others to edit
S	yellow	**Submitted for Approval**	Saved and submitted into approval chain *See Also:* ”Setting Approval Chains” on page 556
M	yellow	**Marked For Deletion**	Requested for deletion

Letter	Border Color	Meaning	Content state
T		**Awaiting Completion of Associated Tasks**	Task(s) assigned to content are not complete
P	grey	**Pending Go Live Date**	Approved but “Go Live” date hasn’t occurred yet
D		**Pending Deletion**	Content was created with a future start date then checked in and deleted. This status only remains until the start date is reached. At that point, the content is deleted.

For more information about

- content statuses, see Appendix A of the **Ektron CMS400.NET** User Manual
- content activities, see ”Managing HTML Content” on page 61

Edit (✎)

Ektron CMS400.NET content can be in any of several states.

- **Green border** - you can check out the content for editing
- **Yellow border** - you can edit the content if you submitted it for publishing; otherwise, you cannot
- **Red border** - you cannot edit the content

NOTE Once you check out content, it cannot be checked out or edited by other users until you check it in.

To edit content, follow these steps.

1. Log in to Ektron CMS400.NET, as described in ”Logging Into an Ektron CMS400.NET Web Site” on page 6.
2. Browse to content you want to edit.
3. Right click the mouse to display the floating toolbar.

4. Click the Edit button ().
5. The Edit Content screen is displayed.
6. From that screen, you can
    - Edit content
    - Save changes
    - Check-in content
    - Enter or edit a summary
    - Enter or edit metadata
    - Submit the content for approval
    - Publish content to the Web site
    - Access the library

For more information, see the **Ektron CMS400.NET** User Manual Section “Working with Folders and Content” > “Editing Content”.

View Content Difference ()

The compare toolbar button appears when the content is in any state other than published.

Using Ektron CMS400.NET’s content comparison utility, eWebDiff, you can see the changes made to the selected content.

To compare the currently published version of a content with the currently staged version, follow these steps.

1. Log in to Ektron CMS400.NET.
2. Browse through your Web site until you find content that has a staged version to be compared with.
3. If the floating toolbar does not appear, right click the mouse to display it.
4. Click the View Differences button (). eWebDiff opens in a new window.

NOTE See ”Comparing Versions of Content” on page 93 for additional information about the CMS Compare utility.

Approve (✓)

When logged in as a user who is part of an approval chain, you may see content with a yellow border. The yellow border indicates that the content is in the approval chain. If you are the next approver of the content, an Approve button (✓) appears in the toolbar.

To approve submitted content, follow these steps.

1. Browse to a content that is submitted and awaiting your approval.
2. *See Also:* If the floating toolbar does not appear, right click the mouse to display it.
3. Click the Approve button (✓).
4. The Approve Content screen is displayed.
5. Perform one of the following actions:

   - **Approve** (✓) the content and submit it to the next approver. If you are the last approver, the content is published to the site.

   - **Decline** (✗) the content, which checks the content in and makes it available for editing by all users with permissions

NOTE If the content has any active tasks, a comments window pops up. You can insert comments to describe how approving or declining the content affects the task.

   - Click (☒) at the top corner of the window to close without doing anything

For more information, see "Setting Approval Chains" on page 556.

View History (📄)

Each time content is checked in or published, a snapshot is made of it and stored in Ektron CMS400.NET.You can access and view historical versions of the content.

To view the history for a content item, follow these steps.

1. Log in to Ektron CMS400.NET, as described in "Logging Into an Ektron CMS400.NET Web Site" on page 6.
2. Find the content whose history you want to view.
3. Right click the mouse to display the floating toolbar.
4. Click the View History button ().
5. The Content History window appears.

NOTE See "Content History" on page 80 for more information about viewing, comparing, and restoring historical versions.

Preview ()

If content's state is other than Published or checked out, this button displays the entire template as though everything that is currently staged has been published. So, you can see what your changes will look like on the Web site *before* publishing. If necessary, you can fix any problems and perfect the page before submitting it into the approval chain.

To preview staged content, follow these steps.

1. Log in to Ektron CMS400.NET, as described in "Logging Into an Ektron CMS400.NET Web Site" on page 6.
2. Browse through your Ektron CMS400.NET Web site until you find the content you want to preview.

NOTE Content items with staged content can either have a green or yellow border. Look for the preview toolbar button, which indicates that the content has a staged version.

3. Right click the mouse to display the floating toolbar.
4. Click the Preview button ().

A new browser window opens with the staged version of the content viewable in the template.

Workarea ()

The Workarea is the centralized location of all Ektron CMS400.NET actions that you can perform. As an administrator, you have access to many more actions than a standard user. To access your Workarea, follow these steps.

1. Log in to Ektron CMS400.NET, as described in ”Logging Into an Ektron CMS400.NET Web Site” on page 6.
2. Navigate to any page that has Ektron CMS400.NET content displayed on it.
3. Right click the mouse to display the floating toolbar.
4. Click the Workarea button ( ).
5. The Workarea opens in a new window.
6. To learn more about the Workarea, see ”Accessing the Workarea” on page 11.

Logout ( )

This button logs you out of Ektron CMS400.NET.

Site Preview

To learn about Site Preview mode, see “Logging In and Out” > “Site Preview” in the **Ektron CMS400.NET** User manual.

Modifying the Application Setup Screen

In the setup section of the configuration folder, you can enter or edit information for the Ektron CMS400.NET Web site including:

- License keys
- Default language
- Maximum content and summary sizes
- email notification
- Physical library folders on file server
- Builtin user information
- Editor options
- Work page size settings

You must complete this before any user can access your Ektron CMS400.NET Web site.

- ”Enabling WebImageFX” on page 30
- ”Enabling CMS to Create File System Folders” on page 31
- ”BuiltIn User” on page 32
- ”Editor Options” on page 32

NOTE Only members of the Administrator User Group can view and edit the Application Setup screen.

Viewing Application Setup Information

To view Ektron CMS400.NET setup information, follow these steps.

1. Access the Workarea. *See Also:* ”Accessing the Workarea” on page 11
2. Click the **Settings** folder button in the left frame.
3. Expand the folder tree, and click **Configurations > Setup**.
4. The Application Setup screen is displayed.

Updating Setup Information

To update setup information, follow these steps.

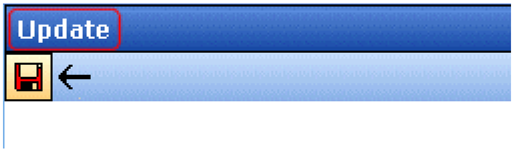
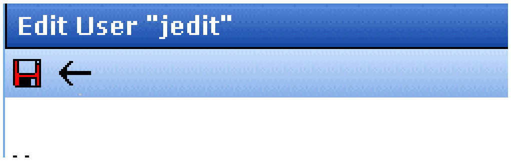
1. Access the Application Setup screen, as described in ”Viewing Application Setup Information” on page 25.
2. Click the Edit button (✎).
3. The Application Setup screen appears. Update the fields as needed. The following table explains the fields.

.

Field	**Description**
License Key(s)	Enter the license key sent to you from Ektron via email into this field.
Module Licenses	Enter the license key for WebImageFX that was sent to you via email. See ”Enabling WebImageFX” on page 30 for more information.
Default Application Language	Select a default language for Ektron CMS400.NET. **How a User’s Application Language Affects His Use of Ektron CMS400.NET** This user’s language determines the screens and messages that appear in **Ektron CMS400.NET**. **How the System Default Language Relates to a User’s Language Setting** In the user profile, you can set each user’s language. You can set any user’s language to system default. Each user whose language is set to system default uses the language assigned here. Note: Do not confuse this default application language with the ek_DefaultContentLanguage variable in web.config. For more information on that variable, see ”The Default Language” on page 647.

Field	Description
Maximum Content Size	In bytes, limit the size of each content item by specifying a maximum size. If a user's changes to content results in exceeding this limit, the user is told to reduce the size of the content before he can save it. It cannot exceed 1,000,000 characters.
Maximum Summary Size	Limit the size of each summary by specifying a maximum size. If a user's changes to a summary result in exceeding this limit, the user is told to reduce the size of the content before he can save it. It cannot exceed 65,000 characters.
System email Address	Enter a valid email address. This address will appear in the **From** field in the notification emails.
Enable Sending of System Notification Email	Check the box to enable email notification for the entire CMS. Unchecking this box disables email notification, regardless of whether individual users have their email enabled.
Asynchronous Processor Location	If your site uses the Web Alerts feature, enter or update the location of the asynchronous processor Web Services file. The default location appears below. *See Also:* "Setting Up the Message Queue and Asynchronous Processor" on page 771
This is a Staging Server (Only used with Site Replication)	Check this box if you use the Site Replication feature and the server on which this server resides is a staging server. If you check this box, Web alerts are not generated when content is updated. Web alerts should only be created on a production server.
Publish in Other Format: Enable Office documents to be published in other format	Check the box to allow **Ektron CMS400.NET** to render Office documents in either PDF or HTML format. When a checked, PDF or HTML generation is available for individual folders. *See Also:* "Editing Folder Properties" on page 46
Library Folder Creation: Enable CMS to create file system folders for library assets	Check the box if you want to create physical folders on your file system server that match the Ektron CMS400.NET library folder tree. *See Also:* "Enabling CMS to Create File System Folders" on page 31
Built - in User Information	Edit the username and/or password for the built in user. By default, the username and password combination is **builtin/builtin**. Important! Ektron strongly urges you to change the default password assigned to the builtin user. An opportunity to do this is presented during installation. *See Also:* "BuiltIn User" on page 32

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Editor Options</td><td>Toggle between displaying and not displaying font related buttons in the editor. Also choose to remove styles and preserve MS Word styles and classes. *See Also:* ”Editor Options” on page 32</td></tr>
<tr><td>Accessibility/Section 508 Evaluation</td><td>”Validating Content For Compliance with Accessibility Standards” on page 87</td></tr>
<tr><td colspan="2">**Work Page Size**
The following fields change the
- default editor screen size
- whether button text appears in the title bar
- default Web page after sign-in
- default Workarea page
The default values are automatically applied to all new users, and to all existing users when you upgrade.
Normally, you can modify these values for any user via the Edit User screen. But, you can force these values on all users, removing the ability to personalize them.</td></tr>
<tr><td>Width</td><td>If desired, change the width of the screen in which **Ektron CMS400.NET** appears. The width in pixels must be between 400 and 2400.
This field accommodates users who have larger monitors and/or prefer a higher resolution, such as 1280 x 1024.
The default value for this setting is 790.</td></tr>
<tr><td>Height</td><td>If desired, you can change the height of the screen in which **Ektron CMS400.NET** appears. The height in pixels must be between 300 and 1800.
This field accommodates users who have larger monitors and/or prefer a higher resolution, such as 1280 x 1024.
The default value for this setting is 580.</td></tr>
</table>

Field	Description
Display button text in the title bar	Check this box if you want any button’s caption text to appear in the screen title’s bar whenever a user moves the mouse over the button. Note the word **Update**, describing the button, in the illustration below  If you do not check this box, the screen’s title remains in the title bar when the user moves the mouse over the button, as illustrated below. 
Landing Page after login	If you want one page in your Web site to appear after users sign in, enter the URL to that page. You can click **Select Page** to browse to the landing page. The last published version of the page appears. If the page has never been published, nothing appears. By default, the page from which the user logged in reappears.
Set smart desktop as the start location in the Workarea	If you want the Smart Desktop to appear as soon as users enter the Workarea, click inside this check box. *See Also:* ”Workarea Navigation” on page 13 By default, the user sees the Smart Desktop after sign in. If you leave this check box blank, when you enter the Workarea, you go to the folder of the content specified at the **Landing Page after login** field.
Force preferences to all users	To force these settings on all **Ektron CMS400.NET** users, check this box. If you do, users can see the values in the user profile screen but not change them. If you leave this box blank, users can personalize these values in their User Profile.
Enable Verify email?	Check this box if users should be notified whenever they subscribe to an email notification list. *See Also:* ”What Happens if Verification email is Used” on page 797

Field	Description
Enable PreApproval Group	Use this field to enable Automatic Task Creation. *See Also:* ”Automatic Creation of Tasks Associated with Content” on page 360

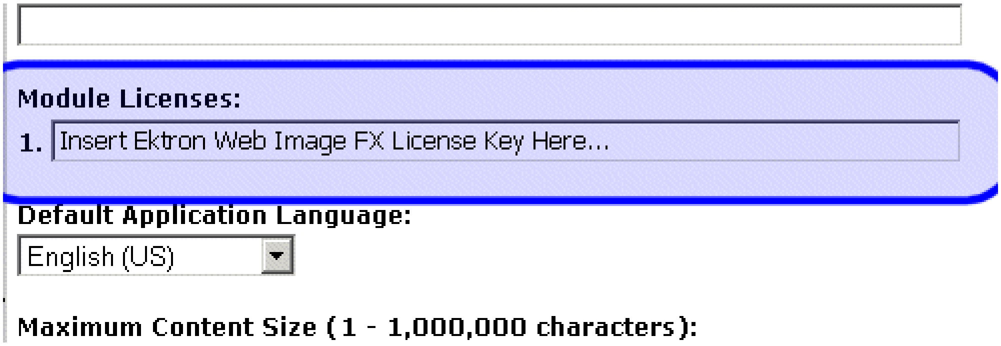
4. Make the necessary changes.
5. Click the Update button (💾).

Enabling WebImageFX

When purchasing Ektron CMS400.NET, you had the option to purchase Ektron WebImageFX as well. WebImageFX is an imaging application that allows users to edit images online.

If you purchased WebImageFX when you purchased Ektron CMS400.NET, you should have received an email with a license key for WebImageFX as well.

To enable WebImageFX within Ektron CMS400.NET, from the application setup page, insert the WebImageFX license key in the **Module License** field.



Module Licenses:

1. Insert Ektron Web Image FX License Key Here...

Default Application Language:

English (US)

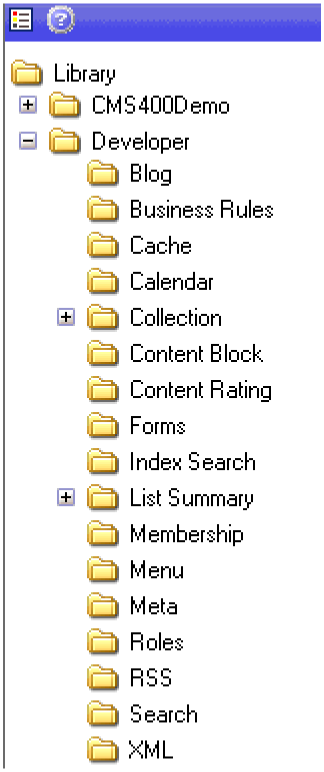
Maximum Content Size (1 - 1,000,000 characters):

Enabling CMS to Create File System Folders

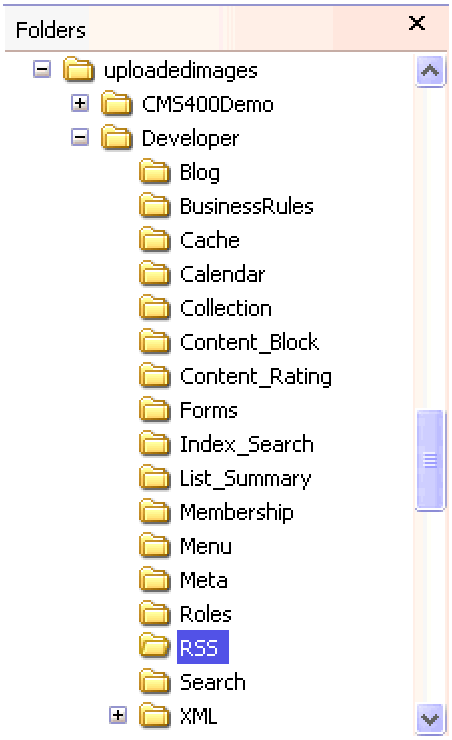
If this option is enabled, each time a new content/library folder is created in Ektron CMS400.NET, a corresponding physical folder is created on the file system. This helps organize library assets on your file server.

The following illustration compares the library folder tree with the file system's folder structure.

Ektron CMS400 folder tree


Library
CMS400Demo
Developer
Blog
Business Rules
Cache
Calendar
Collection
Content Block
Content Rating
Forms
Index Search
List Summary
Membership
Menu
Meta
Roles
RSS
Search
XML

File server folder tree


Folders
uploadedimages
CMS400Demo
Developer
Blog
BusinessRules
Cache
Calendar
Collection
Content_Block
Content_Rating
Forms
Index_Search
List_Summary
Membership
Menu
Meta
Roles
RSS
Search
XML

NOTE If upgrading, the installation does not create sample Web site's folders on the file server. These folders must be added manually. However, all folders created by you are also created on the file server when enabled.

BuiltIn User

The builtin user is a user that is defined in the Ektron CMS400.NET setup screen. Primarily, he's an emergency user if you cannot log in to Ektron CMS400.NET as the administrator.

NOTE The builtin user can log in to Ektron CMS400.NET whether or not Active Directory or LDAP is enabled.

Only use the builtin user to correct a bad or expired license key. It is not designed for regular CMS operations. If you try to edit content while signed on as this user, you see errors.

IMPORTANT! By default, the username and password combination for the builtin user is builtin/ builtin. For security reasons, Ektron recommends changing the username and password upon installation.

Editing the BuiltIn User

To edit the builtin user's information, follow these steps.

1. Accessing the Edit Application Setup Information screen, as described in "Updating Setup Information" on page 26.
2. Locate the **Built In User** field.
3. Edit the built in user information by changing the username and password.
4. Click the Update button (💾).

NOTE If you cannot sign in to **Ektron CMS400.NET** because the builtin user password was changed and you don't know the new password, use the BuiltinAccountReset.exe utility. This resets your **Ektron CMS400.NET** user \ password to Builtin \ Builtin. This utility is located in `C:\Program Files\Ektron\CMS400v61\Utilities`.

Editor Options

Style sheets greatly reduce the source code (and thereby the size of) a content. For this reason, they are becoming more popular than font-related tags for marking up content. The editor options section lets you determine how the editor handles this issue.

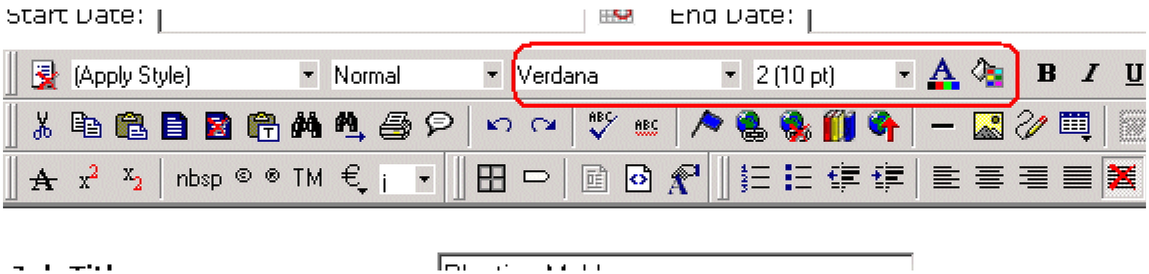
The following table explains the editor options you may set.

.

Editor Option	Description
Enable Font Buttons	This option displays the following font-related buttons on the editor toolbar: • Font Face • Font Size • Font Color • Font Background Color *See Also:* "Enable Font Buttons" on page 33 Note: If **Remove Styles** is checked (see below), all inline styles added to the content are removed when the HTML is cleaned.
Preserve MS-Word Styles	When content from MS Word is cut and pasted into the editor, the editor, by default, removes some MS Word styles. Checking this box prevents the editor from removing them. Note: Ektron does *not* recommend enabling this feature.
Preserve MS-Word Classes	Similar to styles, when content from MS-Word is cut and pasted into the editor, the editor, by default, removes some MS-Word classes. Checking this box prevents the editor from removing them.

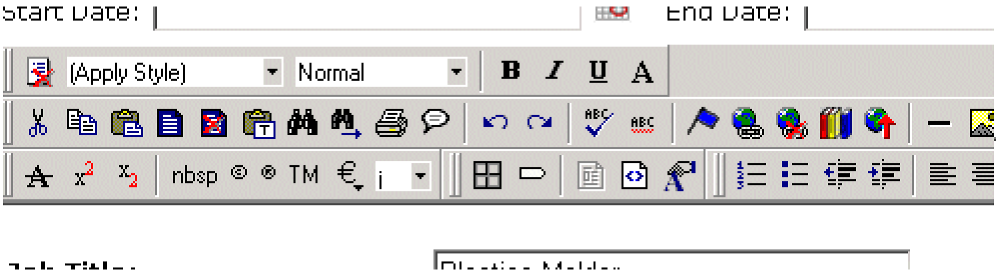
Enable Font Buttons

Here is the editor with font related buttons enabled.



Disable Font Buttons

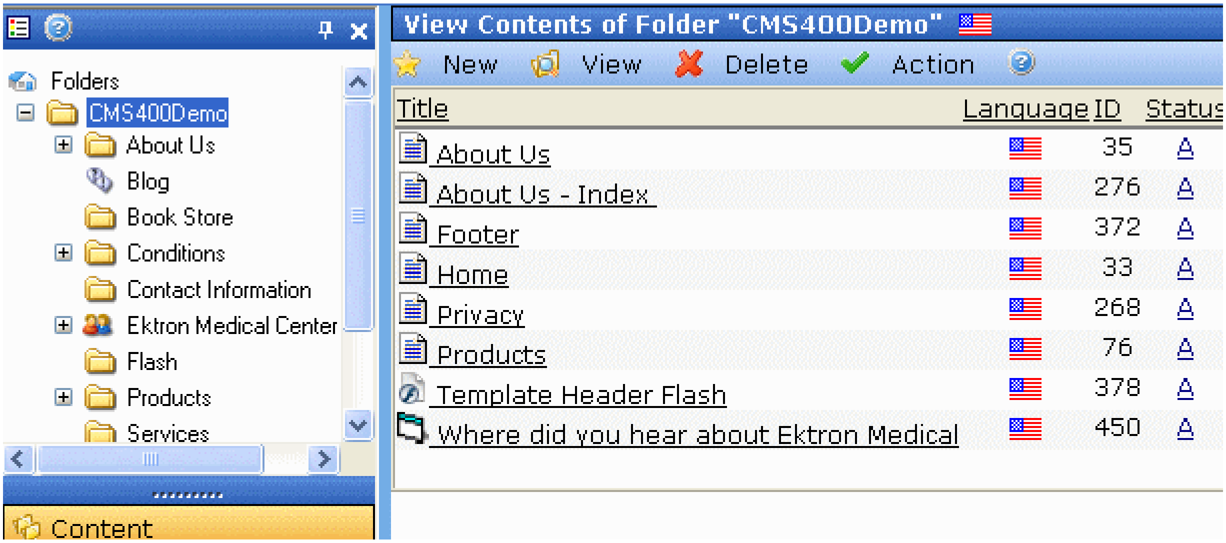
Here is the editor with the font buttons disabled.


Start Date:
End Date:
(Apply Style)
Normal
B
I
U
A
nbsp
TM
Job Title:

Managing Content

Managing Content Folders

An administrator can control every aspect of the content and the folders that hold them. The controls include setting permissions, approvals, and adding, editing, publishing, and deleting content. Below is the content folder.


Folders
CMS400Demo
About Us
Blog
Book Store
Conditions
Contact Information
Ektron Medical Center
Flash
Products
Services
Content
View Contents of Folder "CMS400Demo"
New
View
Delete
Action

Title	Language	ID	Status
About Us	🇺🇸	35	A
About Us - Index	🇺🇸	276	A
Footer	🇺🇸	372	A
Home	🇺🇸	33	A
Privacy	🇺🇸	268	A
Products	🇺🇸	76	A
Template Header Flash	🇺🇸	378	A
Where did you hear about Ektron Medical	🇺🇸	450	A

This chapter explains how to add, edit, publish, and delete content. It includes the following information:

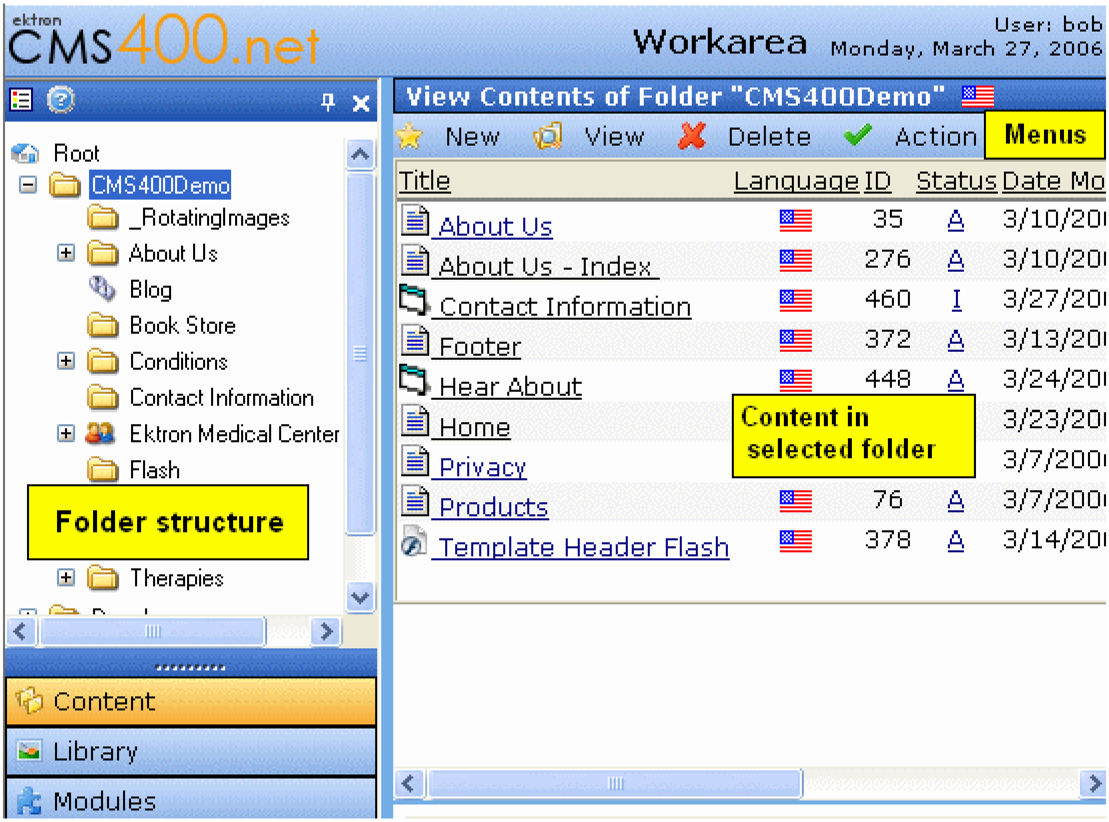
- ”Accessing the Content Folder” on page 36
- ”Folder Properties” on page 42
- ”Purge History” on page 48

- ”Smart Forms” on page 49
- ”Breadcrumbs” on page 50
- ”Adding Subfolders” on page 59
- ”Deleting Folders” on page 60
- ”Search Content Folder” on page 60

Accessing the Content Folder

To access a content folder, follow these steps.

1. Access the Workarea.
2. Click the **Content** folder in left side of the Workarea.
3. All content in the root content folder appears in the right frame. In the left frame, the content folder expands to display its subfolders.


ektron
CMS400.net
Workarea
User: bob
Monday, March 27, 2006
View Contents of Folder "CMS400Demo"
New
View
Delete
Action
Root
CMS400Demo
_RotatingImages
About Us
Blog
Book Store
Conditions
Contact Information
Ektron Medical Center
Flash
Therapies
Content
Library
Modules

Title	Language	ID	Status	Date Mo
About Us	🇺🇸	35	A	3/10/20
About Us - Index	🇺🇸	276	A	3/10/20
Contact Information	🇺🇸	460	I	3/27/20
Footer	🇺🇸	372	A	3/13/20
Hear About	🇺🇸	448	A	3/24/20
Home				3/23/20
Privacy				3/7/200
Products	🇺🇸	76	A	3/7/200
Template Header Flash	🇺🇸	378	A	3/14/20

Menus

Content in selected folder

Folder structure

NOTE To learn about modifying the folder display, see ”Modifying the Folder Display” on page 41.

From this screen, you can perform administrative actions and maintain content. Each folder displays the following information about its content.

Field	Description
Title	The name given to the content by the creator.
Language	The content’s language. *See Also:* ”Working with Multi-Language Content” on page 640
ID	The number Ektron CMS400.NET assigns to the content. It is used to retrieve the content from the database.
Status	The content’s status. *See Also:* ”Content Status” on page 19
Date Modified	The most recent date that the content was added, edited, or published.
Last Editor	The last user who accessed the content.

Additionally, each folder has the following menus.

- ”New Menu” on page 38
- ”View Menu” on page 39
- ”Delete Menu” on page 40
- ”Action Menu” on page 40

New Menu

Menu Option	**Creates the following new item within selected folder**	**For more information, see**
Folder	folder	”Adding Subfolders” on page 59
Blog	Blog	“Blogs” in the **Ektron CMS400.NET** USer Manual
Discussion Board	Discussion Board	”Discussion Boards” on page 383
HTML Content	HTML content	”Adding Content” on page 72
HTML Form/ Survey	HTML Form, Poll, or Survey	”Managing HTML Forms” on page 281
Smart Form	Smart Form	”Smart Forms” on page 49
Office Documents	Office Document	**Ektron CMS400.NET** User Manual Section “Using the Document Management Functionality” > “Working with Microsoft Office Documents”
Managed Files	Managed file, any supported type	**Ektron CMS400.NET** User Manual Section “Using the Document Management Functionality” > “Working with Managed Files”
Multimedia	Multimedia file, any supported type	”Managing Multimedia Assets” on page 307
Open Office	Open Office file, any supported type	**Ektron CMS400.NET** User Manual Section “Using the Document Management Functionality” > “Working with Open Office Files”
Collection	Collection	”Collections” on page 483
Menu	Menu	”Menu Feature” on page 491

View Menu

The View Menu provides the following functions.

Menu Option	Function	For more information, see
All types	Displays *all* content types of selected language.	
• HTML content • HTML Form/Survey • Office Documents • Managed Files • Multimedia • Open Office	Limits folder display to *selected content type*. For example, choose **View > Office Documents**, and see only Office Documents in the folder -- other content types are suppressed. This is especially helpful if the folder has a lot of items, and you are looking for only one type of content.	• ”Adding Content” on page 72 • ”Managing HTML Forms” on page 281 • **Ektron CMS400.NET** User Manual Section “Using the Document Management Functionality” > “Working with Microsoft Office Documents” • **Ektron CMS400.NET** User Manual Section “Using the Document Management Functionality” > “Working with Managed Files” • ”Managing Multimedia Assets” on page 307 • **Ektron CMS400.NET** User Manual Section “Using the Document Management Functionality” > “Working with Open Office Files”
Language	Limits display within a folder to one language. The language setting also determines the language of any new items you create in the folder.	
Menus	Lets user view and work with menus	Ektron CMS400.NET User Manual section “Working with Menus” > “Adding a New Menu” “Adding a New Menu” > “Adding a Menu via Content Folder
Collections	Lets user view and work with Collection	”Collections” on page 483

Menu Option	Function	For more information, see
Archived Content	Lets user view and work with Archived content. That is, content that passed its scheduled End Date and whose archive option is either **Archive and remove from site** or **Archive and remain on Site**.	Ektron CMS400.NET User manual section “Scheduling Content to Begin and End” > “Setting Archive Options”
Folder Properties	Lets user view and edit a folder’s properties. In the properties screens, you can set permissions, approvals, etc.	”Folder Properties” on page 42

Delete Menu

This menu lets you perform the following functions.

.

Menu option	Lets you	More Information
Delete this folder	Delete current folder and all of its content	”Deleting Folders” on page 60
Delete content	Delete one, some, or all content items within folder	**Ektron CMS400.NET** User Manual section “Working with Folders and Content” > “Deleting Content”

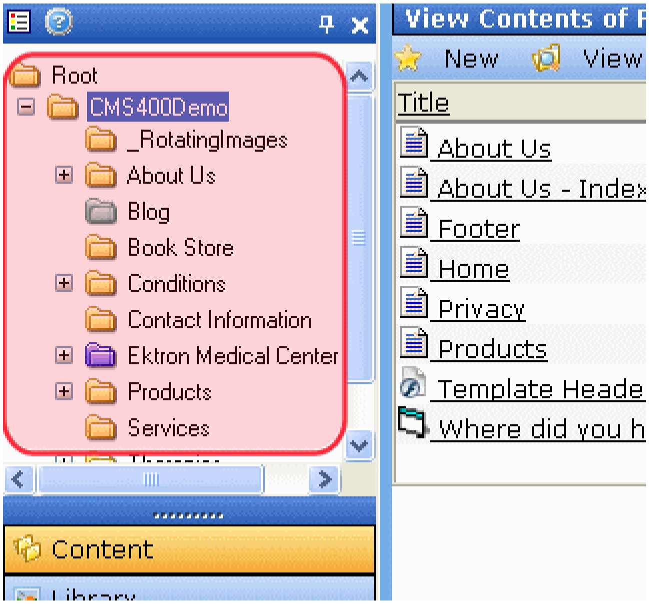
Action Menu

This menu lets you perform the following functions.

Menu option	Lets you	More Information
Export for translation	Prepare content for translation by a translation agency	”Using the Language Export Feature” on page 655
Move/Copy Content	Move or copy content to another folder.	”Moving or Copying Content” on page 76
Search	Search through content in the Workarea.	”Search Content Folder” on page 60

Modifying the Folder Display

Ektron CMS400.NET provides two techniques for displaying the folder tree. (The folder tree appears in the left frame when the Content tab is selected, as shown below.)


Root
CMS400Demo
_RotatingImages
About Us
Blog
Book Store
Conditions
Contact Information
Ektron Medical Center
Products
Services
Content
View Contents of F
New
View
Title
About Us
About Us - Index
Footer
Home
Privacy
Products
Template Heade
Where did you h

- Classic - used in previous versions of **Ektron CMS400.NET**
- Ajax - available in version 5.1 or higher

The following table contrasts the two techniques.

Technique	How it Works	Advantage
Classic	Fetches all folders and subfolders while initially displaying the Workarea	While initial wait time may be longer, the wait time for opening child folders is shorter
Ajax	Initially fetches only folders one level below Content (root) folder. Subsequent levels are fetched when user clicks the parent folder.	Can reduce initial wait time when displaying the Workarea

By default, **Ektron CMS400.NET** uses the Ajax technique. To change it to Classic, open the web.config file in your site root and change the value of the `ek_treemodel` setting from one (1) to zero (0).

To change the technique back to Ajax, change the value of the `ek_treemodel` setting from zero (0) to one (1).

Folder Properties

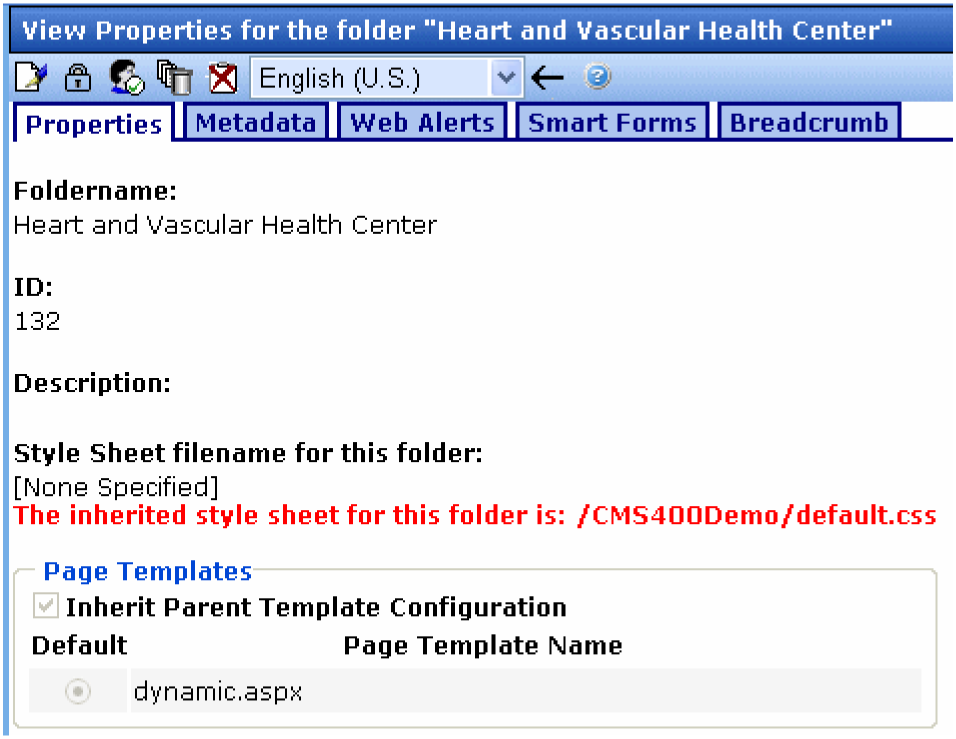
The folder properties screen lets you set permissions and approvals for a folder. You can also assign or modify the folder's metadata, Web Alerts, and Smart Forms.

NOTE Only members of the Administrator User Group and those defined in the Manage Members for Role: Folder User Admin screen can view, add, or edit folder properties. (*See Also:* "Defining Roles" on page 564) In addition, if a user is not a member of the Administrators group, he must be given permission for individual folders on the Folder Properties > View Permissions for Folder screen. (*See Also:* "Setting Permissions" on page 547)

Accessing the Folder Properties Screen

To access the folder properties screen, follow these steps.

1. Navigate to and click the content folder whose properties you want to edit.
2. Click **View > Folder Properties**.
3. The folder's View Properties screen appears.



View Properties for the folder "Heart and Vascular Health Center"

Foldername:
Heart and Vascular Health Center

ID:
132

Description:

Style Sheet filename for this folder:
[None Specified]
The inherited style sheet for this folder is: /CMS400Demo/default.css

Page Templates

☑ Inherit Parent Template Configuration

Default	Page Template Name
●	dynamic.aspx

If you want to change any properties, click the Edit button (📝) to proceed to the edit screen.

The table below describes the fields on the Folder Properties screen.

Fields on the Folder Properties Screen

Tab	Field	Description
Properties	Foldername	Edit the name of the content folder. Note: You cannot change the root folder name.
	Description	Edit the description of the content folder.

Tab	Field	Description
	Style Sheet filename for this folder: (leave blank to inherit)	Specify a style sheet that defines the styles of the content within the content folder. Or, leave this field blank to inherit the style sheet from the parent content folder. This style sheet affects content while being edited but has no effect on how the content appears on your Web site. To set or edit the style sheet that determines how your Web pages display, open the page's Web form and place a `<link rel="stylesheet"...` tag within its <HEAD> tags.
	Template filename for this folder: (leave blank to inherit)	Specify a template for the folder. Or, leave this field blank to inherit the template from the parent content folder. Content in this folder appears on your Web site within the template you choose. *See Also:* "Creating/Updating Templates" on page 62
	Page Templates	Lets you specify one or more templates for content in this folder. *See Also:* "Creating/Updating Templates" on page 62
	Multi-Site Domain Configuration	Lets you set up and manage several Web sites under one CMS. *See Also:* "Support for Multiple Sites" on page 756
	Should Office documents added to this folder be published in other format? Note: This field only appears if the **Enable Office documents to be published in other format** property is checked in the Settings > Configuration > Setup screen. *See Also:* "Updating Setup Information" on page 26 (continued on next page)	Select **Publish Office documents as PDF**, **Publish Office documents as HTML**, or **No** to elect neither choice. **Publish Office documents as PDF** (This field only appears if the **Publish as PDF property** is checked in **Settings > Configuration > Setup**.) Select this option if Office documents in this folder are published as PDF files. *See Also:* "PDF Generation" on page 314

Tab	Field	Description
	Should Office documents added to this folder be published in other format? (continued)	**Publish Office documents as HTML** Select this option if you want to publish Office documents in this folder in an HTML format. If you select this option, Office documents are transformed to HTML format, which means they are formatted to display within a browser. As a result, anyone visiting your site can view the document, whether or not they have Microsoft Office software installed on their computer. If you do not elect this option, nor **Publish Office documents as PDF**, a site visitor without Microsoft Office software cannot view a page that contains an Office document. Note: Only Microsoft Word, Excel, and PowerPoint files can be published as HTML. Note: This property is not inherited from a parent folder, nor is it inherited by any subfolders below this folder. For more information about working with Office documents, see the **Ektron CMS400.NET** User Manual section “Using the Document Management Functionality“> “Working with Office Documents.”
	Quick Deploy: Replicate Folder Contents	Determines whether content in this folder is updated when Quick Deploy is run. *See Also:* ”Quick Deploy” on page 730
Metadata	Metadata/Custom-Fields available for folder	See ”Assigning Metadata to a Folder” on page 115
Web Alerts	Web Alert fields for this folder	See ”Assigning Web Alert Information to Content” on page 793
Smart Forms	Inherit Parent Configuration	See ”Smart Forms” on page 49
Breadcrumb	Inherit Parent Configuration	See ”Breadcrumbs” on page 50

Folder Properties Toolbar

The Folder Properties screen contains these toolbar buttons.

Button	Name	Description	More Information
📝	Edit Properties	Access the Edit Folder Properties screen	”Editing Folder Properties” on page 46
🔒	Permissions	Access the folder’s Permissions Table	”Setting Permissions” on page 547
👤	Modify Preapproval Group	Set or update preapproval group assigned to folder	”Automatic Creation of Tasks Associated with Content” on page 360
👤	Approvals	Access the folder’s approvals table	”Setting Approval Chains” on page 556
🗑	Purge History	Access the folder’s purge history table	”Purge History” on page 48
☒	Restore Web Alert Inheritance	Assigns the folder’s Web Alert properties to all content in folder	”Inheriting Content-Level Web Alert Information from Its Folder” on page 795
←	Back	Go to previous screen	

Editing Folder Properties

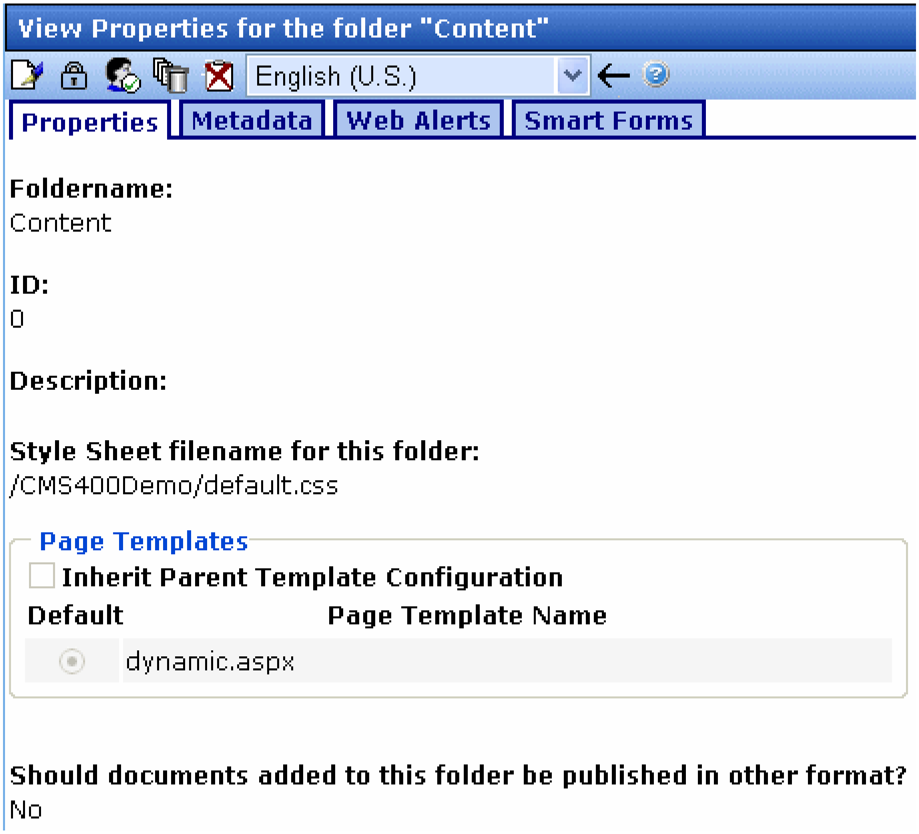
A content folder’s properties consist of

- name
- description
- style sheet
- template
- Metadata
- Web Alerts
- ”Smart Forms” on page 49

- ”Breadcrumbs” on page 50

To edit any properties for a folder, follow these steps.

1. Access the View Properties screen for the folder you want to edit, as described in ”Accessing the Folder Properties Screen” on page 42.
2. Click the Edit button (📝).
3. The folder’s Edit Properties screen appears.


View Properties for the folder "Content"
English (U.S.)
Properties
Metadata
Web Alerts
Smart Forms

Foldername:
Content

ID:
0

Description:

Style Sheet filename for this folder:
/CMS400Demo/default.css

Page Templates

☐ Inherit Parent Template Configuration

Default	Page Template Name
●	dynamic.aspx

Should documents added to this folder be published in other format?
No

4. Make the necessary changes to the content folder’s properties. See ”Fields on the Folder Properties Screen” on page 43.
5. Click the Update button (💾).

Purge History

The Purge History option lets you delete historical versions of content in a folder. When purging, your options are

- specify a date before which historical versions are purged
- indicate whether the purge includes a folder's subfolders
- purge published as well as checked-in versions of content

NOTE Only Ektron CMS400.NET administrators and users identified on the Manage Members for Role: Folder User Admin screen can purge history.

To purge the history for a content folder, follow these steps.

1. Access the View Folder Properties screen for the content folder you want to purge the history for, as described in "Accessing the Folder Properties Screen" on page 42.
2. Click the Purge History button (🗑).
3. The Purge History screen appears.
4. Use the following table to customize the Purge History options.

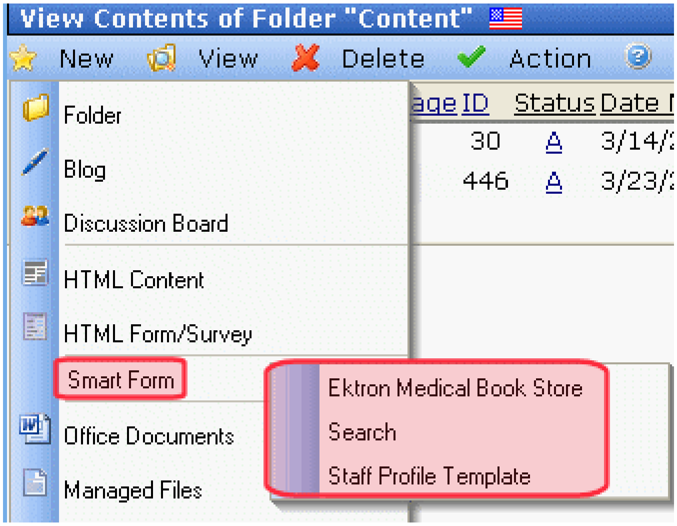
Field	Description	Required?
Only purge historical versions before	Specify a date to limit the number of historical versions to purge. When specified, only historical versions with a date before this date are purged.	Yes
Recursive Purge	Purges historical records for content in this folder's subfolders.	No
Purge versions marked as Published	Purges published versions of content as well as checked-in versions.	No

5. Click the Purge History button (🗑).
6. A confirmation message is displayed.
7. Click **OK** to continue.
8. Ektron CMS400.NET executes the purge and displays a confirmation when complete.

Smart Forms

Use the Smart Forms screen to assign one or more XML configurations to a folder. (To learn about how Smart Forms are created, see "Working with Smart Forms" on page 163.)

When creating new content in a folder, the **New** menu provides a Smart Form option. This option displays a secondary menu, which lists Smart Forms that you can use to create XML content. (See graphic below.)


View Contents of Folder "Content"
New
View
Delete
Action
age ID
Status
Date
30
A
3/14/
446
A
3/23/
Folder
Blog
Discussion Board
HTML Content
HTML Form/Survey
Smart Form
Office Documents
Managed Files
Ektron Medical Book Store
Search
Staff Profile Template

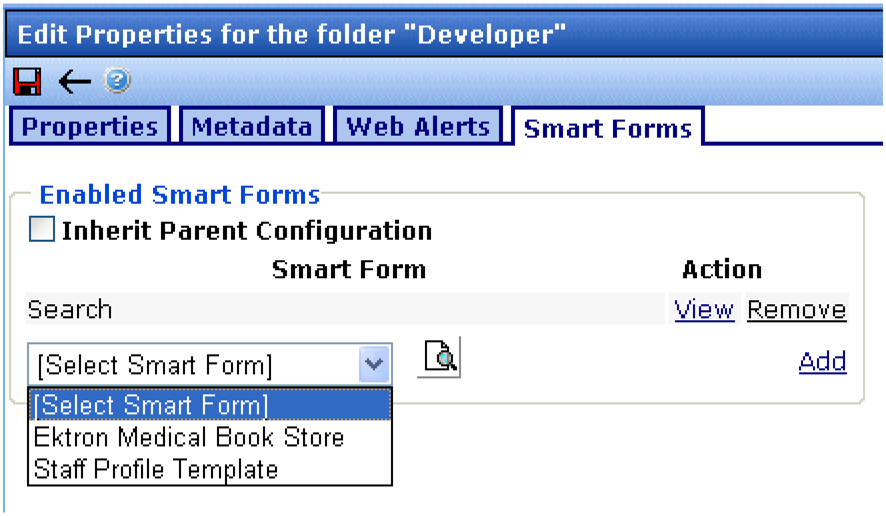
This section explains how to determine the list of Smart Forms available when creating content.

Inheritance and Smart Forms

A folder's Smart Forms can be inherited from the parent folder, or you can break inheritance and assign a unique group of Smart Forms. Use the **Inherit Parent Configuration** checkbox to retain or break inheritance.

Assigning Smart Forms to a Folder

If you break inheritance, you then select the Smart Forms that can be assigned to content in the folder using the Smart Forms dropdown list (shown below).


Edit Properties for the folder "Developer"
Properties
Metadata
Web Alerts
Smart Forms
Enabled Smart Forms
☐ Inherit Parent Configuration
Smart Form
Action
Search
View
Remove
[Select Smart Form]
Add
[Select Smart Form]
Ektron Medical Book Store
Staff Profile Template

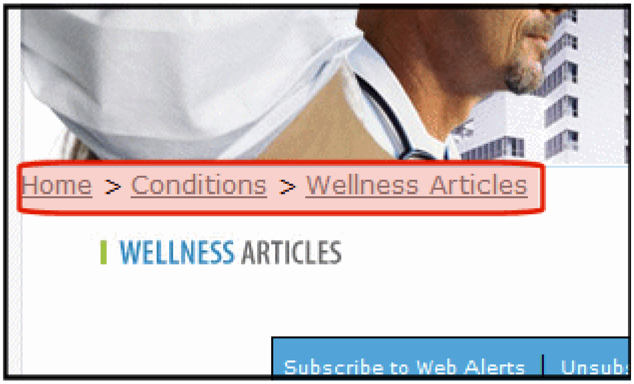
You can preview any Smart Form by clicking the Preview button (). To add any Smart Form, select it from the dropdown list and click **Add**.

To remove a Smart Form, click **Remove**.

Breadcrumbs

WARNING! The information described in this section is for use with the FolderBreadcrumb server control, *not* the BreadCrumb server control. For additional information on each server control, see The Developer Manual sections “**Introduction to Ektron CMS400.NET Server Controls”** > “**BreadCrumb Server Control**” and “**Introduction to Ektron CMS400.NET Server Controls**” > “**FolderBreadcrumb Server Control**”.

Use the Breadcrumb tab to define a site map for the folder or inherit one from the parent folder. Breadcrumbs improve the way site visitors can navigate your site. Below is an example.



The following topics explain Breadcrumbs in more detail.

- ”Inheritance and Breadcrumbs” on page 51
- ”Steps to Add a Breadcrumb” on page 51
- ”Reordering the Breadcrumb Items” on page 54
- ”Editing a Breadcrumb Item” on page 56
- ”Removing a Breadcrumb Item” on page 58

Inheritance and Breadcrumbs

A folder’s breadcrumbs can be inherited from the parent folder, or you can break inheritance and assign a path of breadcrumbs. Use the **Inherit Parent Configuration** checkbox to retain or break inheritance.

Working with Breadcrumbs in a Folder

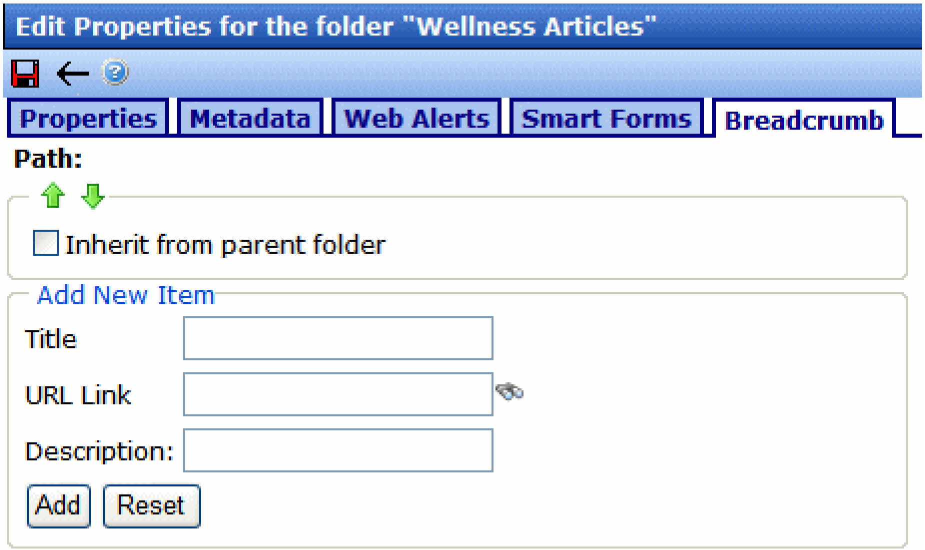
If you break inheritance to the parent folder, you can assign a folder path for your breadcrumb.

Steps to Add a Breadcrumb

Navigate to the folder for which you want to add the breadcrumbs. The example below adds three breadcrumbs to the trail.

1. On the **View Contents of Folder** screen, click **View** > **Folder Properties**.
2. Click the Edit Properties button ().

3. Click the **Breadcrumb** tab.
4. The Edit Breadcrumbs screen appears.


Edit Properties for the folder "Wellness Articles"
Properties
Metadata
Web Alerts
Smart Forms
Breadcrumb
Path:
☐ Inherit from parent folder
Add New Item
Title
URL Link
Description:
Add
Reset

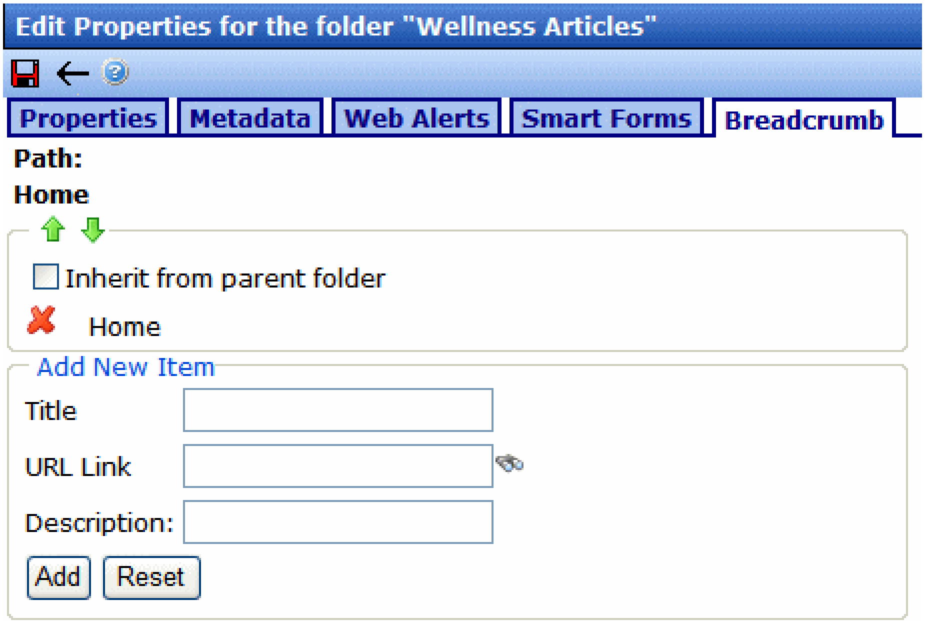
5. In the Add New Item section of the screen, add the following information.

- **Title** - the name of the breadcrumb as you want it to appear in the breadcrumb trail
- **URL Link** - the URL path to the breadcrumbs destination. For example, default.aspx. If you are not sure where the file is located, click the Binoculars ( ), and the library for quicklinks appears.

  You can also enter a URL, for example, `www.ektron.com`.
- **Description** - add a description for the breadcrumb

6. Click the Add button (Add).
7. The first item in the breadcrumb path appears

.



Edit Properties for the folder "Wellness Articles"

Properties
Metadata
Web Alerts
Smart Forms
Breadcrumb

Path:

Home

☐ Inherit from parent folder

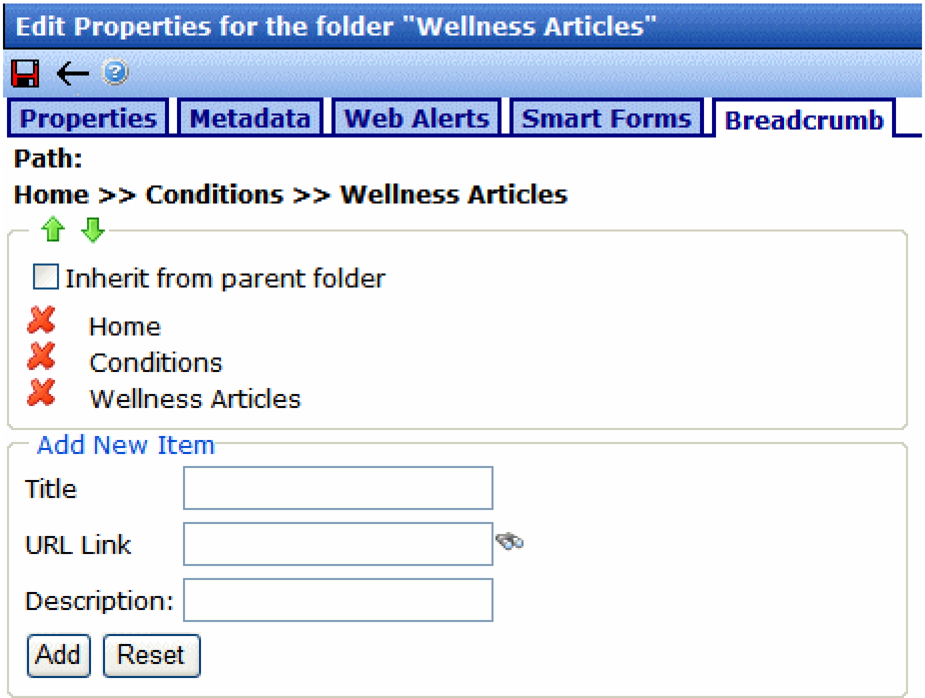
Home

Add New Item

Title	
URL Link	
Description:	

Add
Reset

8. Repeat Steps five and six two more times.
9. The items in the breadcrumb now appear like this.

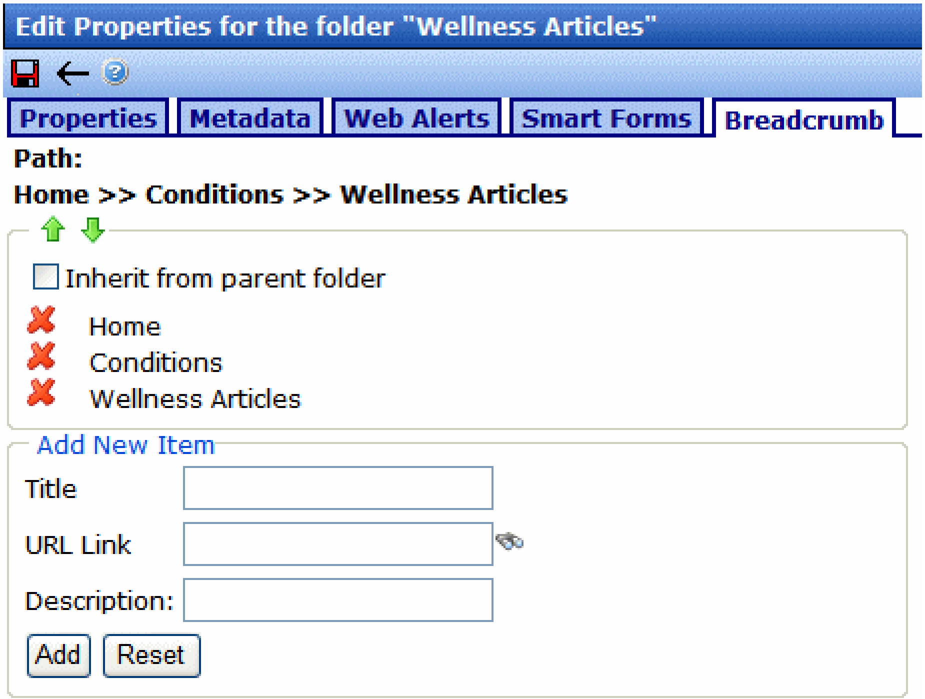

Edit Properties for the folder "Wellness Articles"
Properties
Metadata
Web Alerts
Smart Forms
Breadcrumb
Path:
Home >> Conditions >> Wellness Articles
☐ Inherit from parent folder
Home
Conditions
Wellness Articles
Add New Item
Title
URL Link
Description:
Add
Reset

10. Click the Save button (🖫).

Reordering the Breadcrumb Items

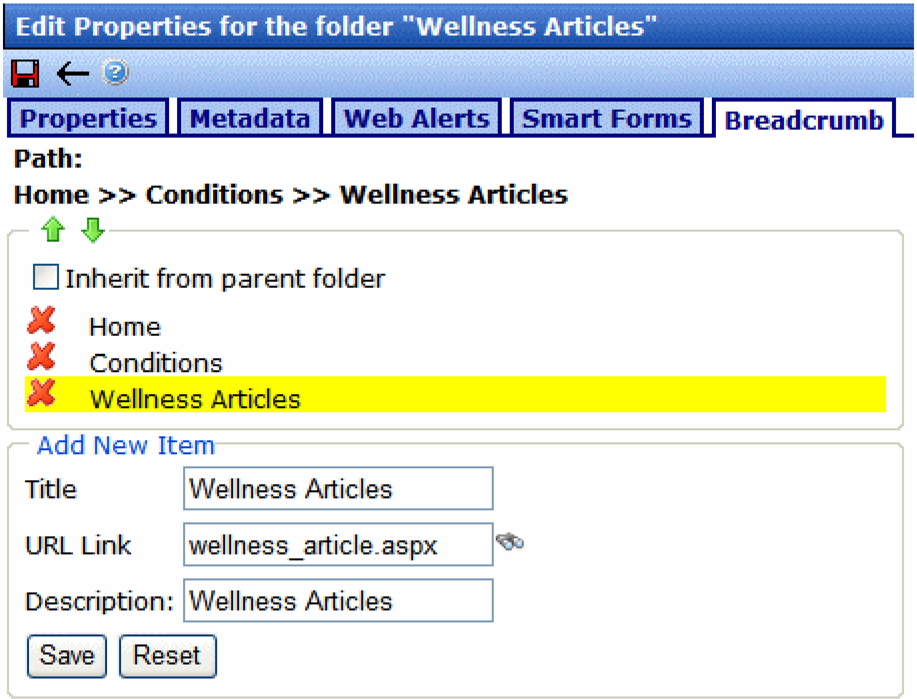
1. On the **View Contents of Folder** screen, click **View** > **Folder Properties**.
2. Click the Edit Properties button (✎).
3. Click the **Breadcrumb** tab.

4. The Edit Breadcrumbs screen appears.


Edit Properties for the folder "Wellness Articles"
Properties
Metadata
Web Alerts
Smart Forms
Breadcrumb
Path:
Home >> Conditions >> Wellness Articles
☐ Inherit from parent folder
Home
Conditions
Wellness Articles
Add New Item
Title
URL Link
Description:
Add
Reset

5. Click a breadcrumb item.

WARNING! Do not click on the red X. This deletes the breadcrumb item. *See Also:* "Removing a Breadcrumb Item" on page 58.


Edit Properties for the folder "Wellness Articles"
Properties
Metadata
Web Alerts
Smart Forms
Breadcrumb

Path:
Home >> Conditions >> Wellness Articles

☐ Inherit from parent folder

- Home
- Conditions
- Wellness Articles

Add New Item

Title	Wellness Articles
URL Link	wellness_article.aspx
Description:	Wellness Articles

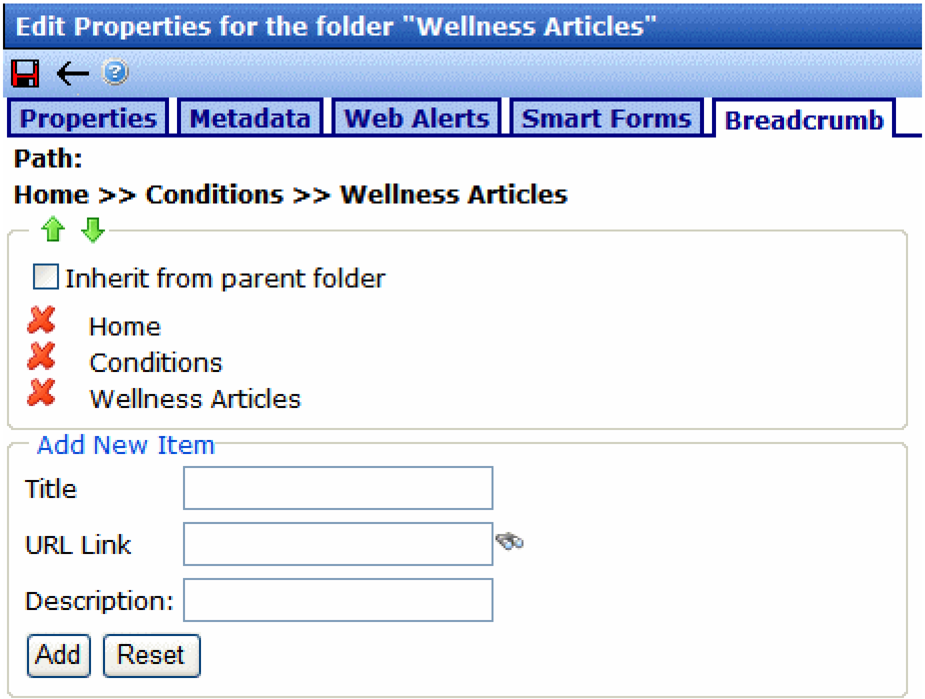
Save
Reset

6. Click the green Up and Down buttons (⇧ ⇩) to move the item around in the list.
7. Once the items are in the correct position, click the Save button (💾).

Editing a Breadcrumb Item

1. On the **View Contents of Folder** screen, click **View** > **Folder Properties**.
2. Click the Edit Properties button (📝).
3. Click the **Breadcrumb** tab.

4. The Edit Breadcrumbs screen appears.



Edit Properties for the folder "Wellness Articles"

Path:

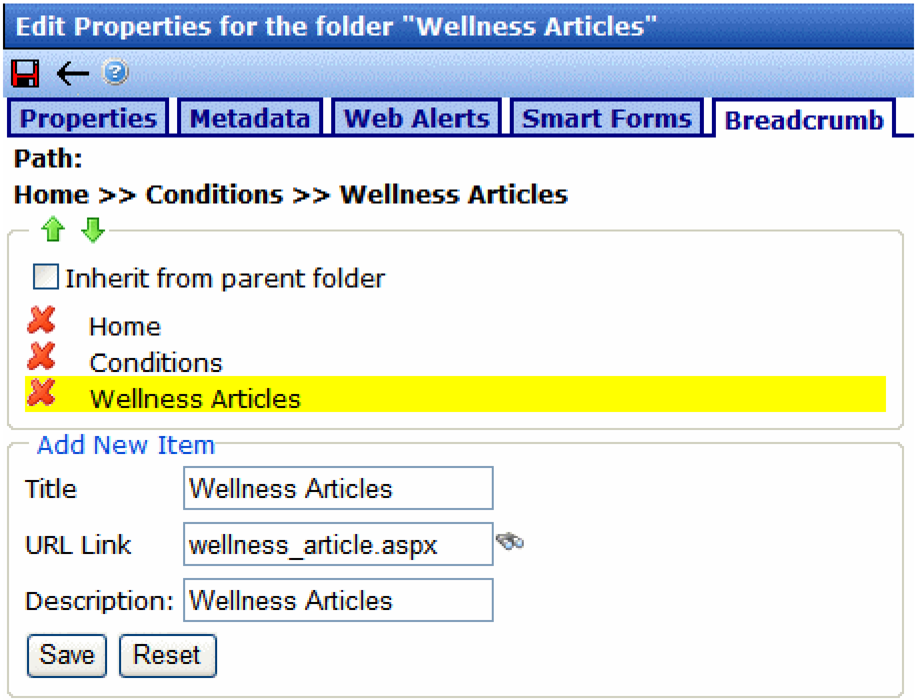
Home >> Conditions >> Wellness Articles

☐ Inherit from parent folder

Properties
Metadata
Web Alerts
Smart Forms
Breadcrumb
Home
Conditions
Wellness Articles
Add New Item
Title
URL Link
Description:
Add
Reset

5. Click a breadcrumb item.

WARNING! Do not click the red X. This deletes the breadcrumb item. *See Also:* "Removing a Breadcrumb Item" on page 58.


Edit Properties for the folder "Wellness Articles"
Properties
Metadata
Web Alerts
Smart Forms
Breadcrumb

Path:
Home >> Conditions >> Wellness Articles

☐ Inherit from parent folder

Home
Conditions
Wellness Articles

Add New Item

Title	Wellness Articles
URL Link	wellness_article.aspx
Description:	Wellness Articles

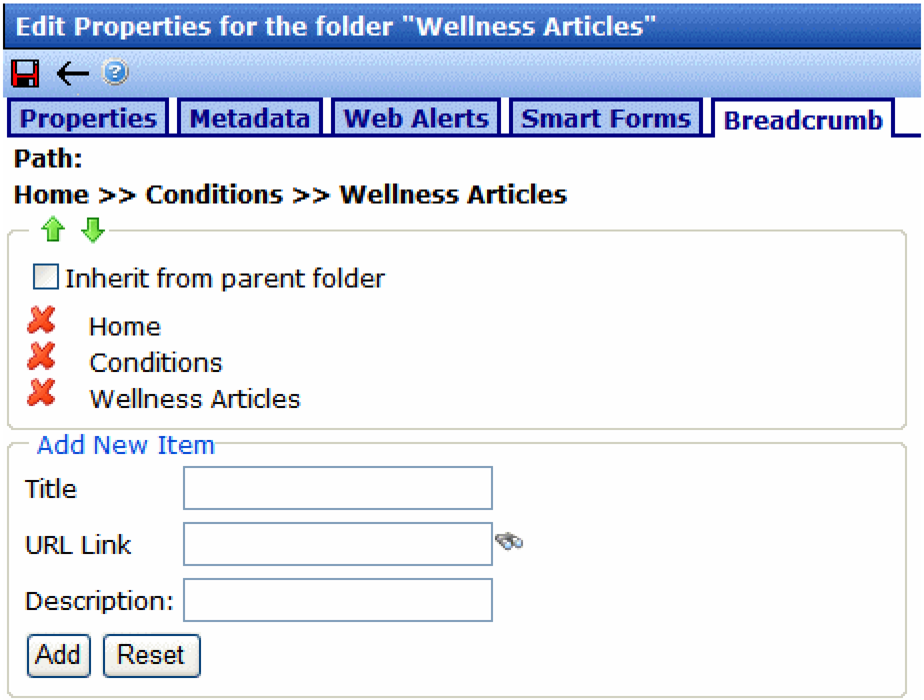
Save
Reset

6. In the **Add New Item** section, edit the information.
7. Click the Save button (Save).
8. Click the Save button ( ).

Removing a Breadcrumb Item

1. On the **View Contents of Folder** screen, click **View** > **Folder Properties**.
2. Click the Edit Properties button ( ).
3. Click the **Breadcrumb** tab.

4. The Edit Breadcrumbs screen appears.


Edit Properties for the folder "Wellness Articles"

Properties
Metadata
Web Alerts
Smart Forms
Breadcrumb

Path:

Home >> Conditions >> Wellness Articles

☐ Inherit from parent folder

Home
Conditions
Wellness Articles
Add New Item
Title
URL Link
Description:
Add
Reset

5. Click the Red X (✗) next to the breadcrumb item you want to remove.
6. The breadcrumb item is deleted.
7. Click the Save button (💾).

Adding Subfolders

To further organize content on your Web site, create subfolders to store related content. To add a sub folder, follow these steps.

1. Navigate to and click the folder within which you want to create a subfolder.
2. Click **New > Folder**.
3. The Add a Subfolder screen appears.
4. Complete the fields. See ”Fields on the Folder Properties Screen” on page 43.
5. Click the Save button (💾).

You can modify the subfolder’s properties, permissions, approval chain, etc. For a list of options, see ”Folder Properties Toolbar” on page 46.

Deleting Folders

You can delete obsolete folders from the Ektron CMS400.NET Web site.

NOTE You cannot delete the top-level folder, **Content**.

CAUTION! Deleting a content folder permanently deletes the content and Quicklinks that belong to the content folder, as well as its subfolders.

To delete a content folder, follow these steps.

1. In your Workarea, navigate to the content folder you want to delete.
2. Click the Delete Folder button ( ).
3. A confirmation message is displayed.
4. Click **OK**.

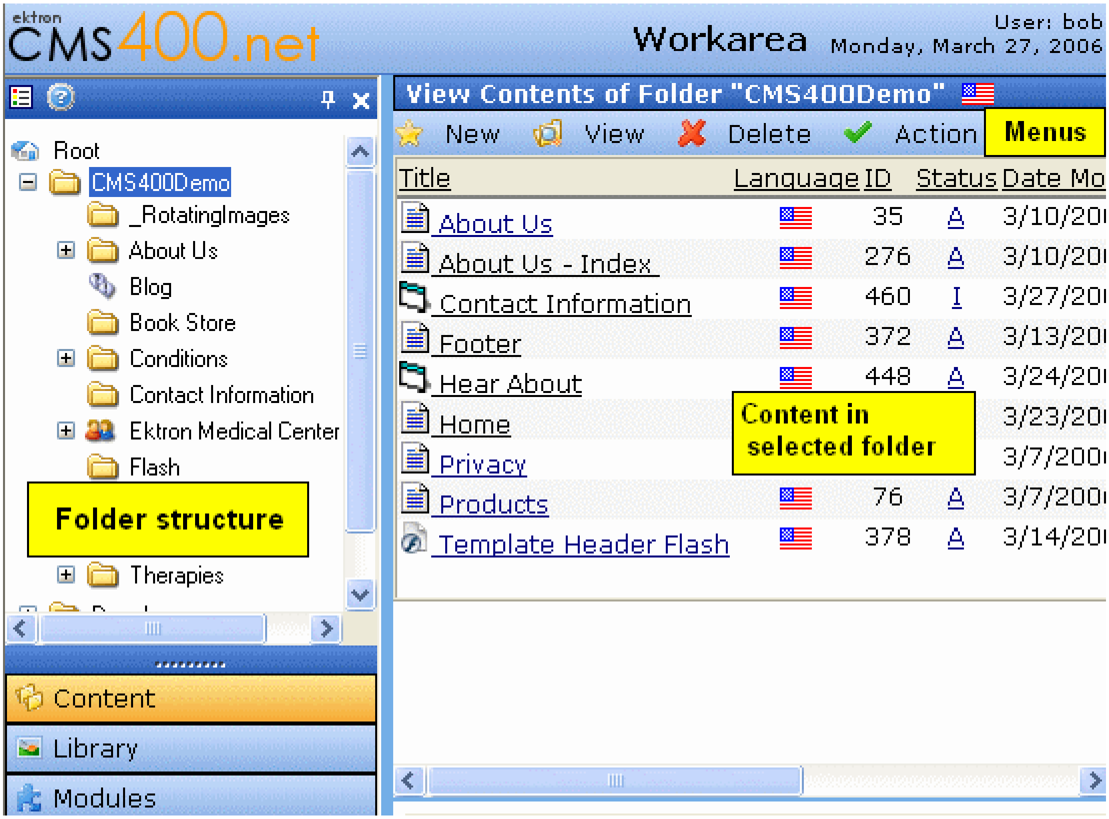
Search Content Folder

You can search a folder to locate content within your Web site. Use this feature to find content when you know the text that needs to be updated but are unsure of its folder or where it is on the Web site. The search only looks through the current folder and its subfolders. So if you want to search the entire site, begin with the root content folder.

To learn more about searching through folders on **Ektron CMS400.NET**, see the following section of the **Ektron CMS400.NET** User Manual “Working with Folders and Content” > “Searching the Workarea.”

Managing HTML Content

When you enter the Content folder in Ektron CMS400.NET as an administrator, you can control every aspect of the content and folders. Some controls include setting permissions, approvals, and adding, editing, publishing, and deleting content. Below is an example of the Content folder.


ektron CMS400.net
Workarea
User: bob
Monday, March 27, 2006
View Contents of Folder "CMS400Demo"
New
View
Delete
Action
Menus
Root
CMS400Demo
_RotatingImages
About Us
Blog
Book Store
Conditions
Contact Information
Ektron Medical Center
Flash
Folder structure
Therapies
Content in selected folder
Content
Library
Modules

Title	Language	ID	Status	Date Mo
About Us	🇺🇸	35	A	3/10/20
About Us - Index	🇺🇸	276	A	3/10/20
Contact Information	🇺🇸	460	I	3/27/20
Footer	🇺🇸	372	A	3/13/20
Hear About	🇺🇸	448	A	3/24/20
Home				3/23/20
Privacy				3/7/200
Products	🇺🇸	76	A	3/7/200
Template Header Flash	🇺🇸	378	A	3/14/20

This chapter explains how to add, edit, publish, and delete content. Permissions and Approvals are explained in later chapters.

See Also:

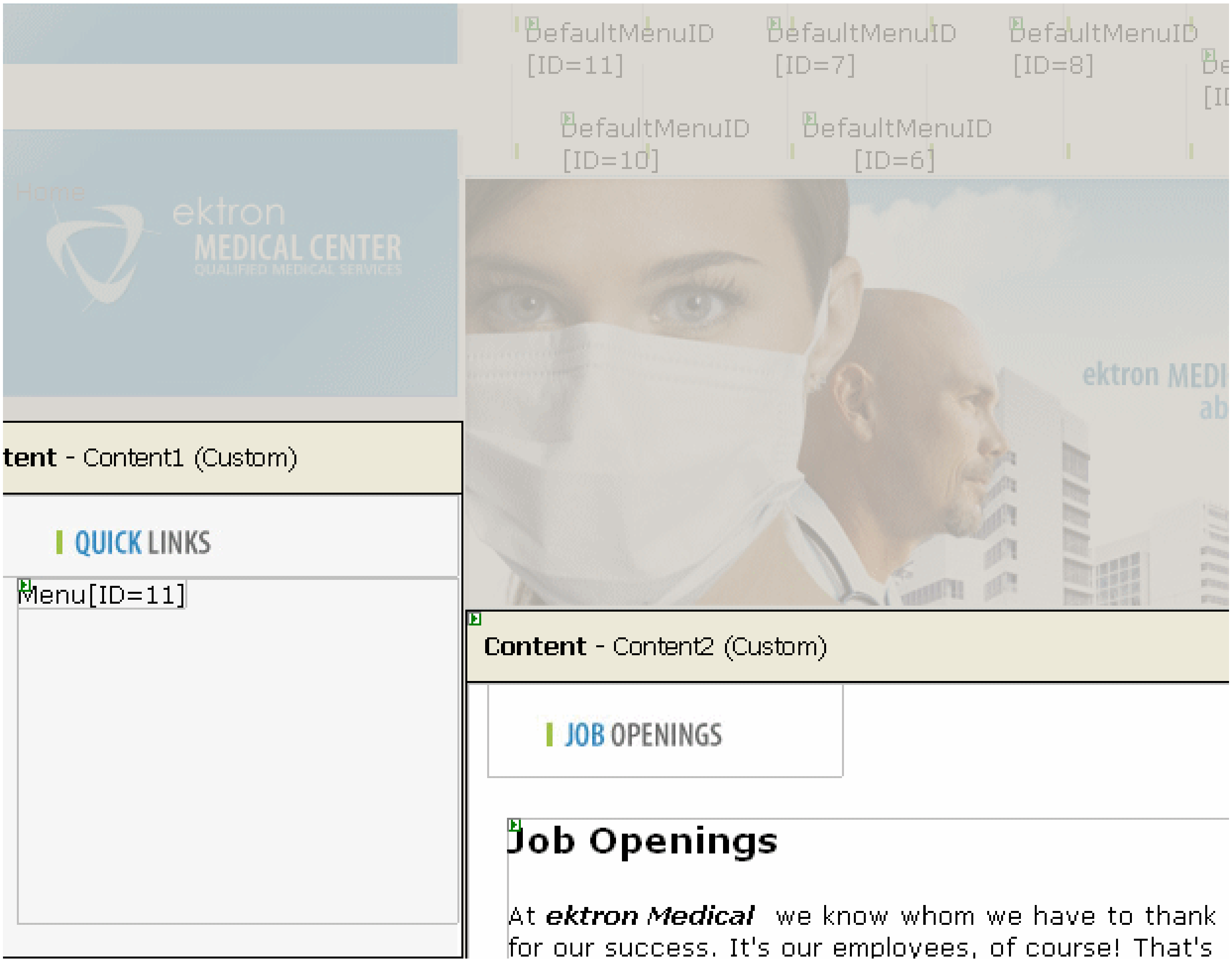
- ”Creating/Updating Templates” on page 62
- ”Adding Content” on page 72

- ”Forming URLs For Ektron CMS400.NET Documents” on page 74
- ”Viewing Content” on page 75
- ”Editing Content” on page 76
- ”Moving or Copying Content” on page 76
- ”Deleting Content” on page 80
- ”Content History” on page 80
- ”Content Permissions” on page 80
- ”Content Approvals” on page 80
- ”Link Checking” on page 81
- ”Assigning Tasks to Content” on page 81
- ”Content Properties” on page 81
- ”Content Rating” on page 82

Creating/Updating Templates

During the setup of your **Ektron CMS400.NET** Web site, templates are created for your Web pages. A template typically includes page headers and footers as well as placeholders for content, forms, summaries, calendars, collections, or other page elements.

A template included with Ektron’s sample site appears below. Notice that the top of the screen contains headers that appear on several pages. Other areas contain links to **Ektron CMS400.NET** objects, such as menus and text. The developer can easily modify the content inside these areas.


DefaultMenuID [ID=11]
DefaultMenuID [ID=7]
DefaultMenuID [ID=8]
DefaultMenuID [ID=10]
DefaultMenuID [ID=6]
Home
ektron MEDICAL CENTER
QUALIFIED MEDICAL SERVICES
tent - Content1 (Custom)
QUICK LINKS
Menu[ID=11]
ektron MEDI
ab
Content - Content2 (Custom)
JOB OPENINGS

Job Openings

At *ektron Medical* we know whom we have to thank for our success. It's our employees, of course! That's

NOTE To learn more about creating templates, see the **Ektron CMS400.NET** Developer's Manual section "Introduction to Ektron CMS400.NET Server Controls" > "Setting Up a Template."

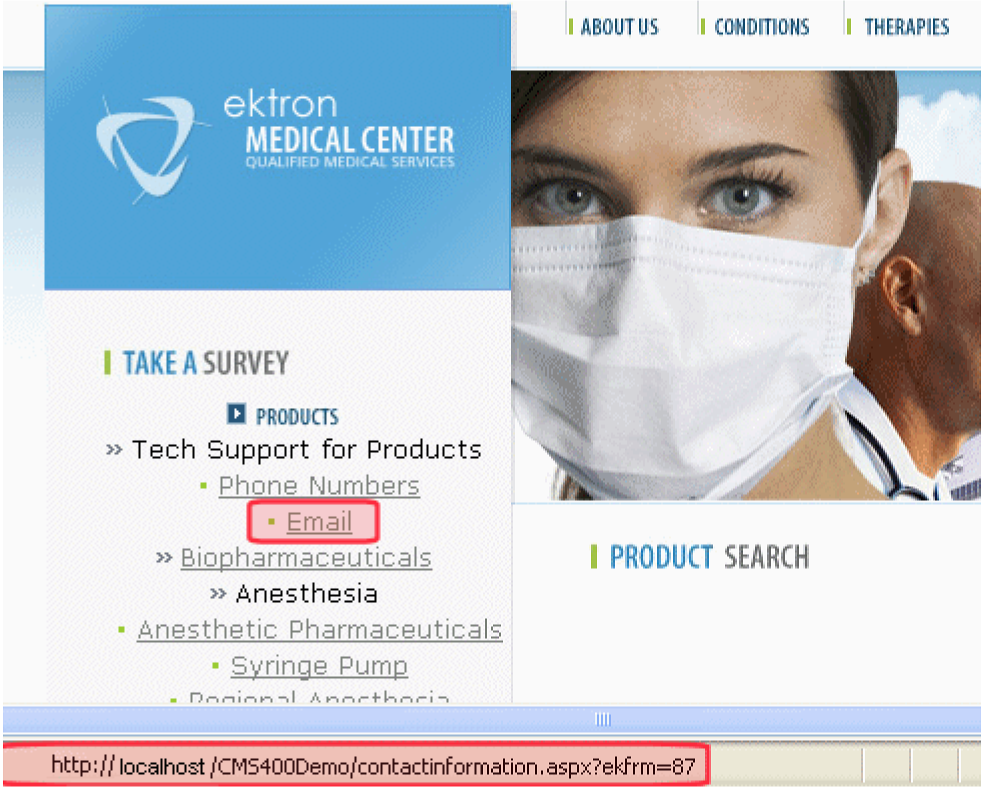
Templates are more fully explained through the following topics.

- "How Templates are Used" on page 64
- "Declaring Templates" on page 64
- "Inheritance of Folder Templates" on page 67
- "Assigning Templates to Folders" on page 68
- "Assigning Templates to Content" on page 70

How Templates are Used

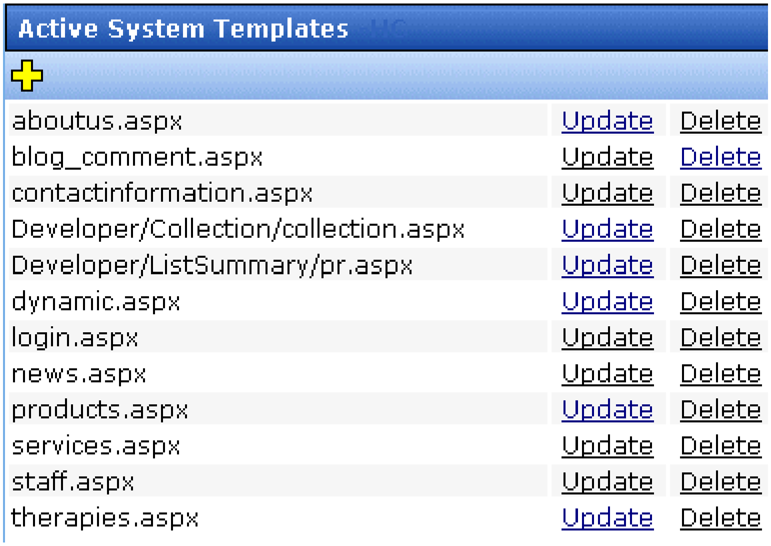
Except for your Web site's home page, all pages on your site are made accessible by *hyperlinks*. Hyperlinks can appear within content. They are also used to link content items from list summaries, menus, and collections.

The template is a key component of the hyperlink definition -- it defines the template in which to display the content. As seen in the example below, when the user selects **Email**, that content item (ID 87) will display within the `contactinformation.aspx` template.


ABOUT US
CONDITIONS
THERAPIES
ektron
MEDICAL CENTER
QUALIFIED MEDICAL SERVICES
TAKE A SURVEY
PRODUCTS
» Tech Support for Products
Phone Numbers
Email
» Biopharmaceuticals
» Anesthesia
Anesthetic Pharmaceuticals
Syringe Pump
PRODUCT SEARCH
http://localhost/CMS400Demo/contactinformation.aspx?ekfrm=87

Declaring Templates

After creating your templates, declare them within **Ektron CMS400.NET**. To do this, go to the Active System Templates screen, available from **Settings > Configuration > Template Configuration**.



Active System Templates

aboutus.aspx	Update	Delete
blog_comment.aspx	Update	Delete
contactinformation.aspx	Update	Delete
Developer/Collection/collection.aspx	Update	Delete
Developer/ListSummary/pr.aspx	Update	Delete
dynamic.aspx	Update	Delete
login.aspx	Update	Delete
news.aspx	Update	Delete
products.aspx	Update	Delete
services.aspx	Update	Delete
staff.aspx	Update	Delete
therapies.aspx	Update	Delete

From this screen, you can add new templates, or delete or update existing ones.

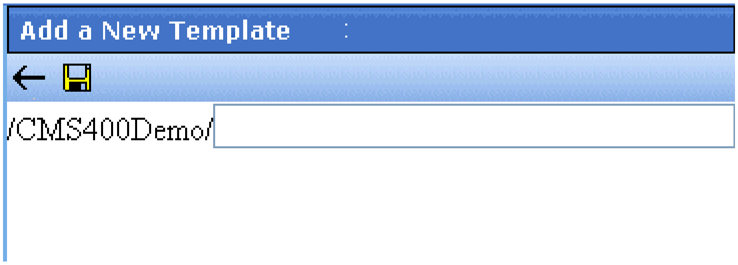
NOTE Only members of the Administrators group and users defined in the Manage Members for Role: Template Configuration screen have permission to add, delete or update templates. *See Also:* ”Defining Roles” on page 564

See Also:

- ”Creating/Updating Templates” on page 62
- ”Adding a New Template” on page 65
- ”Deleting a Template” on page 66
- ”Updating a Template” on page 66

Adding a New Template

To add a new template, click the Add button (✚). The Add a New Template screen appears.



Enter the path to the new template and click the Save button (💾).

Deleting a Template

To delete a template, click Delete next to the template.

You can only delete a template if it is not assigned as any folder's default template. If you choose a template that is assigned as a default, a screen tells you why you cannot delete it and lists the folders for which it is the default.

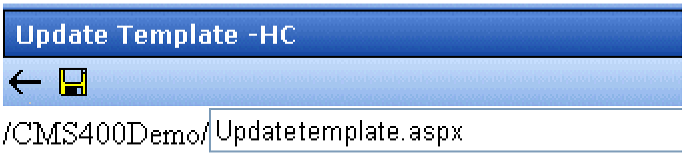
If you delete a template that is not used as a default but is applied to content, that content's template is changed to its folder's default template.

Updating a Template

Use the **update** command to change all references from an old to a new template. For example, your old template is named MyTemplate.aspx. You can want replace all references to it to Updatetemplate.aspx.

To do this, follow these steps.

1. Click Update next to the template.
2. A new screen appears.
3. Enter **Updatetemplate.aspx**.
4. Click the Save button (💾).

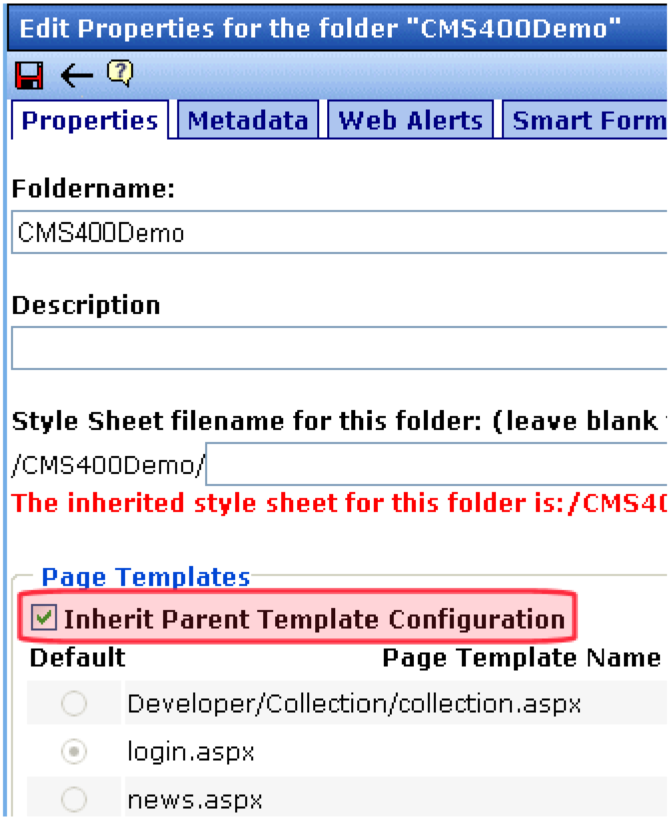


/CMS400Demo/ Updatetemplate.aspx

Inheritance of Folder Templates

By default, all folders below the root folder inherit from their parent. However, you can override the default and assign a unique set of templates to any folder.

Before you can change a folder’s template assignment, you must break inheritance from the parent folder. To do this, go to the Edit Folder Properties screen and uncheck the box next to **Inherit Parent Template Configuration** (illustrated below). *See Also:* ”Editing Folder Properties” on page 46



Edit Properties for the folder "CMS400Demo"

Foldername:
CMS400Demo

Description

Style Sheet filename for this folder: (leave blank
/CMS400Demo/
The inherited style sheet for this folder is:/CMS4

Page Templates

☑ Inherit Parent Template Configuration

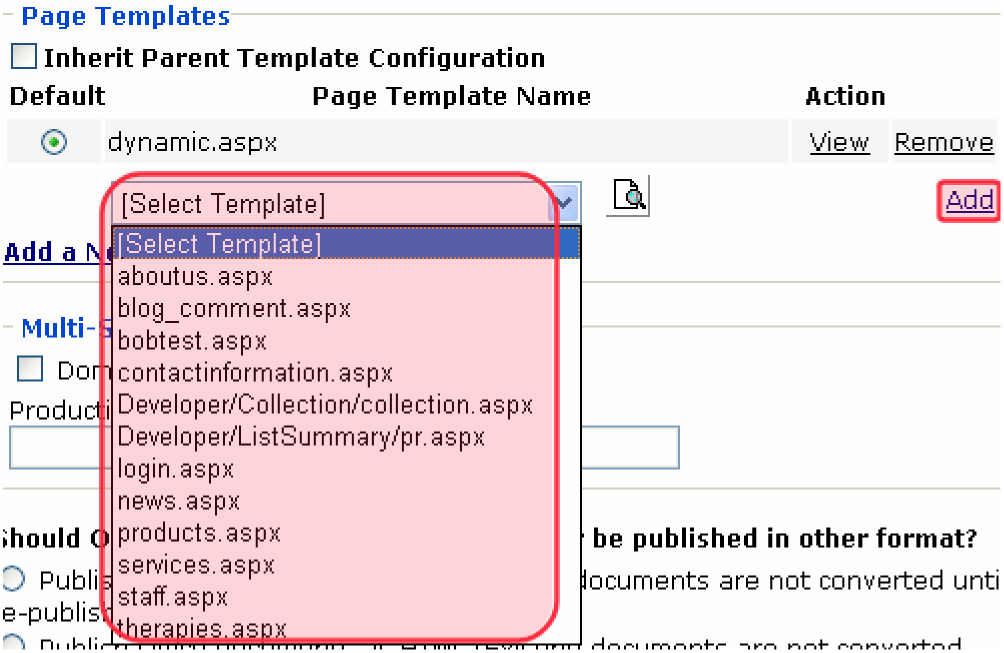
Default	Page Template Name
○	Developer/Collection/collection.aspx
●	login.aspx
○	news.aspx

Each folder must have at least one template. Also, one template must be chosen as the default.

Assigning Templates to Folders

If you break template inheritance, all inherited templates are initially assigned to the folder. You can then remove unwanted templates or add new ones.

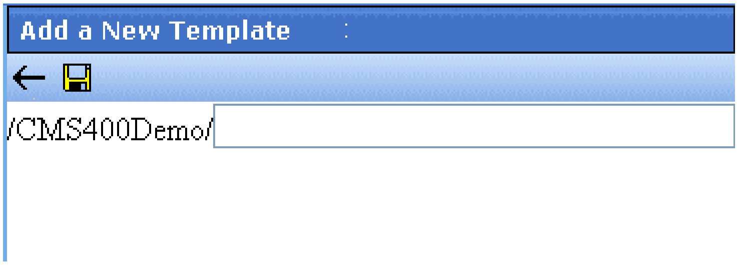
All available templates appear in the template dropdown list (illustrated below). Select any that you want to be available from the folder and click **Add**.


Page Templates
☐ Inherit Parent Template Configuration
Default
Page Template Name
Action
● dynamic.aspx
View
Remove
[Select Template]
Add
Add a N
Multi-S
☐ Dom
Producti
[Select Template]
aboutus.aspx
blog_comment.aspx
bobtest.aspx
contactinformation.aspx
Developer/Collection/collection.aspx
Developer/ListSummary/pr.aspx
login.aspx
news.aspx
products.aspx
services.aspx
staff.aspx
therapies.aspx
hould O
be published in other format?
○ Publi
ocuments are not converted unti
e-publis

The list of available templates is managed through the ActIve System Templates screen. *See Also:* "Declaring Templates" on page 64

Adding a Template to a Folder

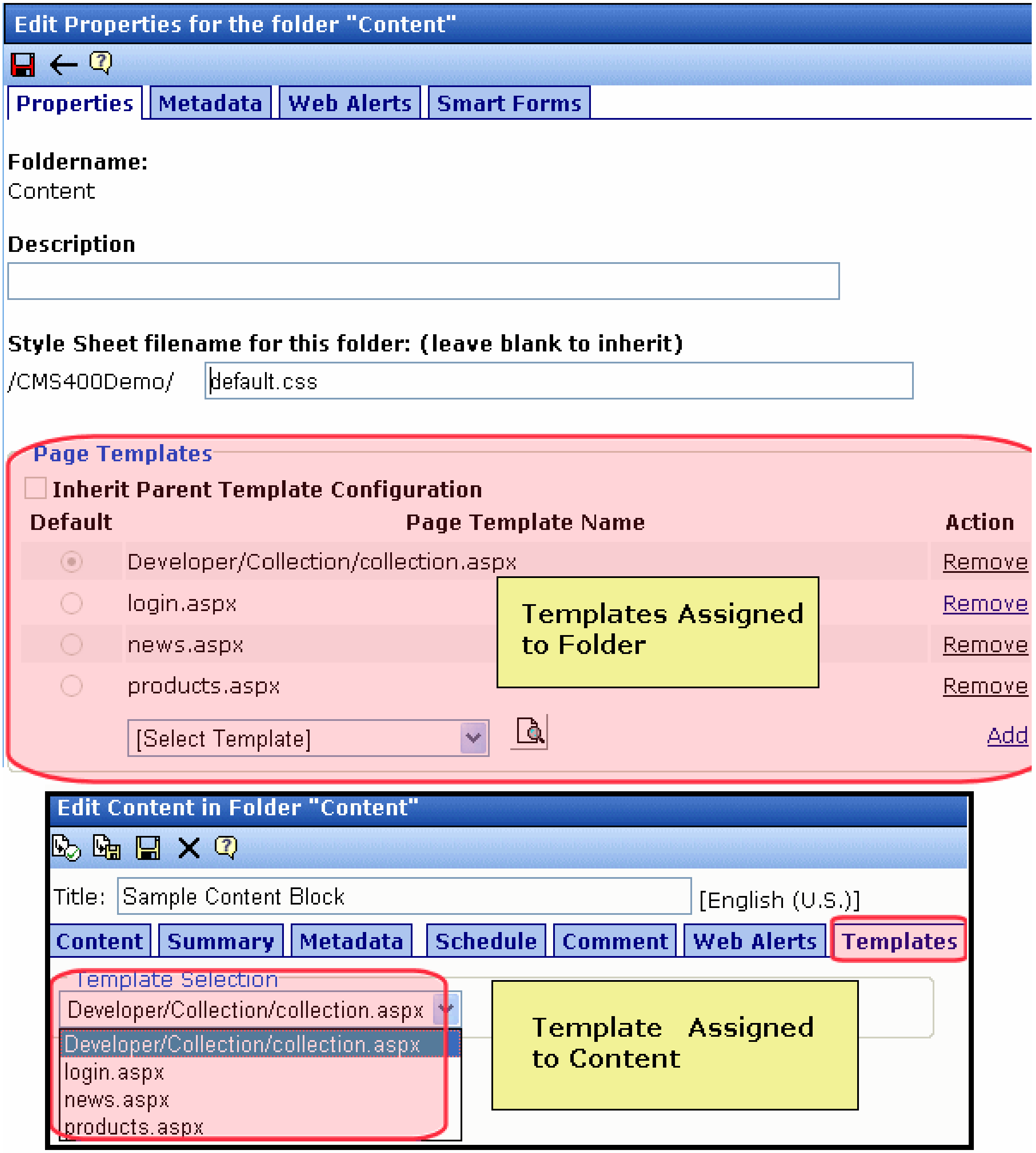
To add a new template, click the Add button (✚). The Add a New Template screen appears.


Add a New Template
/CMS400Demo/

Enter the path to the new template and click the Save button (💾).

Assigning Templates to Content

A folder’s default template is automatically applied to all content in the folder. However, you can change a content item’s template to any of those assigned to the folder. This relationship is illustrated below.



Edit Properties for the folder "Content"

Properties | Metadata | Web Alerts | Smart Forms

Foldername:
Content

Description

Style Sheet filename for this folder: (leave blank to inherit)
/CMS400Demo/ default.css

Page Templates

☐ **Inherit Parent Template Configuration**

Default	Page Template Name	Action
●	Developer/Collection/collection.aspx	Remove
○	login.aspx	Remove
○	news.aspx	Remove
○	products.aspx	Remove
	[Select Template]	Add

Templates Assigned to Folder

Edit Content in Folder "Content"

Title: Sample Content Block [English (U.S.)]

Content | Summary | Metadata | Schedule | Comment | Web Alerts | Templates

Template Selection
Developer/Collection/collection.aspx
- Developer/Collection/collection.aspx
- login.aspx
- news.aspx
- products.aspx

Template Assigned to Content

To change the template applied to a content item, edit that content, and go to the **Templates** tab as shown above. Then, select a template to apply to the content.

As explained in ”How Templates are Used” on page 64, the template assigned to the content will be used whenever a hyperlink is created to it.

See Also: ”Editing Content” on page 76

Adding Content

Ektron CMS400.NETallows for several types of content.

- **HTML** - Content created using HTML code.
- **HTML Form/Survey** - Users can create and maintain HTML forms to collect information and opinions from visitors to your Web site.
- **Smart Forms** - Content created using an XML configuration
- **Multimedia Files** - Files that include audio, video, or both.
- **Microsoft Office Documents** - Content created in Microsoft Office and stored in CMS400.NET via the Document Management functionality.
- **Open Office Documents** - Content created Open Office and stored in CMS400.NET via the Document Management functionality.
- **Managed Files** - Content created with software external to the CMS and stored in CMS400.NET via the Document Management functionality. These files are typically .pdf, .gif, .jpeg, .zip, and .txt files.

Office documents and Managed files are added to the CMS in one of two ways:

- By dragging and dropping files from Windows Explorer to the drag and drop box in the Workarea. *See Also:* The User Manual section “Using the Document Management Functionality” > “Importing Files via Drag and Drop”

  or

- By choosing the type of content from the Content Type dropdown box. Then, clicking the Add Content button or Add Several Files button. *See Also:* The User Manual section “Using the Document Management Functionality”

See Also:

- ”Adding HTML Content” on page 73
- ”Adding XML Content” on page 73
- ”Creating New Content” on page 648
- ”Translating Content” on page 649

Adding HTML Content

See the **Ektron CMS400.NET** User Manual Section “Working with Folders and Content” > “Adding Content”.

Adding XML Content

If one or more Smart Forms are assigned to a content folder, users can create XML content within it. Any folder (other than the root content folder) can have a unique group of Smart Forms or inherit them from the parent folder. *See Also:* ”Smart Forms” on page 49

To add XML content, follow these steps.

1. In the Workarea, browse to a folder to which at least one Smart Form has been assigned.
2. Click **New > Smart Form** then select the Smart Form you will use for the content.

NOTE When selecting the folder to create the content in, keep in mind the permissions that are going to be set on it, and which users will have permissions for it.

NOTE Depending on the Smart Form assigned to the content, the default XML may appear differently.

3. The procedure for creating XML content is similar to that for creating HTML content. Follow the steps described in ”Adding HTML Content” on page 73.

The Smart Form formats the screen display. When that content is published and a site visitor completes the screen, the user’s input is saved as XML. For more information, see ”Working with Smart Forms” on page 163.

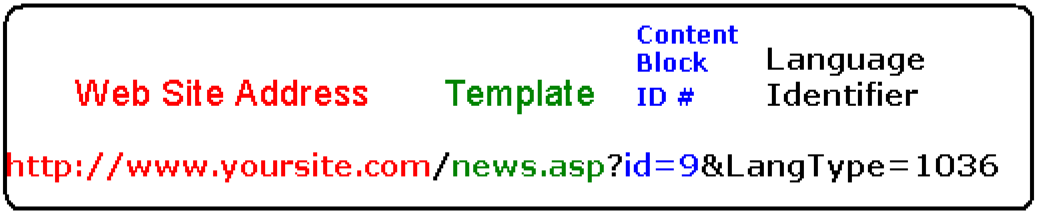
Forming URLs For Ektron CMS400.NET Documents

Whenever content is created, **Ektron CMS400.NET** generates a unique identifier of that content. *See Also:* **Ektron CMS400.NET** User Manual > “Library Folder” > “Quicklinks and Forms.”

The identifier for Ektron CMS400.NET content is made up of these elements:

- Site address
- ”The Template” on page 74
- ”The Content Variable” on page 74
- ”The Language Identifier” on page 75

WARNING! Only use the language identifier if you are forcing or changing the language.



The Template

The template determines much of the page layout. By itself, the template URL retrieves the empty template or the template with its default document.

NOTE You can set a default document for a template in the content function by inserting an id number.

See Also: ”Creating/Updating Templates” on page 62

The Content Variable

A question mark (?) separates the template URL from the content variable. The content variable indicates which document or content the server places in the template before displaying the page. Below is a description of the URL format.

Content variable	Example	Description
ID=n	`http://www.yourEktronwebsite.com / index.aspx?ID=1`	ID selects a single document to display. Use this variable for a single document template type. The value corresponds to the content's id value.

The above variable's name is based on the templates included in the Ektron CMS400.NET's sample site. If your Web master changed the variable names in your site's template, use the name of the corresponding variable in each template rather than the one above.

The Language Identifier

This part of the URL identifies the language selected by a visitor to your site. It only appears if your site supports multiple languages.

WARNING! Only use the language identifier if you are forcing or changing the language.

To learn more, see "Multi-Language Support" on page 640.

Viewing Content

See the **Ektron CMS400.NET** User Manual Section "Working with Folders and Content" > "Viewing Content".

NOTE You can use the `ek_PageSize` setting in the web.config file to determine the maximum number of items that can appear on a page before it "breaks." When a page breaks, additional entries appear on another screen, and the following text appears near the bottom of the items list:

Page 1 of 2

[First Page] [Previous Page] [Next Page] [Last Page]

Editing Content

See the **Ektron CMS400.NET** User Manual Section “Working with Folders and Content” > “Editing Content”.

Moving or Copying Content

You can *move* content from any folder to any other folder. Or, you can *copy* content from one folder to another. At the end of both procedures, a copy of the content resides in the new folder. The new content gets the next available `Content Id` number.

When copying, you *leave* the content in its original folder, while moving *deletes* the content from the original folder. Other than that difference, the procedure for performing both actions is virtually identical.

Who Can Move or Copy Content?

Only members of the Administrators user group or those assigned in the Roles > Folder User Admins screen can move or copy content. *See Also:* ”Defining Roles” on page 564 and ”Guidelines for Using The Folder-User Admin Role” on page 566

Which Content Can Be Moved Or Copied?

You can only move or copy content with a status of Approved (Published). This includes expired content. If the content’s status is not published, you must wait for it to reach that status before moving or copying it.

What is Moved Or Copied?

When content is moved or copied, the following changes are made.

- The content inherits permissions and the approval chain from the new folder.

The content’s Quicklink is moved or copied in the library to the destination folder. However, the Quicklink remains the same (that is, the default template doesn’t change). You can update this by editing the Quicklink. This procedure in described in the **Ektron**

CMS400.NET User Manual section “Updating Default Template for Multiple Quicklinks.”

Note

If the Link Management setting in the web.config file is set to `true`, you do not need to update the quicklink. Link Management automatically finds the correct template based on the current content folder.

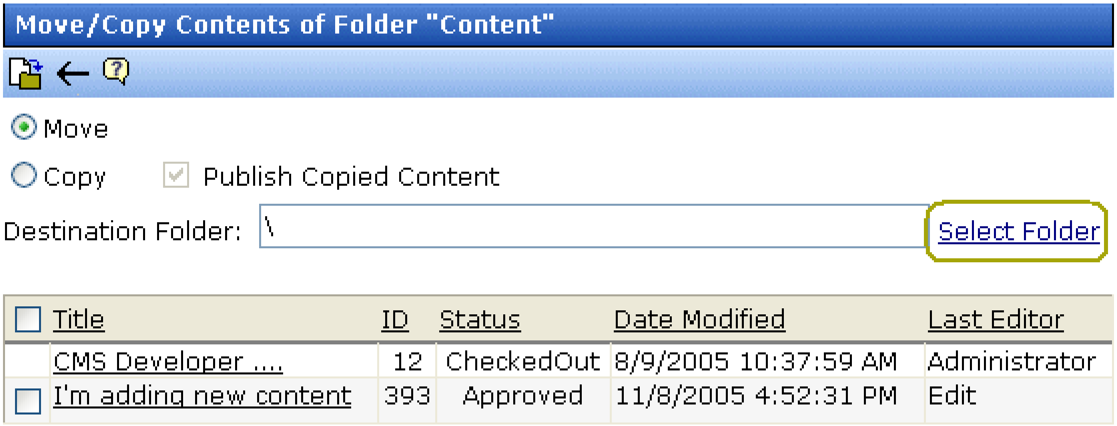
- If the new folder already contains content with the same title, **Ektron CMS400.NET** appends a number to the title to make it unique. For example: `ASP.NET Unleashed(2)`.
- The new folder’s default template is assigned to the content
- If the content has a Smart Form, it remains assigned even if the Smart Form is not assigned to the new folder

Moving Or Copying One Content Item

To move or copy content to another folder, follow these steps.

1. Access the View Content screen for the content you want to move or copy, as described in ”Viewing Content” on page 75.
2. Click the Move/Copy Content button (📁).
3. The Move/Copy Content screen is displayed.
4. Select either **Move** or **Copy**.
5. If you choose **Copy**, and you want the content to be published as soon as the copying is complete, check **Publish Copied Content**.

   If you want the content status in the new folder to be checked in, uncheck the **Publish Copied Content** checkbox.
6. Enter the path to the destination folder. If you don’t know the path, click **Select Folder**. Then, navigate to the destination folder.



Move/Copy Contents of Folder "Content"

● Move

○ Copy ☑ Publish Copied Content

Destination Folder: \ Select Folder

☐	Title	ID	Status	Date Modified	Last Editor
	CMS Developer	12	CheckedOut	8/9/2005 10:37:59 AM	Administrator
☐	I'm adding new content	393	Approved	11/8/2005 4:52:31 PM	Edit

NOTE Only approved or expired content has a checkbox in the left column. Content in other statuses cannot be moved or copied.

7. Click the Move/Copy Content button ().
8. A confirmation message is displayed.
9. Click **OK** to continue.
10. The content is moved or copied to the specified content folder. The destination folder appears with the new content.

Moving Or Copying Several Content Items

To move or copy several content items in the same folder at once, follow these steps.

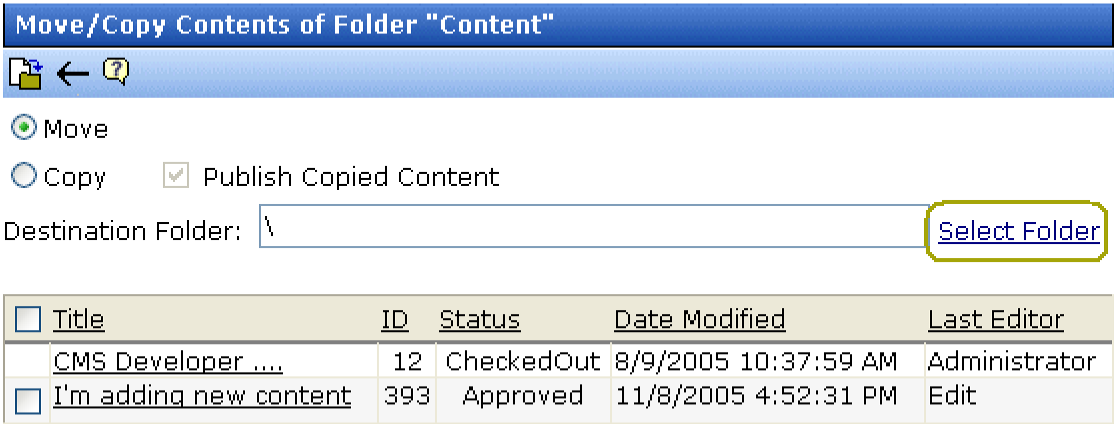
Note Only published and expired content can be moved or copied.

1. Navigate to the folder that contains the content you want to move or copy.
2. Click **Action > Move/Copy Content**.
3. The Move/Copy Contents of Folder screen is displayed.
4. Select either **Move** or **Copy**.
5. Enter the path to the destination folder. If you don’t know the path, click **Select Folder**. Then, navigate to the destination folder.

6. Check the boxes next to the content that you want to move or copy.

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

7. Choose the content folder to move or copy the selected content from the drop down list.



Move/Copy Contents of Folder "Content"

● Move

○ Copy ☑ Publish Copied Content

Destination Folder: \ Select Folder

☐	Title	ID	Status	Date Modified	Last Editor
	CMS Developer	12	CheckedOut	8/9/2005 10:37:59 AM	Administrator
☐	I'm adding new content	393	Approved	11/8/2005 4:52:31 PM	Edit

8. Click the Move/Copy Content button () to move or copy the selected content.
9. A confirmation message is displayed.
10. Click **OK**.
11. The content moves to the destination folder.

Viewing and Restoring Historical Versions of Content

Each time a new version of content is published or checked in, the previous version is stored. Old versions of content may be accessed, and if desired, restored to the Web site.

For more information, see “Viewing and Restoring Previous Content” section of the **Ektron CMS400.NET** User Manual.

Purging Historical Versions of Content

See ”Purge History” on page 48.

Scheduling Content

Scheduling content allows you to specify a future date and time when content will be visible on the Web site. Similarly, you can remove content from the Web site on a specified date and time.

For more information, see “Scheduling Content to Begin and End” in the **Ektron CMS400.NET** User Manual.

Deleting Content

See the **Ektron CMS400.NET** User Manual Section “Working with Folders and Content” > “Deleting Content”.

NOTE An Ektron Knowledge Base article explains how to delete content programmatically. Go to http://dev.ektron.com/fileshare.aspx and click **Programmatically Delete Content**.

Content History

See the **Ektron CMS400.NET** user manual section “Viewing and Restoring Previous Content”.

Content Permissions

See ”Setting Permissions” on page 547.

Content Approvals

See ”Setting Approval Chains” on page 556.

Content Workflow

To learn about the process content must pass through to get published to your Web site, see the **Ektron CMS400.NET** User Manual section “Approving/Declining Content.”

Link Checking

The link checker button locates all content with a link to the displayed content. This feature is useful if you decide to delete content. You can use this to remove those links, which will not work after the deletion.

To display all content that links to the selected content, follow these steps.

1. Access the View Content screen for the content you want to execute the link checker for, as described in ”Viewing Content” on page 75.
2. Click the Check Links button (🌐).
3. A screen displays each content item with a link to the current content.
4. Click the content title to access the View Content screen for the selected content and perform the necessary actions on it.

Assigning Tasks to Content

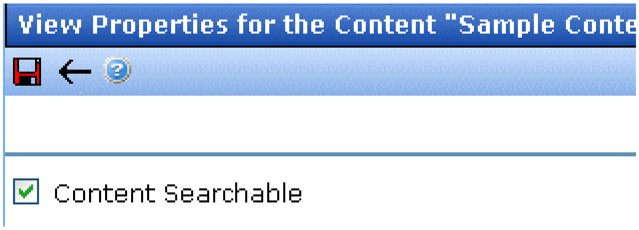
See the **Ektron CMS400.NET** User’s Manual > “Managing Tasks” > “Creating Tasks via Content”.

Content Properties

The Content Properties screen shows whether a search will find the content. To view the Content Properties screen, follow these steps.

1. Access the View Content screen for the content whose properties you want to view, as described in ”Viewing Content” on page 75.

2. Click the Properties button ( ).
3. The View Properties for the Content screen appears.



View Properties for the Content "Sample Conte

☑ Content Searchable

4. Check the **Content Searchable** box if you want this content to be included in an external search of your CMS Web site. That is, a search that is initiated from a page that includes the Search server control.

   This box has no effect on your ability to find this content from the Workarea search.

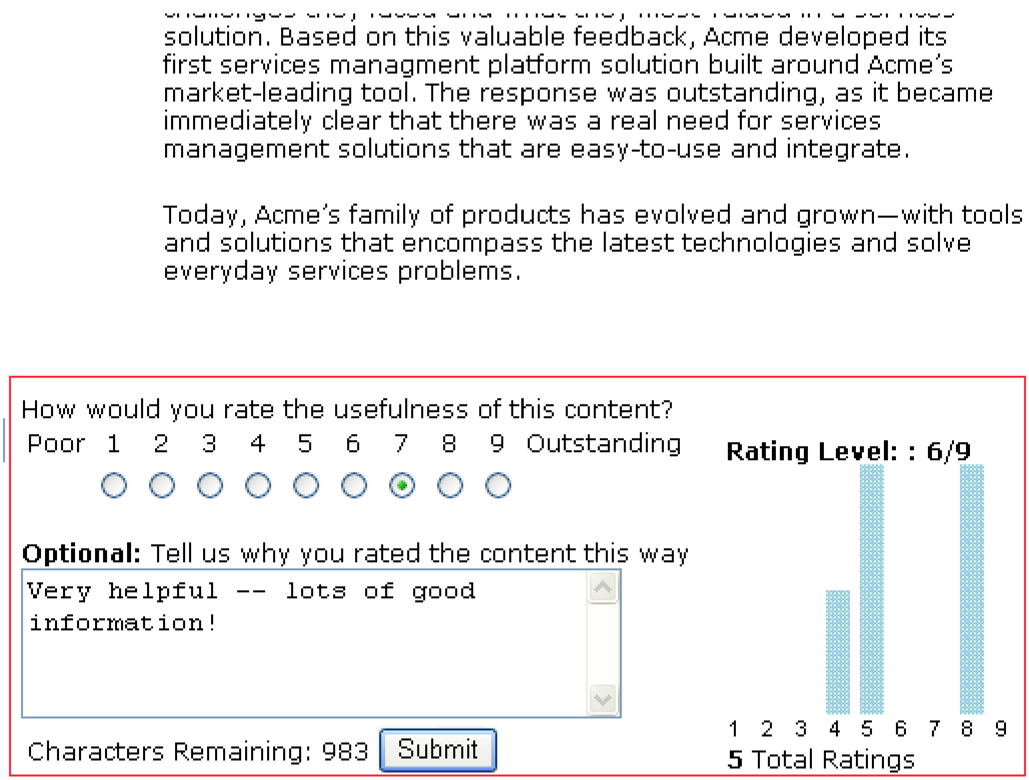
   If you uncheck this box, **Ektron CMS400.NET** excludes this content when a search is performed.
5. Click the Update button ( ).

NOTE If you click the Properties button for content that is displayed on a Web page, the View Content screen opens in the Workarea window.

Content Rating

Ektron CMS400.NET lets you place a rating scale on any content on your Web site. The scale lets you collect feedback by giving site visitors the opportunity to rate the content. A visitor can rank the content on a numerical scale of one through nine, as well as submit a text comment (see illustration below).

NOTE The user’s browser must have cookies enabled in order to submit a content rating.



solution. Based on this valuable feedback, Acme developed its first services managment platform solution built around Acme's market-leading tool. The response was outstanding, as it became immediately clear that there was a real need for services management solutions that are easy-to-use and integrate.

Today, Acme's family of products has evolved and grown—with tools and solutions that encompass the latest technologies and solve everyday services problems.

How would you rate the usefulness of this content?

Poor 1 2 3 4 5 6 7 8 9 Outstanding

○ ○ ○ ○ ○ ○ ● ○ ○

Optional: Tell us why you rated the content this way

Very helpful -- lots of good information!

Characters Remaining: 983

The content rating feature is explained through the following topics.

- ”Inserting the Content Rating Server Control” on page 83
- ”Limiting Visitors to One Rating” on page 84
- ”Viewing the Content Rating Report” on page 84

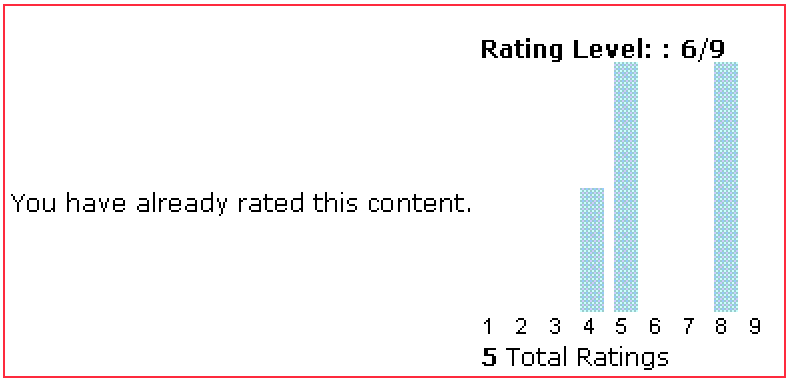
Inserting the Content Rating Server Control

To have a content ratings graph appear on a Web page, your developer inserts a server control. This procedure is described in the **Ektron CMS400.NET** Developer Manual section “Content Rating Server Control.”

Limiting Visitors to One Rating

Ektron CMS400.NET assumes you want to limit a user to rating a content item once. If a regular or membership user logs in before rating a piece of content, **Ektron CMS400.NET** remembers the user ID. If any other site visitor does not log in before rating content, **Ektron CMS400.NET** places a cookie on the site visitor's computer.

So, whenever a page with a Content Rating server control is visited, **Ektron CMS400.NET** checks for the user ID or cookie. If neither exists, it displays a rating scale as displayed in ”Content Rating” on page 82. If the page has already been rated by the user, the following version of the control appears.


You have already rated this content.

NOTE Your developer can customize many aspects of the control. So, it may not match the illustration.

Viewing the Content Rating Report

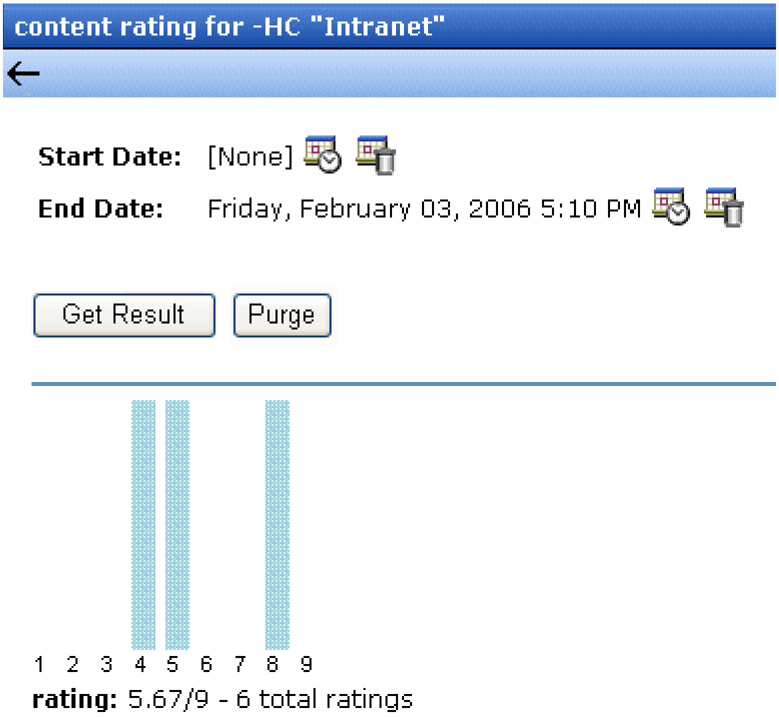
All Content Rating data for a content item is maintained and can be displayed in detail and summary format. To view this data, follow these steps.

1. Sign in to **Ektron CMS400.NET**.
2. Either
   - browse to the content item
   - right click the mouse
   - click **View Advanced Report**

or

- Go to **Workarea** > **Content**.
- Navigate to the folder that contains the content.
- Navigate to the content item.
- Click the View Rating Reports toolbar button (📊).

The Content Rating Report shows a summary of all ratings submitted for the content.



content rating for -HC "Intranet"

Start Date: [None]

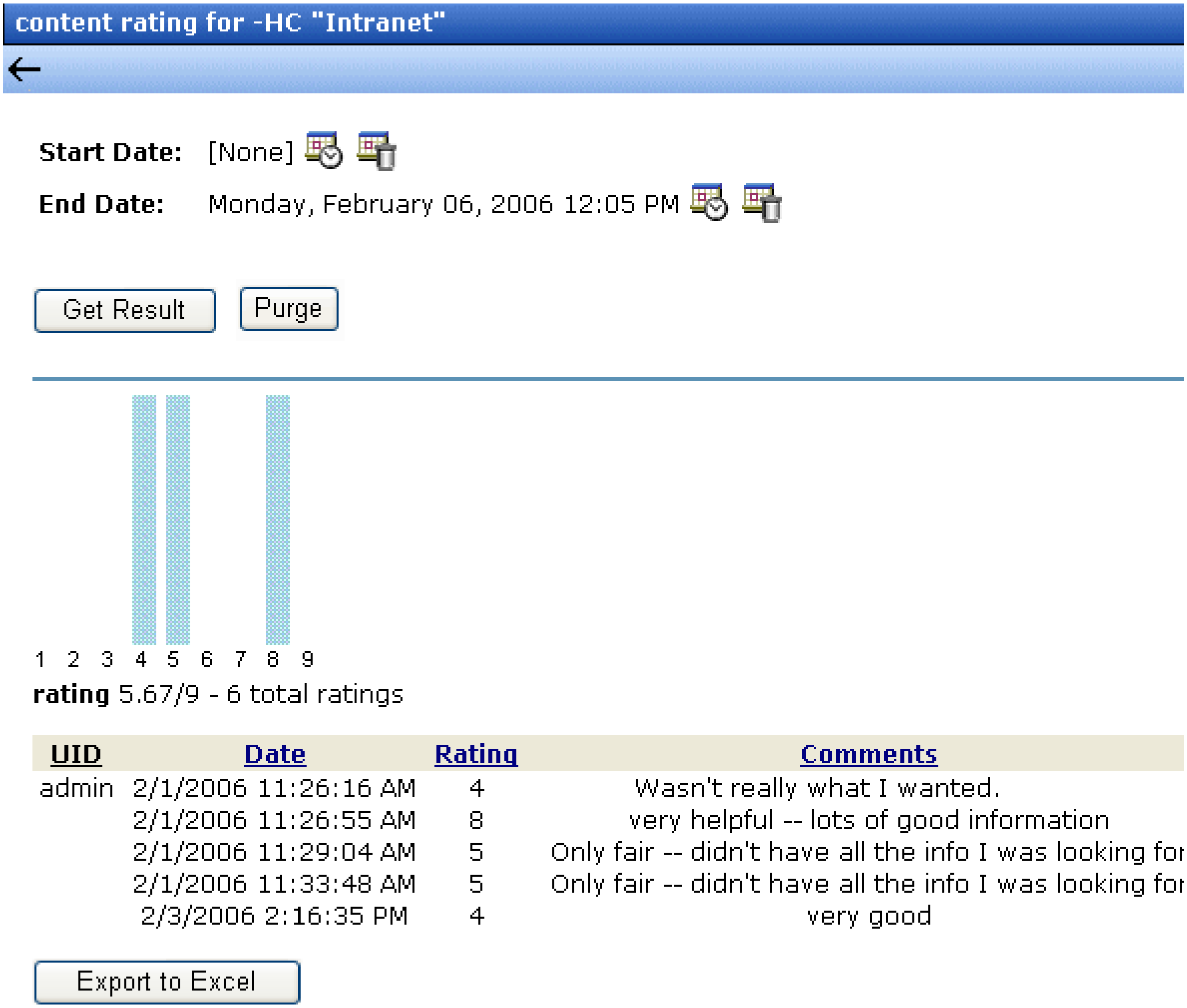
End Date: Friday, February 03, 2006 5:10 PM

rating: 5.67/9 - 6 total ratings

If desired, you can select a range of dates and limit the display of ratings data to those dates. Select start and end dates (using calendar buttons at the top of the screen) and click **Get Result**.

Viewing Content Rating Details

Also, to view details of the ratings data, click **Get Result** (see illustration below).



Start Date: [None]

End Date: Monday, February 06, 2006 12:05 PM

rating 5.67/9 - 6 total ratings

UID	Date	Rating	Comments
admin	2/1/2006 11:26:16 AM	4	Wasn't really what I wanted.
	2/1/2006 11:26:55 AM	8	very helpful -- lots of good information
	2/1/2006 11:29:04 AM	5	Only fair -- didn't have all the info I was looking for
	2/1/2006 11:33:48 AM	5	Only fair -- didn't have all the info I was looking for
	2/3/2006 2:16:35 PM	4	very good

Exporting Details to Excel

If Microsoft Excel is installed on your computer, you can export the ratings detail to Excel for further manipulation of the data. To do so, the **Click Export to Excel** button.

Purging Rating Data

You can to remove content rating data to free up space in your database. To do so, select the date range of the data you want to purge using **Start Date** and **End Date**. Then click the **Purge** button.

Validating XHTML Content

Ektron CMS400.NET can check content for two types of compliance:

- XHTML standards - see ”Validating Content for Compliance with XHTML Standards” on page 92
- accessibility standards established by agencies such as W3C Markup Validation Service - see ”Validating Content For Compliance with Accessibility Standards” on page 87

This check is performed when a user tries to save, check in or (submit for) publish content.

In addition, some dialogs add accessibility data to **Ektron CMS400.NET** content. As examples, the Picture Properties is used to add an image’s `<alt>` attribute. When a user clicks **OK** to save these dialogs, **Ektron CMS400.NET** can check that compliance information is being added. See ”Dialogs that Allow Input of Accessibility Information” on page 91

This section explains how to enable these features, and how to customize them to meet your needs.

The rest of this section provides details about validating XHTML content through these topics.

- ”Validating Content For Compliance with Accessibility Standards” on page 87
- ”Dialogs that Allow Input of Accessibility Information” on page 91
- ”Validating Content for Compliance with XHTML Standards” on page 92

Validating Content For Compliance with Accessibility Standards

To have **Ektron CMS400.NET** check content for compliance with accessibility standards, enable accessibility *and* define an XSLT or Web site to check against.

Enabling Accessibility

In Ektron CMS400 .NET, accessibility options appear on the Configuration Setup screen under **Accessibility/Section 508 Evaluation** (below the **Editor Options**). The options are explained below.

- **Do not validate** - do not check content for compliance with accessibility standards
- **Warn if fails** - the user is warned but allowed to save content
- **Enforce** - the user must bring the content into compliance before submitting it for publication or publishing it; however, can save it or check it in after being warned.

Defining the XSLT or Web Site

When a user tries to save content and **Accessibility/Section 508 Evaluation** is set to **Warn if Fails** or **Enforce**, the content is checked against an XSLT, a Web site designed to validate content, or both.

If you enable both, the content is checked in this order.

1. XSLT
2. Web site

If the first check fails, the second check is not performed.

The XSLT File

Ektron CMS400.NET content can be checked against an XSLT that enforces W3C's WCAG Level 1 requirement. This XSLT, `ektaccesseval.xslt`, resides in the folder to which **Ektron CMS400.NET** is installed.

The XSLT is identified in the following line (highlighted in red) of the configuration data. (In **Ektron CMS400.NET**, the configuration data is stored in site root folder\Workarea\ewebeditpro\cms_config.aspx.)

```
<!-- accessibility options are "strict", "loose" and "none" -->
    <validate accessibility="none" suggestdefaultval="true">
<xslt enabled="true" src="[eWebEditProPath]/ektaccesseval.xslt" />
```

You can modify this XSLT as needed.

Or, you can place a different XSLT in the **Ektron CMS400.NET** root directory and refer to it in the `src` attribute shown above. If you use a different XSLT and validation fails, it should return a description of the problem(s) as HTML. If validation succeeds, it should return nothing.

Validating Against a Web Site

You can also validate XHTML content against a Web site that evaluates its compliance with accessibility standards. Two such sites are listed in the configuration data:

- hermish.com
- webaim.org

You can use either listed site or any other site designed to check for accessibility compliance. Regardless of the site's origin, you can only use one.

The Web sites are specified in these lines of the configuration data. To activate a site, set `enabled` to `true`.

```
<online enabled="false" type="string" contentname="myHTML" src="http://www.hermish.com/
check_this.cfm">
     <data name="URLtest">Your HTML</data>
     <data name="CheckURL">1</data>
     <data name="p1">1</data>
     <data name="p2">1</data>
     <data name="p3">1</data>
     <data name="s508">1</data>
</online>
```

```
<online enabled="false" type="file" contentname="upload" src="http://wave.webaim.org/wave/
Output.jsp">
     <data name="Submit">Submit</data>
     <data name="IPAddress">127.0.0.1</data>
</online>
```

Enabling a Site Not Included in the Configuration Data

Ektron only supports sites listed in the configuration data by default. If you want to validate content against another Web site designed to do that, follow these guidelines.

- Web sites that perform validation typically accept input in this format.

```
<form action="http://www.testing.com/validationaction.asp">
   <textarea name="testcontent"></textarea>
   <input type="submit" name="btnSubmit" value="Validate the
content"/>
</form>
```

To accommodate this format, define the configuration data’s `<online>` element as follows.

```
<online enabled="true" type="string" contentname="testcontent"
src="http://www.testing.com/ validationaction.asp"
keywordsearchresult="failure" keyword="invalid">
    <data name=" btnSubmit"> Validate the content</data>
</online>
```

The following table describes `<online>`’s attributes.

<Online> Attribute	Description
type	If the form accepts an HTML string as input, enter string. If the form accepts a file name as input, enter file.

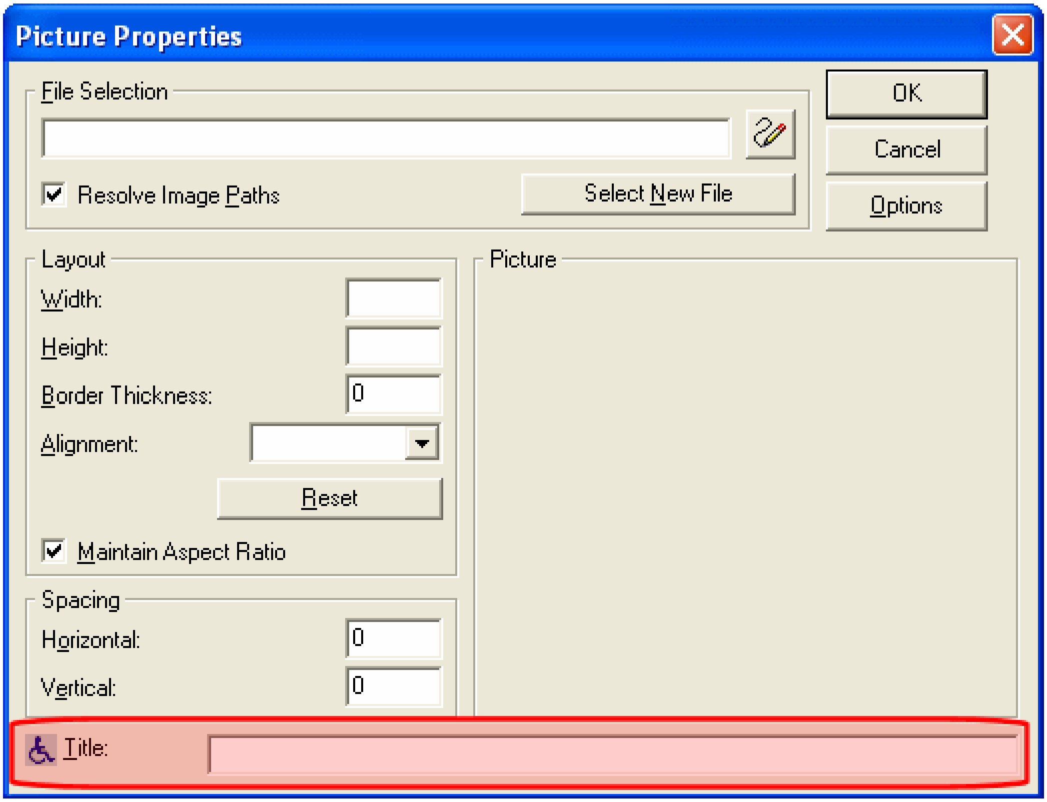
contentname	Enter the value of the `name` attribute of the textarea or input element in the form.
	For a form that accepts an HTML string, the textarea may appear as:
	`<textarea name="testcontent"></textarea>`
	In this case, the value for contentname would be testcontent.
	For a form that accepts a file, the input element may appear as:
	`<input type="file" name="testfile" />`
	In this case, the value for contentname would be testfile.

<Online> Attribute	**Description**
src	To obtain the URL of the Web page that validates HTML content, go to the site and view the source. From there, you should be able to obtain the form's action attribute. Place that into this attribute.
keywordsearchresult	Takes one of two values: `failure` or `success`. • If set to `success` and **Ektron CMS400.NET** finds the keyword (set in the keyword attribute) in the validating Web page's response, the content is saved. • If set to `success` and **Ektron CMS400.NET** does *not* find the keyword in the validating Web page's response, the Web site's failure page appears. Typically, the page explains why the content failed validation. • If set to `failure`, and **Ektron CMS400.NET** finds the keyword (set in the keyword attribute) in the validating Web page's response, Web site's failure page appears. Typically, the page explains why the content failed validation. • If set to `failure`, and **Ektron CMS400.NET** does not find the keyword in the validating Web page's response, the content is saved. If you do not define a keyword and keywordsearchresult, the validating Web page's response (or report) appears.
keyword	Enter a text string that **Ektron CMS400.NET** searches for in the source of the Web site's response to the validation check. For example, if the site displays **Congratulations** when validation passes, enter **Congratulations** in this attribute. In this case, enter `success` as the `keywordsearchresult`. As another example, if you know that a Web site displays the `images/icon_violation.gif` image when validation fails, enter that as the keyword. In this case, enter `failure` as the `keywordsearchresult`.

<Online> Attribute	Description
data	Enter additional form fields to be posted to the Web site during form submission. - The `name` attribute of the data tag specifies the name of the form field. - The value between the `data` tags is the value of the form field when submitted. You may specify as many data tags as needed. For example `<data name="btnSubmit">Validate the content</data>`

Dialogs that Allow Input of Accessibility Information

Several dialog boxes have fields that collect required accessibility data. An example of such a field is highlighted below.


Picture Properties
File Selection
Select New File
OK
Cancel
Options
Layout
Width:
Height:
Alignment:
Reset
Picture
Spacing
♿ Title:

☑ Resolve Image Paths

Border Thickness: 0

☑ Maintain Aspect Ratio

Horizontal: 0

Vertical: 0

When the configuration data’s `suggestdefaultval` property is set to `true`, **Ektron CMS400.NET** tries to ensure that a value exists in required accessibility fields of the following dialogs.

Dialog	Field	How filled if no value exists
Picture Properties	Title	Contents of **File Selection** field copied
Hyperlink	Title	Contents of **Text** field copied
Group Box	Caption	Contents of **Descriptive Name** field copied to **Caption** field
Several Data Designer dialogs, such as Plain Text Field, Image Only field, Link Field, Select List Field	Tooltip text	Contents of **Descriptive Name** field copied

Validating Content for Compliance with XHTML Standards

Ektron CMS400.NET content can be validated against the XHTML 1.0 schema, a Web site, or both. These are described in ”The Schema” on page 92 and ”The Web Site” on page 93.

NOTE This validation occurs when content is saved regardless of the value of the `<accessibility>` attribute.

Besides specifying a schema or Web site, you need to uncomment the following line in ektfilter.xslt (located in the `webroot/ewebeditpro5` directory). This XSLT removes non-W3C-compliant tags and attributes.

```
<xsl:include href="ektfilterxhtml10.xslt"/>
```

The Schema

Two schemas from the W3C site are provided with **Ektron CMS400.NET**.

- www.w3.org/2002/08/xhtml/xhtml1-strict.xsd
- www.w3.org/2002/08/xhtml/xhtml1-transitional.xsd

The schemas are installed to the **Ektron CMS400.NET** root folder. You choose a schema in the following lines of the configuration data.

```
<schema enabled="false" src="[eWebEditProPath]/xhtml1-strict.xsd"/>
<schema enabled="false" src="[eWebEditProPath]/xhtml1-transitional.xsd"/>
```

To specify a schema against which to validate content, set `enabled` to `true`.

The options are explained below.

- **Both schemas disabled**- do not check content for compliance with XHTML standards
- **transitional or strict enabled** - the user must bring the content into compliance before submitting it for publication or publishing it; however, can save it or check it in after being warned.

You can modify the .xsd file as needed. Or, you can place a different .xsd file in the eWebEditPro+XML root directory and refer to it in the `src` attribute shown above.

IMPORTANT! Because of an error in XML parser 4 (see http://support.microsoft.com/default.aspx?scid=kb;EN-US;q262585), Ektron has removed the namespace from the schemas. If you design your own schema, do not use 'xml' to begin user-defined namespace prefixes.

The Web Site

You can validate content against any Web site that enforces W3C's XHTML standards. One site is listed in the configuration data: validator.w3.org.

You can use that site or another site designed to check for XHTML compliance.

To activate the site in the configuration data, set `enabled` to `true` in the code snippet shown below.

```
<online enabled="false" type="string" contentname="fragment" src="http://validator.w3.org/
check"/>
```

If you want to use a different Web site, follow the directions in ”Enabling a Site Not Included in the Configuration Data” on page 89.

Metadata

Metadata is information about a content item, such as its title and language. **Ektron CMS400.NET** provides extensive and flexible support for metadata, which it uses in both standard and innovative ways.

This section explains the types of metadata available, and procedures for working with metadata through the following subtopics.

- ”Types of Metadata” on page 94
- ”Working with Metadata Definitions” on page 105

Types of Metadata

Five kinds of metadata can be added to **Ektron CMS400.NET** content.

Metadata type	Description	For more information, see
Meta tag	Resides in the source code of a Web page. Helps search engines find a Web page.	”Meta Tags” on page 95
HTML tag	Information about the page to be used by a Web browser. For example, `<title>` identifies the content in the screen title, the favorites list, and the browser’s history.	”Title Tag” on page 96
Searchable	Appears on your Web site’s search page, below standard search fields. Helps site visitors find content on your Web site.	”Searchable Metadata” on page 98

Metadata type	Description	For more information, see
Related content	A related content item, collection, List Summary, or library item that accompanies a content item on a Web page.	"Related Content Metadata" on page 100
Simple Dublin Core	A set of fifteen standard fields that cover the most useful information about content.	"Simple Dublin Core Metadata" on page 103

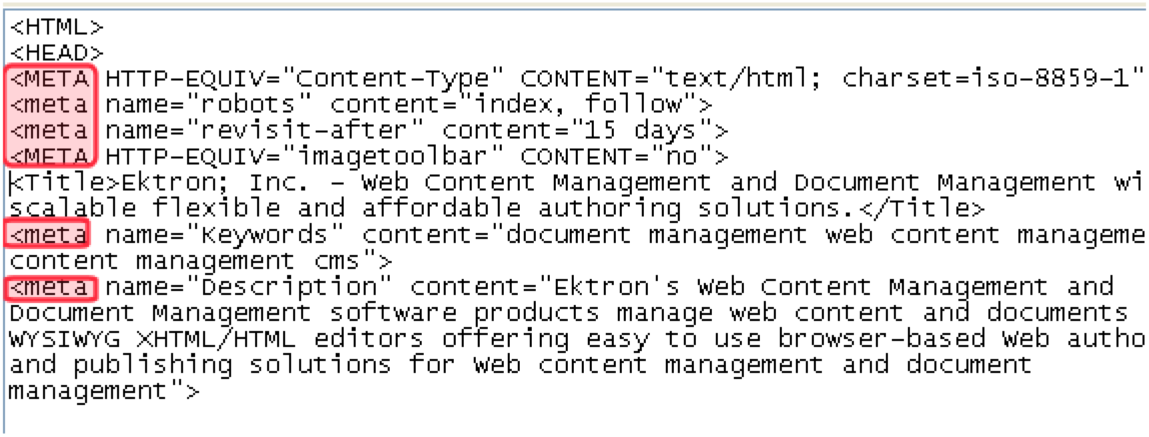
Meta Tags

The META element is an extensible container for use in identifying specialized document meta-information. Meta-information has two main functions:

- to provide a means to discover that a data set exists and how it might be obtained or accessed
- to document the content, quality, and features of a data set, indicating its fitness for use

(Above text copied from www.w3.org/MarkUp/html-spec/html-spec_5.html.)

Example Meta Tags



```
<HTML>
<HEAD>
<META HTTP-EQUIV="Content-Type" CONTENT="text/html; charset=iso-8859-1"
<meta name="robots" content="index, follow">
<meta name="revisit-after" content="15 days">
<META HTTP-EQUIV="imagetoolbar" CONTENT="no">
<Title>Ektron; Inc. - Web Content Management and Document Management wi
scalable flexible and affordable authoring solutions.</Title>
<meta name="Keywords" content="document management web content manageme
content management cms">
<meta name="Description" content="Ektron's Web Content Management and
Document Management software products manage web content and documents
WYSIWYG XHTML/HTML editors offering easy to use browser-based web autho
and publishing solutions for web content management and document
management">
```

Creating and Deploying Meta Tag Definitions

1. While creating a metadata definition, enter the metadata name at the Name field. For example, **Description** and **Keywords**. *See Also:* ”Adding a Metadata Definition” on page 106
2. Reply to the standard fields. See ”Metadata Definition Fields” on page 107.
3. Respond to the additional fields for meta tags. See ”Meta Tag Additional Fields” on page 108
4. Add the definition to all applicable folders. See ”Assigning Metadata to a Folder” on page 115
5. Add the definition to applicable content within the folder. See ”Adding Metadata to Content” on page 118
6. Add a Metadata server control to every Web form (.aspx page) on which the content will appear.

   To learn how to do this, see the Ektron CMS400.NET Developer Manual section “Custom Functions (for your server platform)” > “Metadata Function”, “MetaData Server Control” and “MetaDataList Server Control.”

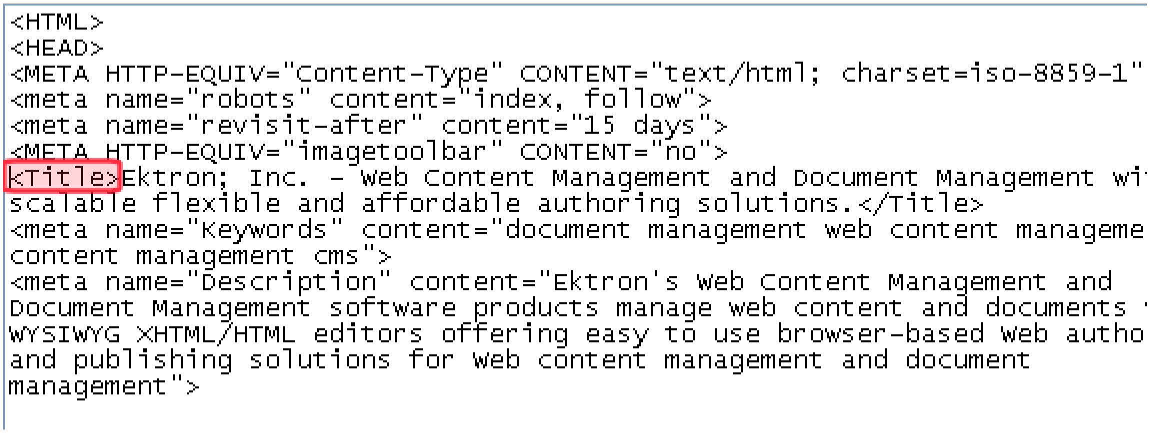
Title Tag

The title should identify the contents of the document in a global context. A browser may display the title of a document in a history list or as a label for the window displaying the document.

(Above text copied from www.w3.org/MarkUp/html-spec/html-spec_5.html.)

Example Title Tag

Example Meta Tags



```
<HTML>
<HEAD>
<META HTTP-EQUIV="Content-Type" CONTENT="text/html; charset=iso-8859-1"
<meta name="robots" content="index, follow">
<meta name="revisit-after" content="15 days">
<META HTTP-EQUIV="imagetoolbar" CONTENT="no">
<Title>Ektron; Inc. - Web Content Management and Document Management wi
scalable flexible and affordable authoring solutions.</Title>
<meta name="Keywords" content="document management web content manageme
content management cms">
<meta name="Description" content="Ektron's Web Content Management and
Document Management software products manage web content and documents
WYSIWYG XHTML/HTML editors offering easy to use browser-based web autho
and publishing solutions for web content management and document
management">
```

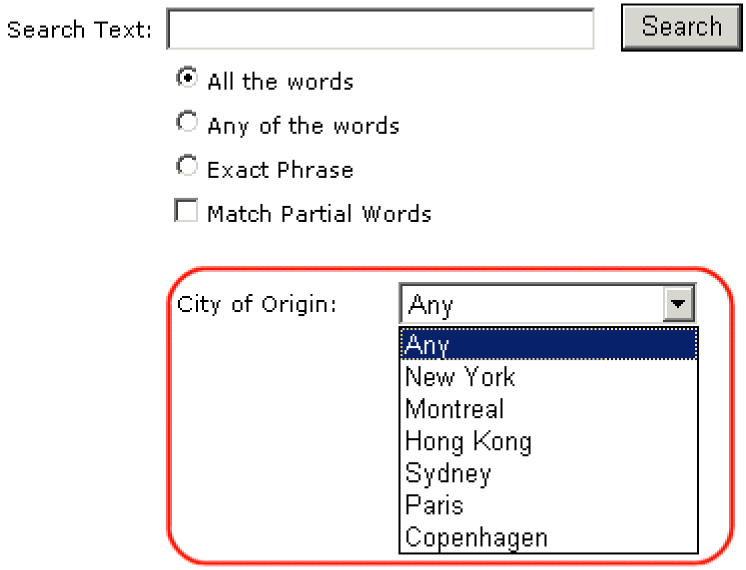
Creating and Deploying Title Tag Definitions

1. While creating a metadata definition, enter **Title** at the **Name** field. *See Also:* ”Adding a Metadata Definition” on page 106
2. Reply to the standard fields. See ”Metadata Definition Fields” on page 107.
3. Respond to the additional field for HTML tags. See ”HTML Tag Additional Field” on page 108
4. Add the definition to a folder. See ”Assigning Metadata to a Folder” on page 115
5. Add the definition to content within the folder. See ”Adding Metadata to Content” on page 118
6. Add a metadata control to every Web form (.aspx page) on which this content will appear.

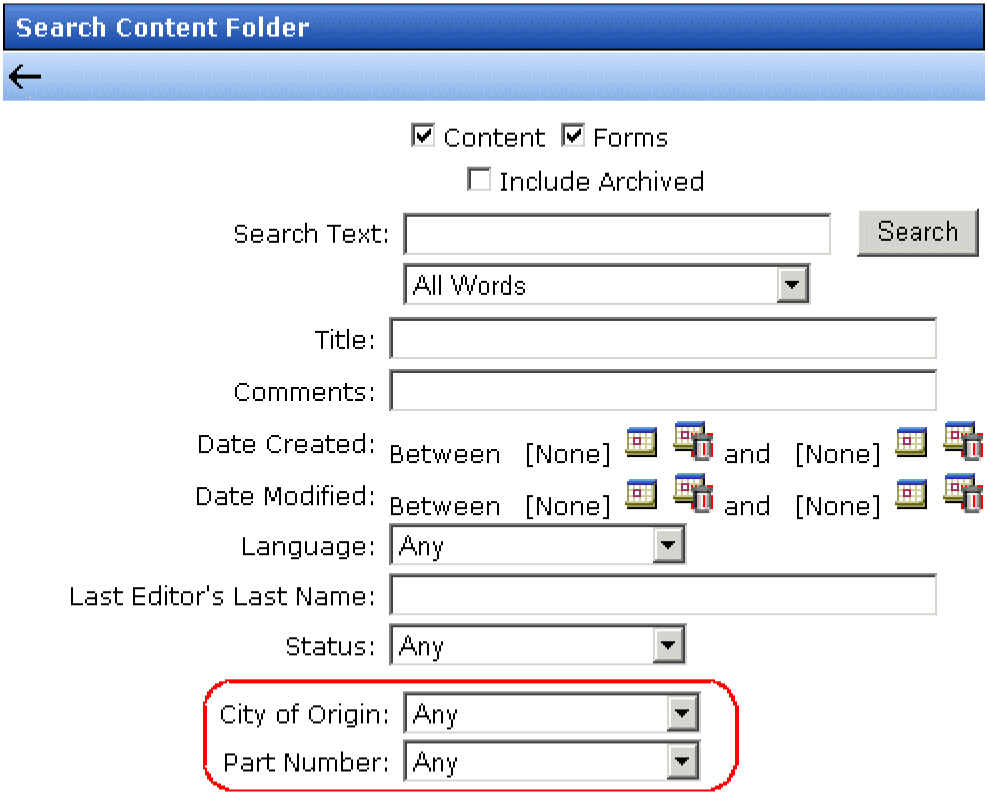
   To learn how to do this, see the Ektron CMS400.NET Developer Manual section “Custom Functions (for your server platform)” > “Metadata Function”, “MetaData Server Control” and “MetaDataList Server Control.”

Searchable Metadata

Searchable metadata appears on your Web site’s search page, below the standard search fields. This type of metadata helps site visitors find content on your Web site (illustrated below).


Search Text:
Search
● All the words
○ Any of the words
○ Exact Phrase
☐ Match Partial Words
City of Origin:
Any
Any
New York
Montreal
Hong Kong
Sydney
Paris
Copenhagen

These search criteria also appear on the Workarea search screen. (To access that screen, click **Action > search** from the View Contents of Folder screen.) See illustration below.



Search Content Folder

☑ Content ☑ Forms

☐ Include Archived

Search Text:

All Words

Title:

Comments:

Date Created: Between [None] and [None]

Date Modified: Between [None] and [None]

Language: Any

Last Editor's Last Name:

Status: Any

City of Origin: Any

Part Number: Any

Creating and Deploying Search Tag Definitions

1. While creating a metadata definition, in the **Name** field, enter a description of the kind of data to be searched. (See examples circled above.) This title describes the search data on the
   - **Metadata** tab of the Folder Properties screen
   - **Metadata** tab of the View Content Screen
   - search screens

   See Also: "Adding a Metadata Definition" on page 106
2. Reply to the standard fields. See "Metadata Definition Fields" on page 107.
3. Respond to additional fields for Searchable Property. definitions. See "Searchable Additional Fields" on page 109

4. Add the definition to a folder. See ”Assigning Metadata to a Folder” on page 115
5. Add the definition to content within the folder. See ”Adding Metadata to Content” on page 118
6. The next time you visit the Workarea search screen, you will see the new field.
7. If you want site visitors to use this field when searching your Web site, ask your developer to set the `ShowExtendedSearch` property of the Search Server Control to **true**. This value lets the searchable metadata appear on the site search.

   See Also: **Ektron CMS400.NET** Developer Manual > “Introduction to Ektron CMS400.NET Server Controls” > “Search Server Control” > “Search Server Control Properties” > “ShowExtendedSearch”

Related Content Metadata

You can associate the following types of content with a content item.

- a content item
- a collection
- a list summary
- one of the following types of library items
  - image
  - hyperlink
  - file

Then, you can set up a Web page so that whenever the source content item appears, the related information appears next to it. For example, your Web site sells motorcycle helmets. On a page that shows a particular helmet, the left column lists a collection of motorcycle drivers who wear that helmet.

Related Content vs. MetadataList Server Control

This capability is similar to the MetadataList Server control. The difference is that MetadataList shows a link to *every* content item with a selected term in the keywords or title. Also, a MetadataList is associated with a Web form (.aspx page), not a content item.

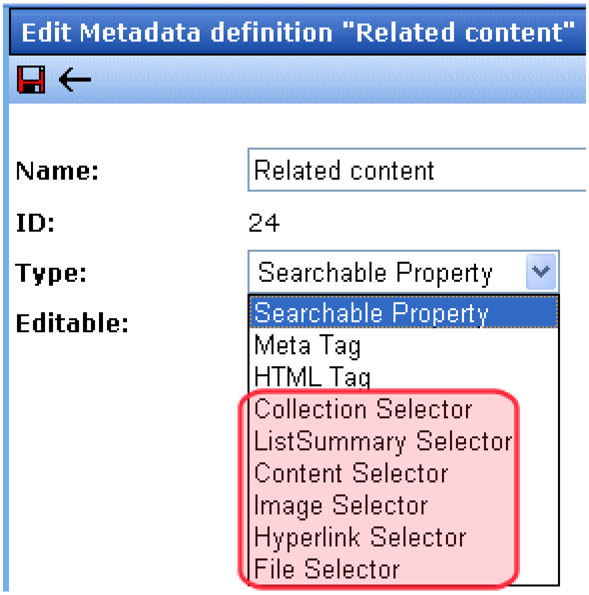
Related content lets you connect a content item with several types of related content (see list above), and is associated with a content item, not a web form. For example, you can display a library image of the company logo on a page whenever content in a certain folder appears. For content in a different folder, a different logo could appear.

Creating and Deploying Related Content Definitions

1. While creating a metadata definition, in the **Name** field, enter a title of this kind of data. This title describes the metadata on the
   - **Metadata** tab of the Folder Properties screen
   - **Metadata** tab of the VIew Content Screen

   See Also: "Adding a Metadata Definition" on page 106
2. Reply to the standard fields. See "Metadata Definition Fields" on page 107.

   The **Type** must end with the word **Selector**. Choices are highlighted below.


Edit Metadata definition "Related content"
Searchable Property
Meta Tag
HTML Tag
Collection Selector
ListSummary Selector
Content Selector
Image Selector
Hyperlink Selector
File Selector

Name: Related content

ID: 24

Type: Searchable Property

Editable:

For example, if you choose **ListSummary Selector**, a specified List Summary will appear on the page along with its associated content item.

Your choices are

- Collection Selector
- ListSummary Selector
- Content Selector
- Image selector *(associates a library image with content)*
- Hyperlink Selector *(associates a library hyperlink with content)*
- File Selector *(associates a library file with content)*

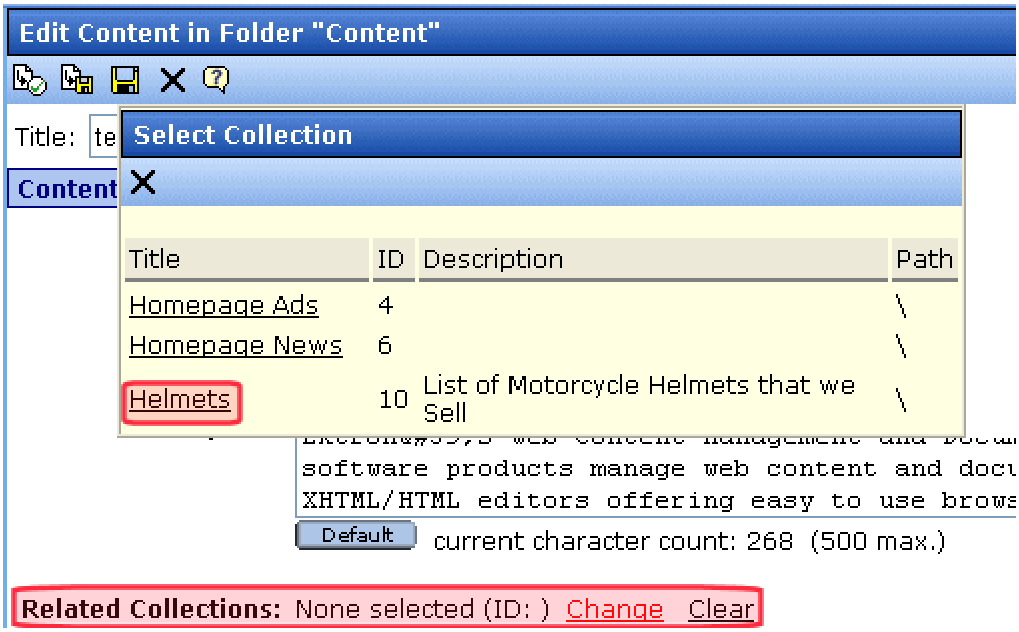
3. Add the definition to all appropriate folders. See ”Assigning Metadata to a Folder” on page 115
4. For each content item to which you want to associate related content, access its **Metadata** tab and identify the related item(s).

WARNING! If you are using **Collection Selector** type, only users with permission to work with collections can select a collection. Also, if you are using **Image, Hyperlink or File Selector** type, only users with permission at least read-only Library permissions can select a library item. *See Also:* ”Setting Permissions” on page 547

For example, a collection of pages describes motorcycle helmets. You want this collection to appear whenever a helmet is being viewed.

To set this up, you would

- edit the helmet content item
- click its **Metadata** tab
- find the metadata definition for the collection
- click **Change**
- select the Helmet Collection



Edit Content in Folder "Content"

Title: te

Content

Select Collection

Title	ID	Description	Path
Homepage Ads	4		\
Homepage News	6		\
Helmets	10	List of Motorcycle Helmets that we Sell	\

software products manage web content and docu

XHTML/HTML editors offering easy to use brows

current character count: 268 (500 max.)

Related Collections: None selected (ID:) Change Clear

5. Have your Web developer add code to each page on which the related item appears. To learn how to do this, access the developer sample page (`http://localhost/cms400demo/default.aspx`) and read the **Meta Associations** description.

Simple Dublin Core Metadata

Simple Dublin Core is a set of fifteen standard names for metadata fields designed to cover the most useful items of information on a document. From the Dublin Core site FAQ: “Dublin Core metadata provides card catalog-like definitions for defining the properties of objects for Web-based resource discovery systems.” For more information, refer to the Usage Guide: http://www.dublincore.org/documents/usageguide/.

By using the Metadata Server Control, you automatically create seven of the fifteen Dublin Core metadata fields. These fields are automatically filled with the information from the equivalent Ektron CMS400.NET property. Below is a list of the seven fields and their Ektron CMS400.NET equivalent. For more information on the Metadata Server Control, see the Developer’s Manual section “Introduction to Ektron CMS400.NET Server Controls” > “MetaData Server Control”

Dublin Core Field Name	Ektron CMS400.NET Property
DC.title	Content block title
DC.description	Plain text version of a content block teaser (summary)
DC.contributor	Content block last editor name
DC.date	Content block last edit date
DC.format	“text/html”
DC.identifier	URL of current page (from ASP.NET Server.Request object)
DC.language	CMS language cookie / current site language, expressed as a .NET System.Globalization Culture Name

Creating the Additional Eight Fields

To fully comply with the Simple Dublin Core metadata element set, the administrator must create the remaining eight Dublin Core fields as standard CMS400.NET Metadata definitions and apply them to all CMS400.NET folders. Next, CMS users complete the appropriate values for each content block.

WARNING! When creating the Dublin Core metadata fields in the Metadata section of the Workarea, you do not need to create the first seven fields in the table above. In addition, the names of the fields you create must match the names below. For example, in the name field, enter “DC.subject”. The DC identifies the metadata as Dublin Core metadata.

The remaining eight Simple Dublin Core fields are described below:

NOTE These descriptions are from the Dublin Core Metadata Initiative site. For a more detailed description, visit http://www.dublincore.org.

- **DC.subject** - The topic of the content of the resource. Typically, a Subject is expressed as keywords, key phrases, or classification codes that describe the topic of the resource.
- **DC.type** - The nature or genre of the content of the resource. Type includes terms describing general categories, functions, genres, or aggregation levels for content.
- **DC.source** - A reference to a resource from which the present resource is derived. For example, DC.source=”Image from page 54 of the 1922 edition of Romeo and Juliet”
- **DC.relation** - A reference to a related resource.
- **DC.coverage** - The extent or scope of the content of the resource. Coverage typically includes spatial location (a place name or geographic co-ordinates), temporal period (a period label, date, or date range) or jurisdiction (such as a named administrative entity). Examples: DC.coverage=”1995-1996”, DC.coverage=”Boston, MA”, DC.coverage=”17th century” or DC.coverage=”Upstate New York”.
- **DC.creator** - An entity primarily responsible for making the content of the resource.
- **DC.publisher** - The entity responsible for making the resource available.
- **DC.rights** - Information about rights held in and over the resource. Typically, a Rights element contains a rights management statement for the resource, or reference a service providing such information.

Working with Metadata Definitions

NOTE Only members of the Administrator User Group and those defined in the Manage Members for Role: Metadata-Admin screen can view, add, or edit metadata definitions. *See Also:* ”Using the Roles Screens” on page 564

Procedures for creating, updating and deleting metadata definitions are explained in the following sections.

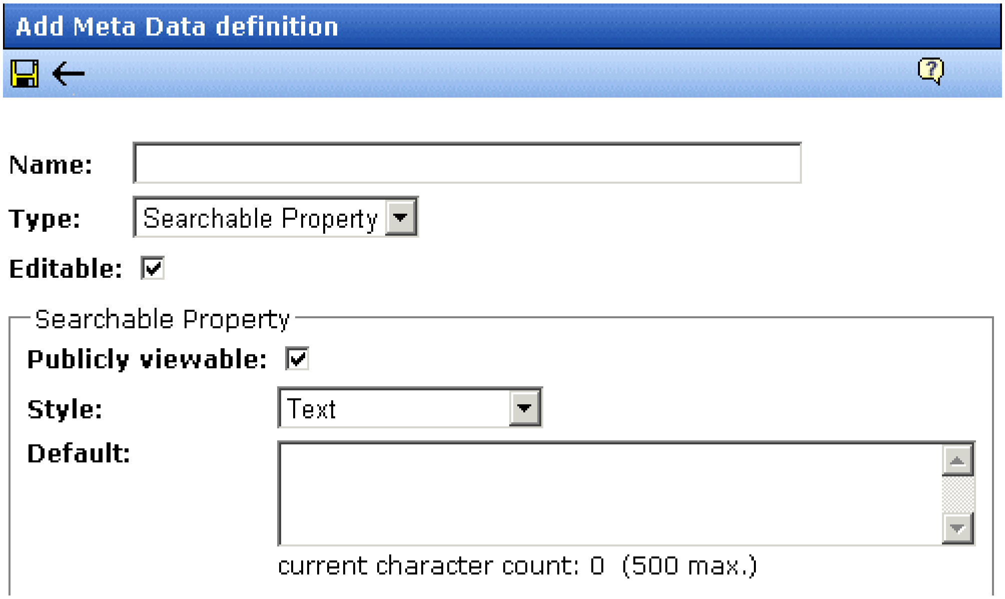
- ”Adding a Metadata Definition” on page 106
- ”Viewing Metadata Definitions” on page 114
- ”Editing a Metadata Definition” on page 114

- ”Deleting a Metadata Definition” on page 115
- ”Assigning Metadata to a Folder” on page 115
- ”Adding Metadata to Content” on page 118

Adding a Metadata Definition

Use the Add Metadata Properties screen to define metadata (such as keywords and title). You can define as many instances of metadata as you wish.

If your site supports multiple languages, you create metadata definitions for each supported language.



Name:

Type: Searchable Property

Editable: ☑

Publicly viewable: ☑

Style: Text

Default:

current character count: 0 (500 max.)

To define one instance of metadata, follow these steps.

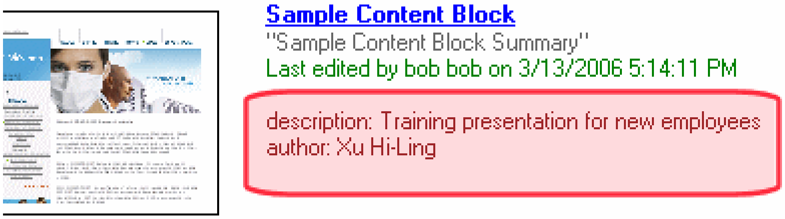
WARNING! After creating a definition, you must assign it to all folders whose content should use it. You assign a metadata definition to a folder in the folder’s properties. See ”Assigning Metadata to a Folder” on page 115.

1. From the Workarea’s left frame, click the **Settings** folder.
2. Click the **Configuration** folder to expand the tree.
3. Click the **Metadata Definition** folder.

4. The View Metadata Definitions screen appears.
5. Select the language for the metadata you are about to define. This metadata will only be available to content in this language.
6. Click the Add Metadata Definition button (M).
7. The Add Metadata Definition screen appears. Using the following table, add the needed information.

Metadata Definition Fields

Field	Description
Name	Enter a name to identify this metadata.
Type	From the drop-down list, select whether this tag is • a searchable property when inserted on the Web page - *See Also:* ”Searchable Additional Fields” on page 109 and ”Searchable Metadata” on page 98 • an HTML tag (for example, `<title>`) - *See Also:* ”HTML Tag Additional Field” on page 108 and ”Title Tag” on page 96 • a Meta tag (`<meta>`) - *See Also:* ”Meta Tag Additional Fields” on page 108 and ”Meta Tags” on page 95 • Collection Selector, ListSummary Selector, Content Selector, Image selector, Hyperlink Selector, File Selector - *See Also:* ”Related Content Metadata” on page 100
Editable	Check this box if you want to allow users to edit the contents of the metadata when creating or editing the metadata’s content. Uncheck this box if you want uniform metadata for each content item that uses this metadata.

Field	Description
Display in Ektron Explorer	Check this box if you want this metadata to appear in Ektron Explorer. If you check the box, and this metadata is assigned to content, the metadata value appears within Ektron Explorer, below the last edited date. The additional information could help Explorer users find the right content. Examples might be a description of the content or the author. See illustration below.  Sample Content Block "Sample Content Block Summary" Last edited by bob bob on 3/13/2006 5:14:11 PM description: Training presentation for new employees author: Xu Hi-Ling

HTML Tag Additional Field

See Also: ”Title Tag” on page 96

Field	Description
Default Text	Enter default content for the HTML tag. For example: `content="document management web content management content management cms"`

Meta Tag Additional Fields

NOTE For background information about metadata, see http://www.w3.org/TR/REC-html40/struct/global.html#edef-META.

See Also: ”Meta Tags” on page 95

Field	Description
Style	Select from the drop-down list to indicate whether you want the style to be **name** or **http-equiv**. For more information, see http://www.w3.org/TR/REC-html40/struct/global.html#h-7.4.4.2
Remove Duplicates	Check this box to remove duplicate words or phrases from the metadata.
Case Sensitive	Check this box to remove duplicates only if the letters and case of each letter match.
Separator	Enter a character to separate the metadata values. The default is a semicolon (;).
Selectable Metadata	Check this box to force users to select from the options specified in the **Allow Selectable Text** and **Default Text** fields. If you do not check this box, users can create their own metadata.
Allow Multiple Selections	Check this box to let users select multiple metadata values instead of one. If multiple values are allowed, use the separator character to delimit them. If this box is not checked, all values appears in a drop-down list, and the user selects the correct one. This field is only active if the **Selectable Metadata** box is checked.
Allowed Selectable Text	Enter standard metadata that can be selected by users. Separate each option by the separator specified for the metadata definition. This field is only active if the **Selectable Metadata** box is checked.
Default Text	Enter default content for the metadata tag.

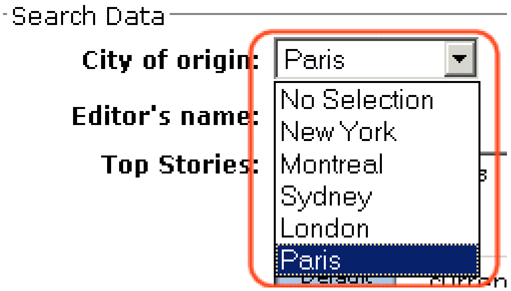
Searchable Additional Fields

See Also: ”Searchable Metadata” on page 98

Field	Description
Publicly Viewable	If you check the box, this search field appears on your Web site's search screen. Site visitors can use the field to find content on your Web site. Note: Regardless of whether this is checked, this search field appears on the Workarea's Search Content Folder screen to help **Ektron CMS400.NET** users find content. Only logged-in users can access the Workarea.
Style	Select the style of the response field from these choices (available in a dropdown list). You are specifying the *kind* of information that a user adding searchable properties to content will enter to describe the data. Later, anyone using the search can search on that information. *See Also:* ”Assigning Metadata to a Folder” on page 115 • Text - The user enters free text to describe the content. • Number - The user enters a number to describe the content. • Date - The user enters a date to describe the content. • Yes or No - The user answers yes or no to describe the content. For example, if the content describes automobile parts, the user could answer **yes** to include new and used parts or **no** to search for new parts only. • Select from a list - The user picks a from a list to describe the content. For an illustration of this style on the Edit Content screen/Searchable Properties tab and the Site Search screen, see ”Select from a List” on page 110. • Multiple selections - The user selects an item from a dropdown list. For an illustration of this style on the Edit Content screen/Searchable Properties tab and the Site Search screen, see ”Multiple Selections” on page 111. *See Also:* ”Converting the Style of a Metadata Definition” on page 112
Default	If desired, enter the most common response to this definition. The default value is automatically applied to all existing content within folders to which this definition is assigned. While editing content that uses this definition, a user can accept the default value or change it. *See Also:* ”Effect of a Default Value on Required Metadata” on page 117

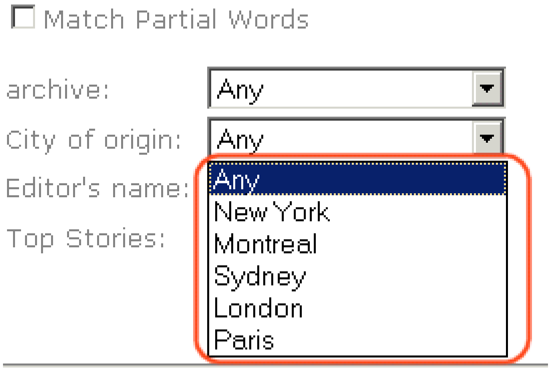
Select from a List

Appearance on Edit Content Screen > Metadata Tab


Search Data
Editor's name:
Top Stories:
No Selection
New York
Montreal
Sydney
London
Paris

City of origin: Paris

Appearance on Search Screen

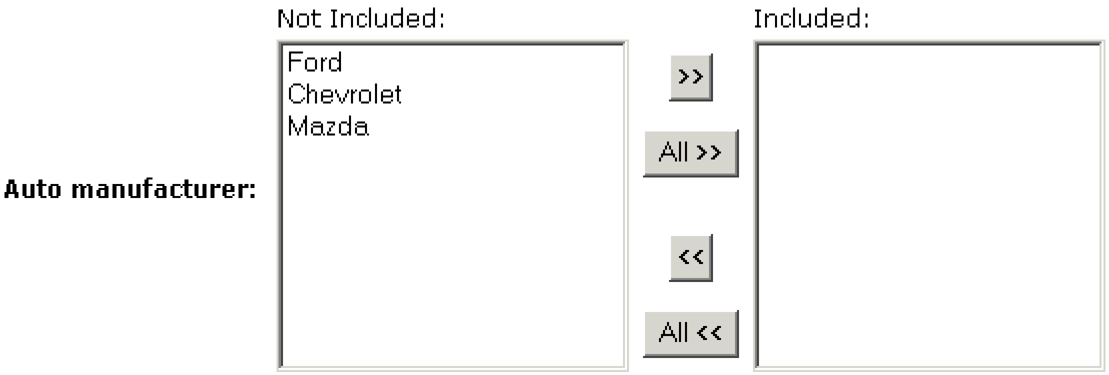

☐ Match Partial Words
Editor's name:
Top Stories:
Any
New York
Montreal
Sydney
London
Paris

archive: Any

City of origin: Any

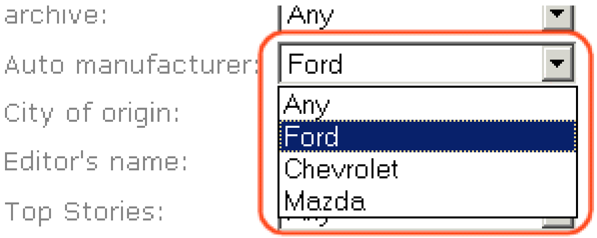
Multiple Selections

Appearance on Edit Content Screen > Metadata Tab


Not Included:
Ford
Chevrolet
Mazda
>>
All >>
<<
All <<
Included:

Auto manufacturer:

Appearance on Search Screen



Converting the Style of a Metadata Definition

This section explains how **Ektron CMS400.NET** handles changing the style of a searchable property type of metadata. For example, you create a definition to collect **Part Number**. Originally, the style is text, but you later decide its style should be number.

When you change the style of searchable property type metadata, **Ektron CMS400.NET** attempts to maintain any data stored in content blocks that use the definition. For example, if the data style was number and you change it to text, the number stored for that metadata definition is converted to text and maintained in all content that uses it.

However, sometimes **Ektron CMS400.NET** cannot maintain the data when you change the style. For example, if you change a metadata definition style from number to date, **Ektron CMS400.NET** cannot convert those styles. In this case, any data stored in metadata definitions is lost.

The following table illustrates all conversion scenarios and how **Ektron CMS400.NET** handles each one. It indicates whether data is maintained after you convert from a data style in the left column to a style to its right.

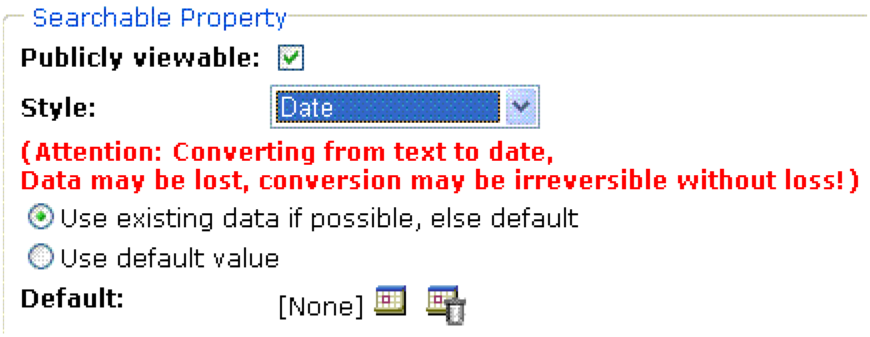
	Text	Number	Date	Boolean	Single Select	Multiple Select
Text	-	OK	OK	NO	NO	NO
Number	OK	-	NO	NO	NO	NO
Date	OK	NO	-	NO	NO	NO
Boolean	OK	NO	NO	-	NO	NO
Single Select	OK	NO	NO	NO	-	OK
Multiple Select	OK	NO	NO	NO	NO	-

Table legend

- **OK** - Data is maintained
- **NO** - Data is lost during conversion

When you change the style of a metadata definition, the screen often gives you these choices:

- Use existing data if possible, else default
- Use default value



Searchable Property

Publicly viewable: ☑

Style: Date

(Attention: Converting from text to date,
Data may be lost, conversion may be irreversible without loss!)

● Use existing data if possible, else default

○ Use default value

Default: [None]

Following these choices is a field that lets you define a default value. If you want to simply replace any existing data, select **Use default value** and enter the new value in the **Default** field.

If the data is convertible (according to the table above), and you want to maintain existing data if possible, select **Use existing data if possible, else default**. Then, enter a default value below. If the existing data cannot be maintained, the default value replaces it.

Viewing Metadata Definitions

You may view any metadata definition. To do so, follow these steps.

1. From the Workarea’s left frame, click the **Settings** folder.
2. Click the **Configuration** folder to expand the tree.
3. Click the **Metadata Definition** folder.
4. The View Metadata Definitions screen appears.
5. Select a language from the drop-down list.
6. Click the Metadata definition you want to view.
7. The View Metadata Definition screen appears. From here, you can edit and delete this definition.

See Also: ”Metadata Definition Fields” on page 107

Editing a Metadata Definition

To edit a metadata definition, follow these steps.

1. Access the View Metadata Definition screen whose definition you want to edit, as described in ”Viewing Metadata Definitions” on page 114.
2. Click the Edit button (📝).
3. The Edit Metadata Definition screen is displayed.
4. Make the necessary changes to the definition.

See Also: ”Metadata Definition Fields” on page 107

5. Click the Update button (💾).

What Happens When a Metadata Definition is Edited?

If you create a metadata definition, assign it to a folder, then users insert metadata information into their content, the collected information takes on the characteristics of the metadata definition. For example, if the metadata is **title** and its type is **HTML tag**, this is how it appears in the Web page's source code.

```
<title>CMS Developer</title>
```

If you later change its type to **Meta**, the following effects occur:

- metadata to which the definition has *already been assigned* maintains the previous style definition. For example, `<title>CMS Developer</title>`.
- when you create a *new* content item that uses the metadata definition, its metadata takes on the new style. For example, `<meta name="title" content="CMS developer">`.

Deleting a Metadata Definition

You can remove metadata definitions that are no longer used from the Ektron CMS400.NET site. When you delete a definition, it is removed from every content item that uses it.

To delete a definition, follow these steps.

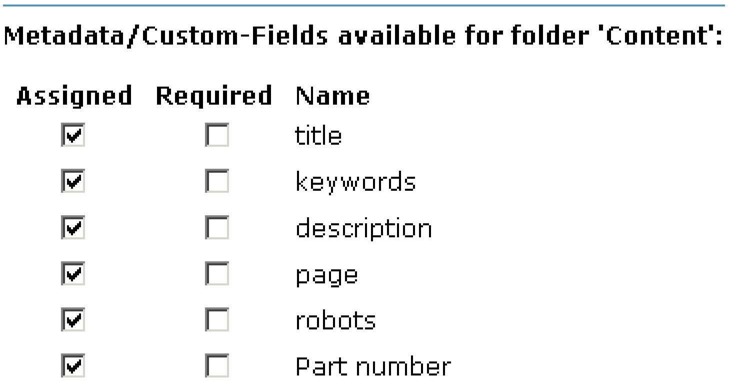
1. Access the View Metadata Definition screen for the definition, as described in "Viewing Metadata Definitions" on page 114.
2. Click the Delete button (🗑).
3. A confirmation message is displayed.
4. Click **OK**.
5. Another confirmation message is displayed.
6. Click **OK**.

Assigning Metadata to a Folder

After creating a searchable metadata definition (see "Adding a Metadata Definition" on page 106), assign it to folders whose content will use it.

On each folder's properties screen, you determine which metadata definitions can be used. It may be some, all, or none of the metadata definitions.

The section of the folder properties screen used to assign metadata appears below. Only metadata definitions whose **Assigned** box is checked can be completed by users working with content in the folder.

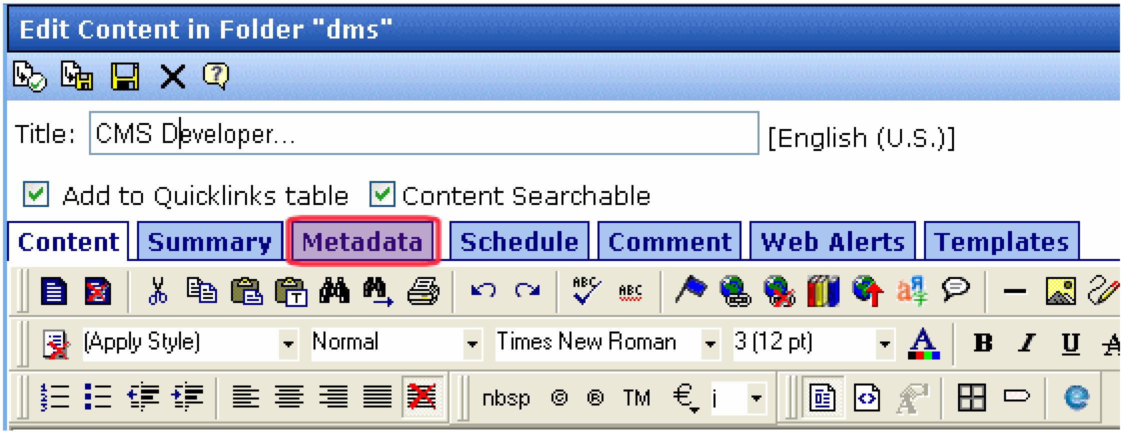


Metadata/Custom-Fields available for folder 'Content':

Assigned	Required	Name
☑	☐	title
☑	☐	keywords
☑	☐	description
☑	☐	page
☑	☐	robots
☑	☐	Part number

See Also: "Metadata" on page 94

Then, while creating or updating content, the user can insert the metadata information via the Metadata tab (illustrated below). The user can only enter metadata values for the types of metadata assigned to the content's folder.



Edit Content in Folder "dms"

Title: CMS Developer... [English (U.S.)]

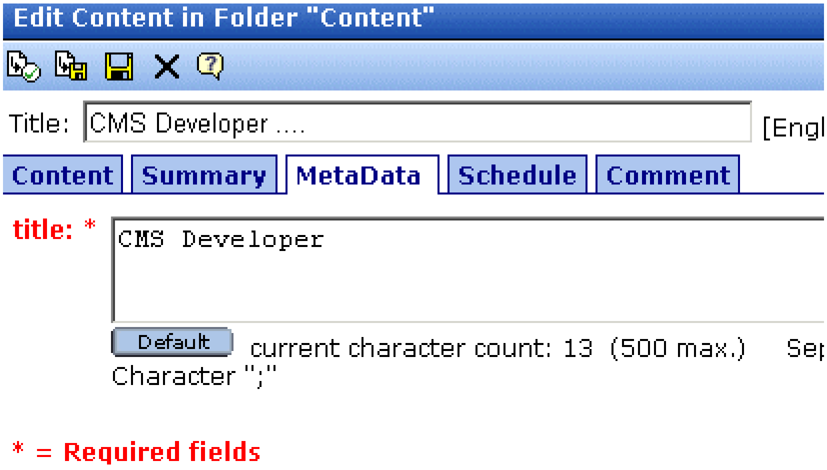
☑ Add to Quicklinks table ☑ Content Searchable

Content
Summary
Metadata
Schedule
Comment
Web Alerts
Templates
(Apply Style)
Normal
Times New Roman
3 (12 pt)
B
I
U
nbsp
©
®
TM
€
i

Requiring Users to Enter Metadata

You can determine that any metadata definition *must* be completed for content before it can be saved (see the **Required** checkboxes in the illustration above). This occurs both when new content is added and existing content is edited.

If you set a kind of metadata to be required, its label is red and includes an asterisk (*) on the Metadata tab of the Edit Content screen, as shown below.



Edit Content in Folder "Content"

Title: CMS Developer ....

title: * CMS Developer

current character count: 13 (500 max.)

Character ";"

* = Required fields

If the user does not complete a required metadata field, a message informs him that it must be completed before he can save the content.

Effect of a Default Value on Required Metadata

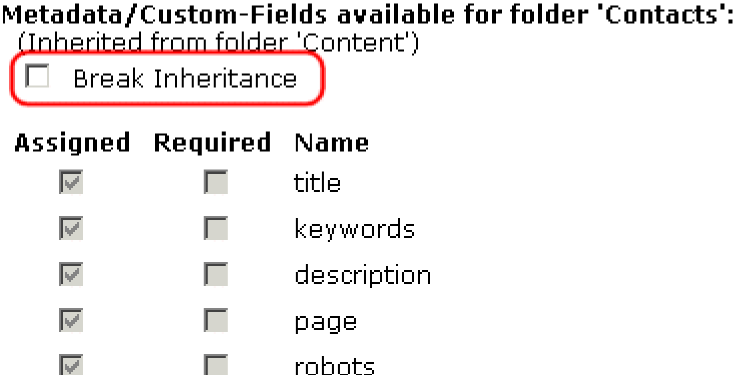
A default value can be defined when creating or editing a metadata definition. *See Also:* ”Adding a Metadata Definition” on page 106

If a default value is defined for a required metadata field, the default value is used when the user saves the content. In this case, the user is not prompted to enter a value because the default value is sufficient.

Inheritance of Metadata by Folder

Each folder can inherit metadata fields from its parent folder or have a unique set of them. The information includes not only which kinds of metadata are *assigned* but also which ones are *required*. For example, you could assign the top folder (Content) all metadata definitions, while you assign the Contacts folder (directly below it) none.

On every folder's properties screen, use the **Break Inheritance** check box (illustrated below) to determine if metadata definitions are the same as the parent folder or unique.



Metadata/Custom-Fields available for folder 'Contacts':
(Inherited from folder 'Content')

☐ Break Inheritance

Assigned	Required	Name
☑	☐	title
☑	☐	keywords
☑	☐	description
☑	☐	page
☑	☐	robots

By default, **Break Inheritance** is not checked, which means that all folders inherit metadata definitions from the root folder (Content).

When you check the **Break Inheritance** check box, all inherited values appear by default (that is, **Assigned** and **Required** boxes are either checked or unchecked). You can then change which boxes are checked/unchecked as desired.

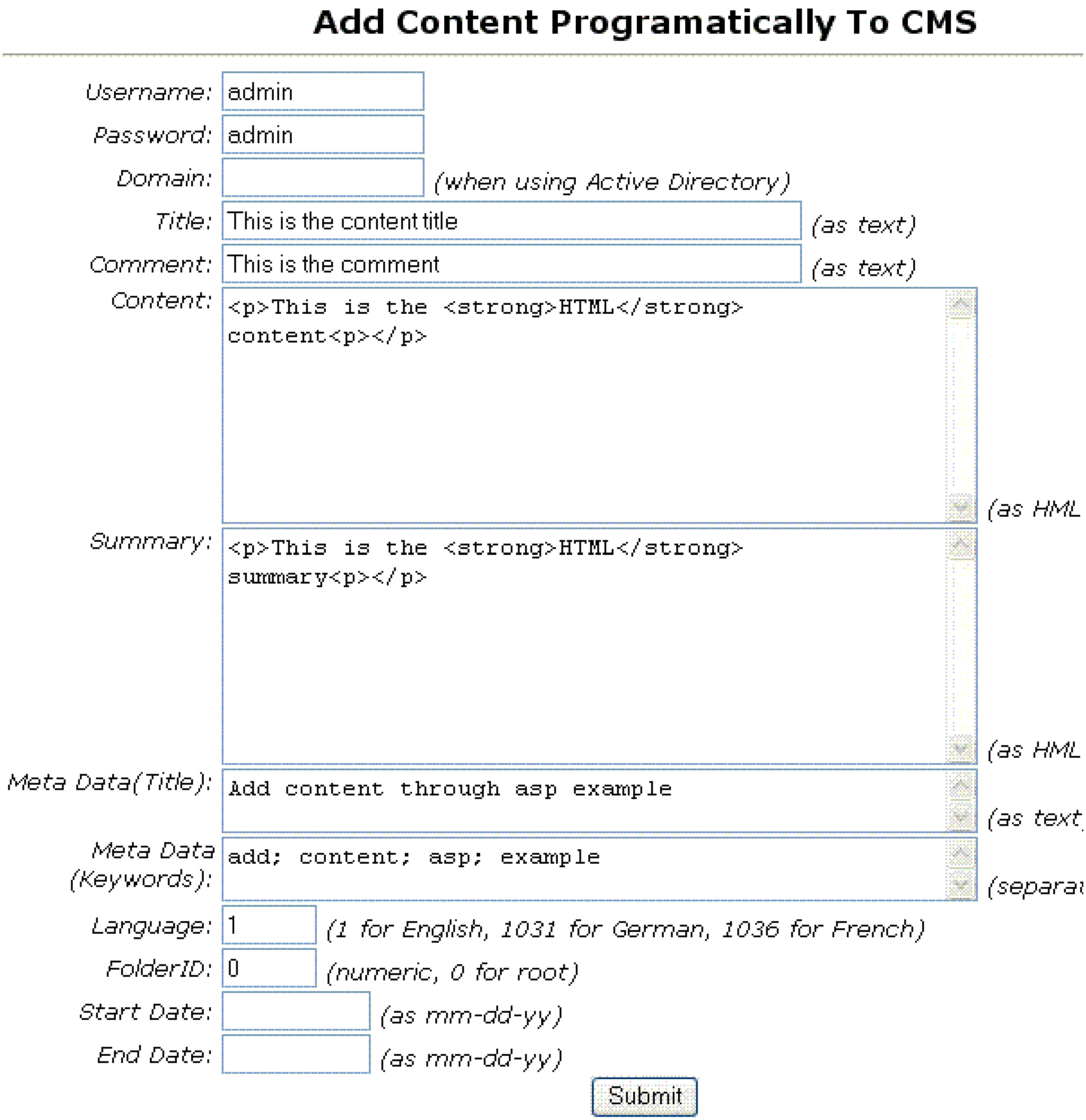
Adding Metadata to Content

When a user creates or updates content, he can define its metadata within the assignments specified for the folder.

Default metadata are applied without user intervention. Instructions for adding metadata are found in the Adding or Editing Data Metadata section of the **Ektron CMS400.NET** User Manual.

Adding Content Programmatically

Content can be created using a special function which lets users add new content without logging in. To accomplish this, your Web site developer places a form on your Web site which lets users submit content without logging in. Here is a sample Add Content form.



Add Content Programatically To CMS

Username:	admin	
Password:	admin	
Domain:		(when using Active Directory)
Title:	This is the content title	(as text)
Comment:	This is the comment	(as text)
Content:	`<p>This is the <strong>HTML</strong> content<p></p>`	(as HML
Summary:	`<p>This is the <strong>HTML</strong> summary<p></p>`	(as HML
Meta Data(Title):	Add content through asp example	(as text
Meta Data (Keywords):	add; content; asp; example	(separa
Language:	1	(1 for English, 1031 for German, 1036 for French)
FolderID:	0	(numeric, 0 for root)
Start Date:		(as mm-dd-yy)
End Date:		(as mm-dd-yy)

Your Web site developer can customize this form to better suit your needs. See the Ektron CMS400.NET Developer Manual for additional information.

Content Reports

The reports folder contains several reports to help you manage the workflow of content through **Ektron CMS400.NET**. In most cases, you choose a report that corresponds to the content's status, then view all content in that status. If appropriate, you can perform tasks on selected content. For example, you can check in checked-out content.

This chapter explains how to access the reports folder in your Workarea, set criteria that determine the information on the reports, and actions you can perform on them.

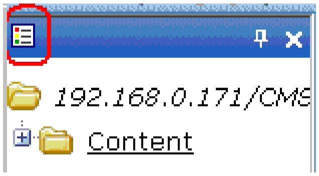
See Also:

- ”Accessing the Reports Folder” on page 121
- ”List of Standard Reports” on page 122
- ”Common Report Topics” on page 123

Accessing the Reports Folder

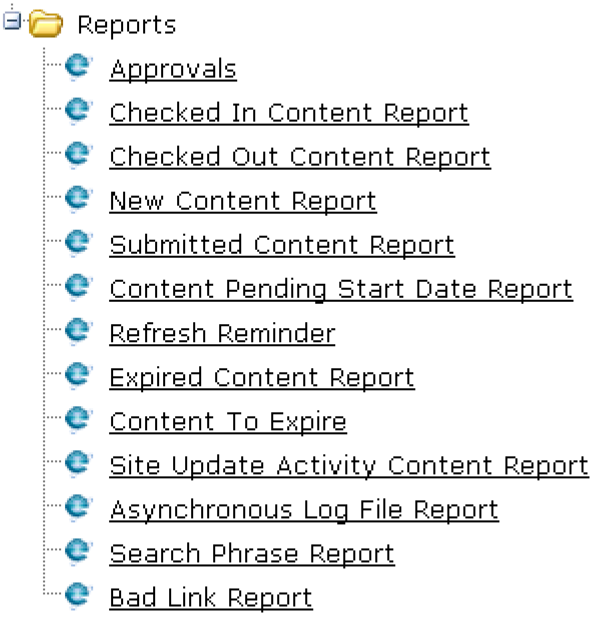
To access the Reports folder, follow these steps.

1. Log in to your Ektron CMS400.NET Web site and access the Workarea.
2. To access the Smart Desktop from anywhere in **Ektron CMS400.NET**, click the button in the top left corner (circled below).



3. Click the **Reports** folder.

4. A list of available reports appears.



Reports
- Approvals
- Checked In Content Report
- Checked Out Content Report
- New Content Report
- Submitted Content Report
- Content Pending Start Date Report
- Refresh Reminder
- Expired Content Report
- Content To Expire
- Site Update Activity Content Report
- Asynchronous Log File Report
- Search Phrase Report
- Bad Link Report

NOTE The Approvals, Checked Out, and Content to Expire Reports are also available from the Workarea.

The reports are described below.

List of Standard Reports

Report	Displays content in this status	For more information, see
Approvals	Requiring your approval	”Approvals Reports” on page 131
Checked In Content	Checked in	”Checked In Report” on page 133
Checked Out Content	Checked out	”Checked Out Report” on page 134
New Content	New (that is, created and saved but never published)	”” on page 151

Report	Displays content in this status	For more information, see
Submitted Content	Submitted for publication	”” on page 151
Content Pending Start Date	Approved and pending a start date	”” on page 151
Refresh Reminder Report	End date has been reached	”Refresh Reminder Report” on page 137
Expired Content	Expired date has been reached	”Expired Content Report” on page 138
Content to Expire	Will expire within specified number of days	”Content to Expire Report” on page 139
Site Update Activity Content Report	Content created or updated in selected folders and within a selected date range	”Site Update Activity Report” on page 140
Asynchronous Log File Report	A log report of the Asynchronous process	**Ektron CMS400.NET** Administrator manual > “Web Alert Feature” > “Setting Up the Message Queue and Asynchronous Processor” > “Asynchronous Log File Reporting”
Search Phrase Report	Frequency of search terms	”Search Phrase Report” on page 144
Preapproval Groups	User groups that have been assigned to folders in order to preapprove content	Ektron CMS400.NET Administrator manual > “Managing Tasks” > “Automatic Creation of Tasks Associated with Content Blocks” > “Assigning a Preapproval Group to a Folder” > “Preapproval Groups Report”
Bad Link Report	Invalid links to external URLs	”Bad Links Report” on page 146

Common Report Topics

The following topics apply to the reports.

- ”Information on the Reports” on page 124
- ”Report Toolbar Options” on page 124
- ”Selecting Content by Folder” on page 125

- ”Selecting Content by Type” on page 126
- ”Sorting and Filtering Content Reports” on page 127
- ”Performing an Action on Several Content Items” on page 127
- ”Viewing/Editing Content on the Report” on page 128
- ”emailing Reports” on page 128

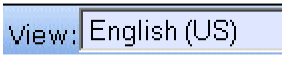
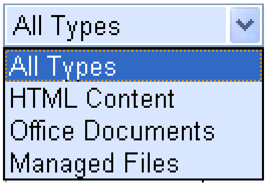
Information on the Reports

Each report displays the following information about its content.

Field	**Description**
Title	Title of content.
ID	Internal number assigned to content by **Ektron CMS400.NET**.
Date Modified	If a Start Date was assigned to the content, it appears here.
Last Editor	The user who last edited the content.
Path	Folder location of content.

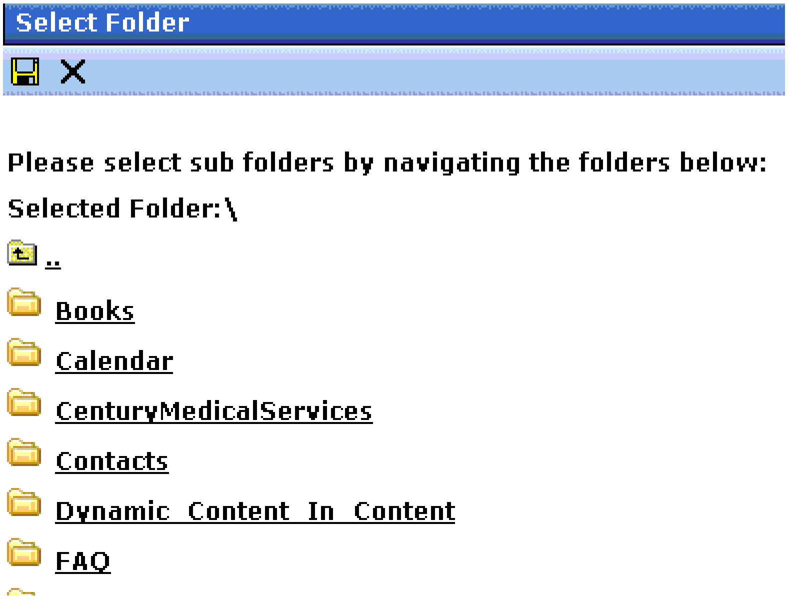
Report Toolbar Options

Toolbar Button	**Description**	**For more information, see**
✉	email this report to selected users	”emailing Reports” on page 128
📂	Select a folder whose content appears on the report. Content in other folders is ignored.	”Selecting Content by Folder” on page 125
←	Go to previous screen	

Toolbar Button	Description	For more information, see
 View: English (US)	Select the language of the content you want to see on the report	
 All Types All Types HTML Content Office Documents Managed Files	Select the type of the content you want to see on the report	

Selecting Content by Folder

You can select a folder and only view the content in that folder that satisfies the other report criteria. For example, the Checked in Content Report can show only content whose status is checked in and which resides in the Contacts folder.


Select Folder
..
Books
Calendar
CenturyMedicalServices
Contacts
Dynamic_Content_In_Content
FAQ

Please select sub folders by navigating the folders below:

Selected Folder:\

Only content in the selected folder appears. The report does not include content from subfolders of the selected folder.

To select content by a folder, follow these steps.

1. From the Smart Desktop, select a report.
2. Click the Select a Folder button (📁).
3. The top level folders appear.
4. If the folder you want is on the list, click the corresponding checkbox.

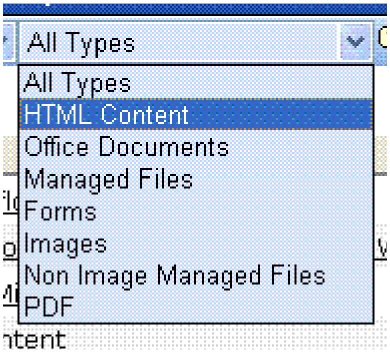
   If the folder you want is a subfolder, click the parent folder’s name. A new screen appears, showing the selected folder’s subfolders. Click the corresponding checkbox.
5. Click the Save button (💾) to finalize your folder selection.
6. The screen displays all content items in the selected folder that satisfy all report criteria.

Selecting Content by Type

After viewing any report, you can select a content type and only view the content of that type that satisfies the other report criteria. For example, the Checked in Content Report can show only Office documents.

To select a content type, follow these steps.

1. From the Smart Desktop, select a report.
2. Use the file types pull-down to select a file type.
3. The screen refreshes and only displays files of that type.



Sorting and Filtering Content Reports

Upon viewing a report's content, you have additional options for filtering report data by user and content folder.

The filtering options for each content report are identical. The following section uses the Checked-In Content report as an example.

Filter by User

To display only content that was checked in by a user, click the name of the user in the report display. When you do, the report redisplays, showing only content which that user checked in.

Filter by Content Folder

To display only content checked in to a selected folder, click the folder on the report display. When you do, the report redisplays, showing only content in that folder.

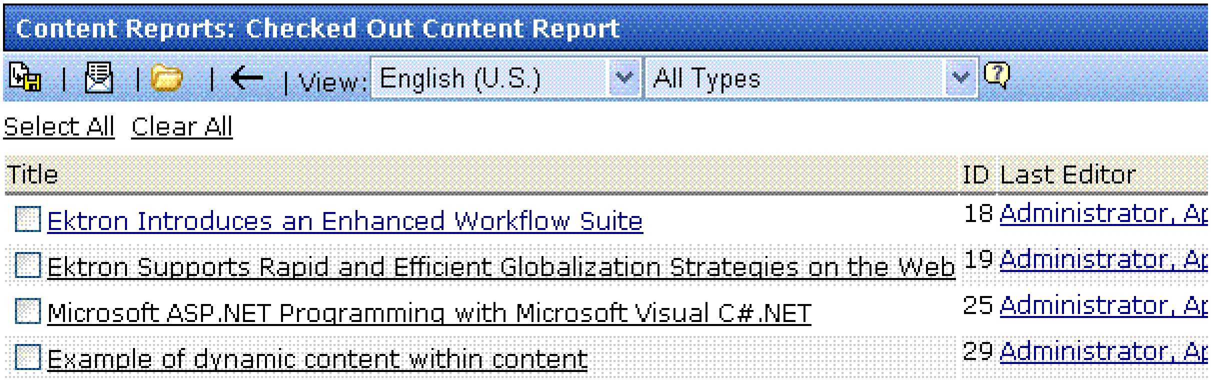
NOTE You can also select a folder and view reports in that folder only. *See Also:* "Selecting Content by Folder" on page 125

Performing an Action on Several Content Items

You can perform the following actions on several or all content items in the Approvals, Checked in, and Checked out reports.

Report	Action you can perform
Approvals	Approve
Checked in	Submit for publication
Checked out	Check in

To select several reports, check the relevant checkboxes (illustrated below). To select all reports, click **Select All**.

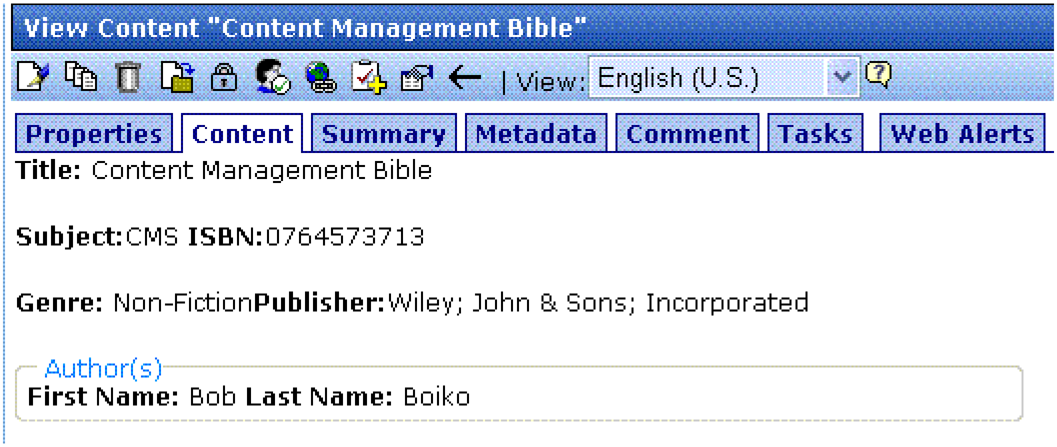

Content Reports: Checked Out Content Report
View: English (U.S.)
All Types
Select All
Clear All

Title	ID	Last Editor
☐ Ektron Introduces an Enhanced Workflow Suite	18	Administrator, Ap
☐ Ektron Supports Rapid and Efficient Globalization Strategies on the Web	19	Administrator, Ap
☐ Microsoft ASP.NET Programming with Microsoft Visual C#.NET	25	Administrator, Ap
☐ Example of dynamic content within content	29	Administrator, Ap

Then, click the button at the top left to perform the action on the selected content items.

Viewing/Editing Content on the Report

To view (and possibly edit) any content on a report, click it. It appears on the View Content screen (illustrated below).


View Content "Content Management Bible"
View: English (U.S.)
Properties
Content
Summary
Metadata
Comment
Tasks
Web Alerts
Author(s)

Title: Content Management Bible

Subject:CMS **ISBN:**0764573713

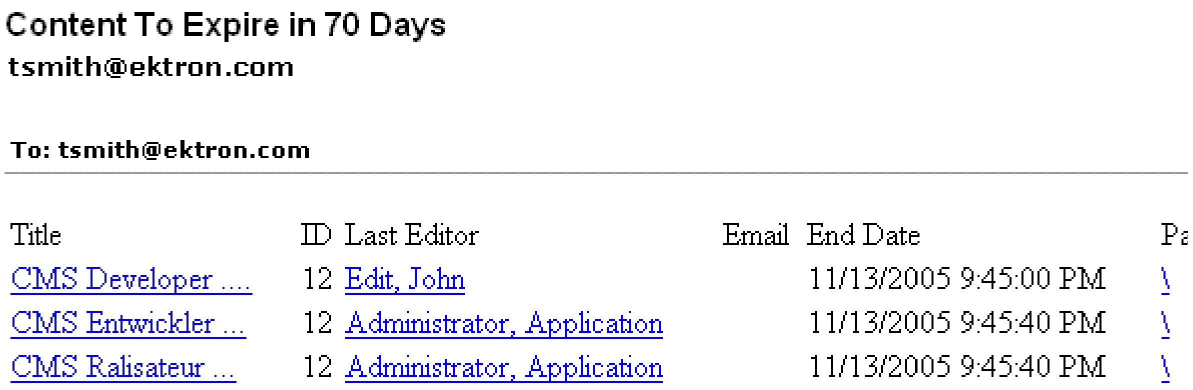
Genre: Non-Fiction**Publisher:**Wiley; John & Sons; Incorporated

First Name: Bob **Last Name:** Boiko

The View Content screen provides several toolbar options that you can perform on the content.

emailing Reports

You can email any report. You might do this, for example, to notify a user that several content items are checked out to him. All information in the report appears in the email. A sample appears below.



Content To Expire in 70 Days

tsmith@ektron.com

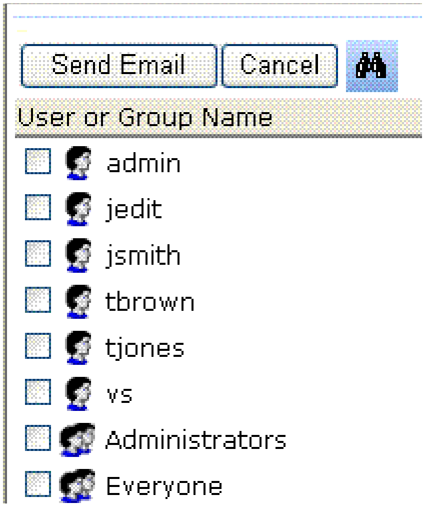
To: tsmith@ektron.com

Title	ID	Last Editor	Email	End Date	Pa
CMS Developer	12	Edit, John		11/13/2005 9:45:00 PM	\
CMS Entwickler ...	12	Administrator, Application		11/13/2005 9:45:40 PM	\
CMS Ralisateur ...	12	Administrator, Application		11/13/2005 9:45:40 PM	\

You can click any content item on the report and proceed to that page of your Web site.

To email any report, follow these steps.

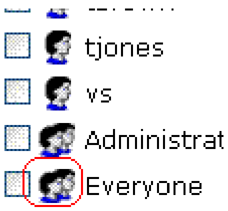
1. Display the report that you want to email.
2. Click the email button (✉).
3. A list of all users and user groups in your **Ektron CMS400.NET** appears.



User or Group Name

☐ admin
☐ jedit
☐ jsmith
☐ tbrown
☐ tjones
☐ vs
☐ Administrators
☐ Everyone

NOTE Users appear first in alphabetical order (by username), followed by user groups. The icon for user groups has two heads (see below).

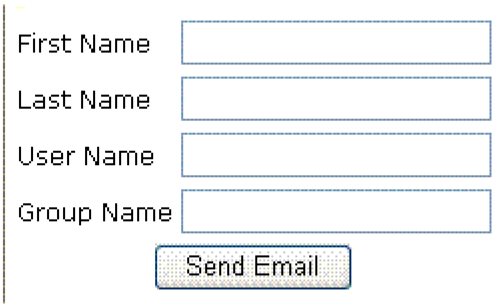


4. Click inside the checkbox of every user or group to receive a copy of the report.

Searching for Report Recipients

If you cannot easily find a user, a search of all users and groups is available. To use it, follow these steps.

1. Display the report that you want to email.
2. Click the email button (✉).
3. A list of all users and user groups in your **Ektron CMS400.NET** appears.
4. Click the Search for User button (🔍).
5. The following screen appears.



6. Enter whatever information you know about the users.
7. Click the **Send email** button.
8. All users that satisfy the search criteria appear on a new screen.
9. Click the checkbox of every user or group to receive the report.

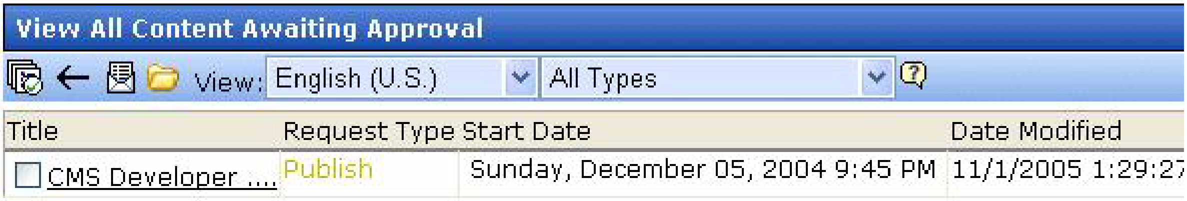
Approvals Reports

Each content item awaiting your approval appears on this report. Thus, you can quickly find all such content without searching through every folder.

The View All Content Awaiting Approval screen displays the following information about this content.

Field	Description
Title	Title of content.
Request Type	Request made for the content. Either **Publish** or **Delete**.
Start Date	Start date, if any, assigned to the content. Determines when content will go live on Web site.
Date Modified	Date the content was most recently changed
Submitted By	User who submitted content for approval.
ID	The ID number if the content.
Language	The language of the content.
Path	Path to content folder where content resides.

Below is an example of the View All Content Awaiting Approval screen.



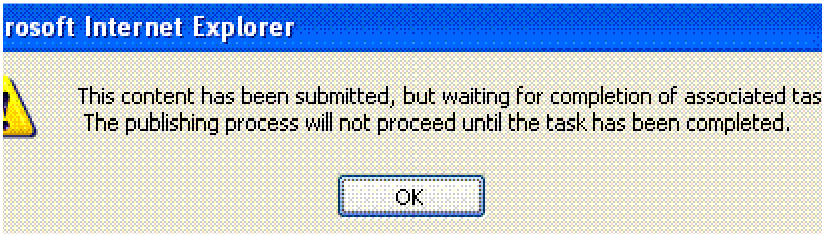
Title	Request Type	Start Date	Date Modified
☐ CMS Developer	Publish	Sunday, December 05, 2004 9:45 PM	11/1/2005 1:29:2

Approving/Declining Content

From the approvals report, you can approve or decline content that was submitted to you. The steps below explain how to do so.

Approve/Decline One Content Item

1. Access your Approvals report in the Workarea (see ”Approvals Reports” on page 131).
2. Click the content you want to approve or decline.
3. The View Content Awaiting Approval page is displayed.
4. Perform an action using the following table as a reference.

Button	Name	**Description**
	Publish	Accept changes to content and publish it to site. Note: If there is a subsequent approver in the content’s approval chain, this button is replaced by a Submit button. If you click Publish but the content item has an incomplete task assigned to another user, the content cannot be published. Instead, the following error message appears.  rosoft Internet Explorer This content has been submitted, but waiting for completion of associated tas The publishing process will not proceed until the task has been completed. The user to whom the task is assigned must complete it before you can publish the content.
	Decline	Reject changes and keep current version of content live on Web site.
	Edit	Check out content and make changes to it if desired.
	View Published/ Staged	Toggle between published and submitted versions of content. This can help you compare differences.
←	Back	Go back to previous screen.

Approving Multiple Content Items

See ”Performing an Action on Several Content Items” on page 127.

The selected content is either submitted to the next publisher, published immediately, or deleted, depending on the content’s approval chain.

Checked In Report

The Checked In Content report displays all the content currently in a checked-in status.

The report displays the following information.

Column	**Description**
Title	Title of content.
ID	ID number assigned to content by Ektron CMS400.NET.
Last Editor	Last user to edit the content.
Date Modified	Date and time content was last edited.
Path	Folder location of content in Ektron CMS400.NET Web site.

Submitting Multiple Content Items

After selecting content, use the submit toolbar option (📄) to submit it for approval or publication, depending on your position in the approval chain.

Checked Out Report

The Checked Out Content report displays all content currently in a checked out status.

The report displays the following information.

Column	Description
Title	Title of content.
ID	ID number assigned to content by Ektron CMS400.NET.
Last Editor	Last user to edit the content.
Date Modified	Date and time content was last edited.
Path	Folder location of content in Ektron CMS400.NET Web site.

After selecting content, check it in using the Checkin button ().

New Content Report

The New Content report displays content in a *new* state, that is, it was created and saved but never published. The new content report contains the following information.

Column	Description
Title	Title of content.
ID	ID number assigned to content by Ektron CMS400.NET.
Last Editor	Last user to edit the content.

Column	Description
Date Modified	Date and time content was last edited.
Path	Folder location of content in Ektron CMS400.NET Web site.

Submitted Report

The Submitted Content report displays all content in a submitted state.

The report contains the following information.

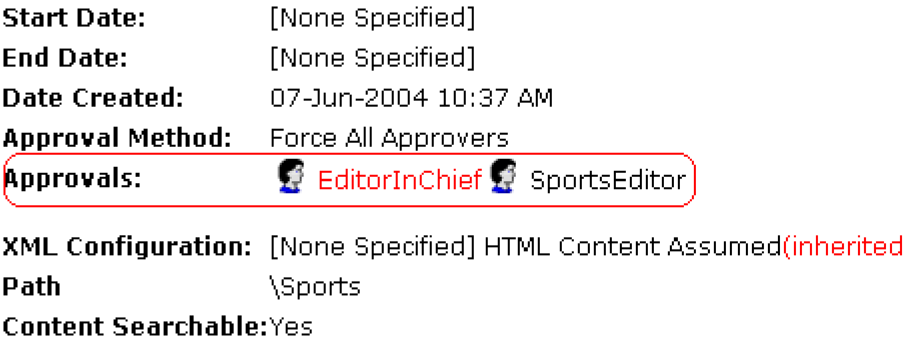
Column	Description
Title	Title of content.
ID	ID number assigned to content by Ektron CMS400.NET.
Last Editor	Last user to edit the content.
Date Modified	Date and time content was last edited.
Path	Folder location of content in Ektron CMS400.NET Web site.

Viewing Position in Approval Chain

While viewing the Submitted Content report, you can view the content’s position is its approval chain. You can use this information to contact the individuals in the chain and ask them to complete their approval. To do so, follow these steps.

1. From the Submitted Content Report, click the content’s title.
2. The View Content page is displayed.
3. Click the **Properties** tab.

4. The content's position in the approval chain is indicated by red text on the **Approvals** line.



Start Date: [None Specified]
End Date: [None Specified]
Date Created: 07-Jun-2004 10:37 AM
Approval Method: Force All Approvers
Approvals: EditorInChief SportsEditor
XML Configuration: [None Specified] HTML Content Assumed(inherited
Path \Sports
Content Searchable: Yes

Content Pending Start Date Report

The Pending Start Date Report displays all content that was approved, but whose start dates haven't occurred.

Each content item on the report contains the following information.

Column	Description
Title	Title of content.
ID	ID number assigned to content by Ektron CMS400.NET.
Last Editor	Last user to edit the content.
Start Date	Date and time content will go live on Web site.
Path	Folder location of content in Ektron CMS400.NET Web site.

Editing Content with a Pending Start Date

You may edit content on the Pending Start Date Content report. To do so, follow these steps.

1. Click the content you want to view.
2. The View Content page is displayed.
3. Using the toolbar at the top of the page, perform any action available.

Refresh Reminder Report

The Refresh Report displays all content whose end date has passed and whose archive option is set to **Refresh Report**. This content is still visible on the Web site. Its appearance on this report indicates that it is due for review. *See Also:* ”Setting Archive Options” on page 65

Each item on the report contains the following information.

Column	Description
Title	Title of content.
ID	ID number assigned to content by Ektron CMS400.NET.
Last Editor	Last user to edit the content.
Date Modified	Date and time the content was last updated.
Path	Folder location of content in Ektron CMS400.NET Web site.

Removing Expired Content from Site

If you review content and decide it should no longer appear on your site, follow these steps to remove it. The content will be visible if you browse to it through the Workarea, but won't appear to site visitors.

1. From the Expired Content Report, click the content.
2. From the View Content screen, click the Edit button (📝).
3. Click the **Schedule** tab.
4. Under **Action on End Date:**, click **Archive and remove from site (expire)**.

Expired Content Report

The Expired Content report displays all content whose end date has passed. Such content is no longer visible on the Web site.

Each item on the list contains the following information.

Column	Description
Title	Title of content.
ID	ID number assigned to content by Ektron CMS400.NET.
Last Editor	Last user to edit the content.
End Date	Date and time the content expired.
Path	Folder location of content in Ektron CMS400.NET Web site.

Editing Expired Content

You may edit any content on the Expired Content report. To do so, follow these steps.

1. Click the content you want to view.

2. The View Content page is displayed.
3. Using the toolbar at the top of the page, perform any action available.

Content to Expire Report

The Content to Expire report lists all content whose end date will occur between today and a number of days that you specify. For example, if today is January 1 and you select 10 days, the report lists all content whose end date is January 1 through January 10.

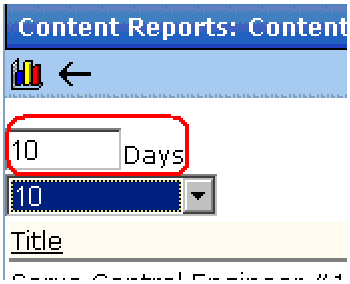
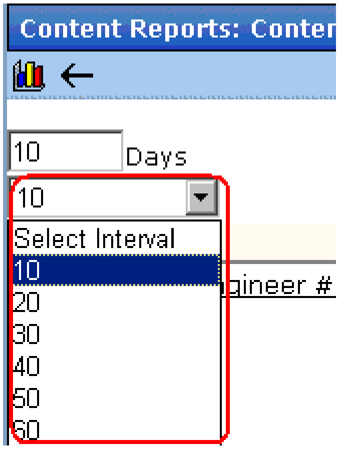
After viewing the report, you can click any content and proceed to the View Content screen for it. From there, you can edit information about it, including its end date if desired.

Each item on the list contains the following information.

Column	**Description**
Title	Title of content.
ID	ID number assigned to content by Ektron CMS400.NET.
Last Editor	Last user to edit the content.
End Date	Date and time the content expired.
Path	Folder location of content in Ektron CMS400.NET Web site.

Selecting the Report's Date Range

To select the report's date range, you have two options:

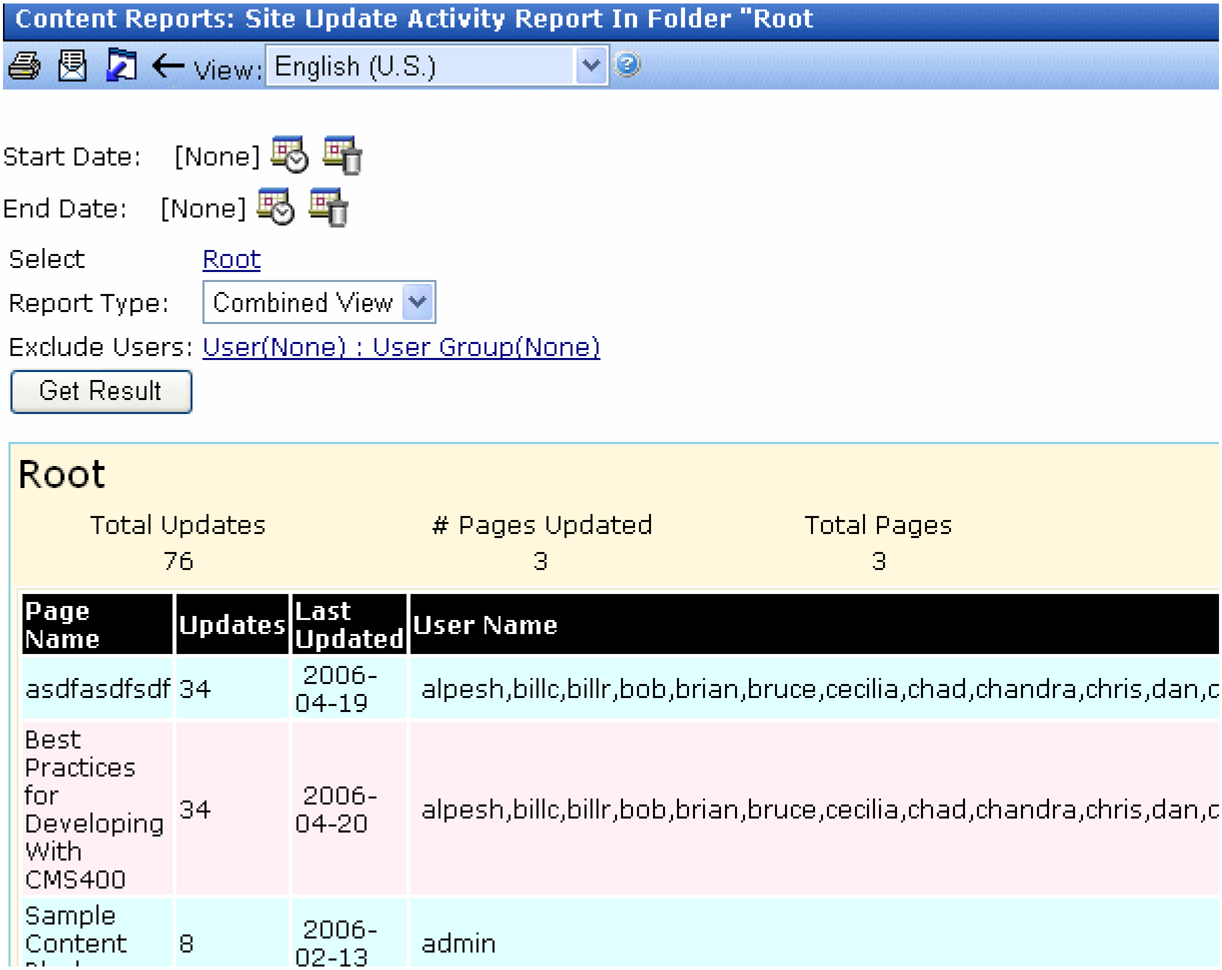
Option	Illustration
Enter a number in the **Days** field. Then click the View Reports button (📊).	 Content Reports: Content 10 Days 10 Title
Select a number from the dropdown list below the **Days** field	 Content Reports: Conter 10 Days 10 Select Interval 10 20 30 40 50 60 gineer #

After selecting a number of days, click the view icon (📊) to see all content that will expire within that time frame.

Site Update Activity Report

The Site Activity Report provides a snapshot of the freshness of the content on your Web site. Specifically, it lists how many content items were published within a folder and date range you select, broken down by folder.

A sample report appears below.


Content Reports: Site Update Activity Report In Folder "Root
View:
Get Result

View: English (U.S.)

Start Date: [None]

End Date: [None]

Select Root

Report Type: Combined View

Exclude Users: User(None) : User Group(None)

Root

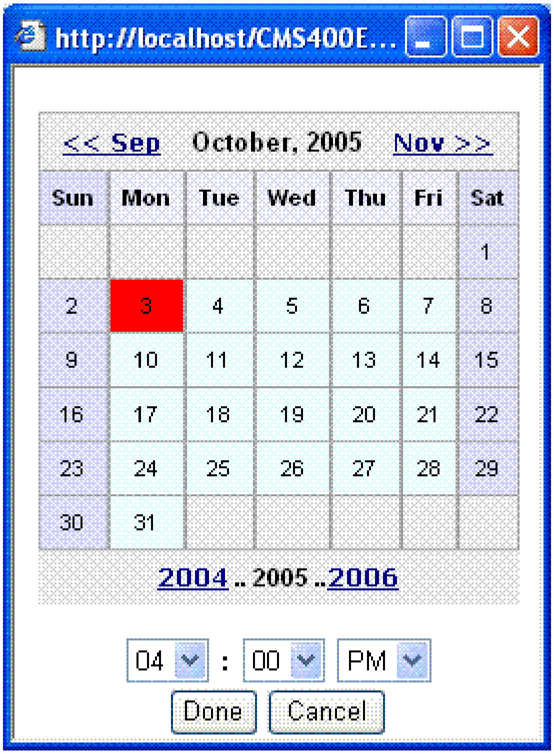
Total Updates	# Pages Updated	Total Pages
76	3	3

Page Name	Updates	Last Updated	User Name
asdfasdfsdf	34	2006-04-19	alpesh,billc,billr,bob,brian,bruce,cecilia,chad,chandra,chris,dan,c
Best Practices for Developing With CMS400	34	2006-04-20	alpesh,billc,billr,bob,brian,bruce,cecilia,chad,chandra,chris,dan,c
Sample Content	8	2006-02-13	admin

Selecting Information to Appear on the Report

To choose which content items will appear on the report, follow these steps.

1. By default, only content in the default language appears on the report. To change the language, use the language pull-down near the top of the screen.
2. Choose a **Start Date** by clicking the calendar icon (📅).
3. A calendar appears. You can move to another month or year by clicking it. When you get to the desired month, click inside the day. The selected date turns red (see below).



October, 2005

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

2004 .. 2005 .. 2006

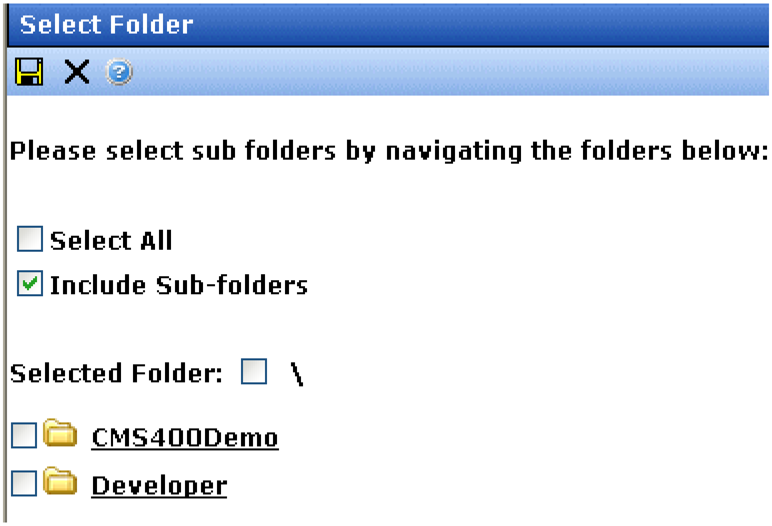
04 : 00 PM

4. Click **Done**.
5. If desired, select an **End Date** using the same procedure.

NOTE If you do not select an end date, the report uses today as the end date.

6. At the **Select** field, choose a folder. The Root folder is the default selection.

   To change that selection, click the folder name. When you do, the Select Folder screen appears.



Select Folder

Please select sub folders by navigating the folders below:

☐ Select All

☑ Include Sub-folders

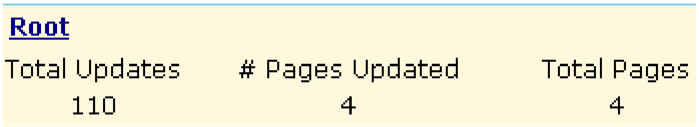
Selected Folder: ☐ \

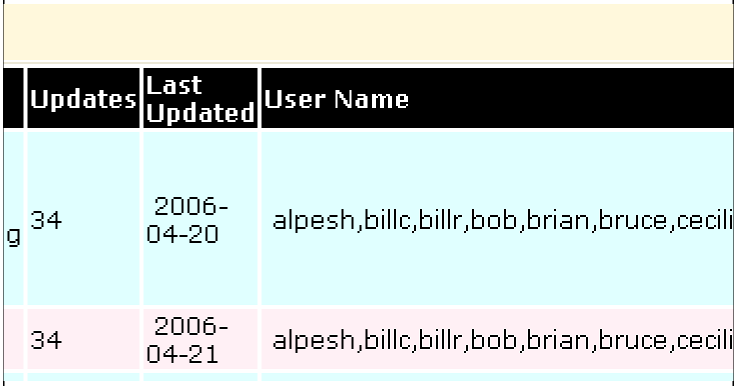
☐ CMS400Demo

☐ Developer

To select all folders on the screen, click the **Select All** checkbox. Otherwise, select folders by clicking the corresponding checkbox. There is also an option to **Include Sub-folders** of the selected folders.

7. Choose the Report type, which determines the information you will see on the report. Options are explained below.

Report Type	Description	Example
Executive View	• folder name • how many times content in folder was published • how many pages were published • number of content items in folder	 Root Total Updates # Pages Updated Total Pages 110 4 4

Report Type	**Description**	**Example**
Detail View	• name of each page that was published • how many times it was published • date it was last published • users who published page • total numbers are *not* provided	 Updates / Last Updated / User Name g 34 / 2006-04-20 / alpesh,billc,billr,bob,brian,bruce,cecili 34 / 2006-04-21 / alpesh,billc,billr,bob,brian,bruce,cecili
Combined View	information from Executive and Detail views	

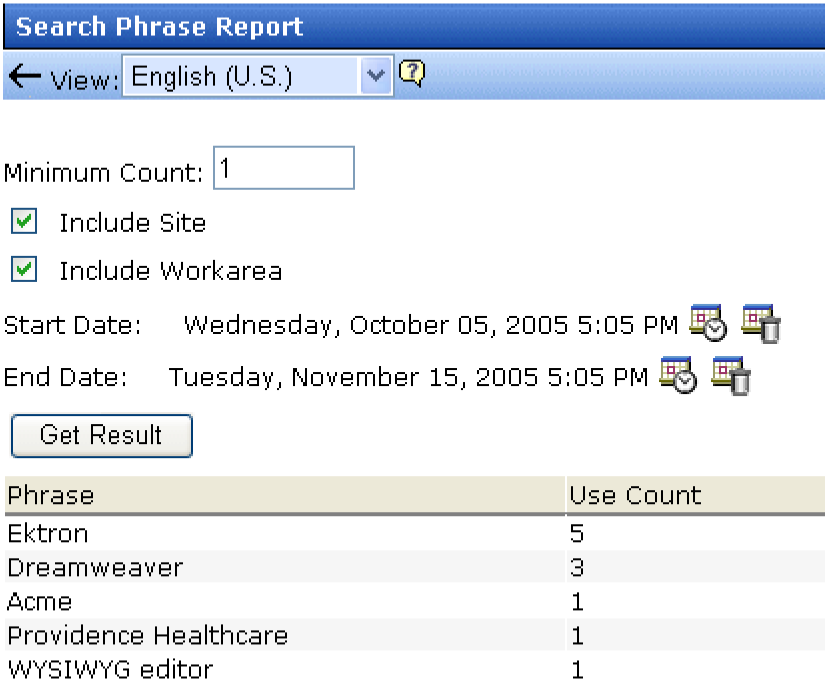
8. If you would like to exclude users or use groups from the report, use the **Exclude Users** field. For example, you want to see all updates other than those you have completed.

   When you click **Exclude Users**, an alphabetical list of users appears, followed by user groups. (User groups have a two-headed icon (Administrators)).

9. Click **Get Result**.

Search Phrase Report

This report displays all terms that were entered into the Search Text Field within a selected range of dates. You can use it to discover the kind of information site visitors are searching for.



View: English (U.S.)

Minimum Count: 1

☑ Include Site

☑ Include Workarea

Start Date: Wednesday, October 05, 2005 5:05 PM

End Date: Tuesday, November 15, 2005 5:05 PM

Phrase	Use Count
Ektron	5
Dreamweaver	3
Acme	1
Providence Healthcare	1
WYSIWYG editor	1

Selection Criteria

You can narrow down the search by selecting any combination of these criteria.

- language - the language of the *search page* (either Workarea or site search). The user performing the search can choose a language before inserting the search text. If he does not explicitly choose a language, the search uses the default one. This report can show results from all languages or any one that you select.
- a *minimum number of occurrences* of the word or phrase to return. For example, you only want words or phrases entered into the **Search Text** field at least 10 times during the last month.
- whether to include words or phrases entered into the *site search* (the search page that site visitors use)

- whether to include words or phrases entered into the *Workarea search* (accessed from the View Contents of Folder screen, this search page is used by authorized CMS users to find content)
- date range

Display of Search Results

The search results show the number of times each word or phrase that satisfies the selection criteria appears. They are arranged in this order.

- words or phrases with the most occurrences appear first
- if several words or phrases have the same number of occurrences, they are arranged alphabetically

Bad Links Report

The Bad Links Report notifies you of any invalid links to external URLs within your content. (An invalid link returns an error code to your browser.)

NOTE The report does not check quicklinks embedded in the content.

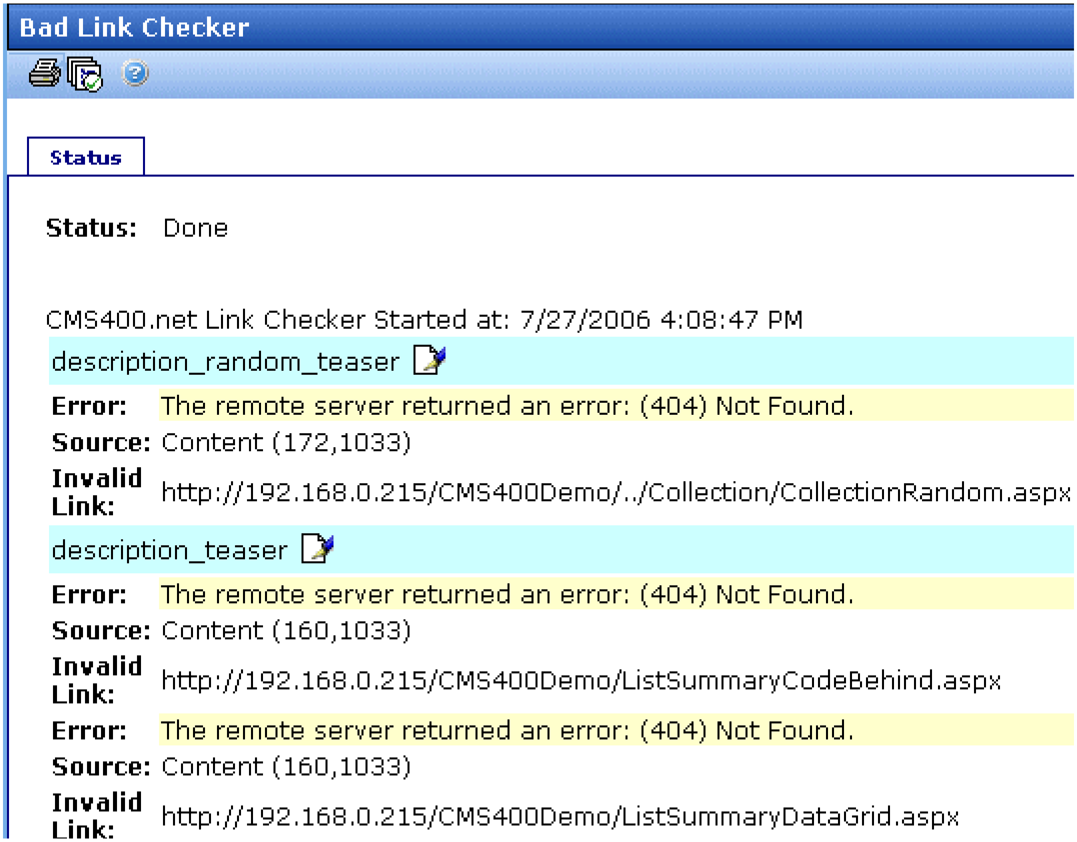
To accomplish this, the report scans the following types of content.

- published HTML content
- published XML content
- HTML forms
- XML Smart Forms
- menus
- active system templates

When the scan is complete, the report lists any item that includes an invalid URL. From the list, you can click a button to access the item, then update or remove the bad link.

Running the Bad Links Report

To run the Bad Links Report, go to **Smart Desktop > Reports**. When you select Bad Link Report, you immediately see its status, either Done or Running.



Status: Done

CMS400.net Link Checker Started at: 7/27/2006 4:08:47 PM

description_random_teaser

Error: The remote server returned an error: (404) Not Found.
Source: Content (172,1033)
Invalid Link: http://192.168.0.215/CMS400Demo/../Collection/CollectionRandom.aspx

description_teaser

Error: The remote server returned an error: (404) Not Found.
Source: Content (160,1033)
Invalid Link: http://192.168.0.215/CMS400Demo/ListSummaryCodeBehind.aspx
Error: The remote server returned an error: (404) Not Found.
Source: Content (160,1033)
Invalid Link: http://192.168.0.215/CMS400Demo/ListSummaryDataGrid.aspx

To begin scanning for bad links, click the Check Links Now button ( ). When you do, any existing data is replaced by new data being collected as the report progresses.

While the report is scanning content, you are free to work in other areas of **Ektron CMS400.NET**. You can even sign off **Ektron CMS400.NET**. These actions have no effect on the report's collection of data.

When all content has been scanned, the report's status changes to **Done**.

If desired, you can print the report by clicking the print button (🖨).

Fixing Errors

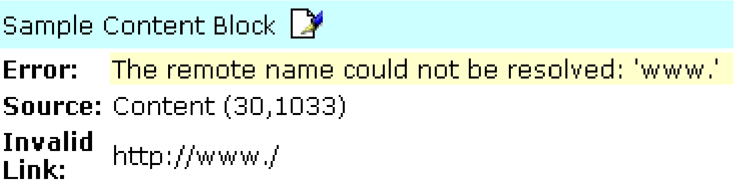
The report lists the following information about each item that contains a bad link.

- title
- error description
- Source, that is, item type (content, menu, etc.) followed in parentheses by information about the item that has the error.

  As examples
  - if the error is in a content block, you see **Content** followed by its id number and language locale id
  - if the error is in a Smart form, you see **Smart form** followed by its ID number
  - If it's a menu, you see **Menu Item (11,0,1033)**. The three parameters are menu ID, menu item ID, and language ID.
  - An error in a template looks like this:

```
ASPX Template (therapies.aspx)

Invalid Link: http://localhost/websrc/WorkArea/therapies.aspx
```

  - The beginning of the bad link's source code. Use this to help you find the bad link from Source View.
- URL that could not be resolved (labeled **Invalid Link**)



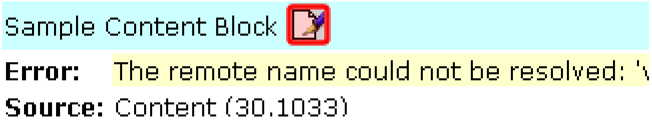
Sample Content Block

Error: The remote name could not be resolved: 'www.'

Source: Content (30,1033)

Invalid Link: http://www./

To fix an error, click the edit button next to the title (highlighted below).



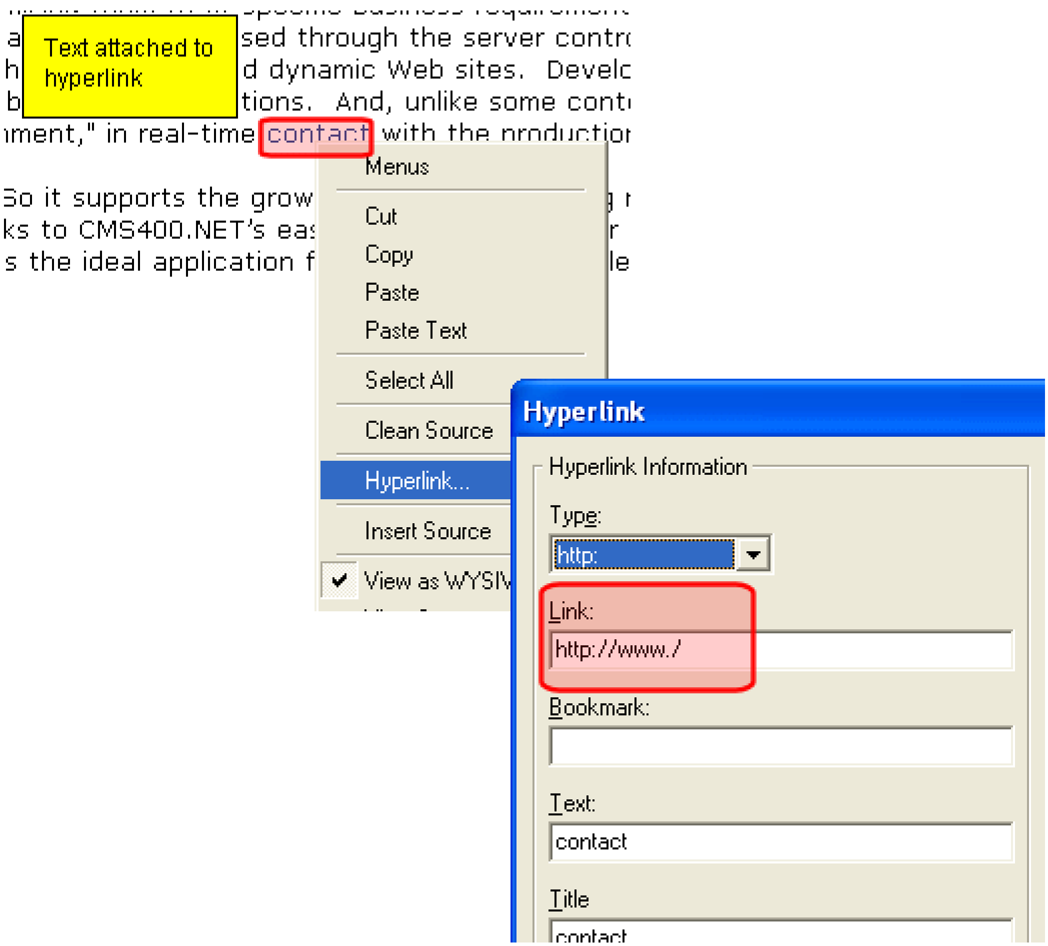
Sample Content Block

Error: The remote name could not be resolved: '\

Source: Content (30,1033)

The item opens in edit mode, so you can fix the bad link.

When working with content, you can select a link, right click the mouse, and select **Hyperlink** to access the hyperlink dialog. From here, you can update or remove the bad link.


Text attached to hyperlink
sed through the server contr
d dynamic Web sites. Develc
tions. And, unlike some cont
ment," in real-time contact with the productior
So it supports the grow
ks to CMS400.NET's eas
s the ideal application f
Menus
Cut
Copy
Paste
Paste Text
Select All
Clean Source
Hyperlink...
Insert Source
View as WYSIW
Hyperlink
Hyperlink Information

Type: http:

Link: http://www./

Bookmark:

Text: contact

Title: contact

Running the Bad Links Report on a Schedule

You can set the Bad Links Report to run in the background at predetermined times. If you do, you can view the report‘s latest results at your convenience without having to wait while it compiles.

To set up a schedule, follow these steps.

1. Open the following configuration file:

```
C:\Program Files\Ektron\EktronWindowsService\Ektron.ASM.EktronServices.exe.config
```

2. Within that file, go to the following line:

```
<add name="RunJob" type="Ektron.ASM.EktronServices.RunCMSJobManager.JobService,
Ektron.ASM.EktronServices" AbsoluteTime="Weekly|5, 2:27:00 PM"  Enabled="true" />
```

3. Use the `absoluteTime` property to set the Bad Links Report’s start time and frequency. By default, the report is scheduled to run every Thursday at 2:27 p.m. The following table lists ways to indicate a schedule.

Frequency	How to indicate	Example
Hourly	Comma-separated list of integers representing the number of minutes, seconds and ms between jobs	360,0,0 (every 360 minutes or 6 hours)
Daily	A time in hh:mm:ss AM/PM format	11:30:00 PM (every day 11:30 pm)
Weekly	**Weekly |** followed by an n is an integer that corresponds to a day of the week, followed by time. Use the time format described for the Daily frequency. Use zero (0) to indicate Sunday, 1 for Monday, etc., through 7 for Saturday.	Weekly| 0 12:00:00 PM (every Sunday at noon)

Frequency	How to indicate	Example
Monthly	**Monthly |** followed by an integer that corresponds to a day of the month, followed by time. Use the time format described for the Daily frequency. Use zero (0) to indicate Sunday, 1 for Monday, etc., through 6 for Saturday.	Monthly| 15 11:30:00 (the 15th of every month at 11:30 PM)

Managing Library Items

Before users can insert images and files into their content, they must be uploaded to the server that contains **Ektron CMS400.NET**. Each user, depending on their permissions, can upload images and files through the library in their Workarea.

In the library, you determine the types of files that can be uploaded and each user's library permissions.

What's In This Chapter?

This chapter assumes you are familiar with the Library Folder chapter of the **Ektron CMS400.NET** User Manual. As a result, the chapter only provides information that is unique to administrators.

The following topics are covered in this chapter:

- "Library Folders and Permissions" on page 152
- "Folder Properties" on page 153
- "Performing Actions on Library Items" on page 156
- "Load Balancing" on page 157
- "If You Have an Ektron WebImageFX License Key..." on page 160

Library Folders and Permissions

Whenever a new content folder is created and permissions given to it, a corresponding new folder is created in the library. The new folder inherits permissions from the content folder.

Items added to library folders are only accessible by users with permission to the corresponding content folder. If items are added to a library folders directly under the main library folder, all users with at least library Read-Only permissions can use those library items in their content.

Conversely, if a library item is uploaded to a folder to which only one person has permissions, that is the only user who can use that library asset.

Folder Properties

The library folder properties contains library-related information, including load balance settings, image and file types that are allowed to be uploaded, as well as other settings.

The following buttons indicate actions you can perform on a library folder.

Button	Description	For more information, see
📋	Folder properties	”Accessing the Library Properties Screen” on page 153
🔍	Search	Ektron CMS400.NET User Manual section “Library Folder” > “Searching the Library”
←	Back to previous screen	

Accessing the Library Properties Screen

As an administrator, you have permission to change the library properties. To view the properties of the library folder, follow these steps.

1. Access a library folder, as explained in ”Folder Properties” on page 153.
2. Click the Properties button (📋).
3. The Library Management window appears, displaying the following settings.

The Library Management Settings

Field	Description
Image Extensions	The types of image files that a content contributor can upload to the library. You can add as many image file extensions as you want, or have none. If no extensions appear, no one can upload image files to the specified folder.
Image Upload Directory	Specifies where the uploaded images are saved on the Web server. By default, the image upload directory is `Web root/ek_sitepath/uploadedimages`. The `ek_sitepath` value is set in the Web.config file. Note: You must create the directory in your Web root manually, before adding it in CMS400.NET. *See Also:* **Ektron CMS400.NET** Setup Manual section “Managing the web.config File.”
Physical Path	Path to file upload folder.
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and you need to set up that folder on the file server.
File Extensions	Specify the types of non-image files that a content contributor can upload to the library. You can add as many non-image file extensions as you want, or have none. If no extensions appear, no one can upload non-image files to the specified folder.
File Upload Directory	Specifies where the uploaded files are saved on the Web server. By default, the file upload directory is `Web root/ek_sitepath/uploadedfiles`. The `ek_sitepath` value is set in the Web.config file. Note: You must create the directory in your Web root manually, before adding it in CMS400.NET. **Ektron CMS400.NET** Setup Manual section “Managing the web.config File.”
Physical Path	Path to file upload folder.
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and you need to set up that folder on the file server.

Editing Library Properties

To edit library properties, follow these steps.

1. Go to the Library Properties screen, as explained in "Accessing the Library Properties Screen" on page 153.
2. Click the Edit button (✎).

Library properties are described in the table below.

Field	Description
Image Extensions	The types of image files that a content contributor can upload to the library. You can add as many image file extensions as you want, or have none. If no extensions appear, no one can upload image files to the specified folder.
Image Upload Directory	Specifies where the uploaded images are saved on the Web server. By default, the image upload directory is `Web root/ek_sitepath/uploadedimages`. The `ek_sitepath` value is set in the Web.config file. Note: You must create the directory in your Web root manually, before adding it in CMS400.NET. **Ektron CMS400.NET** Setup Manual section "Managing the web.config File."
Make Directory Relative to this Web site	If you want to specify the image upload directory's location as relative to your Web site root, check this box. (Your Web site root's location appears to the right of **Make Directory Relative to this Web site**.)
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and you need to set up that folder on the file server.
File Extensions	Specify the types of non-image files that a content contributor can upload to the library. You can add as many non-image file extensions as you want, or have none. If no extensions appear, no one can upload non-image files to the specified folder.

Field	Description
File Upload Directory	Specifies where the uploaded files are saved on the Web server. By default, the file upload directory is `Web root/ek_sitepath/uploadedfiles`. The `ek_sitepath` value is set in the Web.config file. Note: You must create the directory in your Web root manually, before adding it in CMS400.NET. **Ektron CMS400.NET** Setup Manual section “Managing the web.config File.”
Make Directory Relative to this Web site	If you want to specify the file upload directory’s location as relative to your Web site root, check this box. (Your Web site root’s location appears to the right of **Make Directory Relative to this Web site**.)
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and you need to set up that folder on the file server.

Performing Actions on Library Items

The library is made up of images, files, form Quicklinks, hyperlinks, and regular Quicklinks that were added by Ektron CMS400.NET users. The following table displays the actions that can be performed for each library item type.

Action	Files	Images	Hyperlinks	Quicklinks	Form Quicklinks
Add	✓	✓	✓	✓	✓
Edit	✓	✓	✓	✓	✓
View	✓	✓	✓	✓	✓
Overwrite	✓	✓			
Delete	✓	✓	✓	✓	✓

Action	Files	Images	Hyperlinks	Quicklinks	Form Quicklinks
Remove from server	✓	✓			
Check links	✓	✓	✓	✓	✓
Update URL			✓	✓	✓

Most actions can be performed by a user who is granted permission to do so. *See Also:* ”Setting Permissions” on page 547

Load Balancing

This section explains how to create load balancing paths in Ektron CMS400.NET. For further information about the steps needed to set up load balancing outside of Ektron CMS400.NET, see ”Load Balancing” on page 811.

Load Balancing and Ektron CMS400.NET

Ektron CMS400.NET does not need to be aware that load balancing is taking place. However, the library items on all servers must be identical. Therefore, when a user uploads a new item to the Ektron CMS400.NET library, it must be replicated on all other servers in your load balancing model. To achieve this, Ektron CMS400.NET uploads the items to default upload directory and any other folder defined in the library.

Ektron CMS400.NET provides to any administrator an interface for adding load balance folders to the application. These folders needs to be either a virtual or physical folder under the Ektron CMS400.NET Web site. In most cases, this is a virtual folder that points to a mounted hard drive (another server).

NOTE See ”Configuring Load Balancing without Site Replication” on page 813 for more information about this feature.

Accessing Library Load Balancing Screen

To access the load balancing section in the library, follow these steps.

1. Click the **Library** folder button.
2. Click the View Properties button ().
3. Click the View Load Balance Settings button ().
4. The View Library Load Balance Settings screen is displayed.

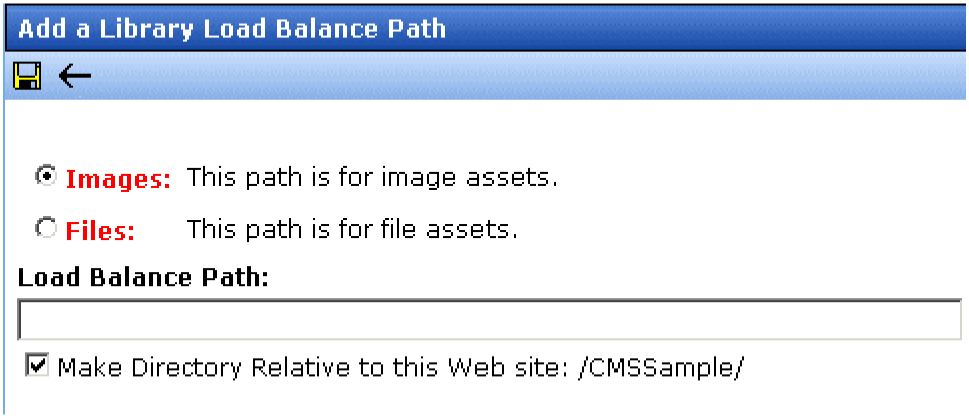
   The screen's columns are described in the following table.

Column Title	**Description**
Web Path	The path of the folder under your server's Web site.
Type	• Images - load balance folder for uploaded images. • Files - load balance folder for uploaded files.
Relative	An **x** indicates if the folder is relative to your Ektron CMS400.NET Web site.
Verified	If the load balance folder exists in the proper location, a green check is used to verify that the folder exists. A red x is displayed when the folder does not exist in the specified location.
Physical Path	The physical location of the folder to which items will be uploaded.

Adding a New Load Balancing Folder

To add a new load balancing folder in the Ektron CMS400.NET library, follow these steps.

1. Access the view load balance settings screen, as described in "Accessing Library Load Balancing Screen" on page 158.
2. Click the Add button (✚) on View Library Load Balance Settings screen.
3. The Add a Library Load Balancing Path screen is displayed.



● **Images:** This path is for image assets.

○ **Files:** This path is for file assets.

Load Balance Path:

☑ Make Directory Relative to this Web site: /CMSSample/

4. Use the following table to help you complete the form.

Field	Description
Images/Files	Specify if the load balance path folder will be for images or files.
Load Balance Path	Enter the path of the folder.
Make Relative	If the folder (or virtual folder) resides under your Ektron CMS400.NET site root, check off the box to make the path relative to that. Otherwise, remove the check.

5. Click the Save button (💾).

Editing a Library Load Balance Path

If the Web path for a load balance folder has changed, you may edit it at any time.

To edit a load balance path, follow these steps.

1. Access the View Library Load Balance Settings screen, as described in ”Accessing Library Load Balancing Screen” on page 158.
2. Click the Web Path of the load balance path you want to edit.
3. The Edit Library Load Balancing Path is displayed.
4. Make the necessary changes to the load balance path.

5. Click the Update button (💾).

Deleting a Library Load Balance Path

Library load balance paths that are no longer needed may easily be deleted.

To delete a library load balance path, follow these steps.

1. Access the View Library Load Balance Settings screen, as described in ”Accessing Library Load Balancing Screen” on page 158.
2. Click the Remove (▬) button.
3. The Remove Library Load Balance Path is displayed.
4. Check off the box(es) of the load balance paths you want to delete.
5. Click the Remove button (▬) to delete the load balance path.

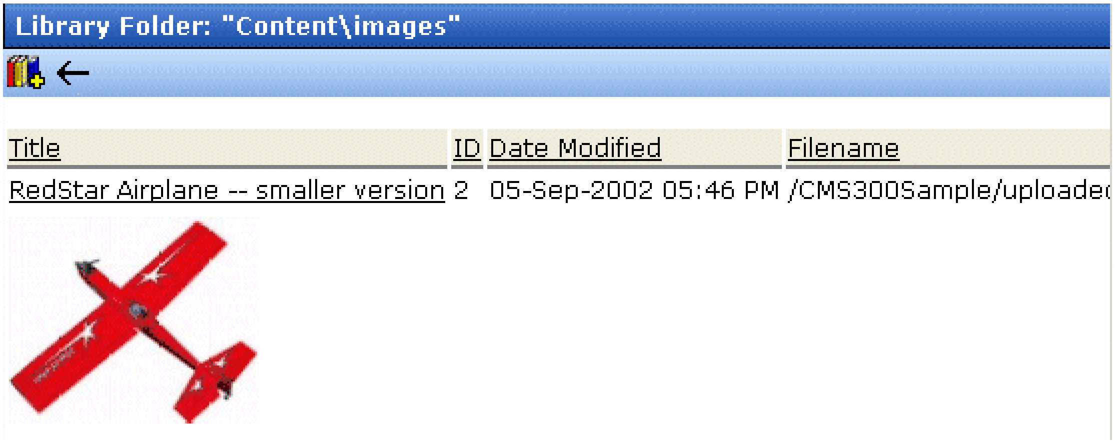
   A confirmation message is displayed.
6. Click **OK**.

If You Have an Ektron WebImageFX License Key...

If you purchased and inserted an Ektron WebImageFX license key into Ektron CMS400.NET, the images folder is enhanced automatically.

Since Ektron WebImageFX has a built-in thumbnail creator for images, each uploaded image in the library also has a thumbnail created for it, allowing you to locate uploaded images faster and easier.

Here is an example of the images folder for an Ektron CMS400.NET Web site with an Ektron WebImageFX license key.



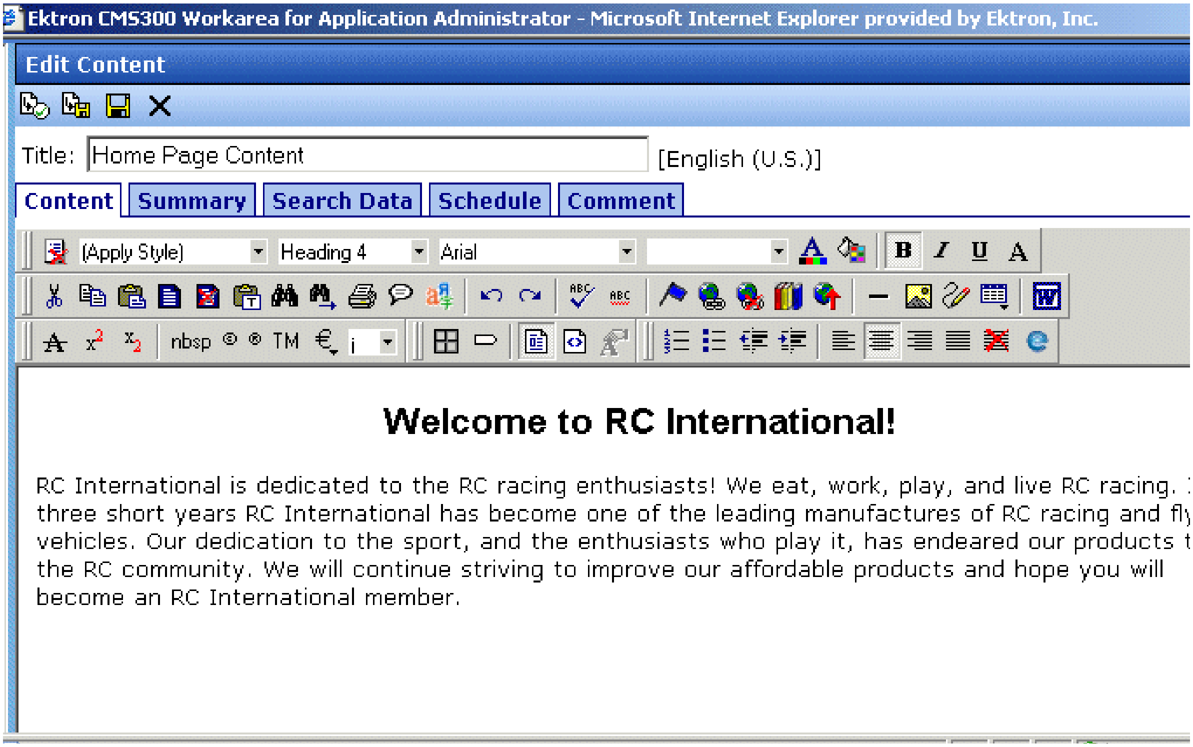
Library Folder: "Content\images"

Title	ID	Date Modified	Filename
RedStar Airplane -- smaller version	2	05-Sep-2002 05:46 PM	/CMS300Sample/uploadec

NOTE For information about acquiring an Ektron WebImageFX license key for Ektron CMS400.NET, contact the Ektron Sales Department.

Using eWebEditPro

This is the editor supplied with Ektron CMS400.NET, eWebEditPro+XML.


Ektron CMS300 Workarea for Application Administrator - Microsoft Internet Explorer provided by Ektron, Inc.
Edit Content
Content
Summary
Search Data
Schedule
Comment
nbsp
TM

Title: Home Page Content [English (U.S.)]

(Apply Style) Heading 4 Arial

Welcome to RC International!

RC International is dedicated to the RC racing enthusiasts! We eat, work, play, and live RC racing. three short years RC International has become one of the leading manufactures of RC racing and fl vehicles. Our dedication to the sport, and the enthusiasts who play it, has endeared our products t the RC community. We will continue striving to improve our affordable products and hope you will become an RC International member.

For more information about using the editor, please refer to the Ektron CMS400.NET User Manual.

Working with Smart Forms

WARNING! The functionality described in this section is not supported when using an Apple Macintosh for editing content.

Ektron CMS400.NET's Smart Forms give you access to the power of XML by separating Web content from presentation. In addition to hiding the XML tags from users, Ektron CMS400.NET can serve content to various presentation devices (e.g., PDAs, mobile phones, WebTV), saving users from the tedium of creating duplicate content. Review and revision are drastically reduced because the accuracy and format of your Web content are managed using XML schema validation.

Using Smart Forms with Ektron CMS400.NET provides the following benefits:

- Strictly enforce content and page layout with Ektron's editor (Ektron eWebEditPro+XML), XSLT, and WYSIWYG templates for content contributors
- Deliver content to multiple devices (e.g., PDAs, mobile phones, WEB TV)
- Easily share content across B2B transactions
- Advanced XML authoring: Ektron's highly-acclaimed XML editor—Ektron eWebEditPro+XML—lets developers hide XML tags from content contributors and provides an easy-to-use WYSIWYG editing interface

Smart Forms are used in Ektron CMS400.NET to define the necessary files to display, save, and validate the content properly. This section explains how to take advantage of Ektron CMS400.NET's Smart Forms.

Benefits of Using XML Data

This section explains why you should use XML as opposed to HTML content for your Web site. Because of XML's advantages, Ektron recommends using XML content whenever possible. Below are several reasons why XML is the preferred format for managing content.

- **Standardized format for capturing content**
    - You can create an XML Smart Form then require anyone creating content in a folder to use the form. The result is more uniform and consistent information.
    - Within an XML Smart Form, you can require authors to complete fields in a specified format. So, for example, if you want the author to enter a date, XML can ensure that it's captured in a standard format. Several standard formats are provided (email address, zip code), and you can create your own.
- **Superior control over content display**
    - Authors contribute XML content but have virtually no control over its format. The Web administrator determines the format through an XSLT file. By customizing the XSLT, you can exert maximum control over your Web site's appearance.
    - Since one file controls several (even hundreds of) pages, you can update just that file to efficiently change the look of all pages whose content is based on the Smart Form.
- **Improved search capabilities**
    - Because XML data is captured in individual fields, you can focus a search on relevant fields. For example, if your XML content captures data about books, you can place an author search on your Web site. Since that search only looks through content in the **Author** field, it is much faster and returns more reliable results than a search of HTML content.

What's in This Chapter?

Here is what's covered in this section.

- "Before You Manage Smart Forms" on page 165
- "Adding a New Smart Form" on page 167
- "Assigning Smart Forms" on page 172

- ”Viewing Smart Forms” on page 173
- ”Editing Smart Forms” on page 178
- ”Editing Data Design Packages” on page 178
- ”Creating Smart Forms Based on Existing Configurations” on page 181
- ”Viewing Data Designer XSLTs” on page 182
- ”Deleting Smart Forms” on page 183
- ”XML Indexing” on page 185

Before You Manage Smart Forms

You must define each Smart Form that will be used in your Web site. Each form is assigned to a content folder or content item and lets you specify how XML content appears in the editor, is validated, and is displayed in an output device.

There are two ways to create a Smart Form.

- Using external XML files
- Using the WYSIWYG Data Designer

This section explains how to create and manage Smart Forms using both methods.

The Smart Form Toolbar

During the process of creating and managing Smart Forms, several toolbar buttons are available. The following table describes the buttons and their actions.

Button	Name	Description	More Information
X	Add Smart Form	Create a new Smart Form from scratch or based on properties of an existing one.	”Adding a New Smart Form” on page 167
←	Back	Return to previous screen	

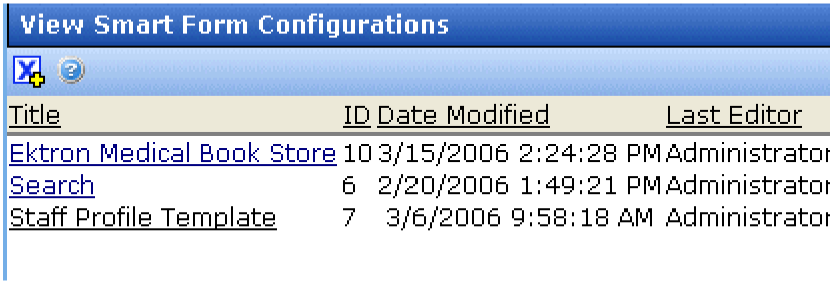
Button	Name	Description	More Information
🔍	Configure Full Text Search	Edit search screen labels	”Editing the Search Labels” on page 193
🗑	Delete	Delete a Smart Form	”Deleting Smart Forms” on page 183
✎	Edit	Edit a Smart Form created with external files	”Editing Smart Forms” on page 178
✎	Edit Data Design	Edit a Smart Form created with the Data Designer	”Editing Data Design Packages” on page 178
💾	Save	Save changes	
💾	Update	Save and update changes	
XSL	View XSLT	Display the XSLT for a Smart Form	”Viewing Data Designer XSLTs” on page 182

Accessing Smart Forms

NOTE Only members of the Administrators group or those defined in Manage Members for Role: Smart Forms Admin screen can create or edit Smart Forms. *See Also:* ”Defining Roles” on page 564

To access the Smart Form section of the Workarea, follow these steps.

1. Access your Workarea, as described in ”Accessing the Workarea” on page 11.
2. In the folder tree on the left side of the Workarea, follow the path **Settings > Configuration > Smart Form Configuration**.
3. The View Smart Forms screen is displayed.



Title	ID	Date Modified	Last Editor
Ektron Medical Book Store	10	3/15/2006 2:24:28 PM	Administrator
Search	6	2/20/2006 1:49:21 PM	Administrator
Staff Profile Template	7	3/6/2006 9:58:18 AM	Administrator

From here, you can view, add, edit, and delete Smart Forms.

- *See Also:* ”Working with Smart Forms” on page 163

Adding a New Smart Form

When adding a new Smart Form, you have two options. The following sections explain both.

- ”Adding a Smart Form Using the Data Designer” on page 167 (recommended)
- ”Adding a Smart Form Using External XML Files” on page 169 (for example, XSLTs, schemas, etc.)

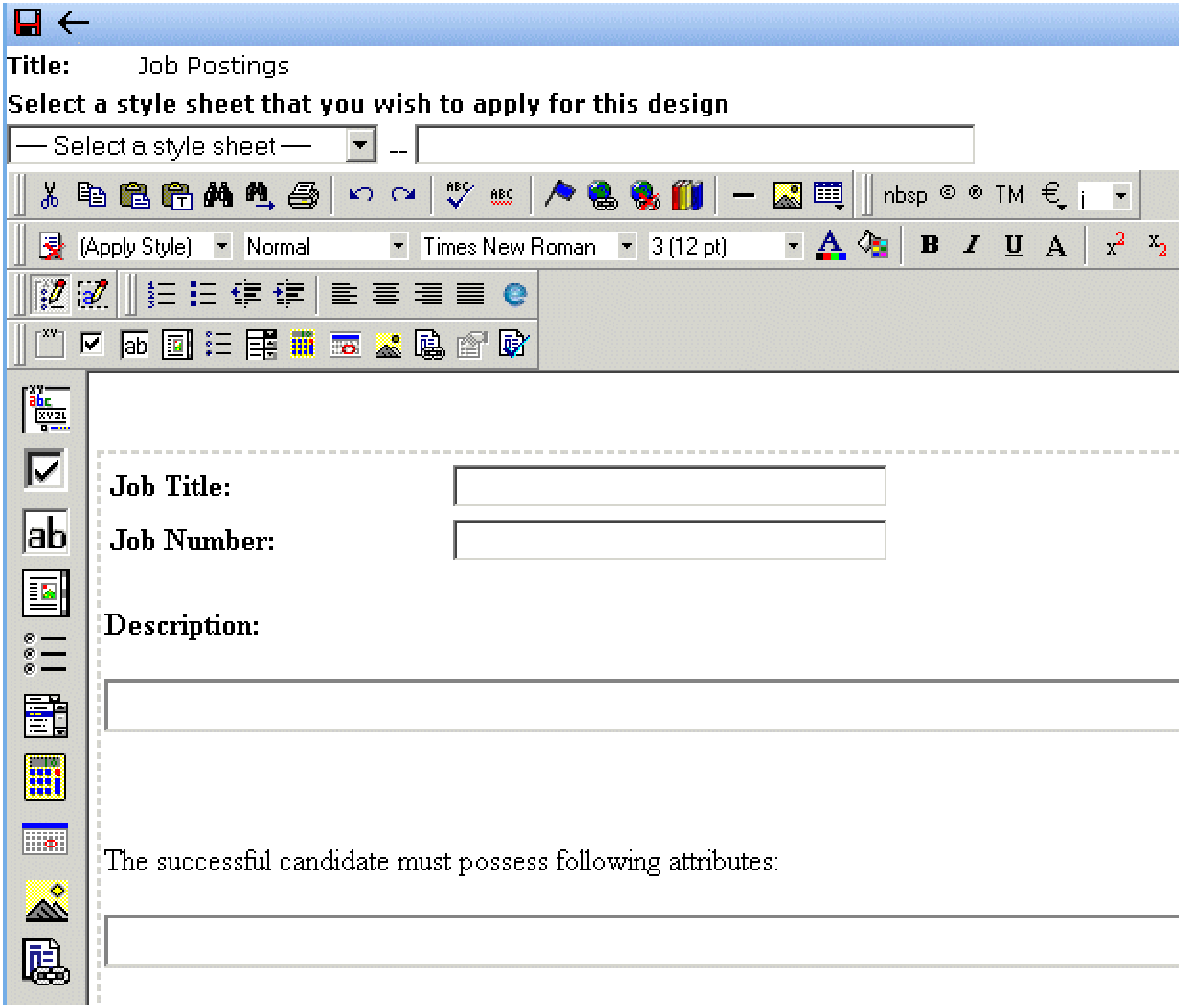
Note: To create a new Smart Form by copying and editing an existing one, see ”Creating Smart Forms Based on Existing Configurations” on page 181.

Adding a Smart Form Using the Data Designer

To add a Smart Form using the WYSIWYG Data Designer, follow these steps.

1. Access the Smart Form screen, as described in ”Accessing Smart Forms” on page 166.
2. Click the Add Smart Form button ( ).
3. The Add Smart Form screen is displayed.
4. Enter a **Title** for the Smart Form.
5. Click the Save button ( ).

6. The Smart Form Data Designer screen appears.



Title: Job Postings

Select a style sheet that you wish to apply for this design

— Select a style sheet —
--
nbsp
©
®
TM
€
(Apply Style)
Normal
Times New Roman
3 (12 pt)
B
I
U
A

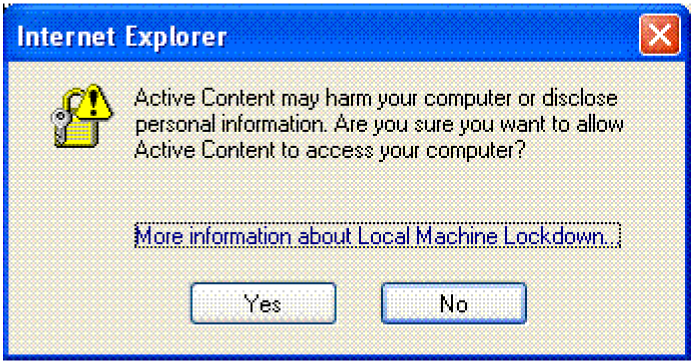
Job Title:

Job Number:

Description:

The successful candidate must possess following attributes:

7. You may get the following error dialog.



Active Content may harm your computer or disclose personal information. Are you sure you want to allow Active Content to access your computer?

To learn about why the dialog is appearing and help decide whether to click **Yes** or **No**, click the link **More information about Local Machine Lockdown**. A Windows Help topic appears and explains your options.

8. If desired, you may specify a style sheet for the Smart Form. Use the field on the right above the editor.

   To do so, either type the path and file name of the CSS file, or select an Ektron CMS400.NET-registered style sheet from the drop down list.

9. Design your XSLT in the Data Designer.

   See ”Using the Data Designer” on page 194 for information about creating XSLTs using the Data Designer.

10. Click the Update button (💾).

You are ready to assign the Smart Form to a folder or content item. See ”Assigning Smart Forms” on page 172 for more information.

Adding a Smart Form Using External XML Files

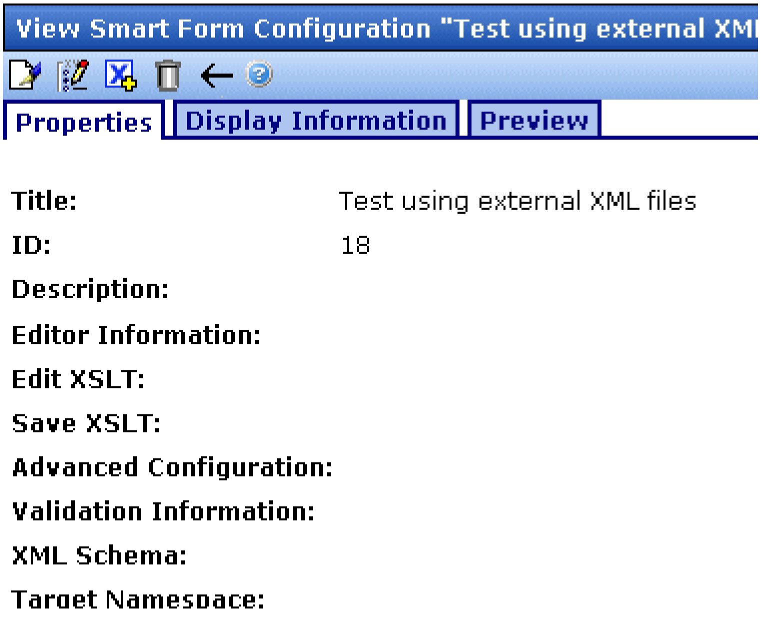
To add a Smart Form using external XML files, follow these steps.

1. Access the Smart Form screen, as described in ”Accessing Smart Forms” on page 166.

2. Click the Add Smart Form button ( ).

3. The Add Smart Form screen is displayed.

4. Enter a **Title** for the Smart Form.
5. Click the Save button (💾).
6. The Smart Form Data Designer screen is displayed.
7. Click the Back arrow (←) to exit.
8. The View Smart Form screen for the new Smart Form is displayed.


View Smart Form Configuration "Test using external XM
Properties
Display Information
Preview

Title: Test using external XML files
ID: 18
Description:
Editor Information:
Edit XSLT:
Save XSLT:
Advanced Configuration:
Validation Information:
XML Schema:
Target Namespace:

9. Click the Edit button (📝).
10. The Edit Smart Form screen is displayed.
11. Enter the necessary information using the following table as a reference.

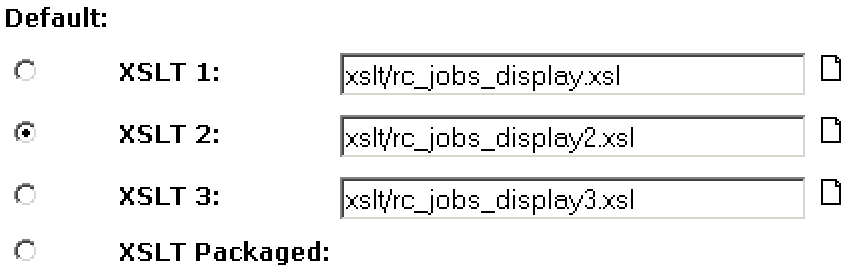
Smart Form Fields

Section	Field	Description
Generic Information	Title	Name given to Smart Form.
	ID (display only)	ID number assigned when configuration is created.
	Description	Detailed description given to configuration by its creator or last editor.

Section	Field	Description
Editor Information	Edit XSLT	XSLT applied to content while being edited.
	Save XSLT	XSLT used to transform the XML when saved to the database.
	Advanced Configuration	XML file that contains display information, schema validation, and other advanced XML data.
Validation Information	XML Schema	The .xsd file used to validate the XML content
	Target Namespace	The default namespace used for outgoing XML
DIsplay Information	XSLT1	XSLT 1 applied to XML data when viewed on a device
	XSLT2	XSLT 2 applied to XML data when viewed on a device
	XSLT3	XSLT 3 applied to XML data when viewed on a device
	XSLT Packaged	XSLT package applied to XML data when viewed on a device

NOTE When a Smart Form is created using the Data Designer, a default display XSLT is created which resembles the edit XSLT created in the editor. This default XSLT can be applied to the XML content.

12. Specify the default display XSLT for the configuration by clicking the corresponding radio button.



Default:

○ **XSLT 1:** xslt/rc_jobs_display.xsl

● **XSLT 2:** xslt/rc_jobs_display2.xsl

○ **XSLT 3:** xslt/rc_jobs_display3.xsl

○ **XSLT Packaged:**

13. Click the Save button (💾).

XML File Verification

A verification button (🗋) appears to the right of some fields on the Add Smart Form screen. After you identify an XSLT or schema, you can click this button to verify that the file:

- exists in the location specified
- contains well-formed XML

NOTE The XML Verification feature does *not* validate the contents of the XML file.

The following table explains possible results when clicking the verification button.

Display	Result	Description
☑	Verified	The file passes all verification parameters
☒	Not Verified	The file either: • Does not exist in the location specified • Does not contain well-formed XML Review current settings. Ensure the file is in the proper location, and that it contains well-formed XML

Assigning Smart Forms

After you create a Smart Form, you can assign it to a folder's Properties screen. (*See Also:* "Smart Forms" on page 49) All content in the folder then uses the configuration.

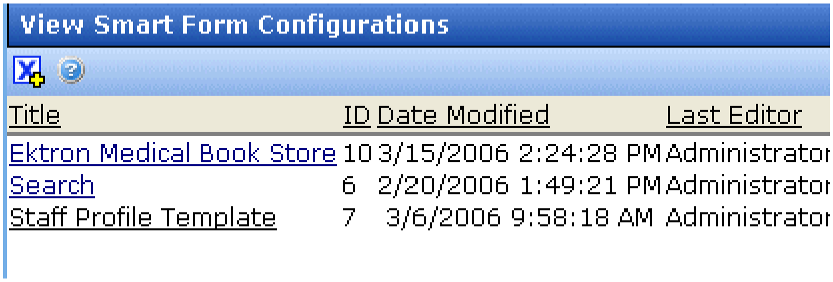
A Smart Form can be inherited from the parent folder, or you can assign a different one.

Viewing Smart Forms

To view a Smart Form, follow these steps.

1. Access the Workarea, as described in "Accessing the Workarea" on page 11.
2. In the folder tree on the left side of the Workarea, follow the path **Settings > Configuration > Smart Form Configuration**.
3. Click the form you want to view.

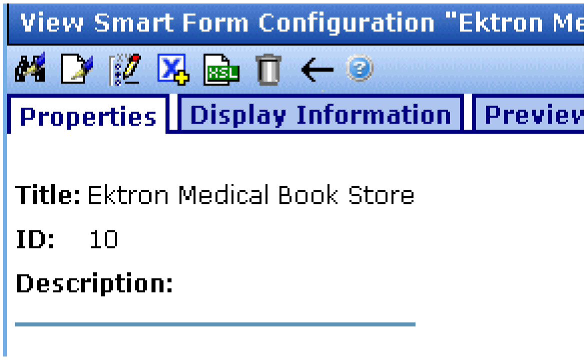
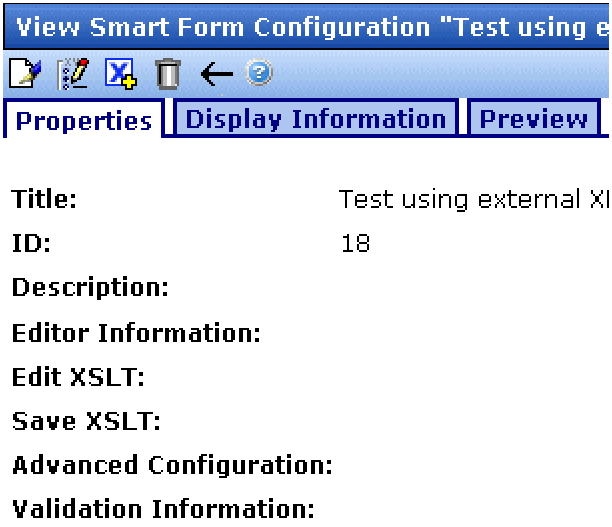
.



View Smart Form Configurations

Title	ID	Date Modified	Last Editor
Ektron Medical Book Store	10	3/15/2006 2:24:28 PM	Administrator
Search	6	2/20/2006 1:49:21 PM	Administrator
Staff Profile Template	7	3/6/2006 9:58:18 AM	Administrator

The View Smart Forms screen appears with a more detailed description of the configuration.

Smart Form Created with...	
Data Designer	**External Files**
 View Smart Form Configuration "Ektron Me Properties | Display Information | Previev **Title:** Ektron Medical Book Store **ID:** 10 **Description:**	 View Smart Form Configuration "Test using e Properties | Display Information | Preview **Title:** Test using external XI **ID:** 18 **Description:** **Editor Information:** **Edit XSLT:** **Save XSLT:** **Advanced Configuration:** **Validation Information:**

The View Smart Form screen has three tabs.

- ”Properties Tab” on page 175
- ”Display Information Tab” on page 178
- ”Preview Tab” on page 177

Each tab is explained below.

After viewing, you can perform the following actions on the Smart Form.

Button	Name	Description	More Information
	Configure Full Text Search	Edit search screen labels	”Editing Smart Forms” on page 178
✎	Edit	Edit a Smart Form	”Editing Smart Forms” on page 178
✎	Edit Data Design	Open the Data Designer	”Editing Data Design Packages” on page 178
X	Add Smart Form	Create a new Smart Form from scratch or based on the properties of an existing one	”Adding a New Smart Form” on page 167
XSL	View XSLT	Display the XSLT for a Smart Form	”Viewing Data Designer XSLTs” on page 182
🗑	Delete	Delete a Smart Form	”Deleting Smart Forms” on page 183
←	Back	Return to previous screen	
?	View online help	View online help	”Accessing Online Help” on page 489

Properties Tab

Field	Description
Title	Name given to Smart Form.
ID	ID number assigned by Ektron CMS400.NET upon creation of the configuration.
Description	Detailed description of configuration given by creator or last editor.

If the Smart Form was created using external XML files (instead of the Data Designer), the following information also appears:

- ”Editor Information” on page 176
- ”Validation Information” on page 176

Editor Information

NOTE This section only appears if you do not use the Data Designer to create your Smart Form.

The editor information contains the file names of the XSLTs used when editing and adding content in the editor.

Field	Description
Edit XSLT	XSLT applied to the content when being edited. Note: If no edit XSLT is specified, the Edit Data Design option is enabled in the toolbar.
Save XSLT	XSLT used to transform the XML created in the editor when saved to the database.
Advanced Configuration	XML file that contains display information, schema validation, and other advanced XML data.

Validation Information

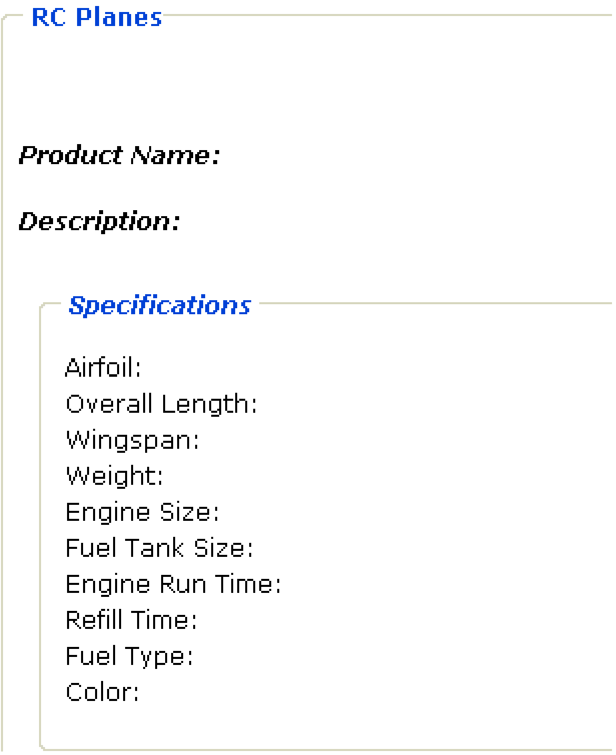
NOTE This section only appears if you do not use the Data Designer to create your Smart Form.

Content that is created and edited with Ektron CMS400.NET may be validated with a schema if desired. The validation information contains information about the schema.

Field	Description
XML Schema	Specify the .xsd file used to validate the XML content that the Smart Form will be assigned to.
Target Namespace	Specify the default namespace used for outgoing XML.

Preview Tab

The **Preview** tab displays the XSLT applied to the editor when XML content is created. This is the XSLT that was created for the Smart Form.



RC Planes

Product Name:

Description:

Specifications

Airfoil:
Overall Length:
Wingspan:
Weight:
Engine Size:
Fuel Tank Size:
Engine Run Time:
Refill Time:
Fuel Type:
Color:

Display Information Tab

The display information tab lists the XSLTs that are used when displaying XML in the respective environment.

Field	Description
XSLT1	Display XSLT 1
XSLT2	Display XSLT 2
XSLT3	Display XSLT 3
XSLT Package	Display XSLT Package (created using the Data Designer)

NOTE When a Smart Form is created using the Data Designer, a default display XSLT is also created which looks similar to the edit XSLT created in the editor. This default XSLT can be applied to the XML content.

The asterisk (*) denotes the default XSLT for the Smart Form.

Editing Smart Forms

After creating a Smart Form, you can modify it when files defined in the configuration have changed.

Since there are two ways to create a Smart Form, there are two ways to edit one.

- ”Editing Data Design Packages” on page 178
- ”Editing a Smart Form Created with External Files” on page 180

Editing Data Design Packages

After you create a Smart Form, you can modify it.

Before You Edit the Data Package!

Before editing a Smart Form data package, it is important to realize the effects of the modifications. If an XML data package is edited, all content to which the configuration is applied is updated.

Information that was originally created may be lost, depending on the changes you make to the package.

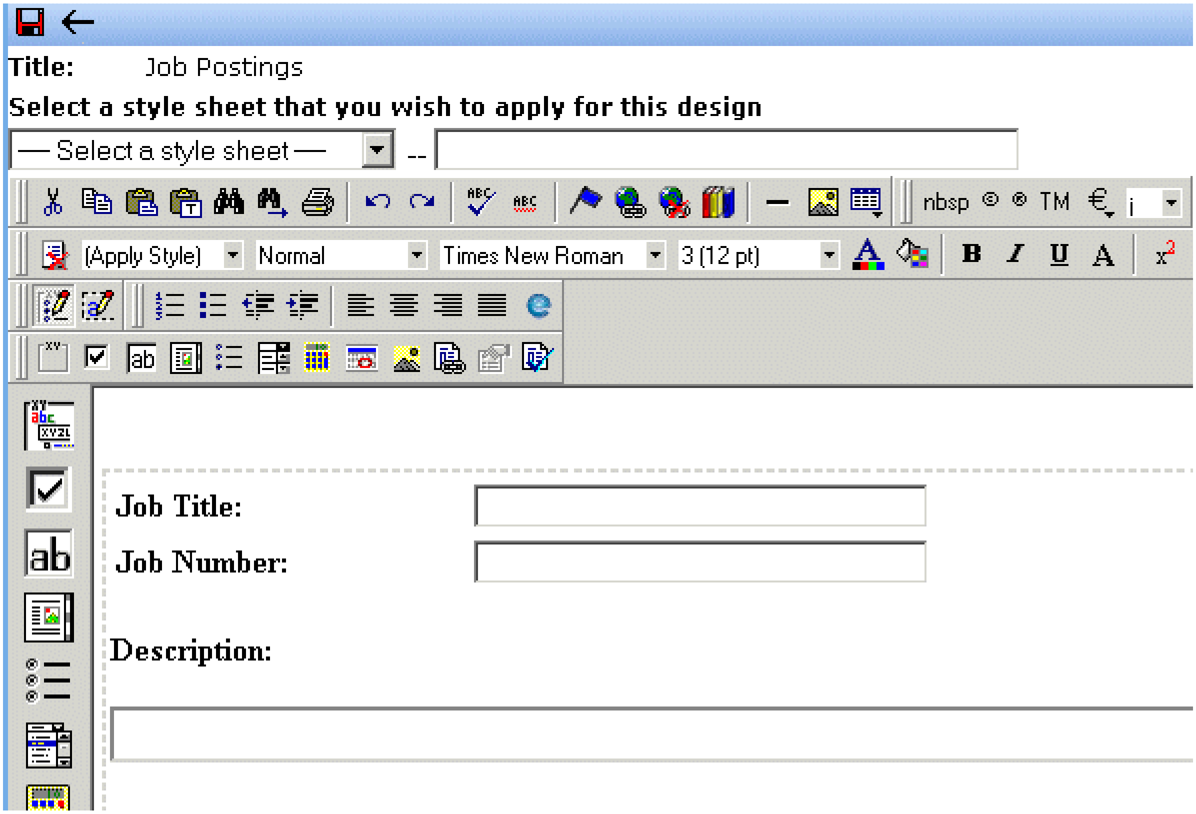
To ensure that information is not lost, use the Create New Smart Form Based on Existing Smart Form option on the view Smart Form screen. See ”Creating Smart Forms Based on Existing Configurations” on page 181 for more information.

Editing a Data Design Package

To edit a data design package, follow these steps.

1. Access the View Smart Forms screen, as described in ”Accessing Smart Forms” on page 166.
2. Click the Smart Form you want to edit.
3. The View Smart Form screen appears with a more detailed description of the configuration.
4. Click the Data Design Mode button (✎) at the top of the screen.

5. The Edit Data Design Package screen displays the current package.



Title: Job Postings

Select a style sheet that you wish to apply for this design

Job Title:

Job Number:

Description:

6. Make the necessary changes to the Data Design package in the editor. See "Using the Data Designer" on page 194 for information about creating XSLTs using the Data Designer.

7. Click the Update button (💾).

Editing a Smart Form Created with External Files

1. Access the View Smart Forms screen, as described in "Accessing Smart Forms" on page 166.
2. Click the Smart Form you want to edit.
3. The View Smart Form screen is displayed.
4. Click the Edit button (✎).
5. The Edit Smart Form screen is displayed.

6. Edit the necessary fields to update the Smart Form. See "Smart Form Fields" on page 170.
7. Click the Update button ().

Now, all content and folders that use the Smart Form take their properties from the updated configuration.

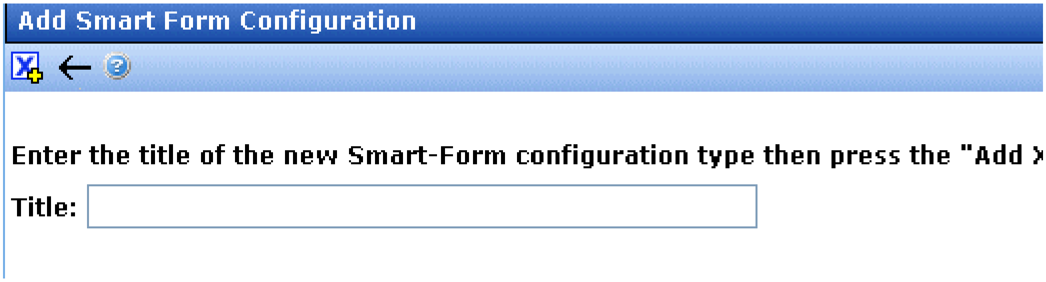
See Also: "XML File Verification" on page 172

Creating Smart Forms Based on Existing Configurations

Whenever major changes must be made to a Smart Form, Ektron recommends creating a copy of it and modifying the copy. In this way, you do not affect the content controlled by the original configuration.

To create a new Smart Form based on an existing one, follow these steps.

1. Access the View Smart Forms screen, as described in "Accessing Smart Forms" on page 166.
2. Click the Smart Form you want to view.
3. The View Smart Form screen appears with a more detailed description of the configuration.
4. Click the Create New Smart Form button ().
5. The Add Smart Form screen is displayed.



Enter the title of the new Smart-Form configuration type then press the "Add

Title:

6. Enter a **Title** for the new Smart Form.
7. Click the Add Smart Form button ().

8. The View Smart Form screen for the new Smart Form is displayed. From here, you can perform the necessary actions on it.

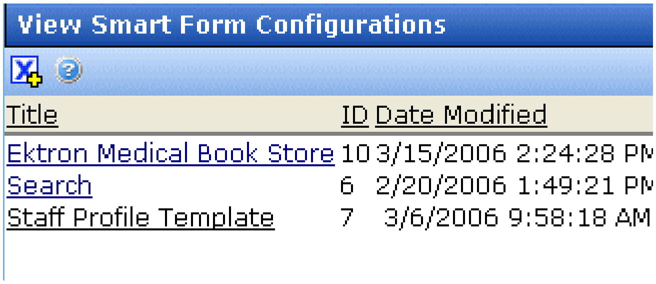
Viewing Data Designer XSLTs

When a Smart Form is created using the Data Designer, an XSLT is produced to assist you with creating your display XSLT. This XSLT includes the structure for your XML documents.

If a display XSLT is not applied to a Smart Form, content is displayed using the default XSLT displayed in the View XSLT screen.

To view the XSLT for a Smart Form, follow these steps.

1. Access the View Smart Forms screen, as described in ”Accessing Smart Forms” on page 166.
2. Click the Smart Form whose XSLT you want to view.



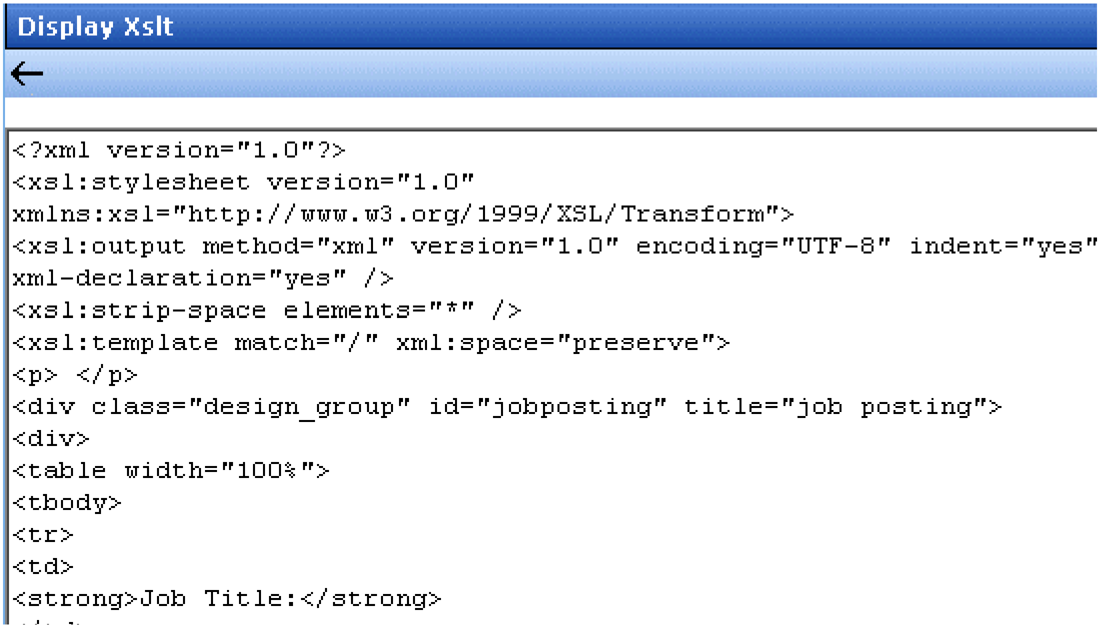
View Smart Form Configurations

Title	ID	Date Modified
Ektron Medical Book Store	10	3/15/2006 2:24:28 PM
Search	6	2/20/2006 1:49:21 PM
Staff Profile Template	7	3/6/2006 9:58:18 AM

NOTE The XSLT only appears if the Smart Form was created using the Data Designer.

3. The View Smart Form screen appears with a more detailed description of the configuration.
4. Click the View XSLT button (XSL).

5. The View XSLT screen is displayed.



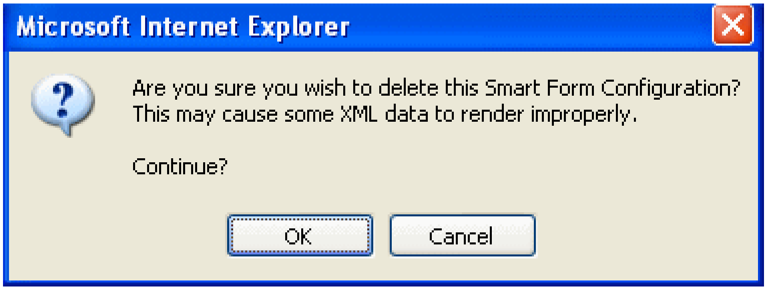
```
<?xml version="1.0"?>
<xsl:stylesheet version="1.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
<xsl:output method="xml" version="1.0" encoding="UTF-8" indent="yes"
xml-declaration="yes" />
<xsl:strip-space elements="*" />
<xsl:template match="/" xml:space="preserve">
<p> </p>
<div class="design_group" id="jobposting" title="job posting">
<div>
<table width="100%">
<tbody>
<tr>
<td>
<strong>Job Title:</strong>
```

You can use this information to create your display XSLT.

Deleting Smart Forms

You can delete Smart Forms that are no longer needed. To do so, follow these steps.

1. Access the View Smart Forms screen, as described in ”Accessing Smart Forms” on page 166.
2. Click the Smart Form you want to delete.
3. The View Smart Form screen is displayed.
4. Click the Delete button (🗑).
5. A confirmation message is displayed.



Are you sure you wish to delete this Smart Form Configuration? This may cause some XML data to render improperly.

Continue?

6. Click **OK**.

XML Indexing

XML Indexing makes it easy to search through the XML information collected by your Web site and display the results on a Web page. The results appear as a list of topic titles, optionally followed by the content summary.

Collection of information has never been easier. The Data Designer lets you choose which XML fields to index. You can also validate those fields to be numbers, dates, Boolean or string values. After you identify the information to be indexed, a search dialog is automatically created. Where appropriate, the dialog automatically populates drop down lists from the indexed data.

NOTE As the name implies, XML indexing is only available for information collected on XML forms. It cannot find information in XHTML content.

- ”User vs. Developer Selected Search Criteria” on page 185
- ”Types of Search Criteria” on page 186
- ”Displaying Search Results” on page 186
- ”Setting up a User-Defined Search” on page 188
- ”Setting up a Developer-Defined Search” on page 189
- ”Specifying Which XML Elements are Indexed” on page 189
- ”Search Dialog Setup” on page 190
- ”Editing the Search Labels” on page 193

User vs. Developer Selected Search Criteria

There are two ways to use XML Indexing feature to make your Web site more robust.

- *Present a screen of search criteria.* A visitor to your site uses the screen to select the kind of information he is looking for. For example, if your site sells outdoor clothing, the user might want to see all wool hats for men under $20.00. A custom function determines the format of the results page.
- *Determine the search and display criteria programmatically using a custom function*. Your Web developer inserts a function on a Web page that specifies search and display criteria. For example, if your site sells books, a visitor to your site sees a navigation link **Find books under $5.00**. When he clicks that link, the function searches your site and returns a Web page (possibly a navigation sidebar) displaying all books in your database whose price is less than $5.00.

NOTE The Ektron Windows Service manages the background processing that creates XML indexes. *See Also:* ”Ektron Windows Service” on page 802.

Types of Search Criteria

XML Indexing allows multi-dimensional searches on all types of XML data. If the field type is string, a search can look for an exact phrase or the occurrence of any word in the phrase. Numerical and date information can be searched using expressions such as greater than, less than, or between two values.

List and choices type fields let the user select from several predetermined values. When searching on these fields, the screen can display all values and let the user select relevant ones.

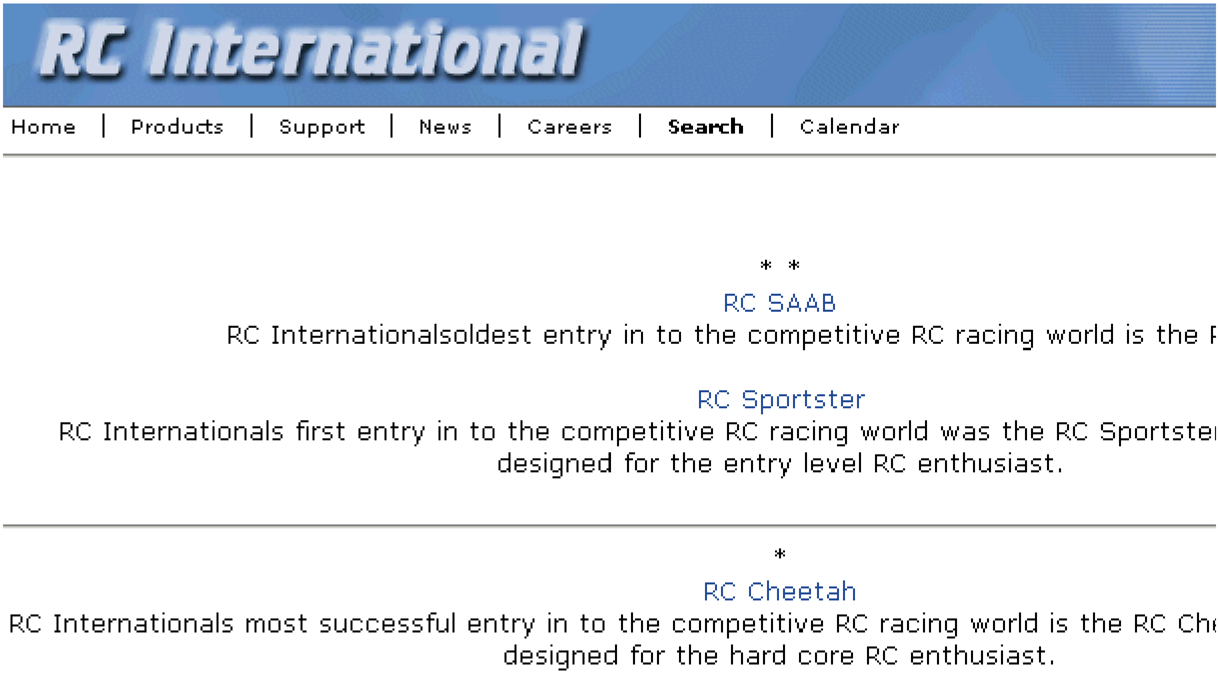
For every search field, **NoSelection** is a possible value. If this is chosen, the search disregards that field when compiling results.

Displaying Search Results

The results page can show content that satisfies all search criteria *or* one or more criteria. If you choose the latter option, the results page shows *weighted* results. That is, pages with the highest number of matches (the most relevant ones) appear first, followed by pages with fewer matches. The number of hits is indicated by an asterisk.

So, if one page matches all of the selection criteria, it appears in the top group. If another page matches some of the selection criteria, it also appears but lower on the page.

In the example below, the first two Web pages had two matches with the selection criteria, while the third page (RC Cheetah) had one match.


RC International
Home | Products | Support | News | Careers | Search | Calendar

* *

RC SAAB

RC Internationalsoldest entry in to the competitive RC racing world is the

RC Sportster

RC Internationals first entry in to the competitive RC racing world was the RC Sportste
designed for the entry level RC enthusiast.

*

RC Cheetah

RC Internationals most successful entry in to the competitive RC racing world is the RC Ch
designed for the hard core RC enthusiast.

By setting recursive and “filter by folder” properties, you can segregate the search to selected folders on your Web site.

The following are examples of industries that can benefit from XML Indexing.

Industry	Use XML indexing to find
Health Care	A cardiologist whose practice is located in your city
Human Resources	Sick time policy
Real Estate	A house with a zip code of 03031 priced under $200,000
Hospitality	A hotel in Boston
Online Retail	Fleece gloves for men
Educational	A course in .NET programming

Setting up a User-Defined Search

To create a user-defined search, follow these steps.

Step	For more information, see
1. Select a Smart Form	”Accessing Smart Forms” on page 166
2. For each field to be searched, assign indexing capability	”Specifying Which XML Elements are Indexed” on page 189
3. Set up the search screen	”Search Dialog Setup” on page 190 and ”Editing the Search Labels” on page 193
4. Have your Web developer set up a page to display a search screen and a results screen	The Ektron CMS400 Developer’s manual section “Standard ASP.NET Methods” > “IndexSearch” and “IndexSearchDisplay”

Setting up a Developer-Defined Search

To set up a developer-defined search, which defines both the criteria and the results page, use the `ecmIndexSearchCollectionDisplay` function. This is documented in the **Ektron CMS400.NET** Developer's manual section "Standard ASP.NET Methods" > "IndexSearchCollectionDisplay."

You can also setup a developer defined search using the IndexSearch Server Control. For more Information, see the **Ektron CMS400.NET** Developer's manual section "Ektron CMS400.NET Server Controls" > "List of Server Controls" > "IndexSearch Server Control."

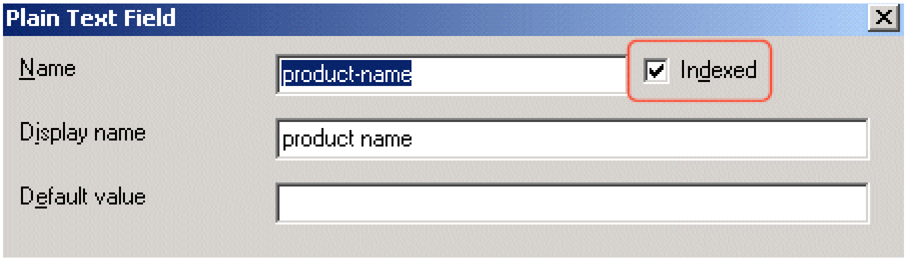
Specifying Which XML Elements are Indexed

You can index the following types of fields:

- Checkbox
- Plain Text
- Choices
- List
- Calculated
- Calendar

To enable indexing for any field on an XML form, follow these steps.

1. Select a Smart Form that you want to index.*See Also:* "Accessing Smart Forms" on page 166
1. Open its Data Design. *See Also:* "Using the Data Designer" on page 194
2. Move the cursor to the field you want to index.
3. Right mouse click on the field and choose **Field Properties**.
4. On the dialog box that appears, check **Indexed**.



Name: product-name ☑ Indexed

Display name: product name

Default value:

Validation

Validation ensures that the user completing the XML form enters the right type of data. You can decide if the user's input should be a number, boolean, date, string, zip code, etc. If you do not specify type attributes using validation data, the field is a string. *See Also:* ”Validation” on page 232

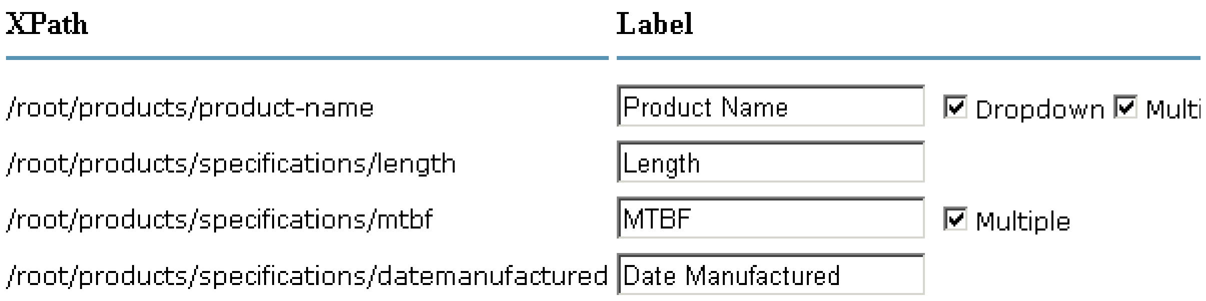
Validation is especially important when users search XML data because, if used properly, it can ensure that the search find the correct information.

For example, if a form field collects a zip code but you set its type to plain text, the user completing the form can insert anything into the field. If the user inserts the letter “o” instead of the number zero (0), the field accepts that input and that record will not be found by the search. On the other hand, if you set validation to zip code, the user can only insert five or nine digits -- any other entry is rejected when the user submits the form.

Search Dialog Setup

When you save a Data Design form, a dialog appears that lets you set up the search form (illustrated below).

NOTE You can also edit the field labels using the Edit Index Search screen. However, on that screen, the **Dropdown** and **Multiple** checkboxes are not available. *See Also:* ”Editing the Search Labels” on page 193

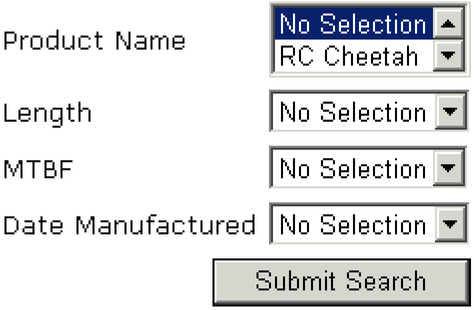


XPath	Label	
/root/products/product-name	Product Name	☑ Dropdown ☑ Multi
/root/products/specifications/length	Length	
/root/products/specifications/mtbf	MTBF	☑ Multiple
/root/products/specifications/datemanufactured	Date Manufactured	

The information on this screen is explained below.

Screen section	Description
Xpath	The xpath to each indexed field. Only indexed fields appear.

Screen section	**Description**

Label	Enter the text that describes the field on the search screen. Below is an example of how the labels appear on the Search screen.
	
	 Product Name
	No Selection
	RC Cheetah
	Length
	No Selection
	MTBF
	No Selection
	Date Manufactured
	No Selection
	Submit Search
	If the field type is
	- *checkbox*, a check box appears on the Search screen
	- *choices or list*, all values appear on the Search screen
	- *calendar*, the user can choose a specific date, any range of dates or beginning and end dates on the Search screen
	- *plain text* with a whole number specified in the validation criteria, the user can choose a specific number, any range of numbers or beginning and ending numbers on the Search screen
	- *plain text with no validation criteria*, the display is determined by the **Dropdown** and **Multiple** checkboxes (below). If Dropdown and Multiple are not checked, the search screen contains these values:
	  - No Selection
	  - Exact phrase
	  - Contains

Dropdown	If the field type is Choices or List, and you check this box, the user performing the search can choose from the choice or list values when selecting search criteria. If the field type is a plain text, and you check this box, the user performing the search can choose among any value stored in this field of the Data Design when selecting search criteria.
Multiple	Check this field if you want to allow the user performing the search to select more than one value. Only active with plain text, List, and Choices fields.

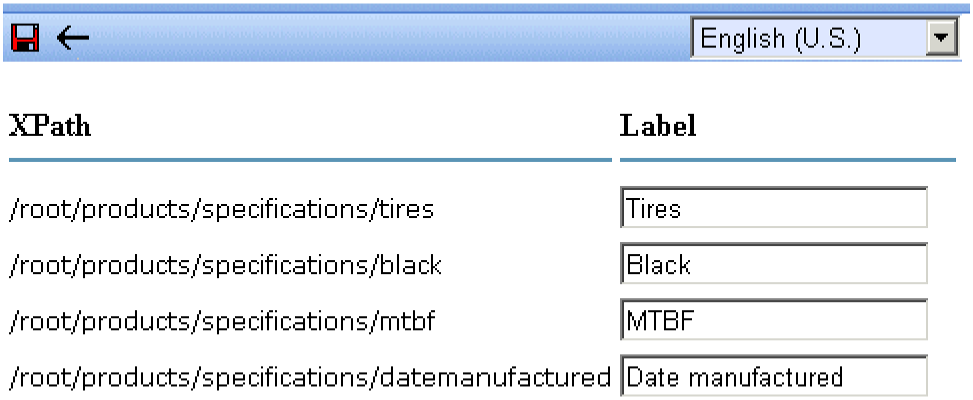
Editing the Search Labels

This screen lets you change the labels that describes the search fields on the search screen.

You can create a set of labels for every supported language by using the language dropdown list in the upper right corner of the screen. *See Also:* ”Working with Multi-Language Content” on page 640

To change the search screen labels, follow these steps.

1. In the Workarea, go to **Settings > Configuration > Smart Form Configuration**.
2. Click a Smart Form.
3. Click the Edit Full Text Search button ().
4. The Edit Screen appears.



English (U.S.)

XPath	Label
/root/products/specifications/tires	Tires
/root/products/specifications/black	Black
/root/products/specifications/mtbf	MTBF
/root/products/specifications/datemanufactured	Date manufactured

5. From the language dropdown list in the top right corner, select the language whose labels you want to edit.
6. Change the labels as needed.
7. Click the Save button ().

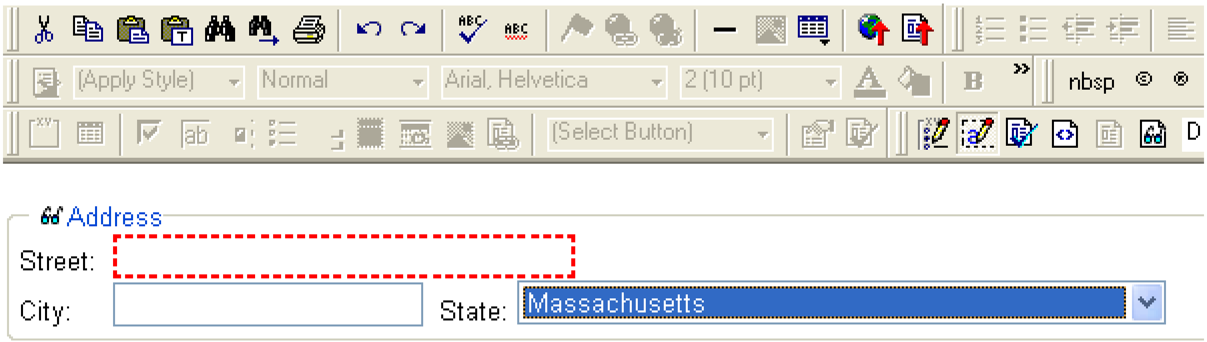
Using the Data Designer

Introduction

eWebEditPro+XML's Data Designer feature lets you design a screen that collects information from users and stores it as XML data. Creating the screen is simple and requires no knowledge of XML.

NOTE When using the Data Designer feature, the following browsers are supported: Netscape 6.2 or later; Internet Explorer 5.5 or later.

For example, you may create the following screen.



Address

Street:

City:

State: Massachusetts

This screen can store information entered by a user as the following XML.

```
 <address>
<street>123 Sesame St.</street>
<city>New York</city>
<state>NY</state>
 </address>
```

Note that the street and city fields accept text, while the state field accepts a pre-defined value (a state).

NOTE The samples installed with **eWebEditPro+XML** provide a good example of using the Data Designer. To try them out, click the Windows Start button (lower left corner of the screen) and follow this path: **Start > Programs > Ektron > ewebeditpro5 > Samples > ASP > Data Design > ASP Data Design Sample**.

This section explains how to use the Data Designer feature through the following topics.

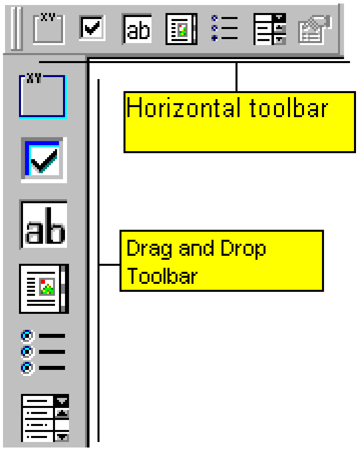
- "Differences in eWebEditPro+XML" on page 195
- "Design Mode vs. Data Entry Mode" on page 196
- "Designing a Screen" on page 197
- "Inserting a Field Type" on page 198
- "Sample Screen Design" on page 203
- "Data Designer Field Types" on page 212

Differences in eWebEditPro+XML

When you use the Data Designer, **eWebEditPro+XML** changes in the following ways.

NOTE The design toolbar and the design mode and Data Entry mode buttons appear only if your site administrator has defined them in the configuration data.

- two toolbars appear, illustrated below. The toolbar buttons let you design the data entry screen. Each button represents a different kind of field.

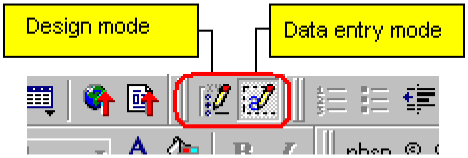


Both toolbars provide mostly the same buttons. The major difference between them is how you use the button to add a field to the screen. If you are using the *horizontal* toolbar, place the cursor where you want field, and click the toolbar button.

When using the *drag and drop toolbar*, drag a button to desired screen location.

Note that a context-sensitive menu, available by right clicking the mouse, is also available to perform the commands. You can right click the mouse then select **Insert Field** to display a context-sensitive menu of all commands. To edit the properties of any field already on the screen, select the field, right click the mouse, and select **Field Properties**.

- two buttons appear on the regular (Edit) toolbar: Design mode and Data Entry mode. (For more information, see "Design Mode vs. Data Entry Mode" on page 196.)



The Data Entry mode button lets you preview the screen being created.

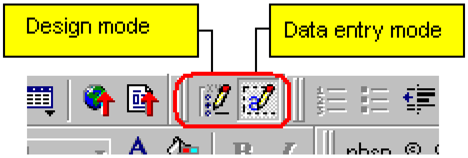
- several toolbar buttons are grayed out -- they do not work with Data Designer

Design Mode vs. Data Entry Mode

The Data Designer feature supplies two "modes," which make it easier for you to design screens:

- *Data Design mode* - lets you insert and remove fields from the data entry screen
- *Data Entry mode* - simulates the screen's appearance during data entry

Two toolbar buttons let you switch between modes. The buttons are located on the Edit toolbar.



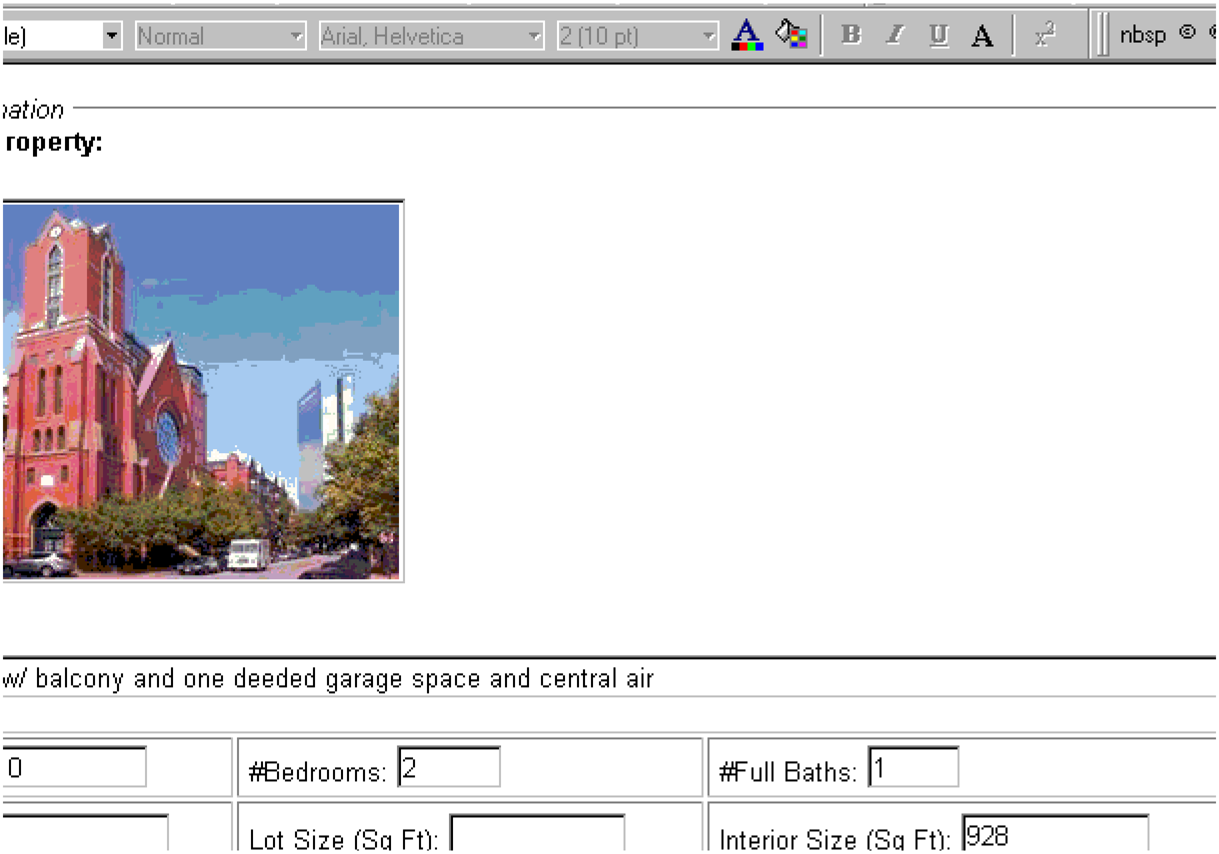
When you begin to create a data entry screen, you are in design mode. To test the screen as the user will see it, click the Data Entry button (). To switch back to Data Entry mode and modify the screen, click the Data Designer button ().

Designing a Screen

To design a screen that captures XML data, you

1. Ask your system administrator to enable a version of **eWebEditPro+XML** that includes the Data Designer. (The administrator should refer to the Data Designer chapter of the Developer’s Reference Guide.)
2. For each field on the screen, select a field type, and place it on the screen. ”Inserting a Field Type” on page 198 explains the kind of field that each button represents.

   You can also use **eWebEditPro+XML**’s rich formatting capabilities to design the screen. For example, you can format text, and use tables, images and hyperlinks to guide the user through the data entry process. Below is a sample screen created with the Data Designer.



ation

roperty:

w/ balcony and one deeded garage space and central air

0

#Bedrooms: 2

#Full Baths: 1

Lot Size (Sq Ft):

Interior Size (Sq Ft): 928

If you are familiar with XML and want to manually edit the page, use the View Source button (<>) to edit the page's source code. If the XML is not well-formed, you are notified and must remain in source view until you fix it.

Inserting a Field Type

eWebEditPro+XML provides several options that let you insert or edit fields in the editor. Each field type is described below.

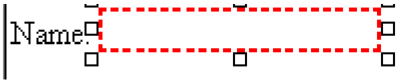
Field type	Icon	Description	For more information, see
Group Box		Groups related fields, which can be surrounded by a box and have a caption	”Group Box” on page 212
Tabular		Same as group box, but fields can be presented in a table format	”Tabular Data” on page 217
Checkbox	☑	User’s response is either checked or unchecked	”Checkbox” on page 226
Plain Text	ab	Free text field; user cannot format text	”Plain Text” on page 228
Rich Area		Free text field; user can format text using the editor	”Rich Area” on page 233
Choices		Several choices appear on screen. User checks appropriate boxes. All user choices are inserted as values within single XML tag.	”Choices” on page 235
List		Same as Choices except options appear in a drop-down box	”Select List” on page 240
Calculated		Performs calculations using other fields on the screen	”Calculated Field” on page 247
Calendar		Lets user insert a date by clicking a calendar	”Calendar Field” on page 257
Image Only		Lets user insert an image	”Image Only Field” on page 263
File Link		Lets user insert a link to a file, such as a PDF document	”File Link Field” on page 266

Field type	Icon	Description	For more information, see
Field Properties		Lets you change the properties of any field. Select the field then click this button. Note: This option is also available on the right click menu, but not available on the drag and drop toolbar	
Validate		Ensure the screen contains valid XML. This button is available in both data entry and data design modes.	

Deleting a Field from the Screen

To remove a field from the screen, follow these steps.

1. Move the cursor to the field.
2. When the cursor changes to a four-headed arrow, click the mouse.
3. Small boxes surround the field.



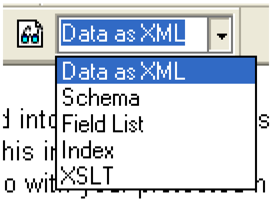
4. Click the cut icon (✂) to remove the field.

Usually, the field label is not deleted when you delete a field. To delete the label, use standard **eWebEditPro+XML** editing buttons.

Previewing the Screen

If you want to view how the screen will appear to the person who will complete the screen, click the View Data Entry button (). (*See Also:* "Design Mode vs. Data Entry Mode" on page 196.)

If you want to see an internal representation of the Data Design, click the Preview button (). Next to the Preview button is a drop-down list of internal formats in which you can view the data design.


Data as XML
Data as XML
Schema
Field List
Index
XSLT

The formats are described below.

Format	Description	Example
Data as XML	The XML data document	

```
<?xml version="1.0" ?>
- <root>
- <Information>
  <LastName />
  <FirstName />
  <MiddleName />
  <Gender>male</Gender>
  <Address />
  <city />
  <state>MA</state>
  <Zip />
  <SSN />
  <BDate />
  <HomeTel />
  <WorkTel />
  <x-ray />
- <Dental_Insurance>
  <Field1 />
  <OtherInsurance>N/A</OtherInsurance>
  <Account_Number>N/A</Account_Number>
  </Dental_Insurance>
  <medication />
  <lastAppointment />
  <clincal />
  </Information>
  </root>
```

Format	Description	Example
Schema	Defines the structure, content, and semantics of an XML document	
Field List	A list of all fields and information about them (as XML)	
Index	xpath information for any indexed field on the screen	

Schema

```
<?xml version="1.0" ?>
- <xs:schema elementFormDefault="qualified"
attributeFormDefault="unqualified"
xmlns:xs="http://www.w3.org/2001/XMLSchema">
- <xs:element name="root">
- <xs:complexType>
- <xs:sequence>
- <xs:element name="Information">
- <xs:complexType>
- <xs:sequence>
- <xs:element name="LastName">
- <xs:simpleType>
- <xs:restriction base="xs:string">
  <xs:minLength xmlns:xs="http://www.w3.org/
2001/XMLSchema" value="1" />
  </xs:restriction>
  </xs:simpleType>
  </xs:element>
- <xs:element name="FirstName">
- <xs:simpleType>
- <xs:restriction base="xs:string">. .. ..
```

Field List

```
<fieldlist>
  <field name="LastName" datatype="string"
basetype="text" xpath="/root/Information/
LastName" title="Last Name">Last Name</field>
  <field name="FirstName" datatype="string"
basetype="text" xpath="/root/Information/
FirstName" title="First Name">First Name</
field>
  <field name="MiddleName" datatype="string"
basetype="text" xpath="/root/Information/
MiddleName" title="Middle Name">Middle Name</
field>
  <field name="Gender" datatype="choice"
basetype="text" xpath="/root/Information/
Gender" title="" datalist="IDAPK3KC">Gender</
field> . .. .. ..
```

Index

```
<?xml version="1.0" ?>
- <indexable>
  <xpath type="string">/root/Information/SSN</
xpath>
  <xpath type="string">/root/Information/
HomeTel</xpath>
  <xpath>/root/Information/WorkTel</xpath>
  </indexable>
```

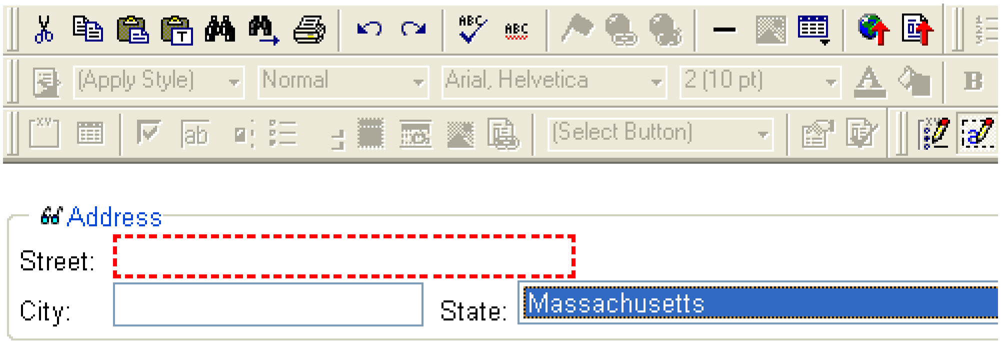
Format	Description	Example
XSLT	The Data Design document’s presentation XSLT	

XSLT

```
<?xml version="1.0" ?>
- <xsl:stylesheet version="1.0"
xmlns:xsl="http://www.w3.org/1999/XSL/
Transform">
  <xsl:output method="xml" version="1.0" omit-
xml-declaration="yes" indent="yes"
encoding="utf-8" />
  <xsl:strip-space elements="*" />
  <xsl:variable name="ektdesignns_fieldlist"
select="/*/ektdesignpackage_list/fieldlist" />
- <xsl:template match="/"
xml:space="preserve">

    <p> </p>

- <fieldset id="Information"
title="Demographic Information">

  <legend>Patient Information</legend>

- <div>

- <p>

  <strong>Last Name</strong>

  <xsl:text> </xsl:text>

  <xsl:value-of select="/root/Information/
LastName" />

  <strong>First Name</strong>

  <xsl:text> </xsl:text>

 <xsl:value-of select="/root/Information/
FirstName" /> .. .. ... ..
```

Sample Screen Design

This section provides a brief overview of designing a screen, so that you can learn how the pieces fit together. Let’s assume you want the screen to look like this.



Address

Street:

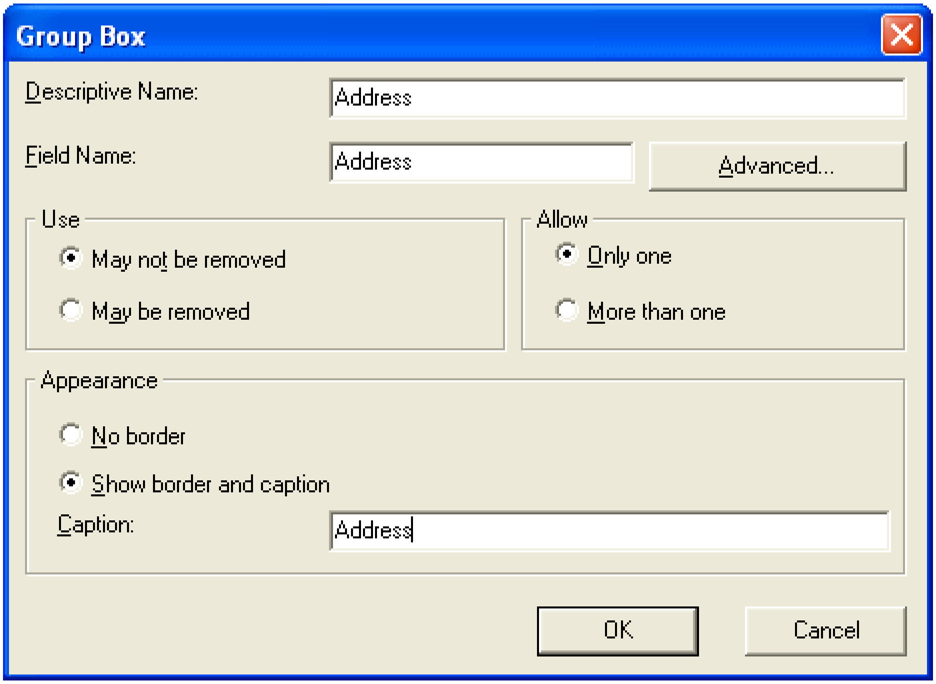
City:

State: Massachusetts

NOTE The following example helps you understand how to create a simple data entry screen. It does not explain how to save a screen so that a user can enter data into it. You can access a good sample by navigating to **Start > Programs > Ektron > eWebEditPro > Samples > ASP > Data Design > ASP Data Design Sample**. When you are ready to create an actual screen, ask your system administrator to help determine a method for saving the screen and making it available to users for data entry.

To create such a screen, follow these steps.

1. Sign on to **eWebEditPro+XML** in Data Designer mode. (Ask your system administrator how to do this. The Developer's Reference Guide (version 4.0 and higher) provides details.)
2. Since you want to surround the data entry fields with a box and a caption, drag the Group Box button () from the drag and drop toolbar onto the screen. Then, complete the dialog as shown below.


Group Box
Advanced...
OK
Cancel

Descriptive Name: Address

Field Name: Address

Use
- ● May not be removed
- ○ May be removed

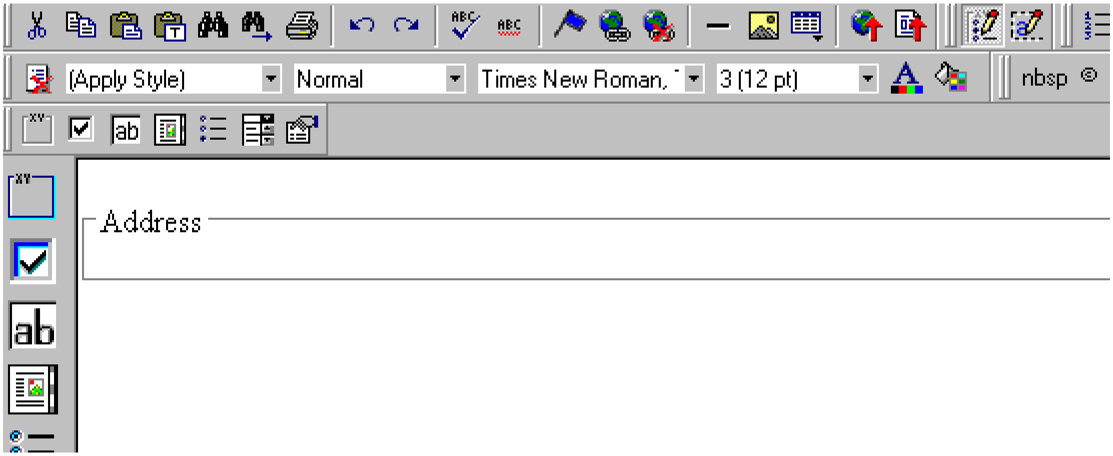
Allow
- ● Only one
- ○ More than one

Appearance
- ○ No border
- ● Show border and caption

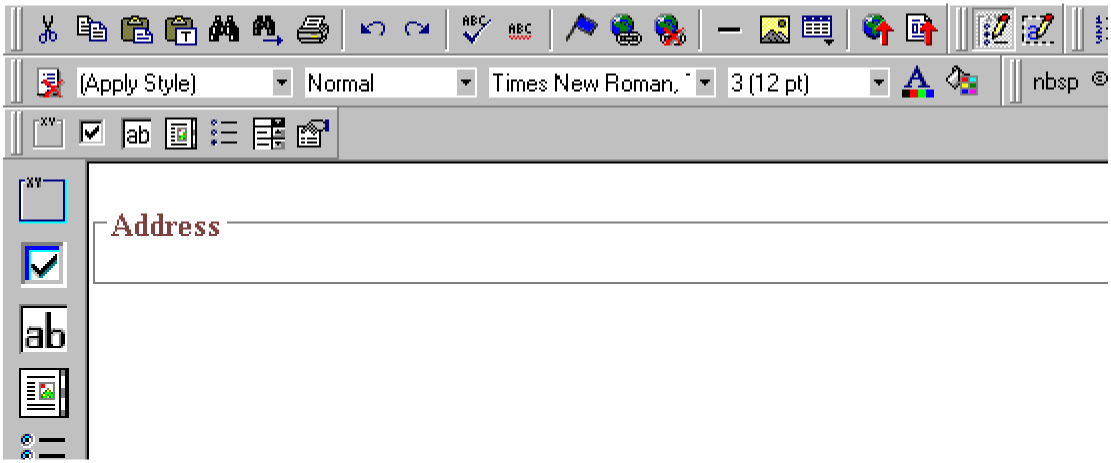
Caption: Address

NOTE Later in the section, documentation is supplied for each field on the dialog box. Since this section is providing an overview, it does not delve into those details.

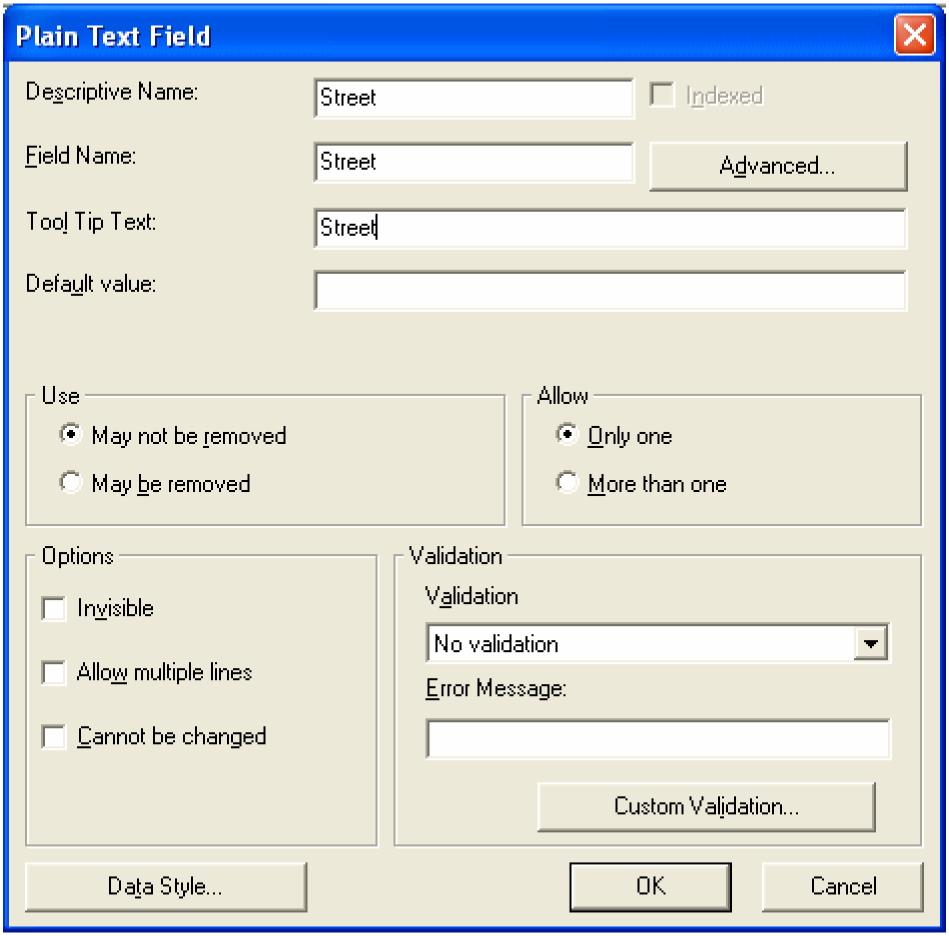
At this point, the screen looks like this.


(Apply Style)
Normal
Times New Roman,
3 (12 pt)
nbsp
ab
Address

3. Select **Address** then apply bold and the custom color shown above. Now the screen looks like this.


(Apply Style)
Normal
Times New Roman,
3 (12 pt)
nbsp
Address

4. The next field, street, should let the user enter text. So, drag the plain text field icon (ab) into the space below **Address**. Then, complete the dialog as shown below.


Plain Text Field
Advanced...
Custom Validation...
Data Style...
OK
Cancel

Descriptive Name: Street

☐ Indexed

Field Name: Street

Tool Tip Text: Street

Default value:

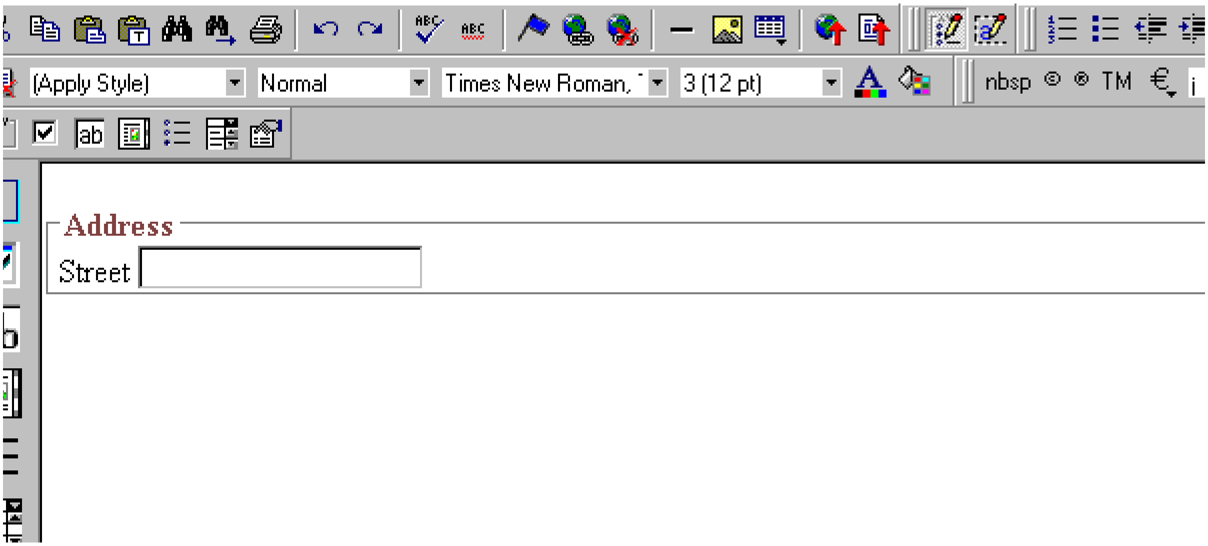
Use
● May not be removed
○ May be removed

Allow
● Only one
○ More than one

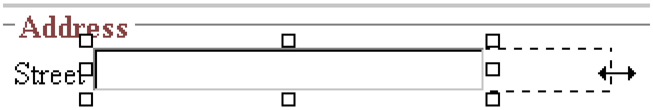
Options
☐ Invisible
☐ Allow multiple lines
☐ Cannot be changed

Validation
Validation: No validation
Error Message:

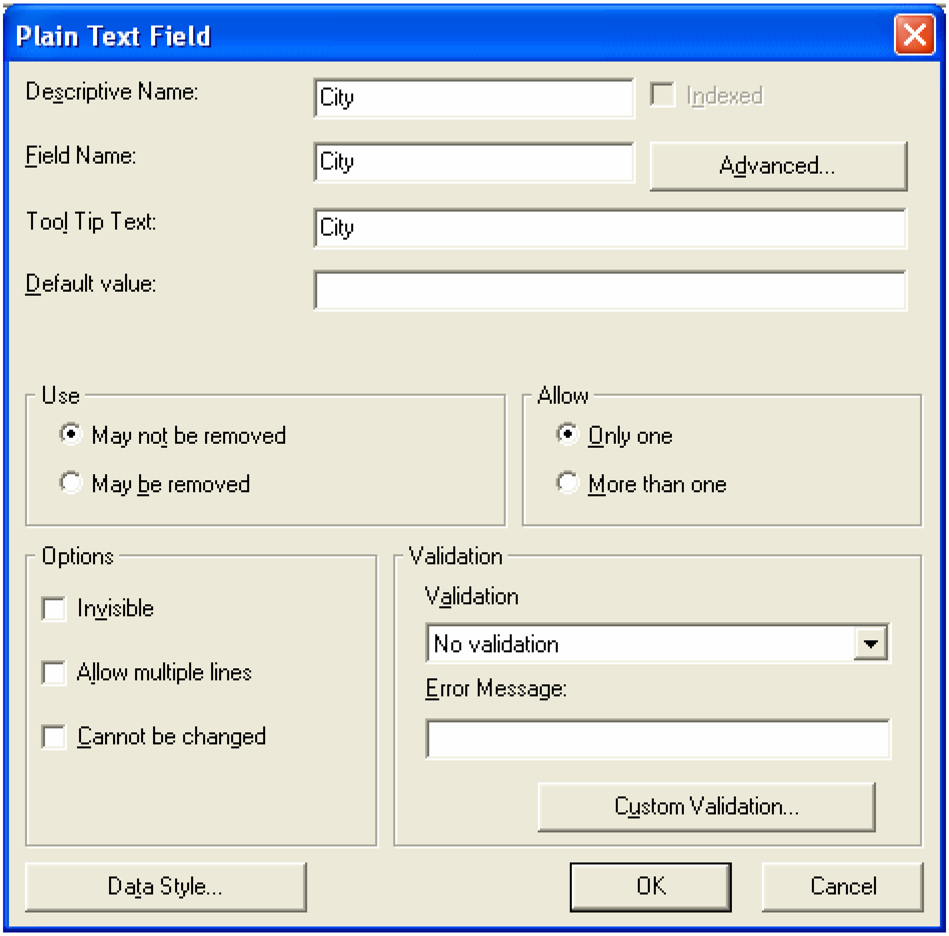
Now, the screen looks like this.


(Apply Style)
Normal
Times New Roman,
3 (12 pt)
nbsp
TM
€
ab
Address
Street

Note that the **Street** field is not wide enough. To widen it, click the field, move the cursor until you see a two-sided arrow, and drag the arrow to the right.


Address
Street

5. The next field, **City**, should also let the user enter text. Assume that you want **City** to appear in the line below **Street**. To make room for **City**, move the cursor to the end of the **Street** field and press <Enter> to create a new line. Next, drag the plain text field icon (ab) into the line below **Street**. Then, complete the dialog as shown below.



Plain Text Field

Descriptive Name: City

☐ Indexed

Field Name: City

Tool Tip Text: City

Default value:

Use

● May not be removed

○ May be removed

Allow

● Only one

○ More than one

Options

☐ Invisible

☐ Allow multiple lines

☐ Cannot be changed

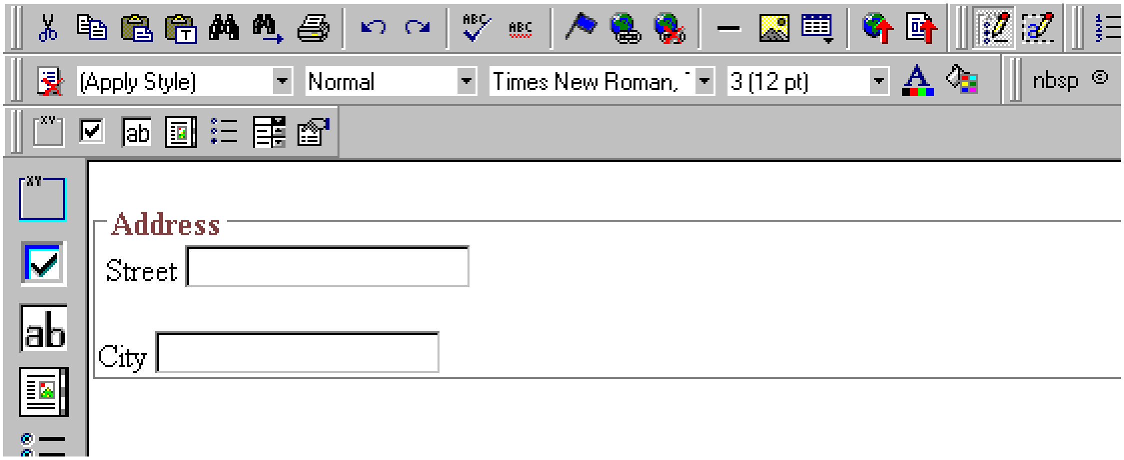
Validation

Validation: No validation

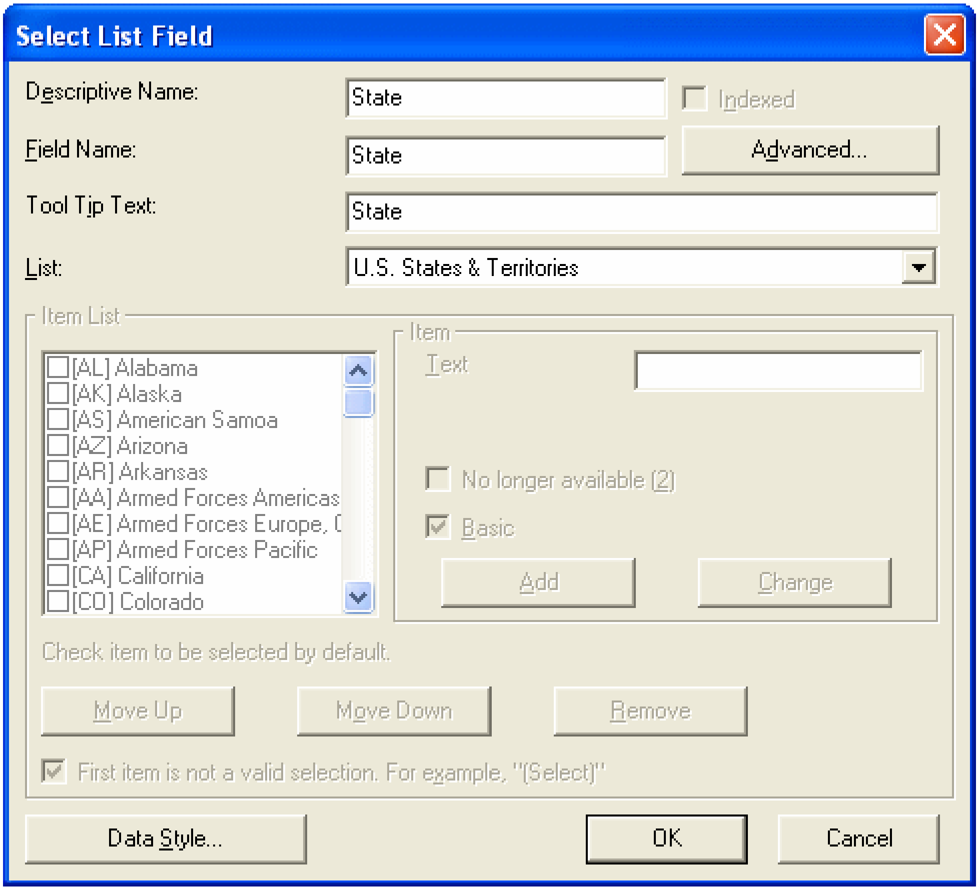
Error Message:

Advanced...
Custom Validation...
Data Style...
OK
Cancel

Now, the screen looks like this.


(Apply Style)
Normal
Times New Roman,
3 (12 pt)
nbsp
Address
Street
City

6. The next field, **State**, should let the user choose from several states. Assume that you want the state to appear to the right of **City**. Move the cursor to the end of the **City** field and drag the Select List Field field icon (▤) into that space. Then, complete the dialog as shown below.



Select List Field

Descriptive Name: State ☐ Indexed

Field Name: State

Tool Tip Text: State

List: U.S. States & Territories

Item List

☐ [AL] Alabama
☐ [AK] Alaska
☐ [AS] American Samoa
☐ [AZ] Arizona
☐ [AR] Arkansas
☐ [AA] Armed Forces Americas
☐ [AE] Armed Forces Europe, (
☐ [AP] Armed Forces Pacific
☐ [CA] California
☐ [CO] Colorado

Item

Text

☐ No longer available (2)

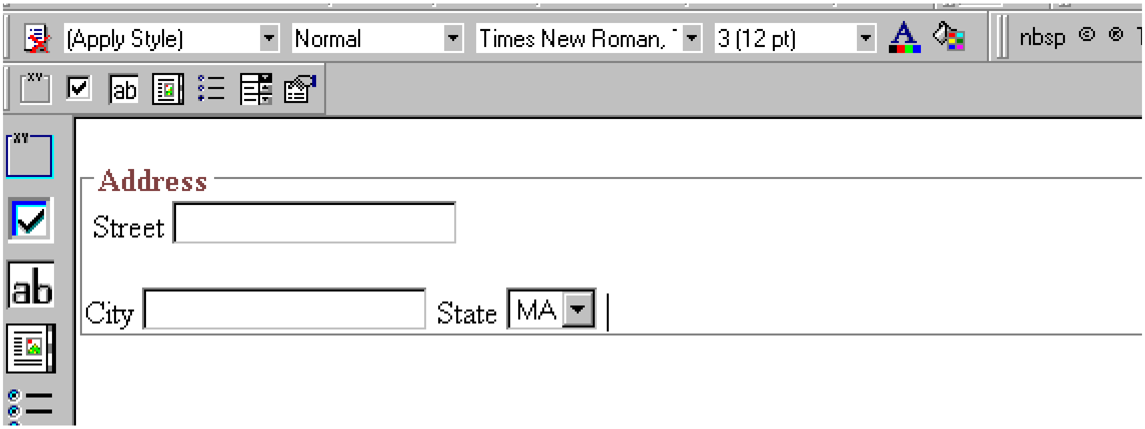
☑ Basic

Check item to be selected by default.

☑ First item is not a valid selection. For example, "(Select)"

Advanced...
Add
Change
Move Up
Move Down
Remove
Data Style...
OK
Cancel

Now, the screen looks like this.



(Apply Style)
Normal
Times New Roman,
3 (12 pt)
nbsp

Address

Street

City State MA

The above example is very simple and does not use some of the Data Designer’s more powerful and flexible features. To learn more about Data Designer, read the rest of this chapter.

Data Designer Field Types

To help you use all of the Data Designer’s capabilities, this section explains each field type you can insert. As you will see, they are very flexible and can accommodate all of your needs when designing a data entry screen.

Group Box

A Group Box field lets you group related fields together on a screen by surrounding them with a box and optionally placing a caption above them.

After you insert a Group Box field, to insert other kinds of fields within the box,

- drag the fields into the box (if you are using the drag and drop toolbar)

or

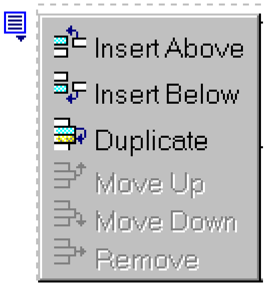
- place the cursor inside the box then select a field type button (if you are using the horizontal toolbar)

NOTE The tabular data field type might better accommodate your needs. See ”Tabular Data” on page 217.

Advantages of Grouping Fields

One advantage of grouping fields is that you can allow the user in Data Entry mode to add another instance of a group.

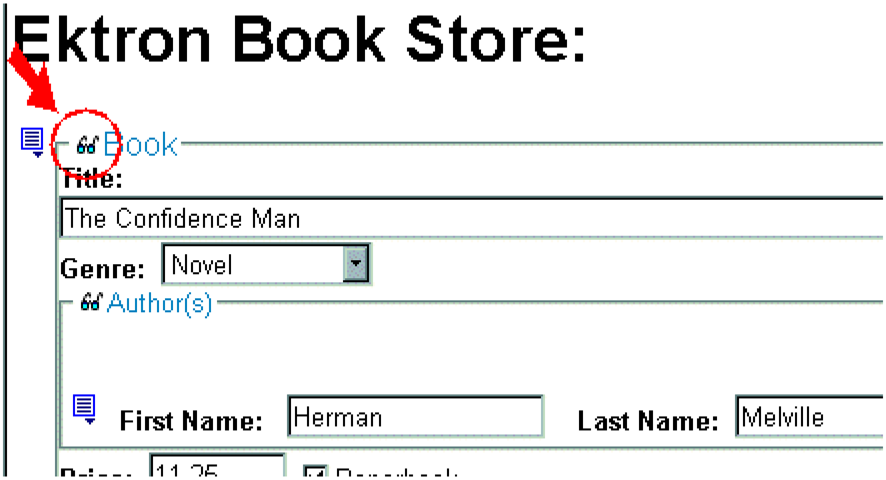
For example, if a screen collects several fields of information about each telephone call, the user could simply click the **Insert Below** button to insert a new group of fields, ready to collect information about the next call.



Another advantage of grouping fields is that you can suppress a group of irrelevant fields. For example, if a screen includes two groups of fields that collect information about hardcover and paperback books, and you are adding information about a hardcover book, you can collapse the paperback book questions because they are not relevant to your current task.

Use the eyeglass icon to expand or collapse the display of fields within a group.

Expanded Group Field with glasses icon highlighted



Ektron Book Store:

Book

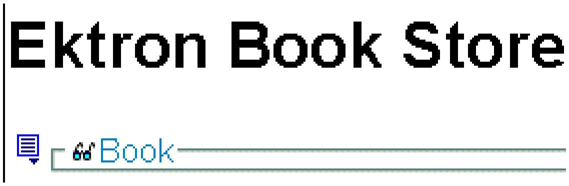
Title: The Confidence Man

Genre: Novel

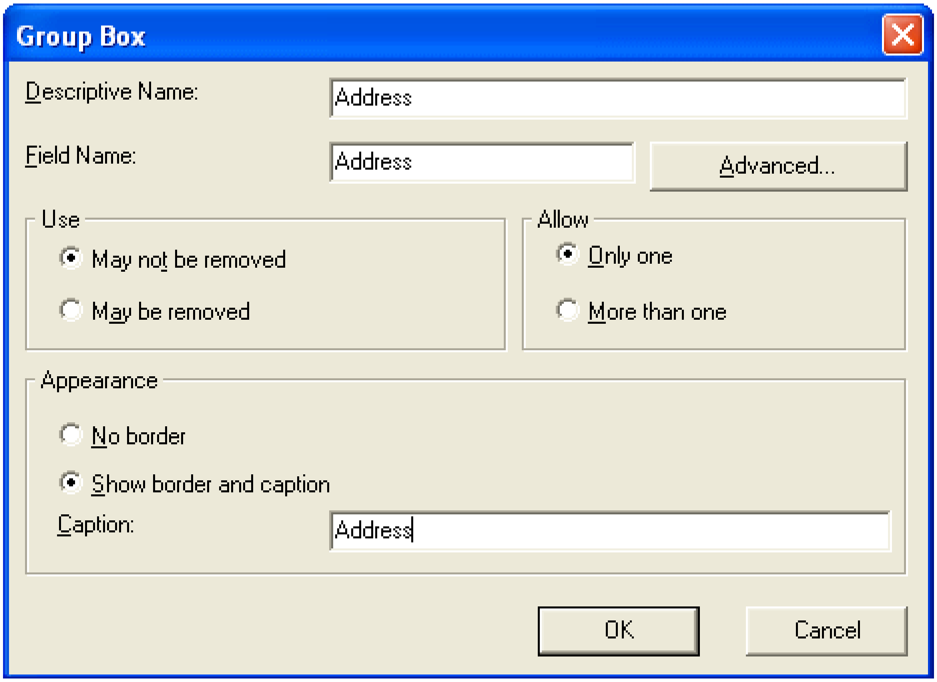
Author(s)

First Name: Herman   Last Name: Melville

Collapsed Group Field


Ektron Book Store
Book

Dialog Box


Group Box
Advanced...
OK
Cancel

Descriptive Name: Address

Field Name: Address

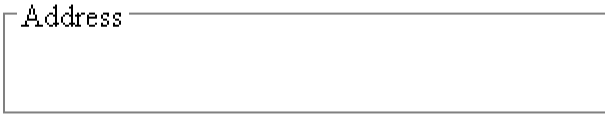
Use
● May not be removed
○ May be removed

Allow
● Only one
○ More than one

Appearance
○ No border
● Show border and caption
Caption: Address

Fields on the Group Box Dialog

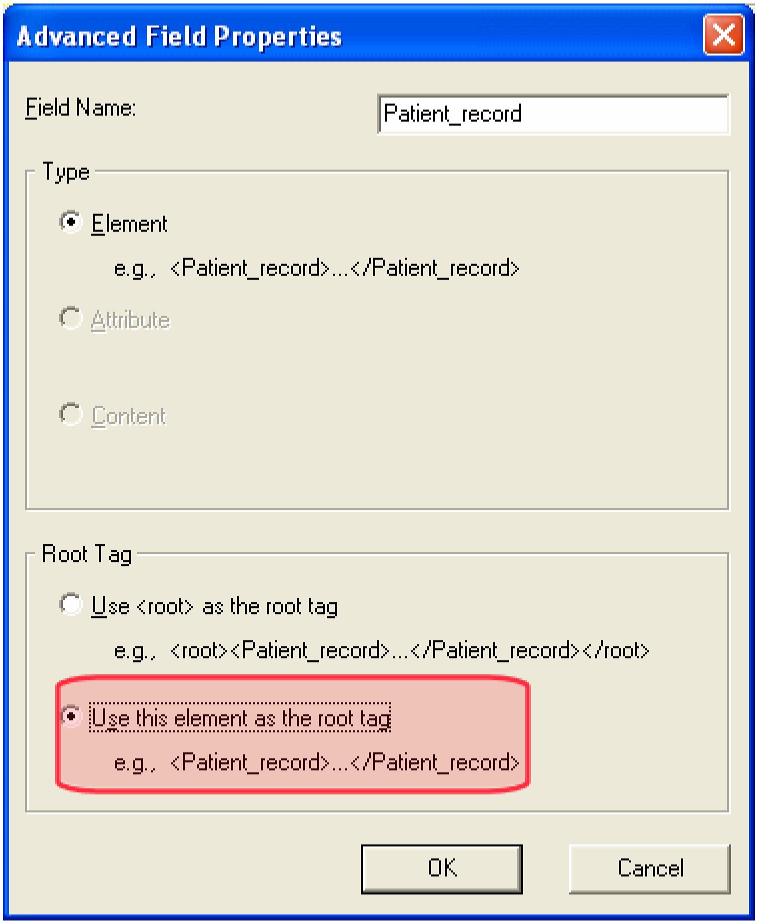
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Descriptive Name</td><td>Enter the name of this field.
Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'”{}[]\|`~) into this field.
Internally, the name is used as the field’s caption.
The Name Field’s Default Value
By default, the Data Designer assigns a name made up of **Field** followed by the next available number. So, the first field’s default name is **Field1**, the second field’s default name is **Field2**, etc. You can change the default if you want.</td></tr>
<tr><td>Field Name</td><td>Enter the field’s element name. This defines the field in the XML.</td></tr>
<tr><td>Advanced</td><td>See ”Advanced Button” on page 268</td></tr>
<tr><td>Use</td><td>See ”The Use Field” on page 272</td></tr>
<tr><td>Allow</td><td>See ”The Allow Field” on page 273</td></tr>
<tr><td>Appearance</td><td>Click **Show border and caption** if you want to surround the fields in this group with a box. You can also create a caption to appear in the top line of the box.
Click **No border** if you do not want to surround the fields in this group with a box.</td></tr>
</table>

Field	Description
Caption	If desired, enter text to describe this group of fields on the data entry screen. For example  Address After you insert this field onto the screen, you can use **eWebEditPro+XML**'s formatting capabilities to modify its size, font, color, and other attributes. Note: The Caption field only appears on this dialog when you create the Group Box field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit Caption text within the editor.

Using a Tag Other Than <Root>

By default, **Ektron CMS400.NET** surrounds your Data Design with `<root>` tags. If you would like to replace the <Root> tags with another element name, follow these steps.

1. After creating a new Data Design screen, insert a Group Box as the first field.
2. In the Group Box Dialog**'s Field Name** field, enter the root text.
3. On the Group Box Dialog box, click the **Advanced** button.
4. In the Root tag section of that dialog, select **Use this element as the Root tag** and press **OK**.



Field Name: Patient_record

Type

● Element

e.g., <Patient_record>...</Patient_record>

○ Attribute

○ Content

Root Tag

○ Use <root> as the root tag

e.g., <root><Patient_record>...</Patient_record></root>

● Use this element as the root tag

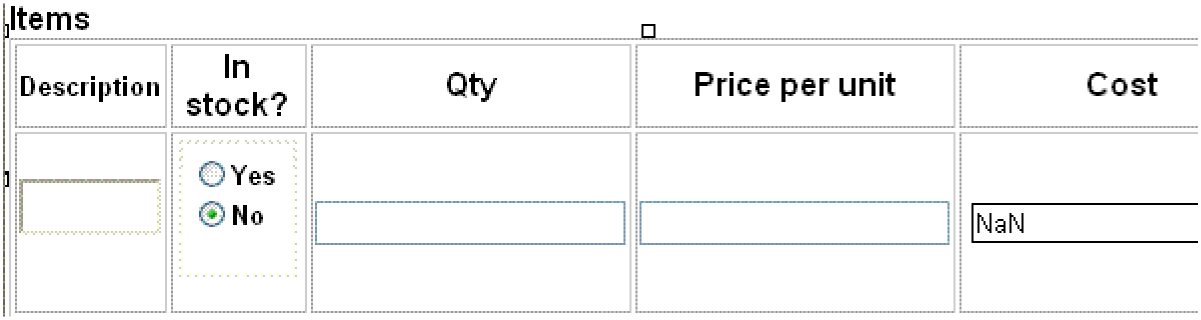
e.g., <Patient_record>...</Patient_record>

5. Place all other screen elements within the Group Box field.

Tabular Data

The Tabular data button inserts a table into which you can place other types of fields. It’s similar to a group box.

Tabular data’s main advantage over a group box is that it lets you place fields in columns (see below).

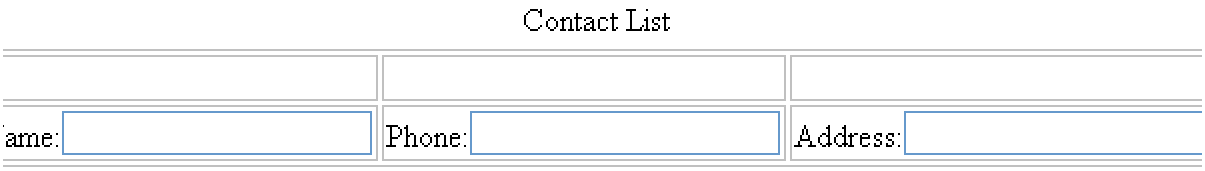

Items
Description
In stock?
Qty
Price per unit
Cost
Yes
No
NaN

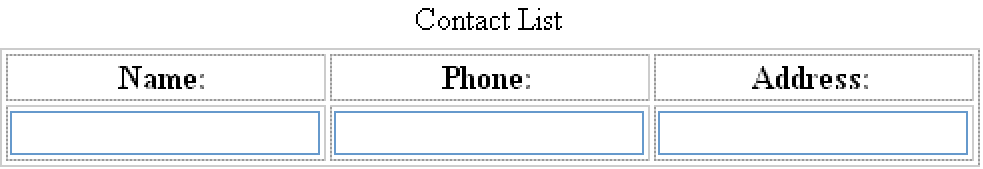
NOTE ”Group Box” on page 212 describes many features that also apply to tabular data. Read that section to gain a full understanding of working with tabular data.

Creating a Table

First you insert the table. Then, you insert an appropriate type of field into each column. As examples, in the table above, the **Description** field type would be plain text, while the **In Stock?** field type would be choices.

If you insert a field into a table and its caption appears to the left of the data entry region (see below), move the caption to the column header (see second illustration below).


Contact List
ame:
Phone:
Address:


Contact List
Name:
Phone:
Address:

To access table commands (such as add row and add column), place the cursor inside a table cell, right click the mouse, and select **Table**.

IMPORTANT! Only table cells into which you place a field are available to visitors of your Web page.

Editing Tabular Data

To edit tabular data, hover the cursor over a table border line until you see a four-headed arrow. Then, click the right mouse button and select **Field Properties**.

NOTE You cannot reduce the number of columns by editing the Tabular Data dialog's **Columns** field. To delete a column, place the cursor in the column and select **Delete Column** from the table commands. The table commands are available in the table drop-down menu, the table toolbar (which is hidden by default), or the right-click context menu.

How Tabular Data Forms XML Structure

Tabular data creates three levels of XML tags:

- inner level: each field in the table
- middle level: each row in the table
- outer level: the entire set of table data

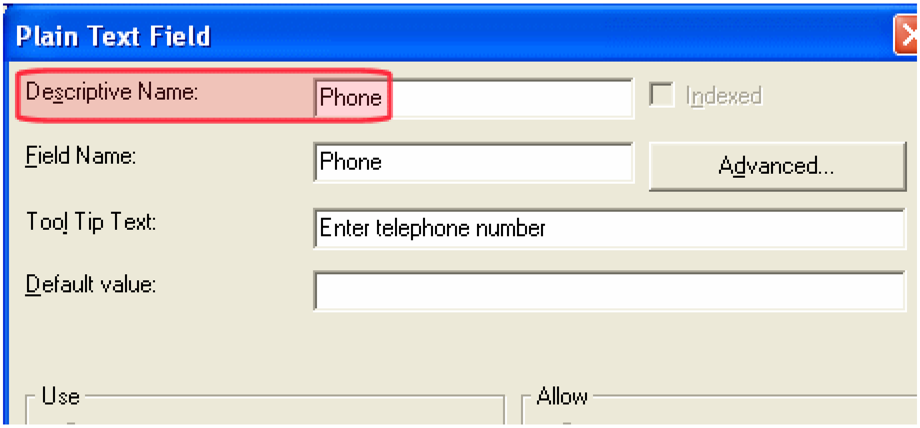
To explain how this works, we'll use the following contact list as an example.

Name	Phone	Email
John Doe	555-1212	john.doe@email.com
Mary Smith	555-8765	msmith@mymail.net

How XML Tags are Assigned to Field Names

When you insert a field into a table, a dialog helps you define the field type. For example, when inserting a plain text field, the Plain

Text Field dialog appears. On that dialog, the value of the **Phone** field defines the tags that enclose that field's contents.


Plain Text Field
Descriptive Name:
☐ Indexed
Field Name:
Advanced...
Tool Tip Text:
Default value:
Use
Allow

Descriptive Name: Phone
Field Name: Phone
Tool Tip Text: Enter telephone number

To continue our example, every contact is represented in XML as:

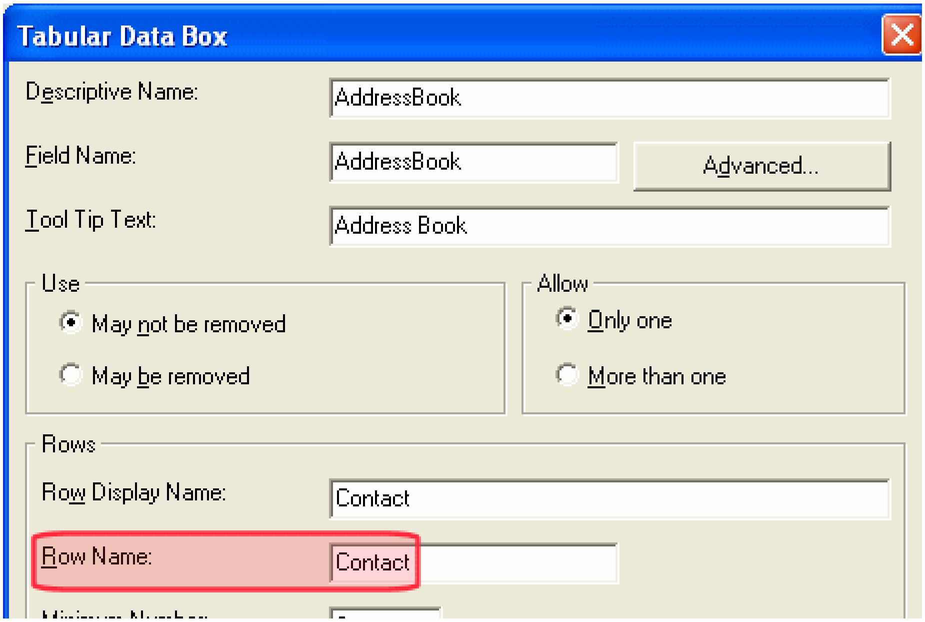
```
<Name>John Doe</Name>
<Phone>555-1212</Phone>
<Email>john.doe@email.com</Email>
```

and

```
<Name>Mary Smith</Name>
<Phone>555-8765</Phone>
<Email>msmith@mymail.net</Email>
```

How XML Tags are Assigned to Table Rows

Each row of the table collects information for one contact. On the Tabular Data Box dialog, the **Row Name** field defines the XML tag that groups information for *each contact*. For example, the **Row Name** field value is **Contact**.



Descriptive Name: AddressBook

Field Name: AddressBook

Tool Tip Text: Address Book

Use: ● May not be removed ○ May be removed

Allow: ● Only one ○ More than one

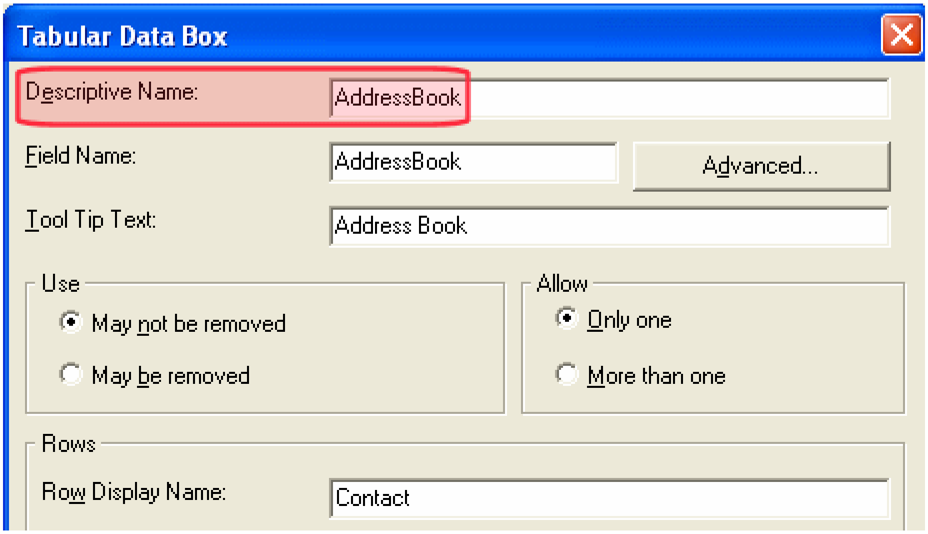
Row Display Name: Contact

Row Name: Contact

```
<Contact>
     <Name>John Doe</Name>
     <Phone>555-1212</Phone>
     <Email>john.doe@email.com</Email>
</Contact>
<Contact>
     <Name>Mary Smith</Name>
     <Phone>555-8765</Phone>
     <Email>msmith@mymail.net</Email>
</Contact>
```

How XML Tags are Assigned to the Entire Table

When you create a table, the name you give it (in the **Name** field of the Tabular Data Box dialog) defines the XML tag that groups *all contacts* on the table. In this example, the name is **AddressBook**.



Descriptive Name: AddressBook
Field Name: AddressBook
Tool Tip Text: Address Book

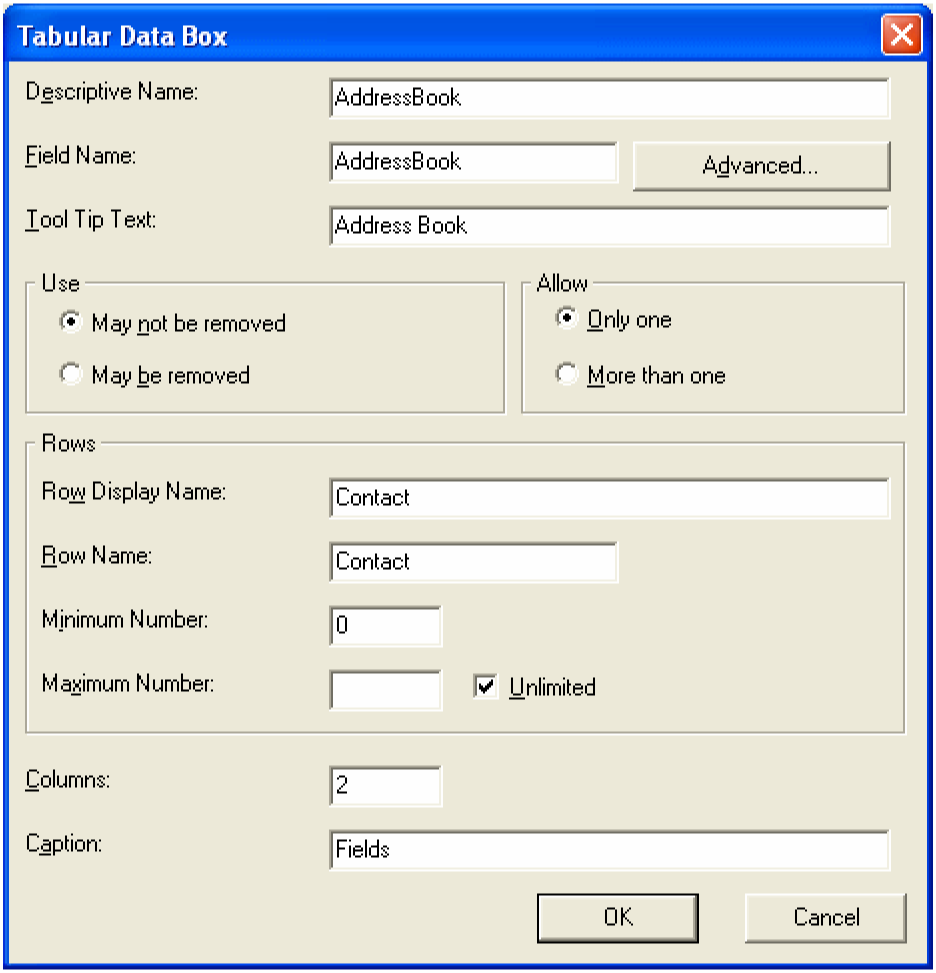
Use
● May not be removed
○ May be removed

Allow
● Only one
○ More than one

Rows
Row Display Name: Contact

```
<AddressBook>
   <Contact>
       <Name>John Doe</Name>
       <Phone>555-1212</Phone>
       <Email>john.doe@email.com</Email>
   </Contact>
   <Contact>
       <Name>Mary Smith</Name>
       <Phone>555-8765</Phone>
       <Email>msmith@mymail.net</Email>
   </Contact>
</AddressBook>
```

Dialog Box



Descriptive Name: AddressBook

Field Name: AddressBook

Tool Tip Text: Address Book

Use

● May not be removed

○ May be removed

Allow

● Only one

○ More than one

Rows

Row Display Name: Contact

Row Name: Contact

Minimum Number: 0

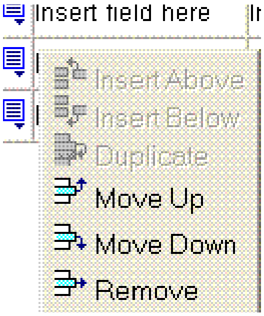
Maximum Number: ☑ Unlimited

Columns: 2

Caption: Fields

Fields on the Tabular Data Dialog

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Descriptive Name</td><td>Enter the name of this table.
Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]\|`~) into this field.
The Name Field’s Default Value
By default, the Data Designer assigns a name made up of Field followed by the next available number. So, the first field’s default name is Field1, the second field’s default name is Field2, etc. You can change the default if you want.</td></tr>
<tr><td>Field Name</td><td>Enter the table’s element name. This will define the table in the XML. <i>See Also:</i> ”How Tabular Data Forms XML Structure” on page 219</td></tr>
<tr><td>Tool Tip Text</td><td>Enter the text that appears when a user hovers the cursor over the table’s column headers.</td></tr>
<tr><td>Advanced</td><td>See ”Advanced Button” on page 268</td></tr>
<tr><td>Use</td><td>See ”The Use Field” on page 272</td></tr>
<tr><td>Allow</td><td>See ”The Allow Field” on page 273
Note: If you check More than one here, you are allowing the user to insert an entirely new table, not an additional table row.</td></tr>
<tr><td colspan="2">Rows</td></tr>
<tr><td>Row display name</td><td>Enter the text that appears when a user hovers the cursor over the table’s cells. Use this field to describe the kind of information to be inserted into the table’s cells.</td></tr>
<tr><td>Row name</td><td>Enter the name of the XML tag used to collect data for each entry in the table.
<i>See Also:</i> ”How Tabular Data Forms XML Structure” on page 219</td></tr>
</table>

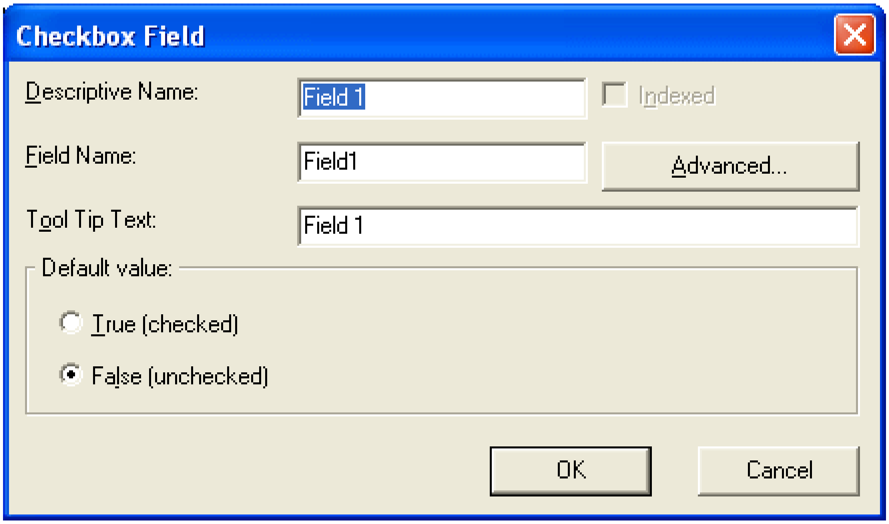
Field	Description
Minimum number	If desired, enter the minimum number of rows for this table. If you enter a number and the data entry user tries to save the screen without inserting at least the minimum number of rows, he is informed that **Element content is incomplete according to the DTD/Schema**. By default, the user is allowed to cancel or save the screen anyway. However, the system administrator determines whether or not the user can save an invalid document.
Maximum number	If desired, enter the maximum number of rows for this table. If you don't want to assign a maximum number, check the **Unlimited** check box. **Result of Assigning a Maximum** When this table appears on a data entry screen, and a user adds the maximum number of rows, the **Insert Above** and **Insert Below** options are grayed out on the menu (see example below).  Insert field here Insert Above Insert Below Duplicate Move Up Move Down Remove
Columns	Enter the number of columns to appear in the table. *See Also:* "Editing Tabular Data" on page 219
Caption	If desired, enter text to describe this table on the data entry screen. The caption appears centered above the table. After you insert this field onto the screen, you can use **eWebEditPro+XML**'s formatting capabilities to modify the caption's size, font, color, and other attributes.

Checkbox ☑

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

☐ Check if you are over 65

Dialog Box



Checkbox Field

Descriptive Name: Field 1 ☐ Indexed

Field Name: Field1

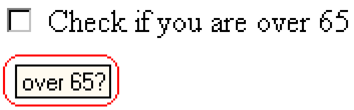
Tool Tip Text: Field 1

Default value:

○ True (checked)

● False (unchecked)

Fields on the Checkbox Dialog

Field	**Description**
Descriptive Name	Enter text to guide the user’s response to this field. To continue the above example, the caption would be **Check if you are over 65**. After you insert this field onto the screen, the Descriptive Name appears to the right of the checkbox. You can use **eWebEditPro+XML**’s formatting capabilities to modify its size, font, color, and other attributes. Note: The Descriptive Name field only appears on this dialog when you create the Check Box field. If you later try to edit the field, it is not on the dialog. However, you can edit the Descriptive Name text within the editor.
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The **Indexed** field may not appear, depending on how your administrator set up your system.
Field Name	Enter the field’s element name. This will define the field in the XML.
Advanced	See ”Advanced Button” on page 268
Tool Tip Text	Enter text that appears when a user hovers the cursor over this field (circled in red below).  ☐ Check if you are over 65 over 65?
Default value	If you want this field to be checked when the screen first appears, click **True**. Otherwise, click **False**.

Plain Text

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

NOTE If a plain text field tries to perform a numerical calculation with a value that is blank or contains letters, `NaN` appears in the field. (`NaN` stands for “not a number.”) If a plain text field tries to divide by zero, `Infinity` appears.

Plain Text Field vs. Rich Area Field

The following capabilities are available with a plain text field but not a rich area field.

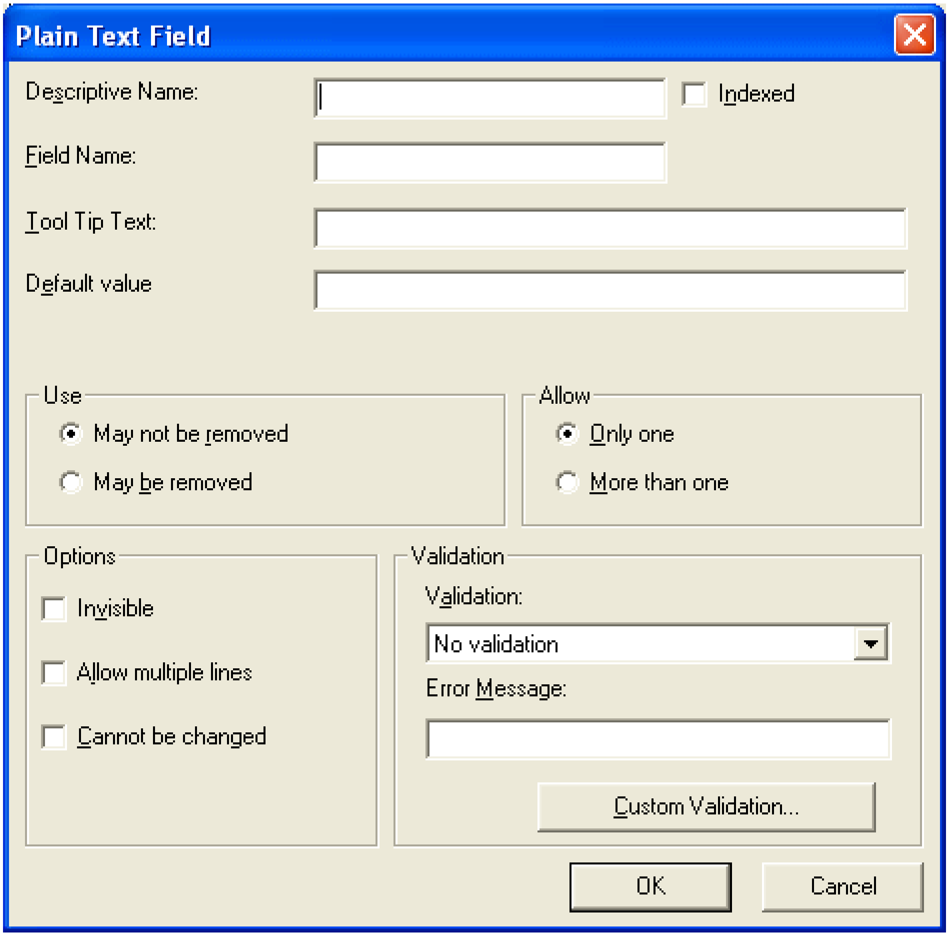
- You can adjust the field’s width by dragging it. See ”Resizing a Plain Text Field” on page 233.
- The text can be read-only or hidden

The following capability is available with a rich area field but not a plain text field.

- In Data Entry mode, the user can change the text’s format, size, style, etc. along with adding hyperlinks, using **eWebEditPro+XML**’s formatting capabilities.

- You can enter custom tags.

Dialog Box



Plain Text Field

Descriptive Name: ☐ Indexed

Field Name:

Tool Tip Text:

Default value

Use
● May not be removed
○ May be removed

Allow
● Only one
○ More than one

Options
☐ Invisible
☐ Allow multiple lines
☐ Cannot be changed

Validation
Validation: No validation
Error Message:

Fields on the Plain Text Dialog

Field	Description
Descriptive Name	Enter the name of this field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field. *See Also:* ”The Name Field’s Default Value” on page 215
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The **Indexed** field may not appear, depending on how your administrator set up your system.
Field Name	Enter the field’s element name. This defines the field in the XML.
Advanced	See ”Advanced Button” on page 268
Tool Tip Text	Enter the text that appears when a user hovers the cursor over this field.
Default Value	If you want to set a default value for this field, enter that value here. The default value appears in Data Entry mode, where the user can accept, change, or delete it. For example, if this field collects a city, and most users enter New York, enter `New York` as the value.
Use	See ”The Use Field” on page 272
Allow	See ”The Allow Field” on page 273

Field	Description
Options	**Invisible** - Check here to make this field hidden in Data Entry mode. This option lets you store unseen information in each XML document. An example might be putting a version number for the data design so that XML documents can be upgraded to newer versions using an XSL transform. **Allow multiple lines** - Check here to let this text box expand to accommodate the user's input. If you do not check this box, a single line input box appears on the data entry screen to accept user input. Note: A field can be either invisible or cannot be changed -- it cannot be both. **Cannot be changed** - Check here to make this field read-only. That is, the user cannot insert data into it in Data Entry mode. You might use this option to provide instructions for completing the screen.

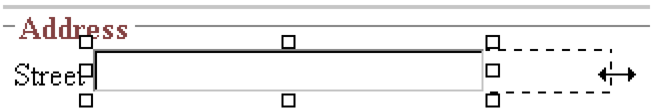
Field	Description
Validation	Select the kind of validation to apply to this field. Your choices are: • **No validation** - the user's response is not checked • **Cannot be blank** - the user must enter a response • **Non-negative whole number or blank** - the user must enter a positive whole number *or* no response • **Non-negative whole number (required)** - the user must enter a positive whole number • **Decimal number or blank** - must be a decimal number (for example, 12.345 or 12) or blank . A leading minus sign "-" is allowed. The decimal point must be a period (.), even in locales that normally use a comma (,). Note: Decimal numbers include whole numbers because the decimal point is implied. That is, 12 is 12.0000. • **Decimal number required -** must be a decimal number (it cannot be blank) of none, one, or two decimal places. A leading minus sign "-" is allowed. The decimal point must be period (.), even in locales that normally use a comma (,). • **Percent: (0-100) required -** the user must enter a whole number from 0 to 100 • **Zip code (US only)** - the user's response must consist of 5 (*nnnnn*) or 9 digits separated by a dash after the fifth (*nnnnn-nnnn*) • **Social Security number (US only)** - the user's response must consist of nine digits in this pattern: *nnn-nn-nnnn* • **Custom -** You can create custom validation. For more information, see "Custom Validation" on page 275. If you assign to this field any value other than **No validation**, the field is initially surrounded by red dashes in Data Entry mode. If the user's response does not meet the validation criterion, the field remains surrounded by red dashes. The system administrator determines whether or not the user can save an invalid document.

Field	Description
Data Style	See ”The Data Style Field” on page 274

Resizing a Plain Text Field

If you insert a plain text field and its width is too small or too large, you can easily resize it. To do so, follow these steps.

1. Place the cursor over the field and click. The cursor changes to a four-headed arrow, and small boxes surround the field.
2. Move the cursor to the far right of the field. (See illustration below). The cursor turns into a two-headed arrow.



3. Drag the arrow to adjust the width.

Rich Area

Use a rich area field to let a user enter a free text response that can be formatted using the editor buttons.

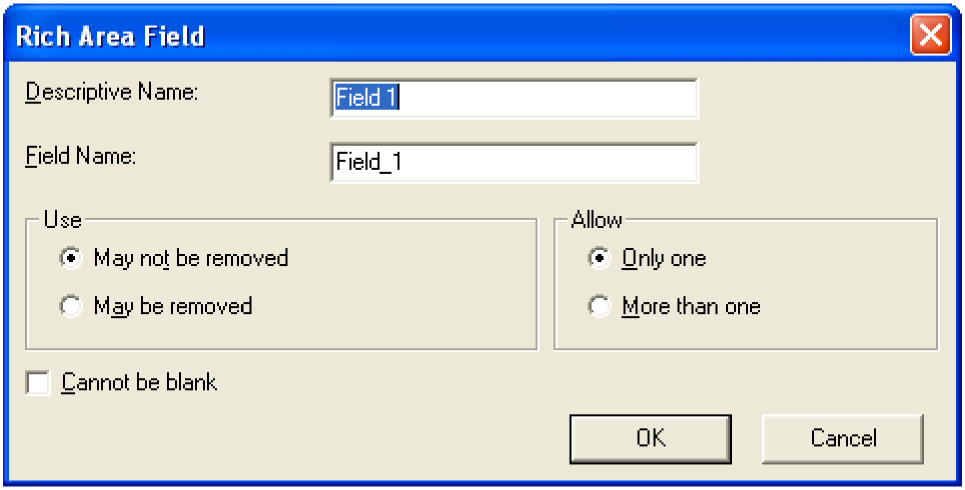
See Also: ”Plain Text Field vs. Rich Area Field” on page 228

Adjusting the Width of a Rich Area Field

Note that, unlike a plain text field, the width of a rich area field cannot be adjusted. It occupies the entire screen width. If a user enters more text than fits on one line, the rich area field automatically adds more lines. To limit the width of a rich area field, place it in a table cell. In this case, the field is as wide as the cell.

If you want to insert default text into a rich area field, insert it after you place the field in the editor.

Dialog Box



Descriptive Name: Field 1

Field Name: Field_1

● May not be removed
○ May be removed

● Only one
○ More than one

☐ Cannot be blank

Fields on the Rich Area Dialog

Field	Description
Descriptive Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field. *See Also:* ”The Name Field’s Default Value” on page 215
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The **Indexed** field may or may not appear, depending on how your administrator set up your system.
Field Name	Enter the field’s element name. This defines the field in the XML.
Advanced	See ”Advanced Button” on page 268
Use	See ”The Use Field” on page 272
Allow	See ”The Allow Field” on page 273

Field	Description
Cannot be blank	If you want to require the user completing this field to enter a response, click inside this check box.

Choices

Use the Choices field when you want to give the data entry user several options. For example, you create a Choices field named **Interests** that lists these options.

- music
- art
- sports

The data entry user could check the first two and leave the third blank.

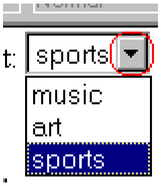
Choices Field vs. Select List Field

The following capabilities are available with a Choices field but not a Select List field.

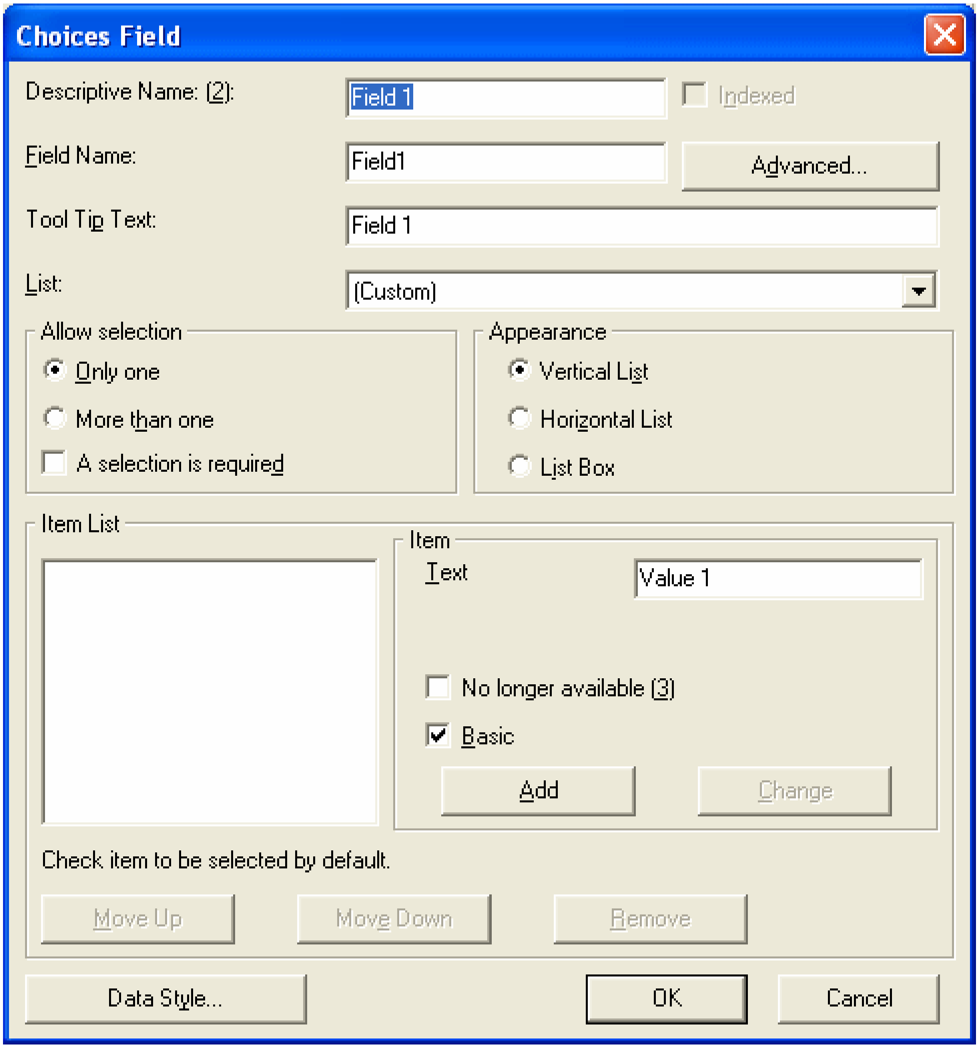
- You can limit the user’s choice to one item or many.
- All items appear on the screen, arranged horizontally or vertically

The following capabilities are available with a Select List field but not a Choices field.

- The user can only select one item.
- Only the default item appears on the screen. To the right of the field, a black down arrow appears (circled in red below). The user clicks the arrow to display all items and select one.



Dialog Box



Choices Field

Descriptive Name: (2): Field 1

☐ Indexed

Field Name: Field1

Tool Tip Text: Field 1

List: (Custom)

Allow selection

● Only one

○ More than one

☐ A selection is required

Appearance

● Vertical List

○ Horizontal List

○ List Box

Item List

Item

Text: Value 1

☐ No longer available (3)

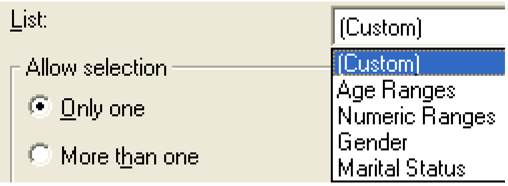
☑ Basic

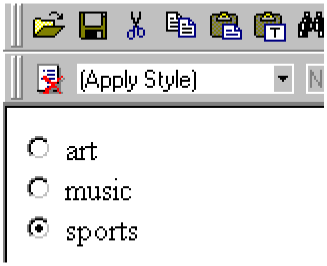
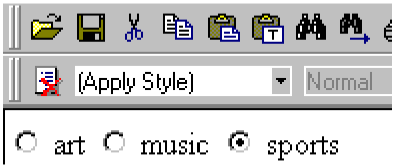
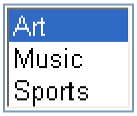
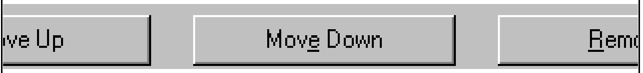
Check item to be selected by default.

Advanced...
Add
Change
Move Up
Move Down
Remove
Data Style...
OK
Cancel

Fields on the Choices Dialog

Field	**Description**
Descriptive Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]\\|`~) into this field. *See Also:* ”The Name Field’s Default Value” on page 215
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The **Indexed** field may or may not appear, depending on how your administrator set up your system.
Field Name	Enter the field’s element name. This defines the field in the XML.
Advanced	See ”Advanced Button” on page 268
Tool Tip Text	Enter the text that appears when a user hovers the cursor over this choice list.

Field	Description
List	**Using a Standard List** If you want to use one of **Ektron CMS400.NET**'s standard lists, click the black down arrow next to the field to see a list of options.  List: (Custom) Allow selection Only one More than one (Custom) Age Ranges Numeric Ranges Gender Marital Status If you choose a standard list, it appears in the lower half of the screen. You cannot change its values. **Creating a Custom List from Scratch** To create your own set of list options, accept the default value, **Custom**. Then, enter the values using the **Item** field. **Initializing a Custom List from a Standard List** You can begin with a standard list then customize it as desired. To do so, follow these steps. 1. In the **List** field, select the list you want to begin with. 2. Return to the **List** field and change the value to **Custom**. 3. The list items appear in the **Item List** field, but are not greyed out. You can add to, modify, or remove them as needed.
Allow selection	Click **More than one** to let the data entry user select more than one item on the data entry screen. Otherwise, click **Only one**. For example, if you click **More than one**, and the choices are: music, art, sports, the user could select all three choices. If you click **Only one**, the user can only select one. **A selection is required -** Check this box if the user must select at least one list item.

Field	Description
Appearance	Click **Vertical List** to arrange the choices vertically. The user selects items by clicking the radio button.  (Apply Style) N ○ art ○ music ● sports Click **Horizontal List** to arrange the choices horizontally.  (Apply Style) Normal ○ art ○ music ● sports Click **List Box** to arrange the choices vertically in a box. The user selects items by clicking inside the box.  Art Music Sports
Item List	This section of the screen displays the items that you enter in the **Value** and **Text** fields. Buttons near the bottom of the screen let you remove and rearrange items from this list.  ve Up Move Down Remo Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox. Note that if **Only One** is selected under **Allow selection** (above), only one item can be selected.

Field	Description
Value	Enter the value that is collected when the data entry user selects this item. For example, if **Interests** appears in the Name field, and you want `music` to be collected when the data entry user selects this item and saves the page, enter **music** here.
No longer available	See ”No longer available” on page 244
Basic	Check this box if you want this item’s XML tag to be the same as its name on the screen. If you want the XML tag to be different from the screen name, uncheck this box. When you do, a new field appears, **Value**. Enter the XML tag into this field.
Data Style	See ”The Data Style Field” on page 274

Select List

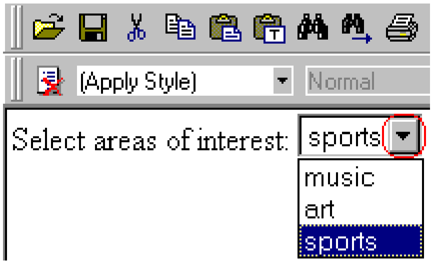
A Select List field is similar to a Choices field. The biggest differences are

- all responses appear in a drop-down box instead of appearing separately
- the user can only select one response. If you want to allow the user to select more than one response, use a choice list instead. *See Also:* ”Choices” on page 235

To see the choices, click the down arrow on the right side of the box (circled below).

See Also: ”Choices Field vs. Select List Field” on page 235

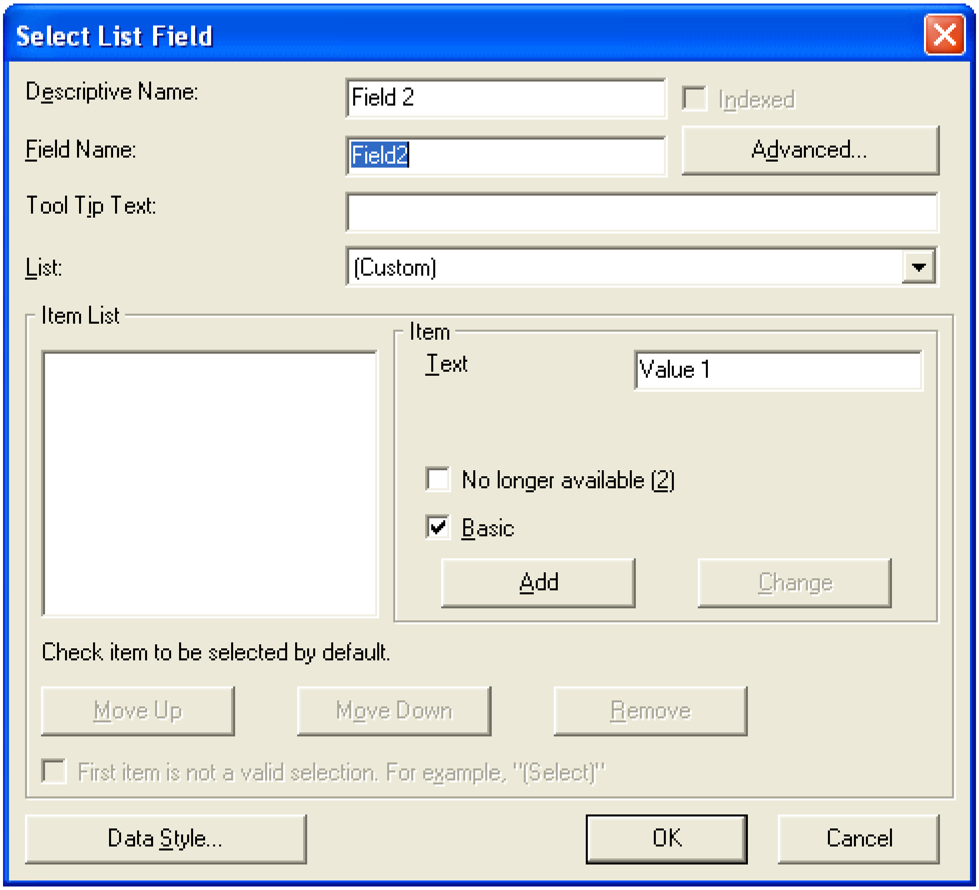
For example:


(Apply Style)
Normal

Select areas of interest: sports

music
art
sports

Dialog Box


Select List Field
Advanced...
Item List
Item
Add
Change
Move Up
Move Down
Remove
Data Style...
OK
Cancel

Descriptive Name: Field 2

☐ Indexed

Field Name: Field2

Tool Tip Text:

List: (Custom)

Text: Value 1

☐ No longer available (2)

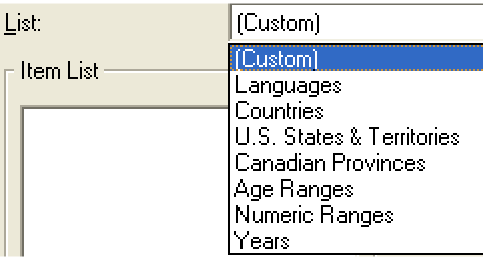
☑ Basic

Check item to be selected by default.

☐ First item is not a valid selection. For example, "(Select)"

Fields on the Select List Field Dialog

Field	**Description**
Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]\\|`~) into this field. *See Also:* ”The Name Field’s Default Value” on page 215
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The **Indexed** field may not appear, depending on how your administrator has set up your system.
Field Name	Enter the field’s element name. This defines the field in the XML.
Advanced	See ”Advanced Button” on page 268
Tool Tip Text	Enter the text that appears when a user hovers the cursor over this list.

Field	Description
List	**Using a Standard List** If you want to use one of **Ektron CMS400.NET**'s standard lists, click the black down arrow next to this field to see your choices.  List: Item List (Custom) (Custom) Languages Countries U.S. States & Territories Canadian Provinces Age Ranges Numeric Ranges Years If you choose a standard list, it appears in the lower half of the screen. You cannot change its values. *See Also:* "Creating Your Own Predefined List" on page 245 and "Creating a Dynamically Populated Choice List" on page 246 **Creating a Custom List from Scratch** To create your own set of list options, accept the default value, **Custom**. Then, enter the values using the **Item** field. **Initializing a Custom List from a Standard List** You can begin with a standard list then customize it as desired. To do so, follow these steps. 1. In the **List** field, select the list you want to begin with. 2. Return to the **List** field and change the value to **Custom**. 3. The list items appear in the **Item List** field, but are not greyed out. You can now add to, modify, or remove them as needed.
Item List	This section of the screen displays the items that you enter in the **Value** and **Text** fields. Buttons let you remove items from this list as well as rearrange them. Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox.

Field	Description
Value	Enter the value that is collected when the data entry user selects this item. For example, if **Interests** appears in the Name field, and you want `music` to be collected when the data entry user selects this item and saves the page, enter **music** here.
Text	Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use **eWebEditPro+XML**’s formatting capabilities to modify its size, font, color, and other attributes.
No longer available	Use this field to indicate that an item can no longer be selected by a user in data entry mode. For example, you have a list of team members. If one member leaves, check **No longer available** rather than removing the member. If checked, the item only appears in data entry mode *if* a document contained the item when the check is applied. This field lets you render a value obsolete without invalidating an existing XML document. **Exception!** -- If multiple selections are allowed in a Choices Field and the item is selected in design mode, it appears in data entry mode but is disabled (grayed-out). This lets you force an item's value into the XML document.
Basic	Check this box if you want this item’s XML tag to be the same as its name on the screen. If you want the XML tag to be different from the screen name, uncheck this box. When you do, a new field appears, **Value**. Enter the XML tag into this field.
First item is not a valid selection. For example, "(Select)"	Check here if the first item on the list is not a valid value but instead text that prompts the user to respond to the field. An example of such text for a list of states would be **Select a state**. If you check this box and the user selects the first value on the list (most likely by default), an error message appears when he tries to save the screen.

Field	Description
Caption	Enter text to guide the user's selection. For example, if the user needs to select an area of interest, the caption could be **Choose your interests**. Note: The **Caption** field only appears on this dialog when you create the Select List field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.
Data Style	See "The Data Style Field" on page 274

Creating Your Own Predefined List

An administrator can create a predefined list of options to appear when a user is inserting a **Select List** field.

Advantage of Creating Custom List in Configuration File

Although a user can create a custom list of choices via the **Item List** area of the Select List Field dialog, that list is only available in that field of that screen. If the user wants to insert the same list in another section of the screen or a different screen, he must re-enter all options.

However, if you create a list according to the steps below, your custom list is stored in the configuration file (along with the standard choice lists, such as **Countries**). As a result, any user connected to your server can insert the list into any **Select List** field on any screen.

Creating the List

To insert a custom list of choices, follow these steps.

1. Open the eWebEditPro+XML configuration file. If you are working with eWebEditPro+XML, this is `webroot/ewebeditpro5/config.xml`.

   If you are working with CMS400, this is `webroot/Workarea/ewebeditpro/cms_config.aspx`.

2. Insert the name of your list into the following section of the configuration file. In the sample below, the custom list is `MyNewList`.

```
<selections name="datalists">
     <listchoice data="MyNewList">My New List</listchoice>
    <listchoice data="languages" localeRef="sLanguages" />
    <listchoice data="countries" localeRef="sCountries" />
    <listchoice data="USPS-US" localeRef="sUSState" />
    <listchoice data="USPS-CA" localeRef="sCaPrvnc" />
    <listchoice data="ageRange" localeRef="sAgeRng" />
    <listchoice data="numRange" localeRef="sNumRng" />
    <listchoice data="years" localeRef="sYrs" />
</selections>
```

3. Find the `<dataentry>` element of the configuration file.
4. Insert the new list within that element. Below is an example of such a list.

```
 <datalist name="MyNewList">
         <schema datatype="string" />
    <item default= "true" value= "Green" />
    <item value= "Red" />
    <item value= "Blue" />
</datalist>
```

Note that

- the `<datalist>` element contains the list
- its `name` must match the `listchoice data` value you entered in Step 2
- you can specify a data type. Values are string, nonNegativeInteger, date, decimal.
- as shown in the third line above, you can specify a default value

Creating a Dynamically Populated Choice List

You specify the elements of the custom options list described above in the configuration data. You can also create a dynamically-populated list from any XML source. The source can be on your server or on a remote Web site. Follow these steps to add a dynamic data list to the **Select List** field.

1. Follow steps 1 through 3 in ”Creating the List” on page 245.

2. Insert a new datalist item according to this pattern.

```
<datalist name="MyNewList" src="{url to xml data source}" select="{xpath to data item
element}" captionxpath="{relative xpath to data item's display text}" valuexpath="{relative
xpath to data item's value}">
```

WARNING! The `datalist name` must match the `listchoice data` attribute.'

For example

```
<datalist name="USPS-CA" src="[eWebEditProPath]/uspsca.xsd" select="/xsd:schema/
xsd:simpleType/xsd:restriction/xsd:enumeration" captionxpath="xsd:annotation/
xsd:documentation" valuexpath="@value" namespaces="xmlns:xsd='http://www.w3.org/2001/
XMLSchema'" validation="select-req">
```

In this example, the data list is stored in the uspsca.xsd file, located within the `ewebeditpro` folder. However, it could be in any XML data source.

Calculated Field

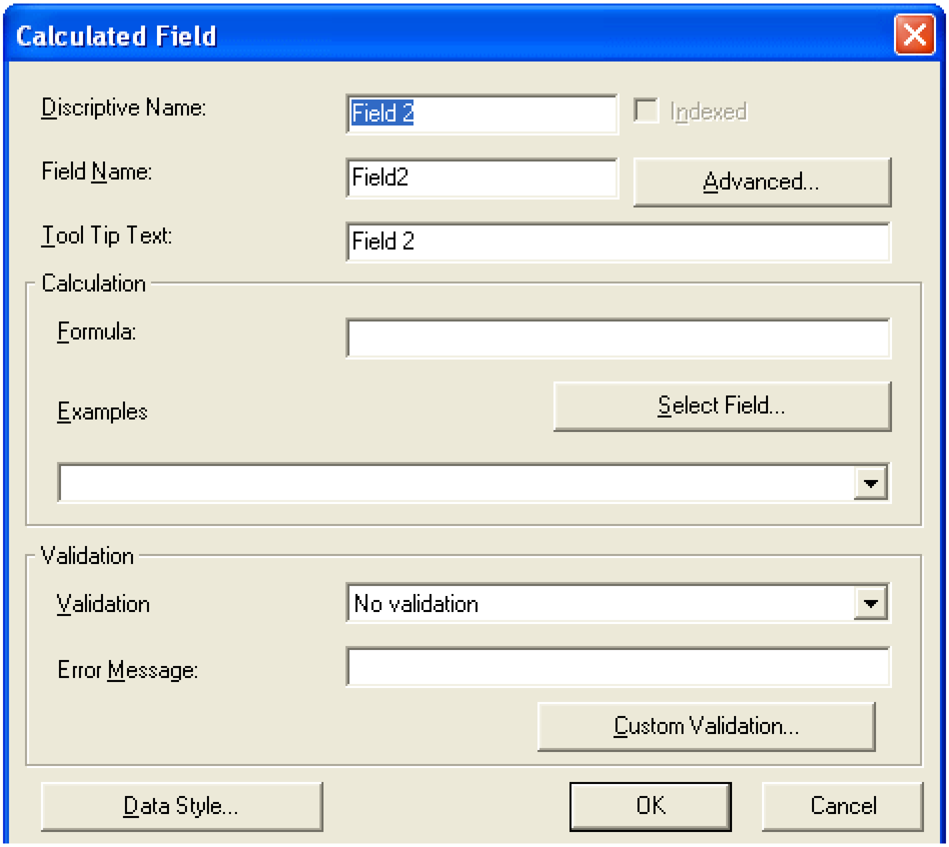
Use a calculated field to perform a calculation based on values in other fields. For example, if your screen collects mortgage information, you could create one field to collect the mortgage and interest payment and another to collect taxes and insurance. The calculated field could sum those two numbers and display the monthly payment.

You can validate a calculated field. For example, you can require a positive number between 100 and 1,000.

Calculated fields are display only -- users cannot edit them.

IMPORTANT! If a field will be referenced in a calculation, use the validation feature to require a value for that field. This forces the user to enter a number to be used in the calculation.

Dialog Box


Calculated Field
Indexed
Advanced...
Calculation
Formula:
Select Field...
Examples
Validation
Error Message:
Custom Validation...
Data Style...
OK
Cancel

Discriptive Name: Field 2

Field Name: Field2

Tool Tip Text: Field 2

Validation: No validation

Fields on the Calculated Field Dialog

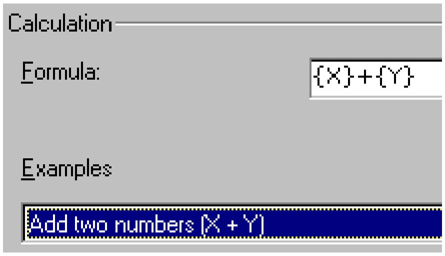
Field	Description
Descriptive Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field. *See Also:* "The Name Field's Default Value" on page 215

Field	Description
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The **Indexed** field may or may not appear, depending on how your administrator has set up your system.
Field Name	Enter the field’s element name. This defines the field in the XML.
Advanced	See ”Advanced Button” on page 268
Tool Tip Text	Enter the text that appears when a user hovers the cursor over this field.
Formula	Enter the calculation that this field will perform. *See Also:* ”Using the Formula Field” on page 250
Select Field	Click this button to select a field to reference in the calculation. For more information, see ”Using the Formula Field” on page 250.
Examples	Click the down arrow to the right of this field to see examples of calculations you can perform. When you select an example, it is copied into the **Formula** field. Note: Your system administrator can customize the examples. Instructions are provided in “The <cmddsgcalc> Command” in the Data Designer chapter of the Developer Reference Guide. *See Also:* ”Explanation of Examples” on page 252

Field	Description
Validation	Select the kind of validation to apply to this field. Your choices are: • **No validation** - the user's response is not checked • **Non-negative number (required)** - the result of the calculation must be a positive number If you assign to this field any value other than **No validation**, the field is surrounded by red dashes in Data Entry mode. If the user's response does not meet the validation criteria, the field remains surrounded by red dashes. Your system administrator determines if a user can save a screen with invalid data.
Error message	If you select **Non-negative number** above, insert text that appears on the screen if the user's response does not meet this criterion.
Custom Validation	See "Custom Validation" on page 275
Data Style	See "The Data Style Field" on page 274

Using the Formula Field

You can copy a sample calculation into the **Formula** field by clicking the **Examples** field and selecting an operation from the drop down list. For example, if you click **Examples Add two numbers {X}+{Y}**, **{X}+{Y}** appears in this field.



Formula: {X}+{Y}

Examples: Add two numbers (X + Y)

Next, replace the variables with fields on the screen. Be sure to select the curly brackets ({}) as well as the letter between them. Then, when the user enters data into those fields, the calculation is performed using the current field values.

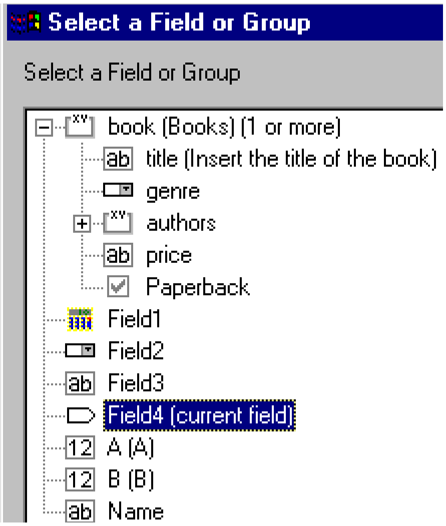
If a calculated field tries to perform a numerical calculation with a value that is blank or contains letters, `NaN` appears in the field. (`NaN` stands for “not a number.”)

If a calculated field tries to divide by zero, `Infinity` appears.

WARNING! If the user does not replace *all* variables with a field or a number, when the content is validated, validation will fail.

To do this, follow these steps.

1. Select the first variable to replace. To continue the example, select **{X}**.
2. Click the **Select Field** button. A screen appears listing appropriate fields on the Data Design screen.



Select a Field or Group
Select a Field or Group
book (Books) (1 or more)
title (Insert the title of the book)
genre
authors
price
Paperback
Field1
Field2
Field3
Field4 (current field)
A (A)
B (B)
Name

3. Select a field to replace **{X}**. When you do, the field name replaces **{X}** in the **Formula** field.

WARNING! If a variable appears more than once in a formula (for example, `{X} * number( {X} &lt;= {Y} ) + {Y} * number( {X} &gt; {Y})`, you only need to replace the first occurrence - **eWebEditPro+XML** replaces subsequent occurrences for you.

---

4. Continue replacing all variables in the formula.

Notes

- If an XML document contains several occurrences of a field that is referenced in a formula, the value is derived as follows:
  - When using the XPath functions `sum()` and `count()`, all values with the field name are considered. For example, a document includes three books whose prices are $10, $20 and $30. In this case, `sum`'s value is $60.
  - When using all other functions, the first value is used. For example, a document includes three books whose prices are $10, $20 and $30. If a calculation formula refers to `<price>`, its value is $10.
- You can replace a variable with a number instead of a field. For example, replace `{X} * {Y}` with `../price * 1.15`.
- The expression can be complex, such as `(round(Field1 * 0.80) + (1 div Field2)) - 2`.
- You can use a string expression that creates a text message. For example, to calculate a full name from its parts: `concat( title, ' ', givenname, ' ', familyname)`, which could produce “Dr. Jonathan Smythe”.

Referencing Other Calculated Fields

A calculated field can only reference other calculated fields that appear before it in a document. For example, a document collects a series of numbers.

- One calculated field counts the number of numbers.
- Another totals their values.
- A third computes the average by dividing the total by the count.

In this example, you must place the third field below or to the right of the first two fields. Calculated fields that are defined later in a document do not appear in the Select Field or Group dialog.

Explanation of Examples

The following table explains the standard examples that appear in the **Examples** drop-down list of the Calculated Field dialog. Note that your system administrator can customize the list, so it may not match what is below.

Example Field Text	Example Field Formula	Description
Add two numbers	{X} + {Y}	Add the value in the first field (X) to the value in the second field (Y).
Subtract two numbers	{X} - {Y}	Subtract the value in the second field (Y) from the value in the first field (X).
Multiply two numbers	{X} * {Y}	Multiply the value in the first field (X) by the value in the second field (Y).
Divide two numbers	format-number({X} div {Y} ,'0.###')	Divide the value in the first field (X) by the value in the second field (Y).
Format as a percentage	format-number({X} div {Y} ,'#0%')	Determine what percentage one number (X) is of another (Y). For example, if {X}=10 and {Y}=100, the result of the calculation is 10%.
Absolute value of a number	{X} * (number({X} &gt; 0)*2-1)	The number regardless of the sign (negative or positive).
Minimum of two numbers	{X} * number({X} &lt;= {Y}) + {Y} * number({X} &gt; {Y})	The smaller of two field values.
Maximum of two numbers	{X} * number({X} &gt;= {Y}) + {Y} * number({X} &lt; {Y})	The larger of two field values.
Zero if subtraction is negative	({X} - {Y}) * number(({X} - {Y}) &gt; 0)	Subtract one number (Y) from another (X). If the difference is less than zero, insert zero.
Multiply by another number if checkbox is checked	`{X} * ( {Y} * number( {Z} ='true') + number( {Z} !='true'))`	X is a numeric field. Y is another numeric field to multiply by X if a checkbox is checked. Z is the checkbox. For example, {X}=2 and {Y}=3 • if the checkbox is checked, the result is 2 * 3, which is 6 • If the checkbox is not checked, the result is 2

Example Field Text	Example Field Formula	Description
Round a decimal number	round({X})	Rounds the number to the nearest integer. For example, `round(3.14)`. The result is 3.
Round up a decimal number	ceiling({X})	Returns the smallest integer that is greater than the number. For example, `ceiling(3.14)`. The result is 4. For negative numbers: ceiling(-3.14) = -3
Round down a decimal number	floor({X})	Returns the largest integer that is not greater than the number argument. . For example, `floor(3.14)`. The result is 3. For negative numbers: floor(-3.14) = -4
Format decimal number 0.00	format-number({X} ,'0.00')	Rounds a value either up or down to the hundredth place. As examples, 100 becomes 100.00, and 3.14159265 becomes 3.14.
Total numeric values from multiple fields	sum({X}[text()] | {Y}[text()] | {Z}[text()]))	Add the values in all referenced fields. Only elements that contain a value are summed. Empty elements are excluded.

Example Field Text	Example Field Formula	Description
Total a list of numeric values	sum({X}[text()])	Total all values in a single repeating field. Here’s an example. Plain Text Field properties Name: Miles Allow: more than one Validation: non-negative whole number XML Data

Total a list of numeric values

```
<root>
  <Miles>89</Miles>
  <Miles>12</Miles>
  <Miles>23</Miles>
  <Miles>19</Miles>
</root>
```

sum(Miles) equals 89+12+23+19=143

Only elements that contain a value are summed. Empty elements are excluded.

Example Field Text	Example Field Formula	Description

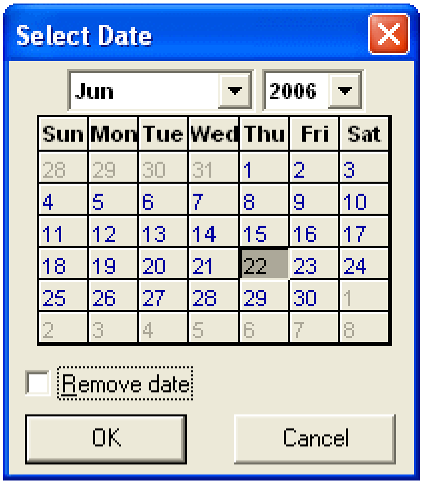
Average a list of numeric values	format-number(sum({X}[text()]) div count({X}),'0.###')	Calculate the average of all values in a single repeating field.
		To continue the example from the **Total a list of numeric values field** (above):
		Plain Text Field properties
		Name: Miles
		Allow: more than one
		Validation: non-negative whole number
		XML Data
		`<root>`
		`  <Miles>89</Miles>`
		`  <Miles>12</Miles>`
		`  <Miles>23</Miles>`
		`  <Miles>19</Miles>`
		`</root>`
		Average=89+12+23+19=143
		divided by the number of values (4)= 35.75
		Only elements that contain a value are summed. Empty elements are excluded.

Count the number of values in a list	count({X})	Calculate the number of values in a single repeating field.
		To continue the example from the **Total a list of numeric values field** (above):
		Plain Text Field properties
		Name: Miles
		Allow: more than one
		Validation: non-negative whole number
		XML Data
		`<root>`
		`  <Miles>89</Miles>`
		`  <Miles>12</Miles>`
		`  <Miles>23</Miles>`
		`  <Miles>19</Miles>`
		`</root>`
		Count = 4

Example Field Text	Example Field Formula	Description
Lowercase text	translate({X} ,'ABCDEFGHIJKLMNOPQRSTUVWXYZ','abcdefghijklmnopqrstuvwxyz')	Replace all uppercase characters with the lowercase version of that character
Uppercase text	translate({X} ,'abcdefghijklmnopqrstuvwxyz','ABCDEFGHIJKLMNOPQRSTUVWXYZ')	Replace all lowercase characters with the uppercase version of that character
Remove extra spaces	normalize-space({X})	Remove extra space characters from content\
Concatenate text	concat({X} , ' ' , {Y})	Link text strings together into a single string. For example, `concat('The',' ','XML')` yields `The XML.`
Size of a text string	string-length({X})	Count the number of characters in a selected field's value. For example, if the referenced field's value is Hello, string-length = 5.

Calendar Field

Insert a calendar field when you want the end user to enter a date. The user must click a date from an interactive calendar.

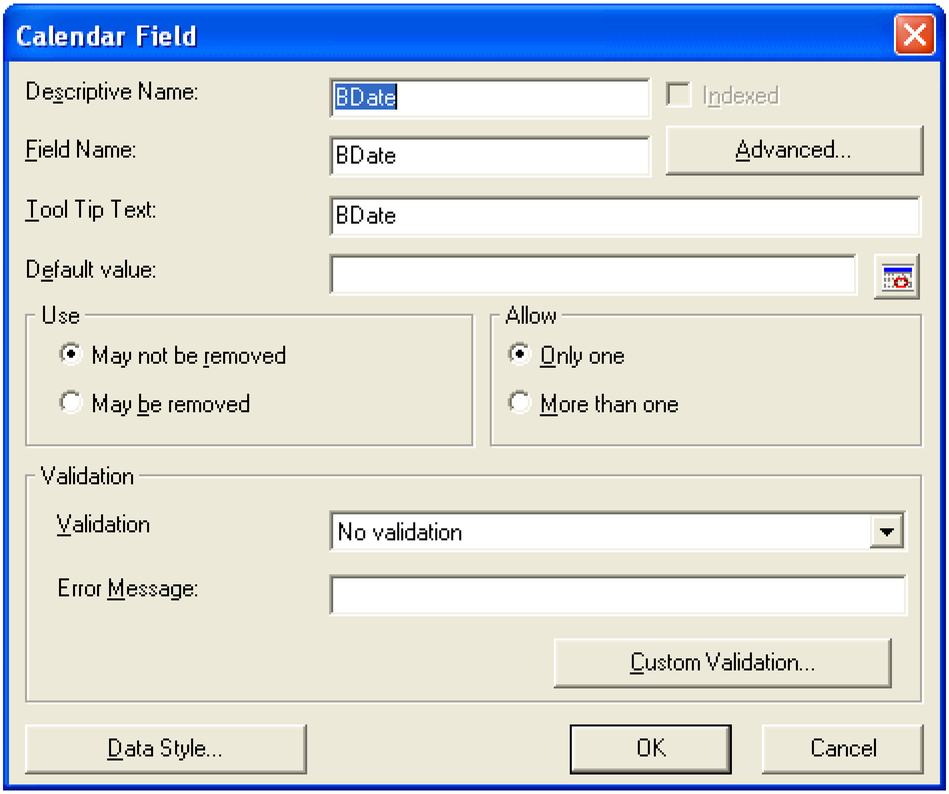


Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Because users cannot enter digits, a standard date format is ensured.

The date is stored as a standard XML date (in the format yyyy-mm-dd), and localized to the computer of the user viewing it.

Dialog Box



Calendar Field

Descriptive Name: BDate

☐ Indexed

Field Name: BDate

Tool Tip Text: BDate

Default value:

Use

● May not be removed

○ May be removed

Allow

● Only one

○ More than one

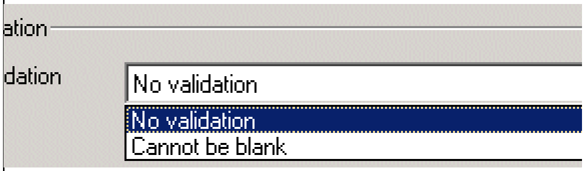
Validation

Validation: No validation

Error Message:

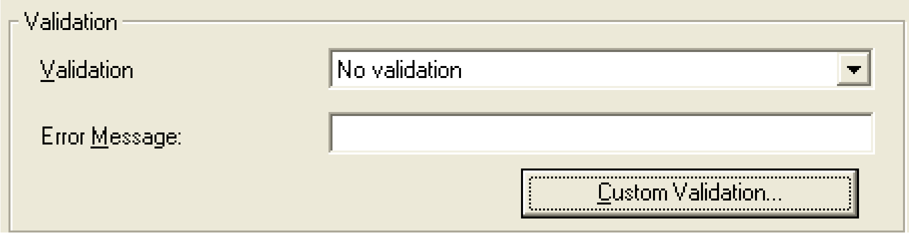
Fields on the Calendar Field Dialog

Field	Description
Descriptive Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]\\|`~) into this field. *See Also:* ”The Name Field’s Default Value” on page 215
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The **Indexed** field may or may not appear, depending on how your administrator has set up your system.
Field Name	Enter the field’s element name. This defines the field in the XML.
Advanced	See ”Advanced Button” on page 268
Tool Tip Text	Enter the text that appears when a user hovers the cursor over this field.
Default value	If you want this screen to have a default date when the user first sees it, click the calendar icon to the right and select a date. The user can change the date in Data Entry mode. Note: If you enter a default date, you cannot later remove it. You can change it. If necessary, you can delete the field and enter a new one.
Use	See ”The Use Field” on page 272
Allow	See ”The Allow Field” on page 273

Field	Description
Validation	If you want to require the user using the calendar to enter a response, click the down arrow to the right of this response field and select **Cannot be blank**.  ation dation No validation No validation Cannot be blank
Error Message	If you select **Cannot be blank** above, insert text that appears on the screen if the user's response does not meet this criterion.
Data Style	See "The Data Style Field" on page 274
Custom Validation	See "Custom Validation with a Calendar Field" on page 260
Data Style	See "The Data Style Field" on page 274

Custom Validation with a Calendar Field

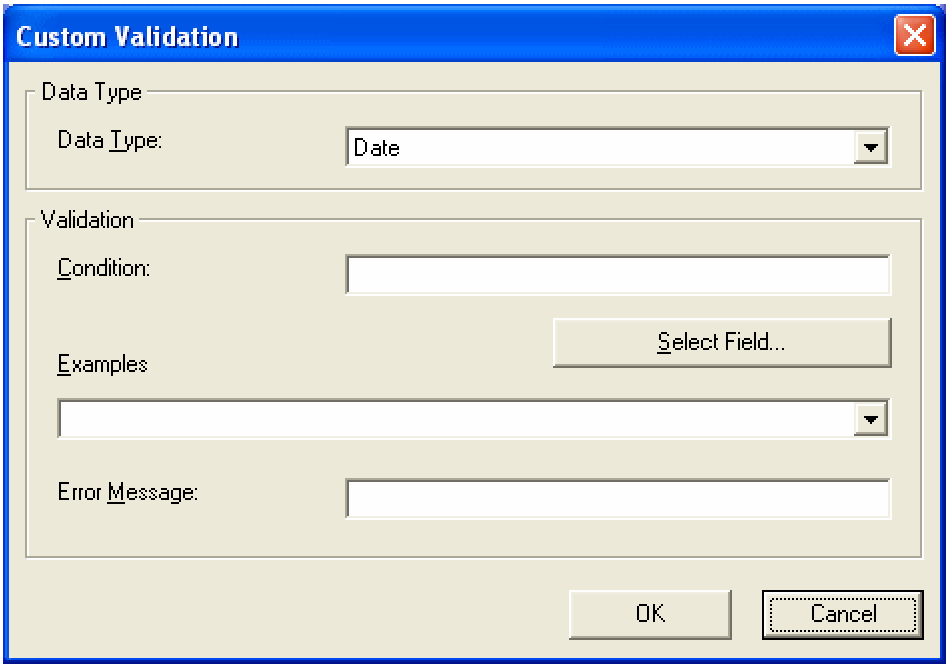
The Calendar Field dialog features a Custom Validation button (illustrated below).


Validation
Validation
No validation
Error Message:
Custom Validation...

When you click the button, the Custom Validation screen appears. The screen can ensure the user's input is greater or less than the date you are inserting on the Data Design screen.

You can compose an error message that appears if the user's response fails to meet the criteria. Your system administrator determines if a user can save the invalid data.

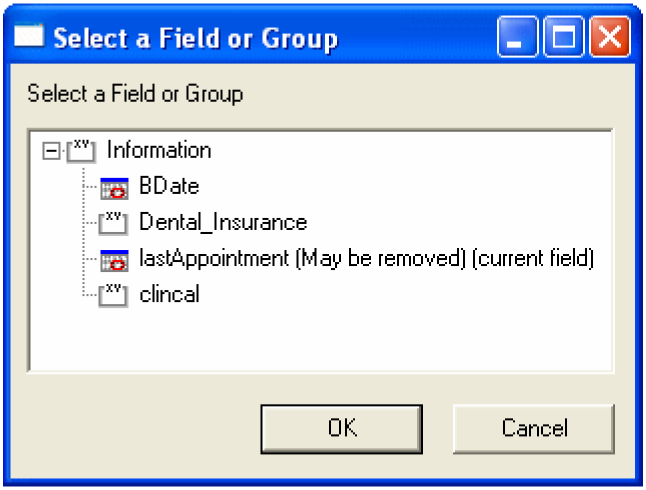
When the **Custom Validation** button is clicked, the Custom Validation dialog appears.



Custom Validation
Data Type
Data Type:
Date
Validation
Condition:
Select Field...
Examples
Error Message:
OK
Cancel

- The **Data Type** field shows **Date**.
- The **Condition** field displays the validation logic.
- The **Examples** drop-down list shows validation expressions that you can apply to the field.
- Any **Error Message** displays in Data Entry mode when the user inserts an invalid value.

When the **Select Field** button is clicked, the Select a Field or Group dialog appears.

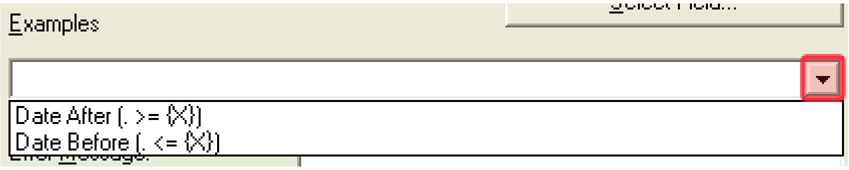

Select a Field or Group
Select a Field or Group
Information
BDate
Dental_Insurance
lastAppointment (May be removed) (current field)
clincal
OK
Cancel

This dialog displays fields that can be inserted into the **Condition** field. Not all field types are listed. You must choose calendar type field (note the calendar to the left of these fields.)

Example of Creating Custom Validation

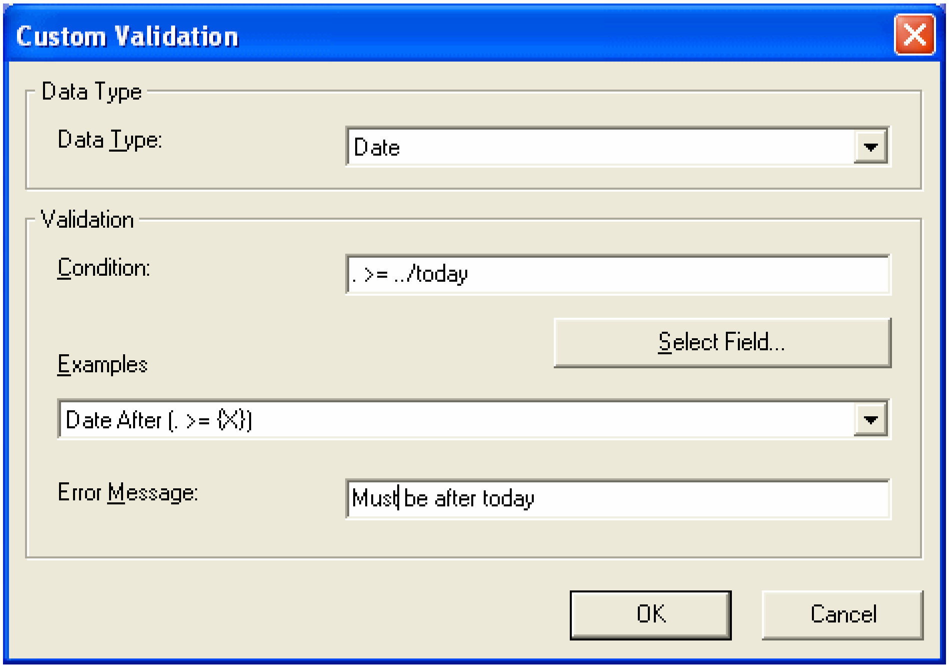
As an example of custom validation, assume that a field collects the date when a patient's health insurance policy expires. You want to make sure the date is later than today. To accomplish this, follow these steps.

1. Create a calendar field that prompts for today's date.
2. Create another calendar field that prompts for a patient's health insurance policy expiration date.
3. While creating the second field, in the **Validation** section, click **Custom Validation**.
4. The Custom validation screen appears.
5. Click the down arrow to the right of the **Examples** field to see sample logic.


Examples
Date After (. >= {X})
Date Before (. <= {X})

6. Click **Date After (. >={X})**. This option lets you specify that the user's response must be later than a specified date.

7. In the **Condition** field, select **{X}** and click the **Select Field** button.
8. The Select Field or Group screen appears.
9. Select the field that prompts for today's date, which you created in Step 1.
10. That field replaces **{X}** in the **Condition** field.
11. Move the cursor to the **Error Message** field and compose an error message. For example: `Must be after today`.
12. Your screen should look like this.



Data Type: Date

Condition: . >= ../today

Date After (. >= {X})

Error Message: Must be after today

13. Press **OK** and return to the **Plain Text** field dialog.
14. Press **OK** to save that dialog and test the validation on the date field. To do this, switch to Data Entry mode and enter a date earlier than today to verify that validation works as expected.

Image Only Field

Use an Image Only field to place an icon on the screen, which the user in Data Entry mode can click to insert an image into the Web content. You can insert a default image if desired.

To let the user insert any file, such as a Microsoft Word document, use a File Link field. *See Also:* "File Link Field" on page 266

Using an Image Only Field in Data Entry Mode

In Data Entry mode, the image's caption appears, followed by a default image (if you specify one) and this icon: 🖼. When the user clicks the icon, this screens described in "Inserting Images" on page 46 appear. See that section for more information.

NOTE The user can only insert a file whose extension is defined within the `<validext>` element of the configdataentry.xml file. Your system administrator can help you do this.

Dialog Box

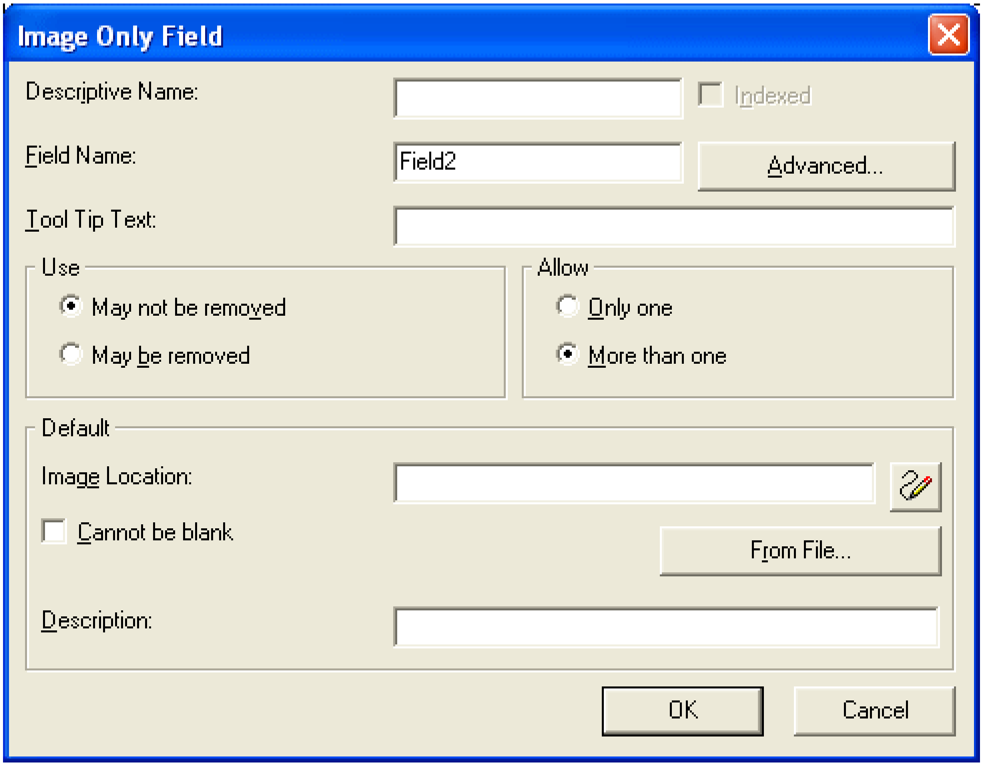


Image Only Field

Descriptive Name:
☐ Indexed
Field Name: Field2
Tool Tip Text:

Use
● May not be removed
○ May be removed

Allow
○ Only one
● More than one

Default
Image Location:
☐ Cannot be blank
Description:

Fields on the Image Only Dialog

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Descriptive Name</td><td>Enter the name of the field.
Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]\|`~) into this field.
See Also: ”The Name Field’s Default Value” on page 215</td></tr>
<tr><td>Indexed</td><td>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.
The **Indexed** field may or may not appear, depending on how your administrator has set up your system.</td></tr>
<tr><td>Field Name</td><td>Enter the field’s element name. This defines the field in the XML.</td></tr>
<tr><td>Advanced</td><td>See ”Advanced Button” on page 268</td></tr>
<tr><td>Tool Tip Text</td><td>Enter the text that appears when a user hovers the cursor over this field.</td></tr>
<tr><td>Use</td><td>See ”The Use Field” on page 272</td></tr>
<tr><td>Allow</td><td>See ”The Allow Field” on page 273</td></tr>
<tr><td>Default Image Location</td><td>If desired, you can insert a default image, which might be the most common image or simply a reminder that an image needs to be inserted.
To help find the image, click the **From File** button and navigate to image file.
You can only insert an image file whose extension appears between the `<validext>` tags in the configdatadesign.xml file. For example:
`<validext>gif,jpg,png,jpeg,jpe,doc,txt`
`</validext>`</td></tr>
<tr><td>Cannot be blank</td><td>If you want to require the user completing this field to enter a response, click inside this check box.</td></tr>
<tr><td>Description</td><td>Enter the image’s alt text. The Alt text appears when the user hovers the cursor over the image on the screen</td></tr>
</table>

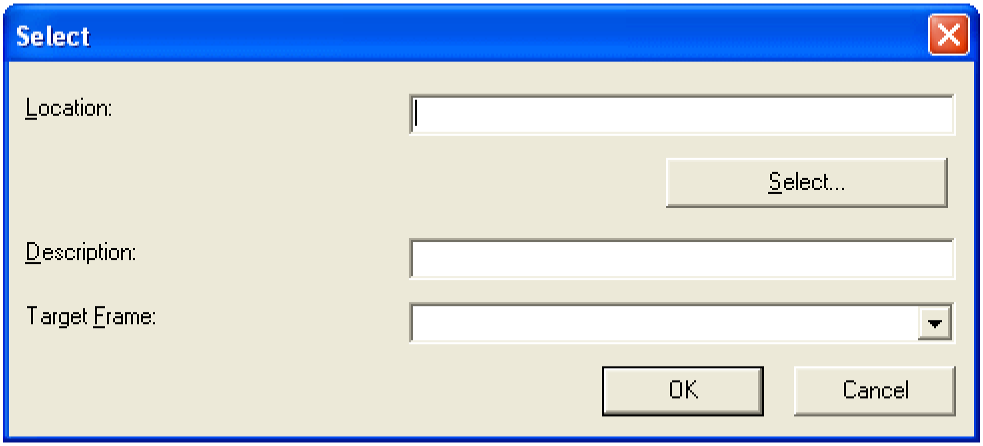
File Link Field

Use a File Link field to place an icon on the screen which the user in Data Entry mode can use to link to any file, such as a Microsoft Word document or a .gif image file. (You can also use an Image Only field to let the user insert an image. *See Also:* "Image Only Field" on page 263)

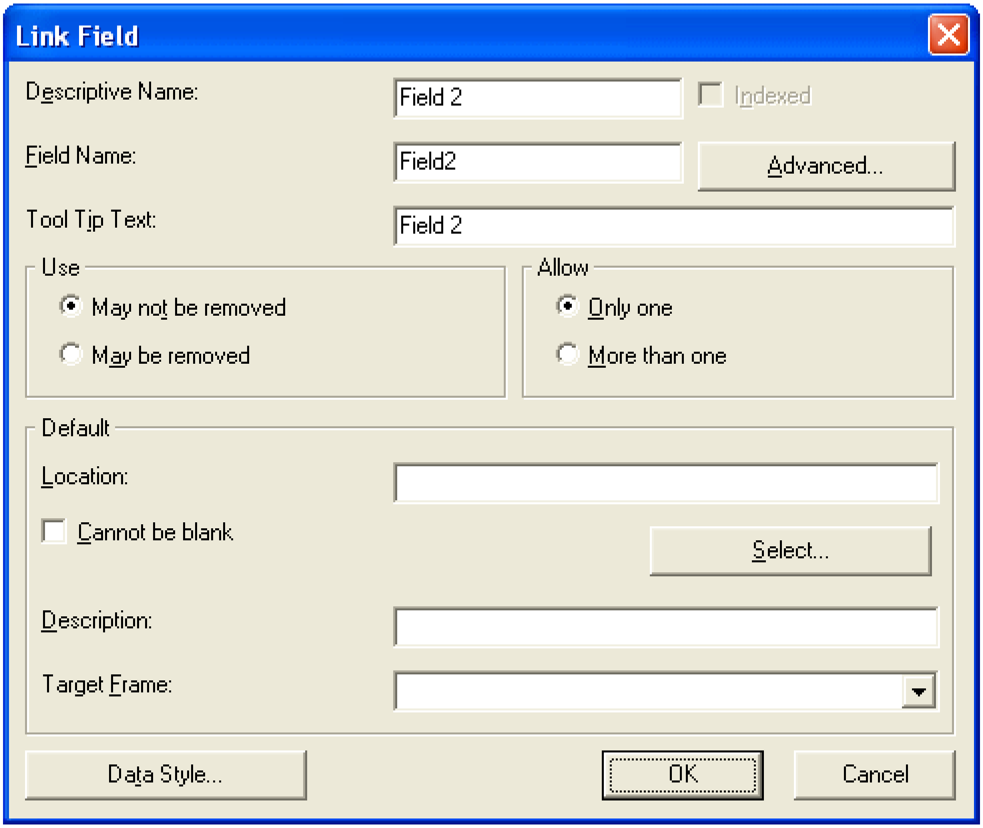
Using a File Link Field in Data Entry Mode

In Data Entry mode, the file link field's caption appears, followed by this icon: . When the user clicks the icon, this screen prompts the user to specify a file, a description, and a Target Frame.

NOTE The user can only insert a file whose extension is defined within the `<validext>` element of the configdataentry.xml file. Your system administrator can help you do this.



Dialog Box



Descriptive Name: Field 2 ☐ Indexed

Field Name: Field2

Tool Tip Text: Field 2

Use
● May not be removed
○ May be removed

Allow
● Only one
○ More than one

Default
Location:
☐ Cannot be blank
Description:
Target Frame:

Fields on the File Link Field Dialog

Field	Description
Descriptive Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field. *See Also:* "The Name Field's Default Value" on page 215

Field	Description
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The indexed field may or may not appear, depending on how your administrator has set up your system.
Field Name	Enter the field's element name. This defines the field in the XML.
Advanced	See "Advanced Button" on page 268
Tool Tip Text	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 272
Allow	See "The Allow Field" on page 273

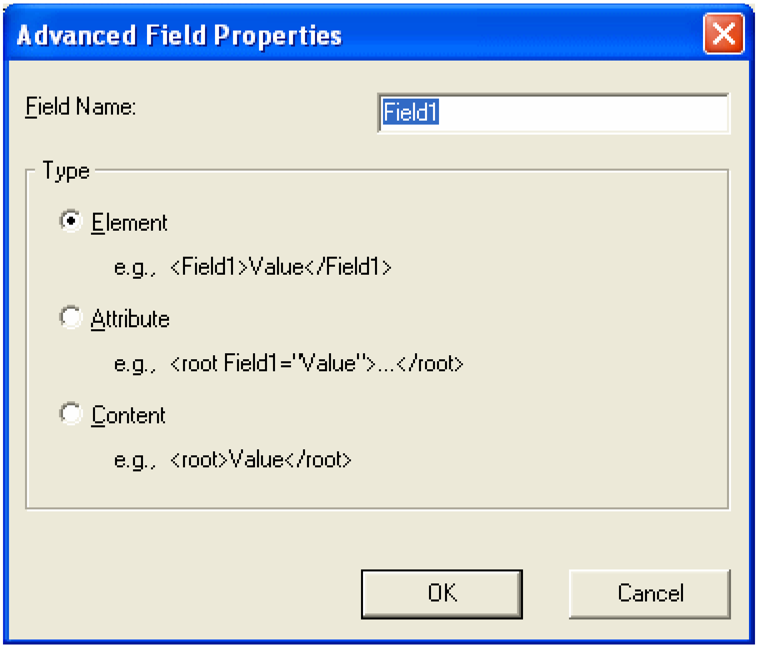
Default Location	If desired, you can insert a default link, which can be the most common link or simply an example.
	To help find the link, click the **Select** button and navigate to a file. You can only insert a file whose extension appears between the `<validext>` element of the configdatadesign.xml file. For example:
	`<validext>gif,jpg,png,jpeg,jpe,pdf,doc`
	`</validext>`

Cannot be blank	If you want to require the user completing this field to enter a response, click this check box.
Description	If desired, enter text that the user can click to access the linked file.
Target Frame	See "Changing the Destination Window" on page 141
Data Style	See "The Data Style Field" on page 274

Fields that Appear on Several Dialogs

Advanced Button

The **Advanced** button opens a dialog that lets you control the XML that the field produces.



Advanced Field Properties

Field Name: Field1

Type

● Element

e.g., <Field1>Value</Field1>

○ Attribute

e.g., <root Field1="Value">...</root>

○ Content

e.g., <root>Value</root>

The dialog lets you generate XML microformats made up of standard XHTML tags and attributes that contain a specific structure and values. The types are described below.

Type	This field defines	Example
Element	A unique tag. The user’s response to the field becomes its value.	`<Lastname>Rogers</Lastname>`
Attribute	An attribute of the containing field. The containing field is typically a Group Box. If you insert an **Attribute** field type, the Field Name field on the dialog box is grayed out. The field name and type can only be edited on the Advanced Field properties screen.	`<PtInformation Lastname="Rogers">` `</PtInformation>`

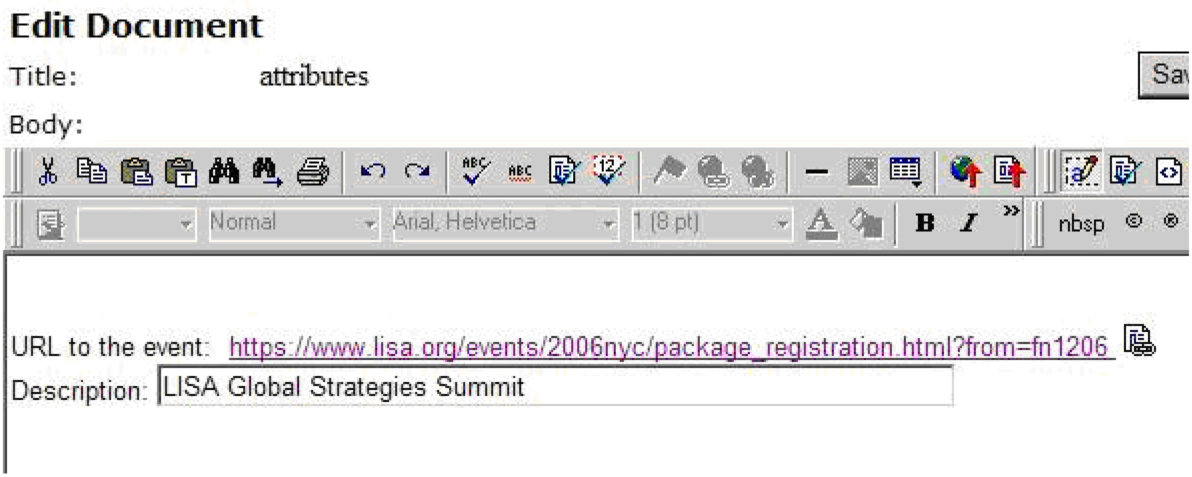
Type	This field defines	Example
Content	The content of the containing field, typically a Group Box. Note that, in this case, field name is not used. As a result, the **Field Name** field is is grayed out. Since most fields define their own content, this option is typically used to define a value to a Group Box that contains other fields defined as attributes. **IMPORTANT!** Only one Content type field is valid within a containing field. If you insert an **Content** field type, the Field Name field on the dialog box is grayed out. The field name and type can only be edited on the Advanced Field properties screen.	`<PtInformation>Rogers</PtInformation>`
Value (Only appears if field type is Image Only or File Link)	Whether the value is an element or plain text. **Value is an element** renders the field as • `<a href="url" title="text" target="frame">text</a>` for a file link • `<img src="url" alt="text" />` for an image **Value is plain text** renders the field as just the url.	

Sample Microformat

For example, the microformat of an event looks like this.

```
<span class="event">
<a class= "url"href="https://www.lisa.org/events/2006nyc/package_registration.html?from=fn1206
">LISA Global Strategies Summit</a>
</span>
```

The Data Entry view looks like this.



Edit Document

Title: attributes

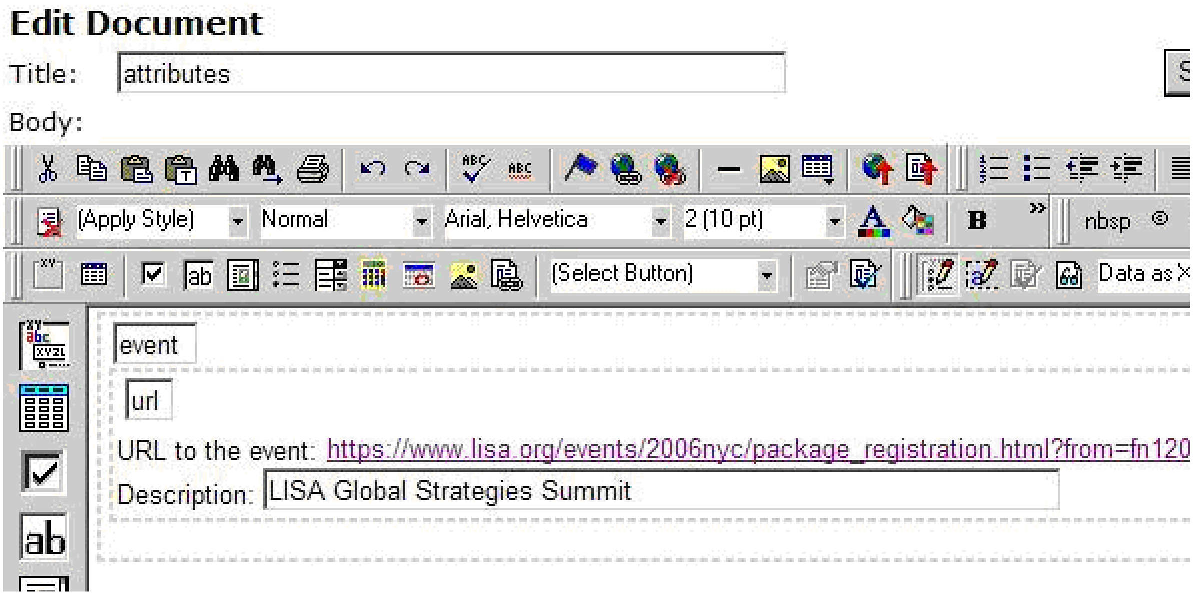
Body:

URL to the event: https://www.lisa.org/events/2006nyc/package_registration.html?from=fn1206

Description: LISA Global Strategies Summit

Sa
Normal
Arial, Helvetica
1 (8 pt)
B
I
nbsp

The Data Design view looks like this.



Edit Document

Title: attributes

Body:

event

url

URL to the event: https://www.lisa.org/events/2006nyc/package_registration.html?from=fn120

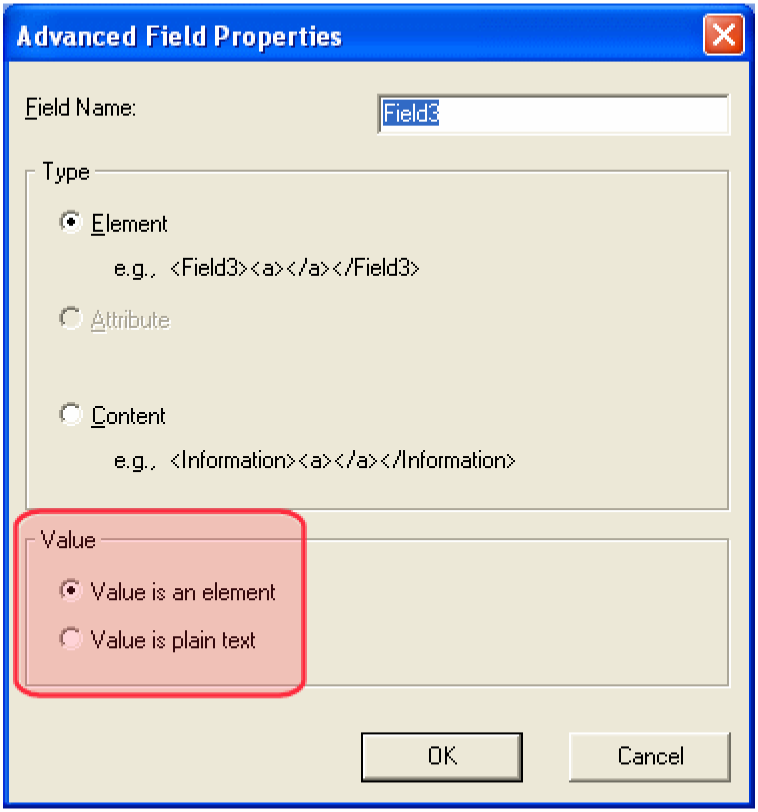
Description: LISA Global Strategies Summit

S
(Apply Style)
Normal
Arial, Helvetica
2 (10 pt)
B
nbsp
(Select Button)
Data as X

Additional Notes about Advanced Field Properties

- If the element is a group box or table, its type must be **Element** because it surrounds other elements.

- If the element is a Rich Area field, its type must be **Element** or **Content**.
- If the element is a link to an external file (either image or link filed), the Advanced Field Properties dialog has an additional field, **Value**. For more information, see ”Value” on page 270.



Field Name: Field3

Type

● Element

e.g., <Field3><a></Field3>

○ Attribute

○ Content

e.g., <Information><a></Information>

Value

● Value is an element

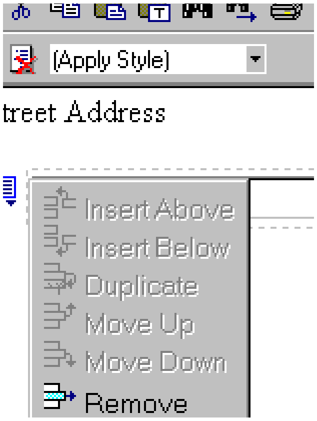
○ Value is plain text

The Use Field

Click **May not be removed** if this field must be included on the screen. Otherwise, click **May be removed**.

If you check **May be removed**, when this field appears on a data entry screen, an icon (▤) appears to the left of the field.

If the user clicks the icon, a dropdown menu provides an option to remove the field, as shown below.



If the user removes the field, + add *field display name* replaces the field on the data entry screen to indicate that the field was removed and can be added if necessary.

For example, if the field's display name is street address, and the user removes the field, + add Street Address appears in place of the field.

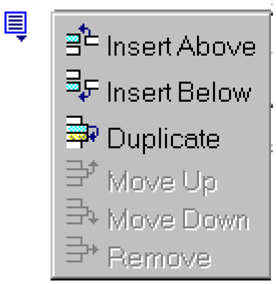
NOTE The menu icon (≣) can also indicate that the user can add instances of a field (see the Allow field, below). So, if a field is required, the icon could appear but omit a **Remove** option.

The Allow Field

Check **more than one** if you want to let the user entering data add instances of this field. Otherwise, check **only one**.

For example, if a screen is collecting names and addresses and you want to let the user enter several of them, check **more than one**.

If you check **more than one**, when this field appears in Data Entry mode, ≣ appears to the left of the field, as shown below.

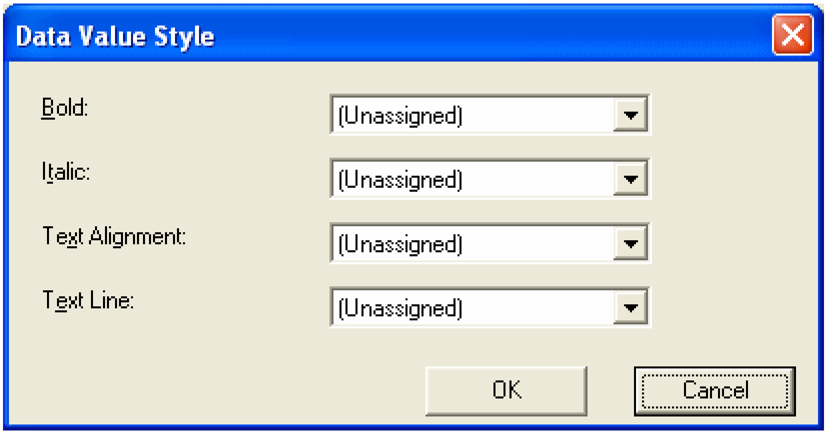

Insert Above
Insert Below
Duplicate
Move Up
Move Down
Remove

If the user entering data clicks ▤, a menu appears (shown above), which lets the user add instances of the field to the screen.

NOTE The menu icon (▤) can also indicate that the user can remove a field (see the Use field, above). So, even if a field allows only one instance, the icon could appear but the menu would only display **Remove**.

The Data Style Field

Click the Data Style button to apply formatting to the field that accepts user input. When you do, the following dialog appears.


Data Value Style
OK
Cancel

Bold: (Unassigned)
Italic: (Unassigned)
Text Alignment: (Unassigned)
Text Line: (Unassigned)

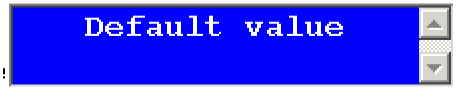
Use the dialog to assign the following formatting attributes to a user response field.

- Font style and size
- Bold and italic

- Text alignment (especially helpful for formatting dollar amounts in a plain text field)
- Underline or strikethrough
- Font color and/or background color

NOTE The configuration data controls a command's appearance on the toolbar and on the Data Style dialog. For example, if `<button command="cmdfontname" />` is removed from configdatadesign.xml, it disappears from the toolbar and the Data Style dialog.

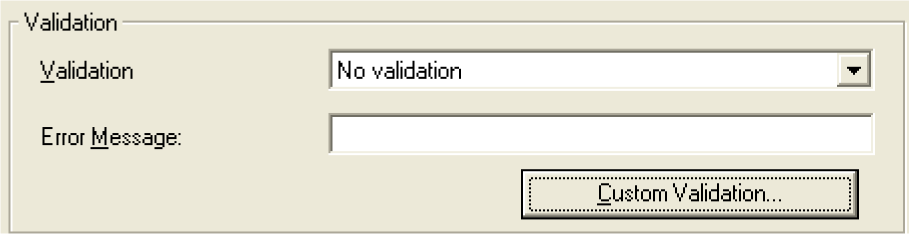
Below is an example of a response field whose font, size, alignment, background, and foreground colors were modified via this dialog.



Default value

Custom Validation

The Plain Text and Calculation field dialogs feature a validation section (illustrated below).



Validation

Validation: No validation

Error Message:

You can use the validation feature to ensure the following about the user’s input.

- The data type - the default types are
    - text
    - URL
    - whole number
    - decimal number

  - floating point number (Floating point includes scientific notation, so is appropriate for scientific numbers. Decimals usually suffice for business numbers.)

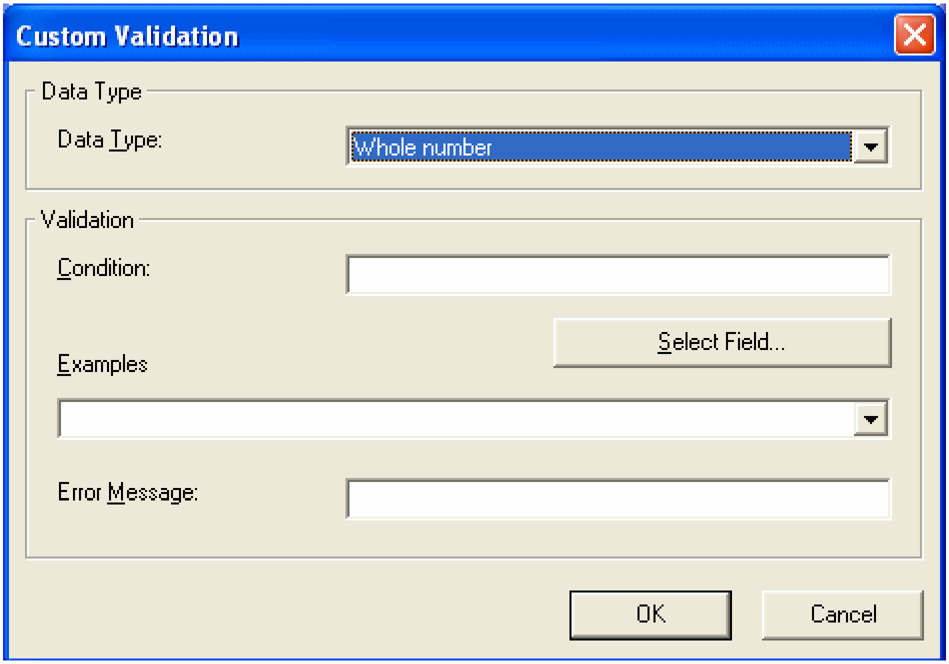
NOTE Your system administrator may customize the choices.

- The field value has one of the following relationships with another field, a number, or an expression - the default expressions are
  - between two values (either another field or a number that you specify)
  - less than
  - equal to
  - not equal to
  - maximum length (usually for text responses)

NOTE Your system administrator may customize the choices.

If the user's response fails to meet the criteria, you can compose an error message that appears when that happens. Your system administrator determines if a user can save the invalid data.

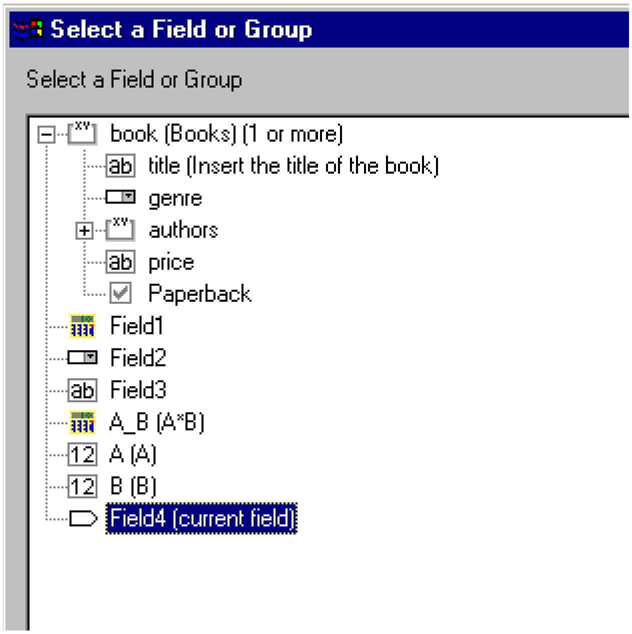
When the **Custom Validation** button is clicked, the Custom Validation dialog appears.


Custom Validation
Data Type
Validation
Condition:
Select Field...
Examples
Error Message:
OK
Cancel

Data Type: Whole number

- The **Data Type** field is the value’s basic type, for example, text number or URL.
- The **Condition** field displays the validation logic.
- The **Examples** drop-down list shows validation expressions that the data design creator can apply to the field.
- Any **Error Message** displays in Data Entry mode when the user inserts an invalid value.

When the **Select Field** button is clicked, the Select a Field or Group dialog appears.

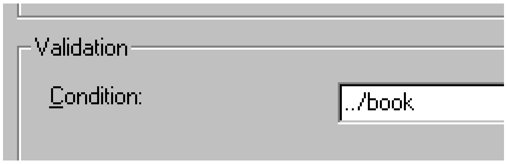


Select a Field or Group

Select a Field or Group

```
book (Books) (1 or more)
    title (Insert the title of the book)
    genre
    authors
    price
    Paperback
Field1
Field2
Field3
A_B (A*B)
A (A)
B (B)
Field4 (current field)
```

This dialog displays fields that can be inserted into the **Condition** field. Some field types, like the RichArea field, are not listed. *See Also:* ”Referencing Other Calculated Fields” on page 252



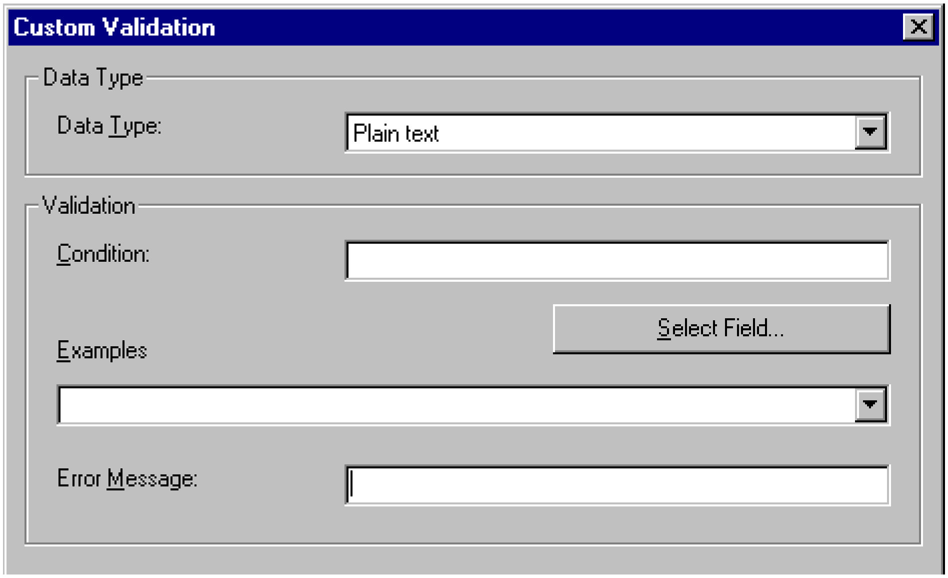
Validation

Condition: ../book

Example of Creating Custom Validation

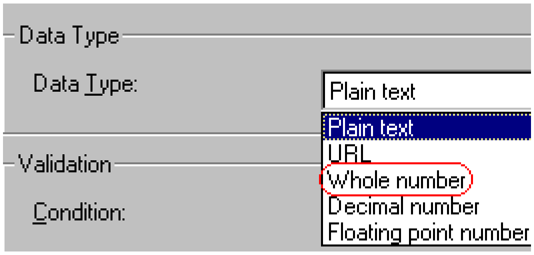
As an example of custom validation, assume that a field collects telephone numbers, and you want to make sure the user enters 10 digits. To accomplish this, follow these steps.

1. Click the Plain Text Field dialog and complete the screen.
2. In the validation section, click **Custom Validation**. The Custom validation screen appears.

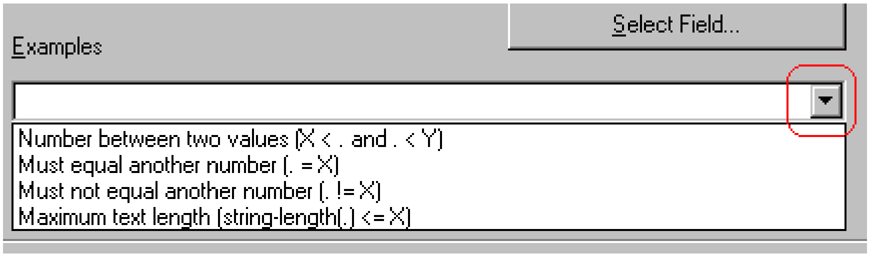

Custom Validation
Data Type
Validation
Condition:
Select Field...
Examples
Error Message:

Data Type: Plain text

3. In the **Data Type** field, select **Whole Number** from the drop down list. This ensures that the user can only enter digits.


Data Type
Data Type:
Plain text
Plain text
URL
Whole number
Decimal number
Floating point number
Validation
Condition:

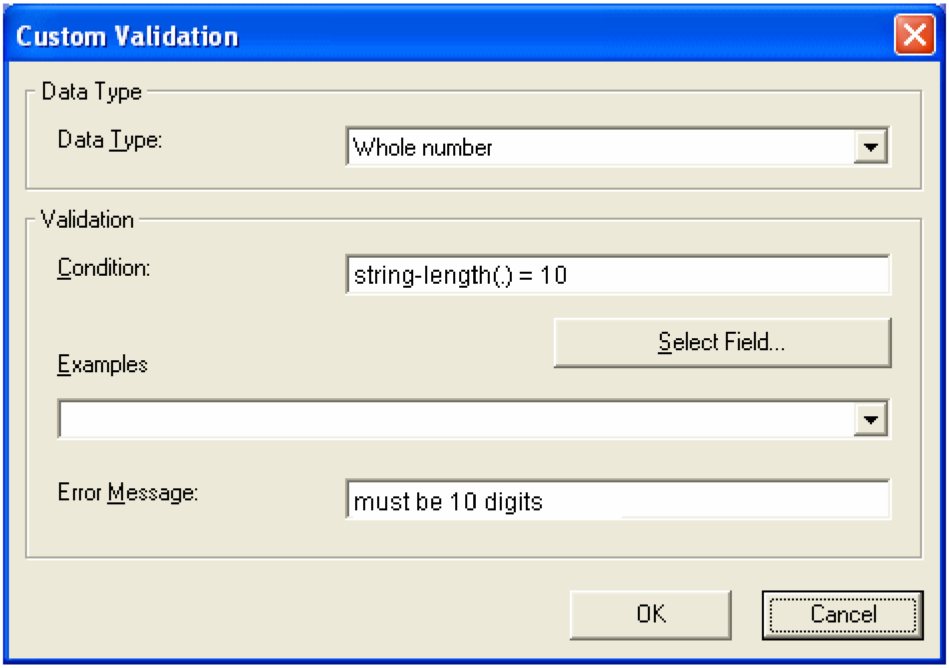
4. Click the down arrow to the right of the **Examples** field to see sample logic.


Select Field...
Examples
Number between two values (X < . and . < Y)
Must equal another number (. = X)
Must not equal another number (. != X)
Maximum text length (string-length(.) <= X)

5. Click **Maximum text length...** . This option lets you specify the length of the user's response.

6. `string-length(.) <= {X}` appears in the **Condition** field.

7. Since you want the user's input to equal 10, remove the less than sign (<) from the calculation. Now it looks like this: `string-length(.) = {X}`.
8. Replace the `{X}` with 10. Now, it looks like this: `string-length(.) = 10`.
9. Move the cursor to the **Error Message** field and compose a relevant error message. For example: `must be 10 digits`.
10. Your screen should look like this.



Data Type: Whole number

Condition: string-length(.) = 10

Error Message: must be 10 digits

11. Press **OK** and return to the **Plain Text** field dialog.
12. Press **OK** to save that dialog and test the validation on the phone number field. To do this, switch to Data Entry mode and enter more or fewer than 10 digits, as well as non-digit characters to verify that validation works as expected.

Managing HTML Forms

Ektron CMS400.NET's HTML Forms feature lets users create and maintain HTML forms to collect information from visitors to your Web site.

This section only describes the following technical topics relating to forms. For more information about using HTML forms, see the **Ektron CMS400.NET** User Manual.

- ”Form Permissions” on page 281
- ”Forms Must Use Template with FormBlock Server Control” on page 282
- ”Preparing the Server to Send email” on page 283
- ”Implementing a Form on a Web Page” on page 284
- ”Sending Data as XML” on page 285
- ”Redirecting Submitted Form Data” on page 293

Form Permissions

Folder Permissions

By default, form permissions are inherited from a form’s folder. To customize permissions for any folder that contains forms, access the folder under Content and assign permission as described in ”Setting Permissions for a Content Folder” on page 551.

Administrator Permissions

Similar to content, users in the administrator user group have full control over form features. You *must* be a member of the administrator group to:

- Add a form
- Edit a form
- Delete a form
- Assign content to a form

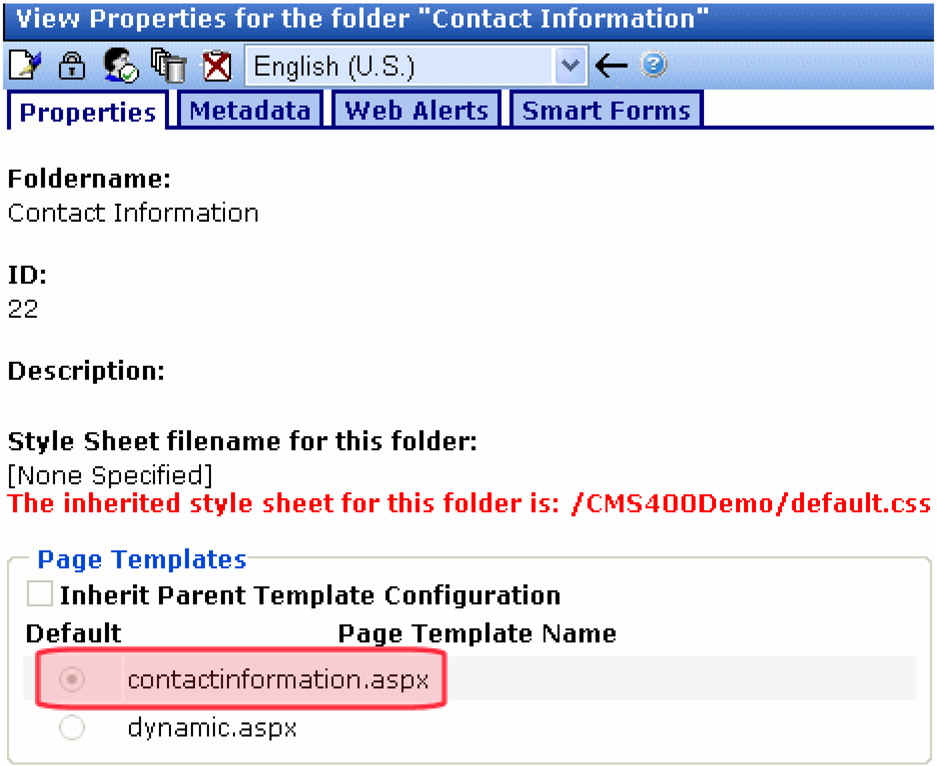
You may also perform all actions on a form’s content.

User Permissions

Users who are not members of the administrator user group can add, edit, delete, and restore form content if granted these permissions for the content folder or item.

Forms Must Use Template with FormBlock Server Control

HTML forms *must* reside in a folder whose template uses the FormBlock server control or function. In the Intranet sample site supplied with **Ektron CMS400.NET**, the Contact Information folder uses such a template, contactinformation.aspx (illustrated below).



Foldername:
Contact Information

ID:
22

Description:

Style Sheet filename for this folder:
[None Specified]
The inherited style sheet for this folder is: /CMS400Demo/default.css

Page Templates

☐ Inherit Parent Template Configuration

Default	Page Template Name
●	contactinformation.aspx
○	dynamic.aspx

You can modify this template as needed or create your own form template and assign it to any folder on its Folder Properties screen.

Since, by default, folders inherit properties from their parent folder, any new folders created under a parent folder use the correct template. Of course, you can break inheritance and assign a custom template for any folder.

Preparing the Server to Send email

Since email generated by forms is created on and sent from the server that hosts Ektron CMS400.NET, the server must be enabled to handle those responsibilities. To configure your Web server to send email, refer to Configuring email Notifications in the Ektron CMS400.NET Setup Manual.

WARNING! A form typically includes fields for source and destination email addresses, which are used to transmit the form via email. An unscrupulous attacker can post a form to a Ektron CMS400.NET page and send email *from* any email address *to* any email address. The attacker's form can be on an HTML page on a server that is remote from the Ektron CMS400.NET installation. Any **Ektron CMS400.NET** on a public site that includes the Ektron CMS400.NET sample site with the form.aspx page and properly configured SMTP can be used to send spam.

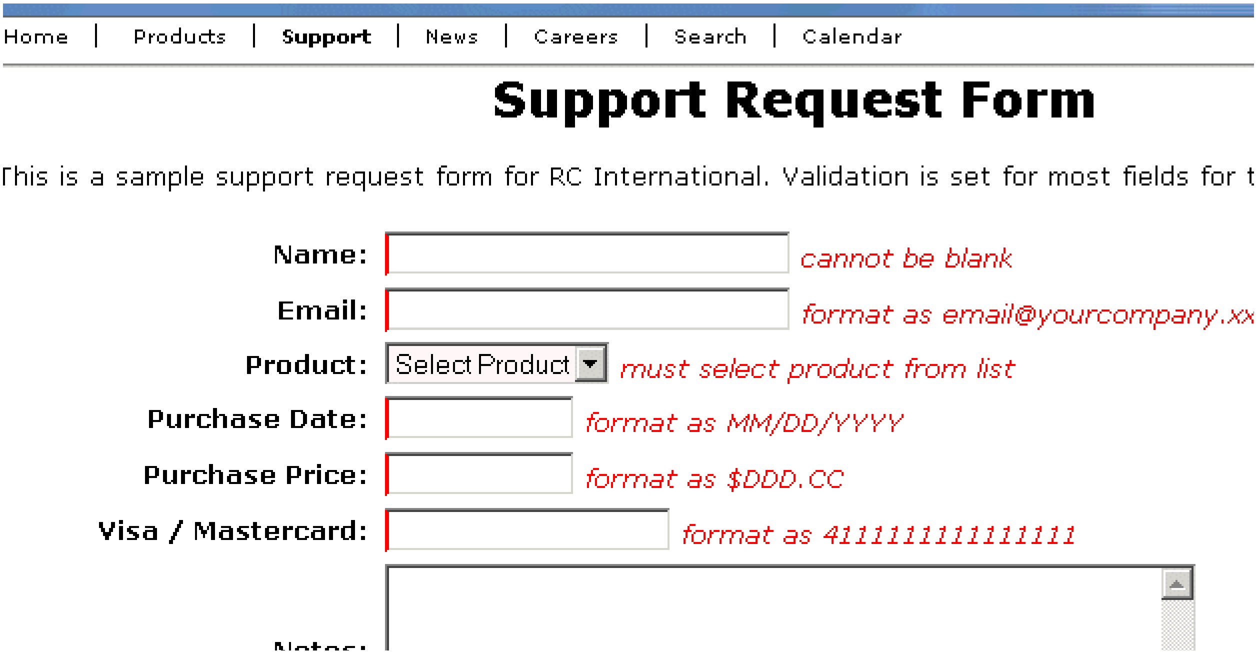
Implementing a Form on a Web Page

After you create a form, the next step is to implement it on a Web Page. To do that, follow these steps.

NOTE The use of server controls or functions to manage templates is documented in the Ektron CMS400.NET Developer's Manual.

1. Open the Web form template on which you want the Form content to appear. (This example uses support.aspx.)
2. Place the FormBlock server control or custom function for a Form content within the body of the template. Below is an example of what the form might look like.

IMPORTANT! Ektron recommends using the Poll server control when displaying a form that is being used as a form or a survey.


Home | Products | Support | News | Careers | Search | Calendar

Support Request Form

This is a sample support request form for RC International. Validation is set for most fields for t

Name:		cannot be blank
Email:		format as email@yourcompany.xx
Product:	Select Product	must select product from list
Purchase Date:		format as MM/DD/YYYY
Purchase Price:		format as $DDD.CC
Visa / Mastercard:		format as 4111111111111111
Notes:		

3. Save and close the new Web form.
4. To test your form, navigate to your Web site then to the new page.
5. Complete the form.
6. Click the Submit Form button.
7. The screen is refreshed and displays the post back message that you created.

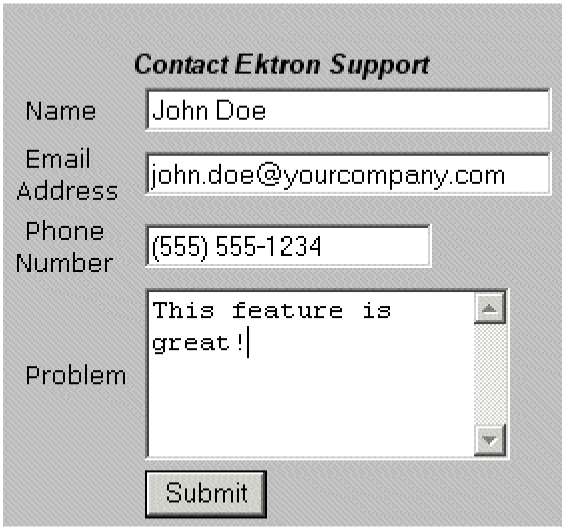
Sending Data as XML

While creating a form that generates email, you can specify that the email be sent as XML data or plain text.

XML has the following advantages over plain text.

- Because XML data is structured, you can easily parse the content to store and retrieve important information.
- If you download the form data to an Excel spreadsheet, the XML tags become the spreadsheet's column headers. *See Also:* **Ektron CMS400.NET** User Manual Section "Working with HTML Forms" >"Viewing Form Reports" > "Exporting Form Reports".

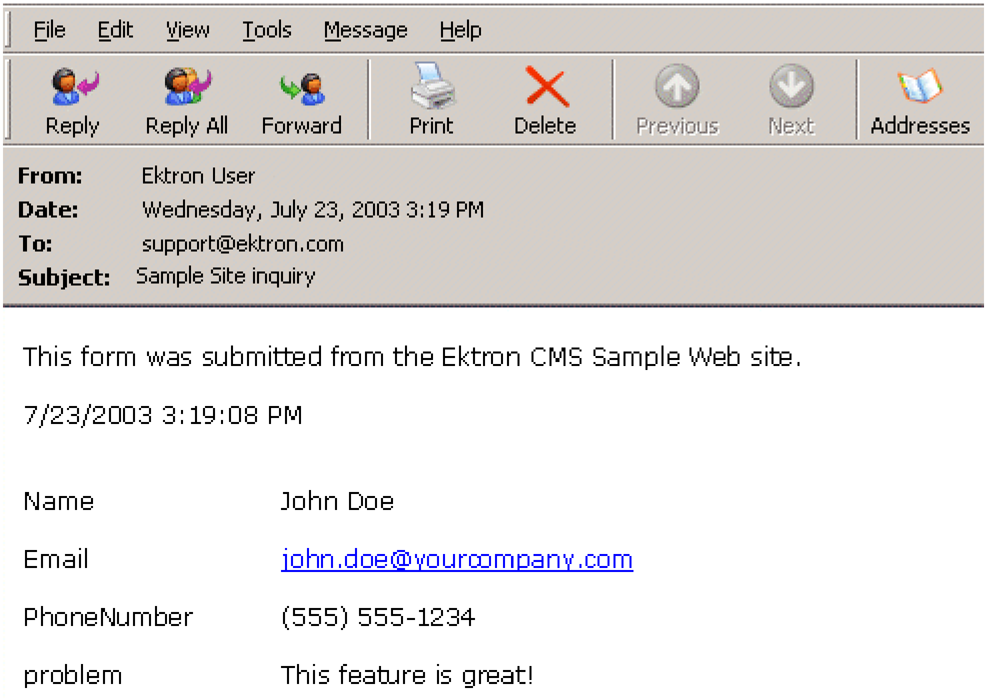
This section contrasts XML and plain text email using the form displayed below as the example. Here is an example of a form before it is submitted.

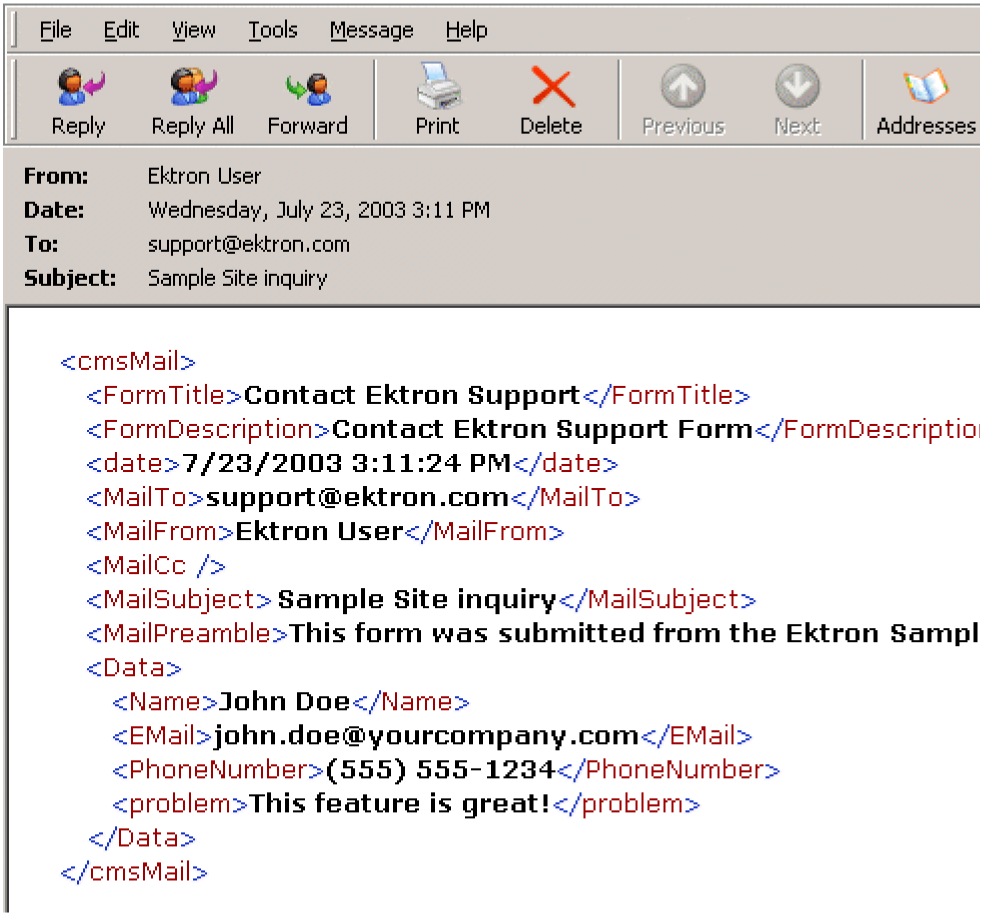


Contact Ektron Support

Name	John Doe
Email Address	john.doe@yourcompany.com
Phone Number	(555) 555-1234
Problem	This feature is great!

The following table displays the resulting email, depending on the method used.

Form sent as	**Generated email**
Plain Text	 File Edit View Tools Message Help Reply Reply All Forward Print Delete Previous Next Addresses **From:** Ektron User **Date:** Wednesday, July 23, 2003 3:19 PM **To:** support@ektron.com **Subject:** Sample Site inquiry This form was submitted from the Ektron CMS Sample Web site. 7/23/2003 3:19:08 PM Name John Doe Email john.doe@yourcompany.com PhoneNumber (555) 555-1234 problem This feature is great!

Form sent as	**Generated email**
XML	

File
Edit
View
Tools
Message
Help
Reply
Reply All
Forward
Print
Delete
Previous
Next
Addresses

From: Ektron User
Date: Wednesday, July 23, 2003 3:11 PM
To: support@ektron.com
Subject: Sample Site inquiry

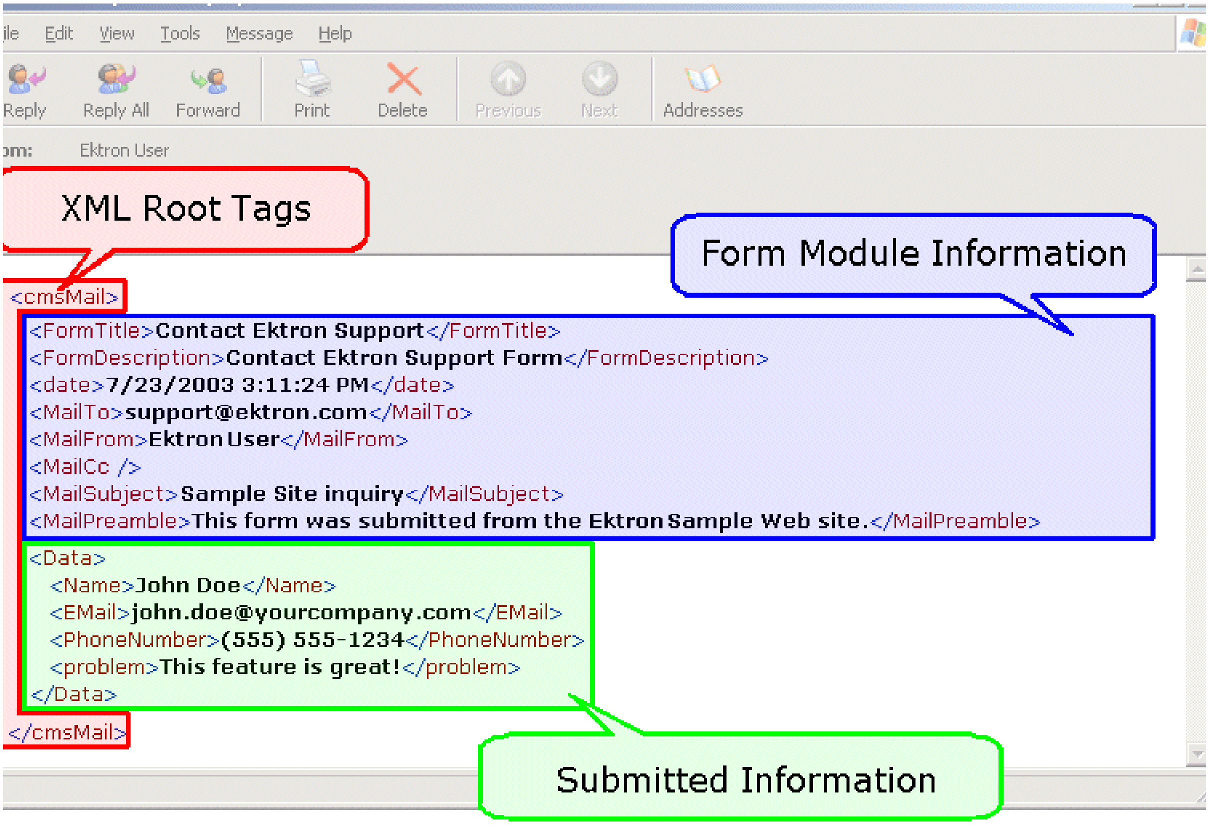
```
<cmsMail>
  <FormTitle>Contact Ektron Support</FormTitle>
  <FormDescription>Contact Ektron Support Form</FormDescriptio
  <date>7/23/2003 3:11:24 PM</date>
  <MailTo>support@ektron.com</MailTo>
  <MailFrom>Ektron User</MailFrom>
  <MailCc />
  <MailSubject>Sample Site inquiry</MailSubject>
  <MailPreamble>This form was submitted from the Ektron Sampl
  <Data>
    <Name>John Doe</Name>
    <EMail>john.doe@yourcompany.com</EMail>
    <PhoneNumber>(555) 555-1234</PhoneNumber>
    <problem>This feature is great!</problem>
  </Data>
</cmsMail>
```

XML email Structure

A form’s XML structure consists of two groups of XML tags:

- Form and mail elements
- Data elements

The following image illustrates the sections of XML email structure.


ile
Edit
View
Tools
Message
Help
Reply
Reply All
Forward
Print
Delete
Previous
Next
Addresses
om:
Ektron User
XML Root Tags
Form Module Information
Submitted Information

```
<cmsMail>
<FormTitle>Contact Ektron Support</FormTitle>
<FormDescription>Contact Ektron Support Form</FormDescription>
<date>7/23/2003 3:11:24 PM</date>
<MailTo>support@ektron.com</MailTo>
<MailFrom>Ektron User</MailFrom>
<MailCc />
<MailSubject>Sample Site inquiry</MailSubject>
<MailPreamble>This form was submitted from the Ektron Sample Web site.</MailPreamble>
<Data>
  <Name>John Doe</Name>
  <EMail>john.doe@yourcompany.com</EMail>
  <PhoneNumber>(555) 555-1234</PhoneNumber>
  <problem>This feature is great!</problem>
</Data>
</cmsMail>
```

The following explains the sections of the XML email.

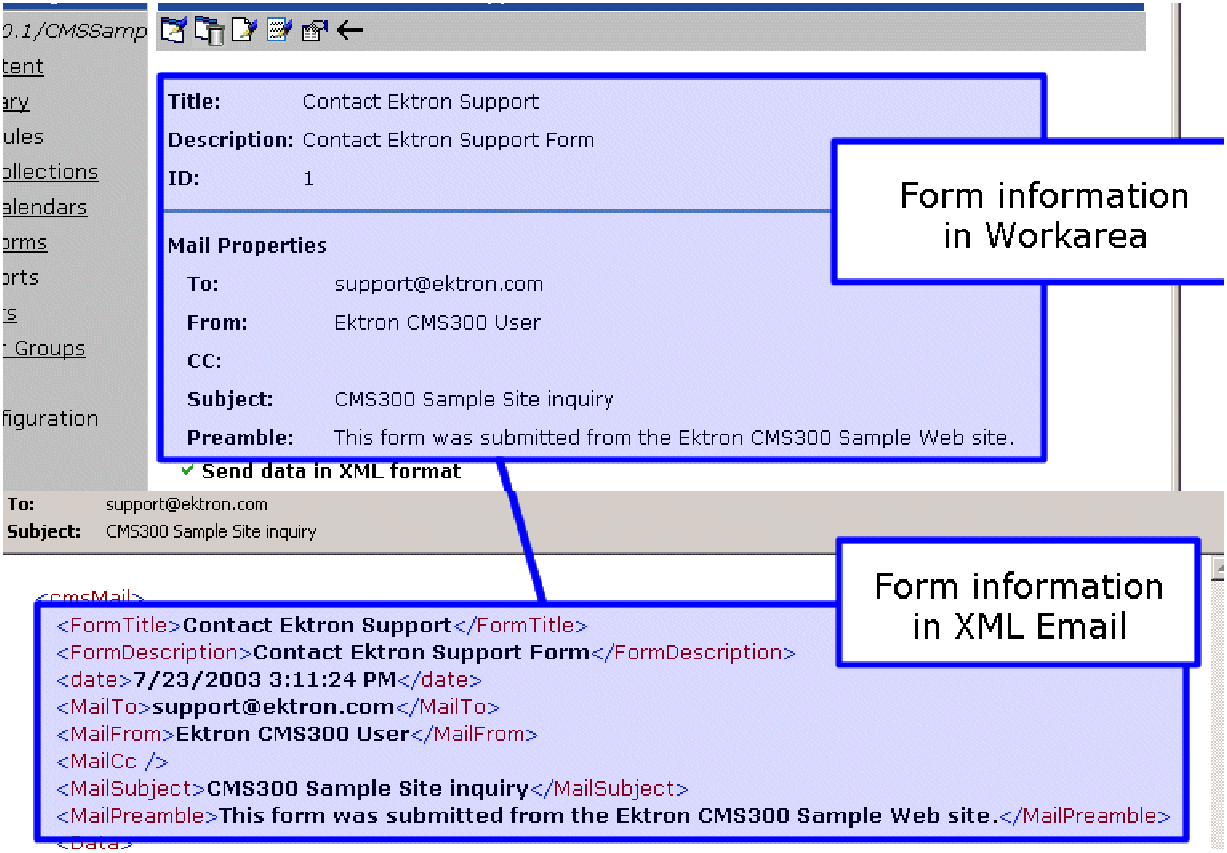
Root Tag

The XML email is wrapped in `<cmsMail>` root tags.

Form and Mail Tags

The form and mail tags display information about the form that was generated from the form information.

This illustration compares the information defined for the form with the information in the XML email.



0.1/CMSSamp
tent
ary
ules
ollections
alendars
orms
orts
rs
Groups
figuration
Form information in Workarea
Form information in XML Email

Title: Contact Ektron Support
Description: Contact Ektron Support Form
ID: 1

Mail Properties

To: support@ektron.com
From: Ektron CMS300 User
CC:
Subject: CMS300 Sample Site inquiry
Preamble: This form was submitted from the Ektron CMS300 Sample Web site.

✓ **Send data in XML format**

To: support@ektron.com
Subject: CMS300 Sample Site inquiry

```
<cmsMail>
  <FormTitle>Contact Ektron Support</FormTitle>
  <FormDescription>Contact Ektron Support Form</FormDescription>
  <date>7/23/2003 3:11:24 PM</date>
  <MailTo>support@ektron.com</MailTo>
  <MailFrom>Ektron CMS300 User</MailFrom>
  <MailCc />
  <MailSubject>CMS300 Sample Site inquiry</MailSubject>
  <MailPreamble>This form was submitted from the Ektron CMS300 Sample Web site.</MailPreamble>
  <Data>
```

The following table explains each XML tag in the form and mail sections of the email.

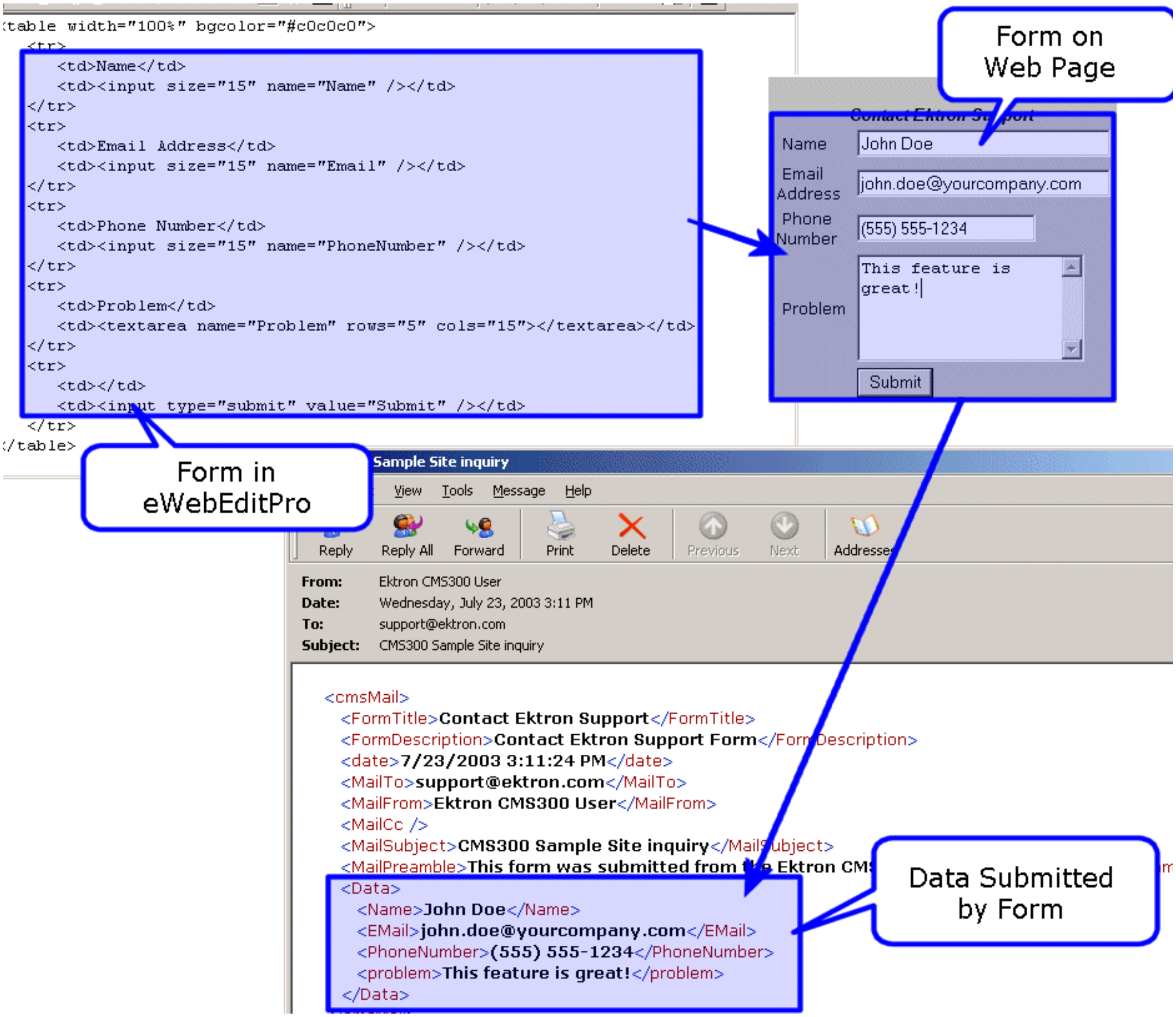
XML Tag	Description
<FormTitle>	Title given to the form that was submitted.
<FormDescription>	Description given to the form that was submitted.
<date>	Date and time the form was submitted.
<MailTo>	To email address(es) defined in the form.
<MailFrom>	From email address(es) defined in the form.
<MailCc>	CC address(es) defined in the form.

XML Tag	Description
<MailSubject>	Subject for the generated email defined in the form.
<MailPreamble>	Preamble for the generated email defined in the form.

Data Tags

The XML email’s data tags wrap the information entered by the form’s submitter. Each form element in the content becomes an XML tag.

The following image illustrates how a form is edited in the editor, displayed on a Web page, and then converted to XML for the email.


Form on Web Page
Form in eWebEditPro
Data Submitted by Form
Sample Site inquiry
View
Tools
Message
Help
Reply
Reply All
Forward
Print
Delete
Previous
Next
Addresses
Submit

```
<table width="100%" bgcolor="#c0c0c0">
   <tr>
      <td>Name</td>
      <td><input size="15" name="Name" /></td>
   </tr>
   <tr>
      <td>Email Address</td>
      <td><input size="15" name="Email" /></td>
   </tr>
   <tr>
      <td>Phone Number</td>
      <td><input size="15" name="PhoneNumber" /></td>
   </tr>
   <tr>
      <td>Problem</td>
      <td><textarea name="Problem" rows="5" cols="15"></textarea></td>
   </tr>
   <tr>
      <td></td>
      <td><input type="submit" value="Submit" /></td>
   </tr>
</table>
```

Contact Ektron Support

Name	John Doe
Email Address	john.doe@yourcompany.com
Phone Number	(555) 555-1234
Problem	This feature is great!

From: Ektron CMS300 User
Date: Wednesday, July 23, 2003 3:11 PM
To: support@ektron.com
Subject: CMS300 Sample Site inquiry

```
<cmsMail>
  <FormTitle>Contact Ektron Support</FormTitle>
  <FormDescription>Contact Ektron Support Form</FormDescription>
  <date>7/23/2003 3:11:24 PM</date>
  <MailTo>support@ektron.com</MailTo>
  <MailFrom>Ektron CMS300 User</MailFrom>
  <MailCc />
  <MailSubject>CMS300 Sample Site inquiry</MailSubject>
  <MailPreamble>This form was submitted from the Ektron CM
  <Data>
    <Name>John Doe</Name>
    <EMail>john.doe@yourcompany.com</EMail>
    <PhoneNumber>(555) 555-1234</PhoneNumber>
    <problem>This feature is great!</problem>
  </Data>
```

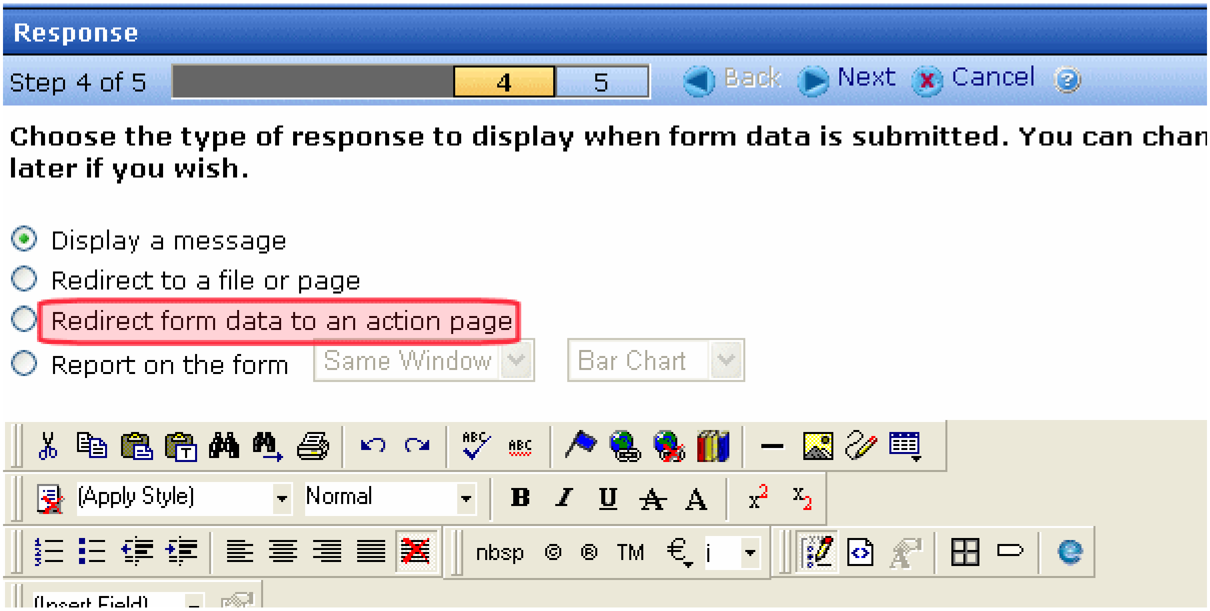
As shown in the graphic, the content is comprised of four form elements that are converted to XML tags:

- Name
- Email
- PhoneNumber
- Problem

Redirecting Submitted Form Data

This section explains how to set up the ability to redirect submitted form data to an action page. Because the data is redirected via server transfer, you can easily customize the handling of a multi-page form.

Users can select this option when creating or editing a form response, as illustrated below.



Response

Step 4 of 5

Choose the type of response to display when form data is submitted. You can chan
later if you wish.

● Display a message
○ Redirect to a file or page
○ Redirect form data to an action page
○ Report on the form

Instructions for how a user chooses a hyperlink to an action page are in the **Ektron CMS400.NET** User Manual section “Working with HTML Forms” > “Creating a New Form” > “Redirecting to an Action Page and Forwarding Form Data”.

NOTE If a form’s specifications indicate that its data is saved to a database, the data is saved before being forwarded to an action page.

The following section explains how an administrator sets up a hyperlink to the action page in preparation for a user’s selection.

Setting Up the Action Page

1. Create the action page. It must
    - load and use the form variables
    - have an .aspx extension
    - reside in the same web application as your Web site

IMPORTANT! If your site is using URL Aliasing, the action page's header must include the following: `EnableEventValidation="false" EnableViewStateMac="false"`

2. Place the action page in your Web site's root folder.
3. Set up a library hyperlink to the .aspx page. Here's how to do that:
    - In **Ektron CMS400.NET**, go to the Library.
    - Select **Hyperlinks** from the file type dropdown.
    - Click the Add button (📚).
    - In the **URL Link** field, enter the path relative to the Web root to the .aspx file you created in Steps 1 and 2. For example:

`http://localhost/cms400demo/ServerVariables.aspx`

    - Give the hyperlink a title and save it.
4. Inform your users of the hyperlink. They will select it when selecting the form response.

Managing Assets

This section explains the administration of the Document Management functionality in **Ektron CMS400.NET**. It includes the following sections:

- ”Asset Management Configuration” on page 295
- ”Checking Document Management Permissions” on page 299
- ”Managing Multimedia Assets” on page 307
- ”PDF Generation” on page 314
- ”Troubleshooting” on page 326

Asset Management Configuration

This section explains configuring Asset Management. By changing these settings, you can:

- update Asset Management server settings
- change which file types are allowed on the Asset Management server
- set the View Type

There are two ways you can configure an Asset Management server:

- the Asset Server Setup screen in the Workarea *See Also:* ”Updating Asset Configuration Settings” on page 296
- the AssetManagement.Config file *See Also:* ”The AssetManagement.Config File” on page 297

In either case, you are editing the AssetManagement.Config file. While the Workarea screen provides a simple way to update this information, some tags can only be updated in the AssetManagement.Config file. The table in ”The

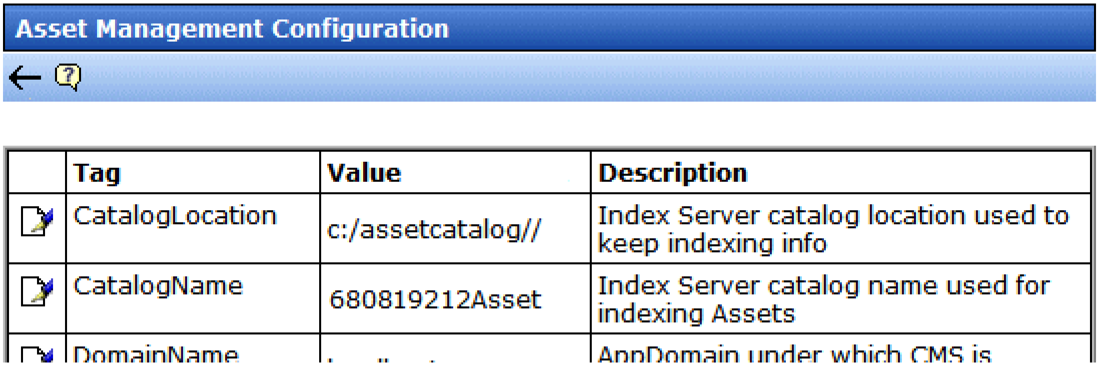
AssetManagement.Config File” on page 297 indicates which tags can be edited in the Workarea.

Updating Asset Configuration Settings

You can update some AssetManagement.Config tags from the Ektron CMS400.NET Workarea. To do that, follow these steps.

NOTE Only members of the Administrator User Group can view, add, or edit the Asset Server Setup.

1. In the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. The **Asset Management Configuration** screen appears.



	Tag	Value	Description
✎	CatalogLocation	c:/assetcatalog//	Index Server catalog location used to keep indexing info
✎	CatalogName	680819212Asset	Index Server catalog name used for indexing Assets
✎	DomainName		AppDomain under which CMS is

3. Click the Edit button (✎) for the tag you want to edit.
4. The **Value** field for that tag changes to a text box.
5. Change the information in the text box.
6. Click the Save button (💾).

For more information on each tag, see ”The AssetManagement.Config File” on page 297

The AssetManagement.Config File

The following table describes the AssetManagement.Config file's tags.

Element	Description	Editable within Workarea?
WebShareDir=	The folder where temporary data files that are waiting to be checked in, saved, or published are stored. For example: `"dmdata"`.	✓
CatalogName=	The name of the Asset Catalog. This name is used when setting up the index service.	✓
LoadBalanced=	Enables Load Balancing for assets. Set to "1" to enable. *See Also:* "Load Balancing Assets" on page 826	✓
CatalogLoc=	The folder location of the Asset Catalog. This location is used when setting up the index service. For example: "`C:\assetcatalog\`".	✓
StorageLocation=	The folder location where published assets are stored. For example: "`C:\assetslibrary`".	✓
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 CMS400.NET** installed.	✓
FileTypes=	Files types that users are allowed to upload to Document Management. For more information, see "Allowing File Types" on page 298. The default file types installed are *.doc,*.xls,*.ppt,*.pdf,*.gif,*.jpg,*.jpeg,*.txt,*.log,*.vsd,*.dot,*.zip,*.swf,*.wma,*.wav,*.avi, *.mp3, *.rm, *.wmv, *.ra, *.mov, *.odt, *.odf, *.odp, *.odg, *.ods, *.odb	✓
UserName=	The user created during the install. If you let **Ektron CMS400.NET** install create the user, the default is EKT_ASSET_USER.	✓

Element	**Description**	**Editable within Workarea?**
Password=	The password for the user created during the install. This password is encrypted during the install. If you are changing the user and need to encrypt a new password, use the `dms400encryptpassword.exe` encryption tool located in `C:\Program Files\Ektron\CMS400v61\Utilities\DMS`.	✓
UserDomain=	The domain for the user created during the install.	✓
PdfGenerator=	The location of the PDF generation software. If you are using local PDF generation software, the path shows the location of your local PDF generation software. If you are using Ektron's PDF generator, the default location is `http://aspnet20.ektron.com/PdfManager/PdfGeneratorService.asmx`. *See Also:* "Modifying the PdfGenerator Information in AssetManagement.config" on page 317	

Allowing File Types

Administrators control which file types are allowed in the Document Management functionality by editing the AssetManagement.config file. Reasons for limiting the file types include:

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

The `<FileTypes>` tag in the AssetManagement.config file contain the file types users can upload. The default file types are: `*.doc,*.xls,*.ppt,*.pdf,*.gif,*.jpg,*.jpeg,*.txt,*.log,*.vsd,*.dot, *.zip,*.swf,*.wma,*.wav,*.avi, *.mp3, *.rm, *.wmv, *.ra, *.mov, *.odt, *.odf, *.odp, *.odg, *.ods, *.odb`.

Steps to Add or Remove a File Type

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

1. Edit in the **Workarea > Settings > Configuration > Asset Server Setup > Update Asset Configuration Settings** screen.

   Or

1. Open the `AssetManagement.config` file. The default location is `(webroot)/(site root)`.
2. Find the `FileTypes=""` element. All file types must appear between the quotes. For example, `FileTypes="*.doc,*.xls"`.

NOTE Use a comma to separate file types. Also, 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`

3. Add or remove any file type.
4. Save and close the `AssetManagement.config` file.

Checking Document Management Permissions

If you are having any problems with permissions, use this section to verify that your user and folder settings are assigned properly.

See Also:

- "User Permissions" on page 299
- "User Settings" on page 301
- "The Dmdata Folder" on page 302

User Permissions

When the Document Management functionality is installed, permissions are granted to several users for the following folders:

- *`webroot`*`\`*`site root`*`\AssetManagement\dmdata`
- *`webroot`*`\`*`site root`*`\Assets`
- *`root`*`\assetlibrary`

The assigned permissions vary depending on your server's operating system.

See Also: "The assetCatalog Folder" on page 306

The following table lists users and their permissions. Scan down the column of your server's operating system to determine which users and permissions should be enabled for the folders listed above.

You can use this information to help troubleshoot potential permission problems.

User	**Needs these permissions**	**Windows 2000 Pro or XP Pro**	**Windows 2003 Server**	**Windows 2003 Enterprise Edition**
IIS_WPG User	See "Advanced Permissions" on page 301		✓	✓
IUSR_ (The IUSR_ account is required only if `Impersonate` is set to `True` in web.config, and its username and password attributes are not specified. If `impersonate` is set to `false` (default setting), the IUSR_ account may be harmlessly removed from the folders listed.)	See "Advanced Permissions" on page 301	✓	✓	
IUSR_Group	See "Advanced Permissions" on page 301			✓
EKT_ASSET_USER	*`webroot`*`/dmdata` folder only: write only access	✓	✓	✓
ASP.NET User	See "Advanced Permissions" on page 301	✓		
SYSTEM	See "Advanced Permissions" on page 301	✓	✓	✓

User	Needs these permissions	Windows 2000 Pro or XP Pro	Windows 2003 Server	Windows 2003 Enterprise Edition
User Defined (The User Defined user account is required only if `Impersonate` is set to `True` in web.config, and its username and password attributes are specified)	See "Advanced Permissions" on page 301	✓	✓	✓

Advanced Permissions

The following are extended permissions for use with the Document Management functionality.

- Traverse Folder / Execute File
- List Folder / Read Data
- Read Attributes
- Read Extended Attributes
- Create Files / Write Data
- Create Folders / Append Data
- Write Attributes
- Write Extended Attributes
- Delete Subfolder and Files
- Read Permissions

User Settings

1. Right click **My Computer**, go to **Manage**, choose **Local Users and Groups**, and select the **Users** folder.
2. Right click the user defined within the `<Username>` tags of the AssetManagment.config. (By default, EKT_ASSET_USER.) Make sure this user's account is not disabled or locked out.

Folders Used by Document Management

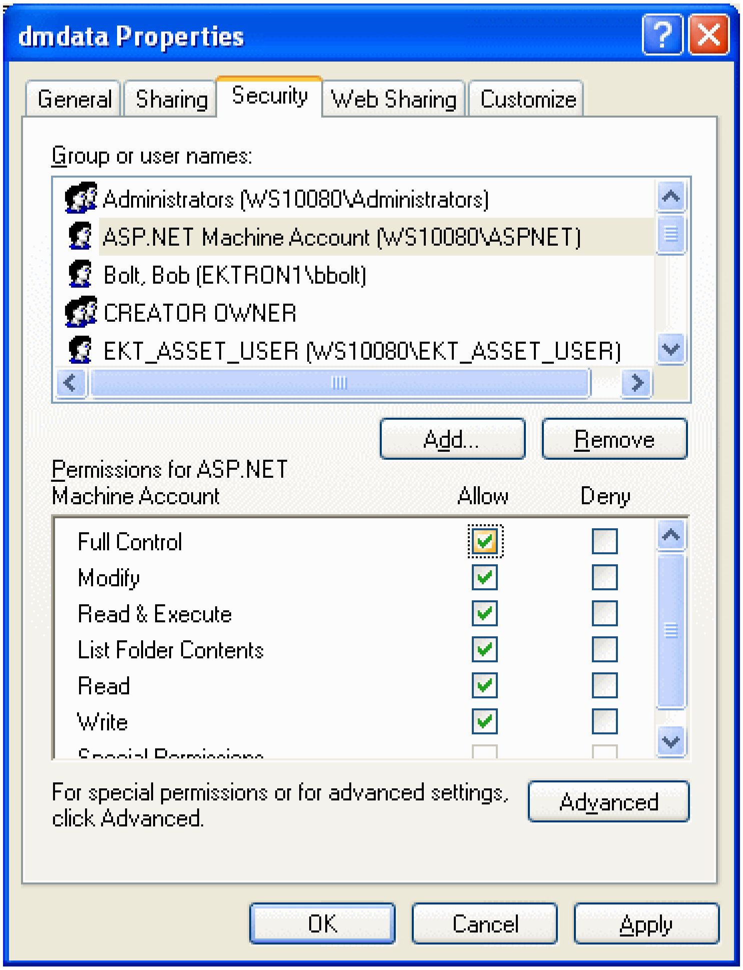
Folder	Set by	Description
assetCatalog	User	Defined by user during installation. The path to this folder can be viewed and changed in the Workarea under **Settings > Configuration > Asset Server Setup > Catalog Location**. *See Also:* ”The assetCatalog Folder” on page 306
assetLibrary	User	Defined by user during installation. The path to this folder can be viewed and changed in the Workarea under **Settings > Configuration > Asset Server Setup > Storage Location**.
dmdata	**Ektron CMS400.NET**	Defined during **Ektron CMS400.NET** installation. Located in the AssetManagement folder.
assets	**Ektron CMS400.NET**	Defined during **Ektron CMS400.NET** installation. Located in site root folder.

The Dmdata Folder

The `dmdata` folder has settings for both the File System and IIS.

Dmdata File System Settings

1. Locate the `webroot\CMS400Demo\AssetManagement\dmdata` folder.
2. Right click it and select **Properties**.
3. On the **Security** tab, make sure the user defined in AssetManagement.config (the default is `EKT_Asset_User`) has at least write permission. DMS uses the `EKT_Asset_User` to upload files to the server.
4. On the same tab, make sure the `ASPNET` user has full control. DMS uses this user to transfer files to the correct folder, and delete them from the `dmdata` folder after the transfer.


dmdata Properties
General
Sharing
Security
Web Sharing
Customize
Add...
Remove
Advanced
OK
Cancel
Apply

Group or user names:

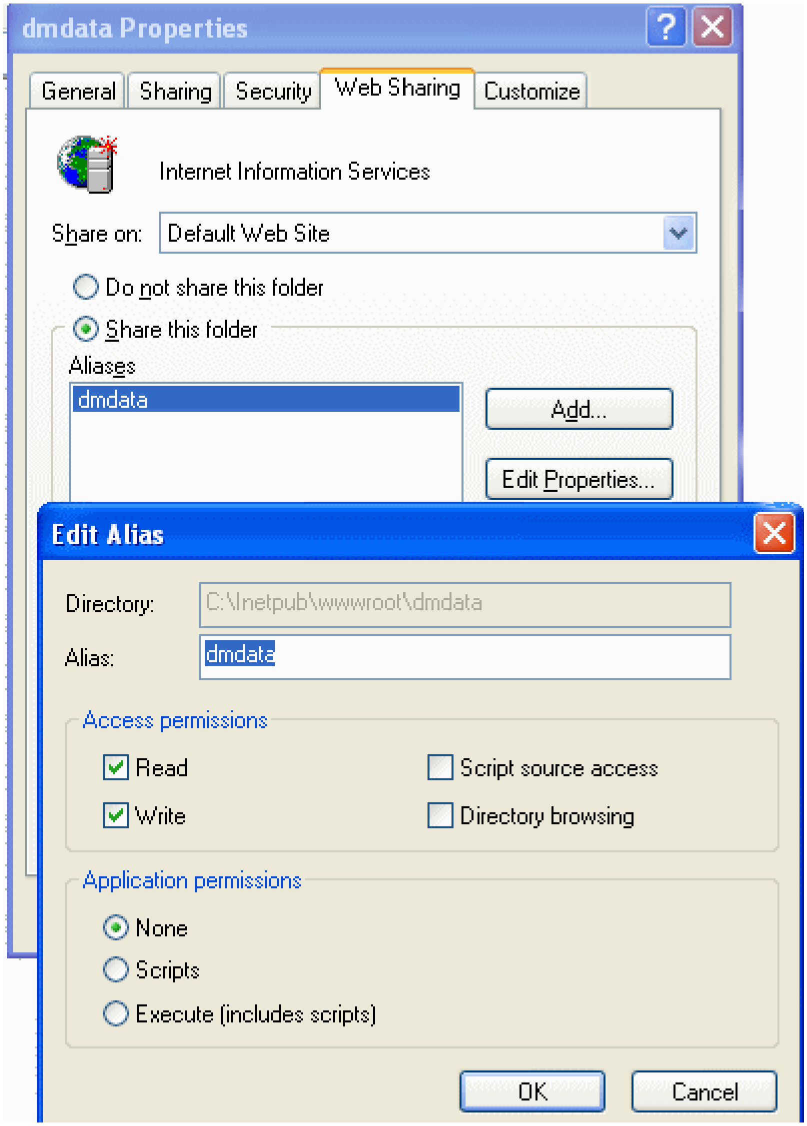
- Administrators (WS10080\Administrators)
- ASP.NET Machine Account (WS10080\ASPNET)
- Bolt, Bob (EKTRON1\bbolt)
- CREATOR OWNER
- EKT_ASSET_USER (WS10080\EKT_ASSET_USER)

Permissions for ASP.NET Machine Account

	Allow	Deny
Full Control	☑	☐
Modify	☑	☐
Read & Execute	☑	☐
List Folder Contents	☑	☐
Read	☑	☐
Write	☑	☐
Special Permissions	☐	☐

For special permissions or for advanced settings, click Advanced.

5. On the **Web Sharing** tab, make sure this folder is being shared, and that the correct site is selected from the dropdown menu.
6. Click **Edit Properties**. On this screen, make sure **Read and Write** are checked, and that **Application Permissions** is set to **None**.


dmdata Properties
General
Sharing
Security
Web Sharing
Customize
Internet Information Services
Add...
Edit Properties...
Edit Alias
OK
Cancel

Share on: Default Web Site

○ Do not share this folder

● Share this folder

Aliases: dmdata

Directory: C:\Inetpub\wwwroot\dmdata

Alias: dmdata

Access permissions

☑ Read

☑ Write

☐ Script source access

☐ Directory browsing

Application permissions

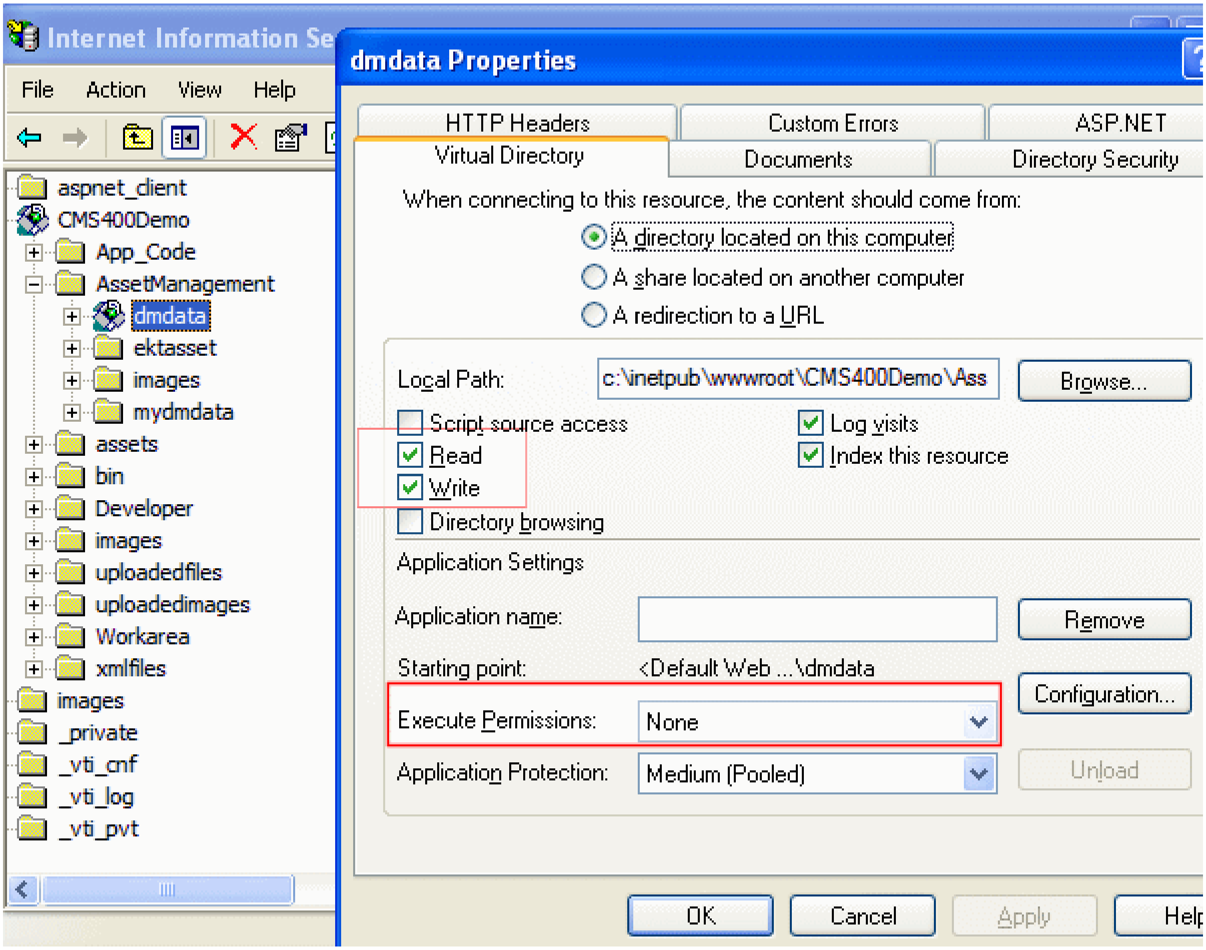
● None

○ Scripts

○ Execute (includes scripts)

Dmdata Settings within IIS

1. Right click the `dmdata` folder and display its **Properties**.
2. On the **Virtual Directory** tab, make sure checkboxes for **read** and **write** are checked. Also, the **Execute Permissions** dropdown must be set to **None**.


Internet Information Se
File
Action
View
Help
aspnet_client
CMS400Demo
App_Code
AssetManagement
dmdata
ektasset
images
mydmdata
assets
bin
Developer
images
uploadedfiles
uploadedimages
Workarea
xmlfiles
images
_private
_vti_cnf
_vti_log
_vti_pvt
dmdata Properties
HTTP Headers
Custom Errors
ASP.NET
Virtual Directory
Documents
Directory Security
Browse...
Remove
Configuration...
Unload
OK
Cancel
Apply
Help

When connecting to this resource, the content should come from:

● A directory located on this computer

○ A share located on another computer

○ A redirection to a URL

Local Path: c:\inetpub\wwwroot\CMS400Demo\Ass

☐ Script source access

☑ Read

☑ Write

☐ Directory browsing

☑ Log visits

☑ Index this resource

Application Settings

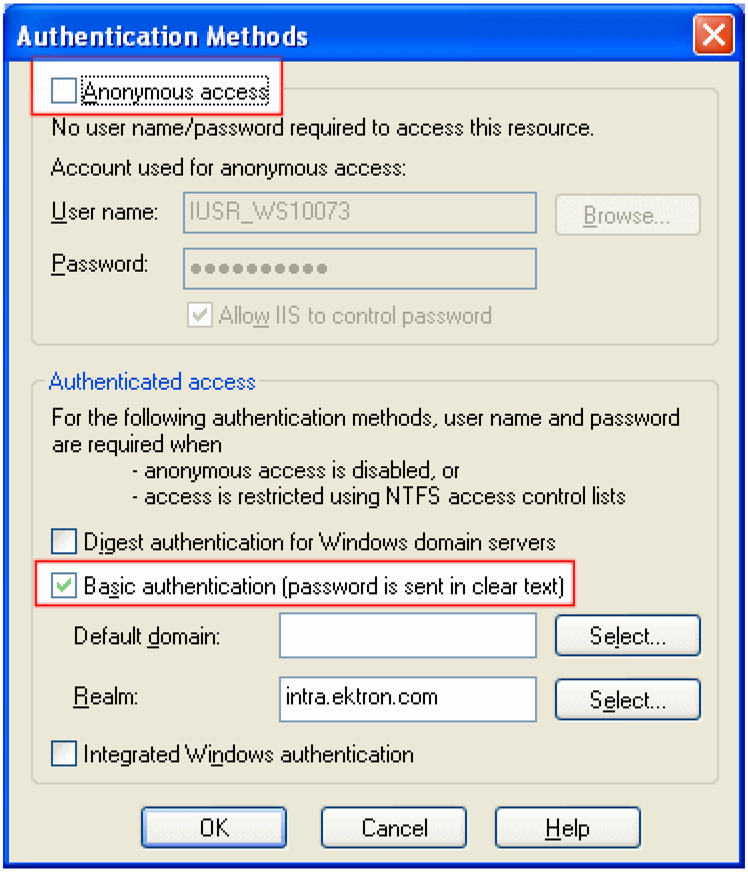
Application name:

Starting point: <Default Web ...\dmdata

Execute Permissions: None

Application Protection: Medium (Pooled)

3. On the **Directory Security** tab, click the **Edit** button for **Anonymous Access and Authentication Control**. Ensure that **Anonymous Access** for this folder is turned off, and that **Basic Authentication** is turned on.



Authentication Methods

☐ Anonymous access

No user name/password required to access this resource.

Account used for anonymous access:

User name: IUSR_WS10073

Password: ●●●●●●●●●●●

☑ Allow IIS to control password

Authenticated access

For the following authentication methods, user name and password are required when
- anonymous access is disabled, or
- access is restricted using NTFS access control lists

☐ Digest authentication for Windows domain servers

☑ Basic authentication (password is sent in clear text)

Default domain:

Realm: intra.ektron.com

☐ Integrated Windows authentication

The assetCatalog Folder

The Asset Catalog folder contains a hidden file, catalog.wsi, which maintains index files created by the Windows Indexing Service. You can view and update the path to this folder in the Workarea under **Settings > Configuration >Asset Server Setup >Catalog Location**.

The system account must have full control over this folder. The asset catalog is created by the Windows Indexing Service, and the permission noted above is set by default.

If you need to recreate the asset catalog, delete it and create a new one using the Windows Indexing Service Manager. Use the catalog name set in the Ektron CMS400.NET Workarea under **Settings > Configuration > Asset Server Setup >Catalog**

Name. The manual creation process is described in ”Setting Up the Indexing Service” on page 327.

The assetLibrary Folder

The Asset Library folder contains file assets uploaded to and managed by DMS. You can view and update the path to this folder in the Workarea under **Settings > Configuration >Asset Server Setup > Storage Location**.

Managing Multimedia Assets

Multimedia files contain audio, video, or both. File types include .wav, .mpeg.,avi and .wma.

Because of these unique characteristics, they warrant special treatment within **Ektron CMS400.NET**. This section explains how multimedia files are handled through the following subtopics.

- ”Supported Multimedia Players” on page 307
- ”Multimedia File Types” on page 308
- ”Working with Multimedia Files in Ektron CMS400.NET” on page 310

Supported Multimedia Players

Ektron CMS400.NET supports the following media players.

- WindowsMedia®
- Quicktime®
- Realplayer®
- Flash®

This means that **Ektron CMS400.NET** only supports multimedia files that can run on one of these players. If you import a multimedia file that cannot play on any supported player, it is treated like any other asset but cannot be played within **Ektron CMS400.NET**.

Downloading Media Players

If a **Ektron CMS400.NET** user within the Workarea, or a site visitor, tries to play a file and no supporting media player exists on the user's computer, the user is prompted to download and install the player.

If the file uses the *Quicktime* or *Flash* media player, the web.config file contains information that prompts the user to immediately download and install the player.

If the file uses the *Realplayer* or *WindowsMedia* media player, the user must go to the host Web site and download them.

Multimedia File Types

Every multimedia file type has a corresponding MIME type. For example, an mp3 file's MIME Type is audio/mpeg.

All supported MIME types are defined within the `mediasettings` element of the web.config file. That section of the web.config file is reproduced below.

```
<add key="application/x-shockwave-flash" value="Flash" />
<add key="audio/x-wav" value="WindowsMedia, Quicktime, Realplayer" />
<add key="audio/x-wav-default" value="WindowsMedia" />
<add key="audio/x-pn-realaudio" value="WindowsMedia, Quicktime, Realplayer" />
<add key="video/x-avi"  value="WindowsMedia, Quicktime, Realplayer" />
<add key="video/x-avi-default" value="Quicktime" />
<add key="video/x-msvideo" value="WindowsMedia, Quicktime"/>
<add key="video/x-msvideo-default" value="WindowsMedia"/>
<add key="audio/x-ms-wma" value="WindowsMedia"/>
<add key="audio/mpeg" value="WindowsMedia,Quicktime"/>
<add key="video/x-realvideo" value="Realplayer"/>
<add key="video/x-ms-wmv" value="WindowsMedia"/>
<add key="audio/x-realaudio" value="Realplayer"/>
<add key="video/quicktime" value="Quicktime"/>
```

NOTE A good reference of file and corresponding MIME types is http://www.w3schools.com/media/media_mimeref.asp.

To determine if a multimedia file type is supported, go to the Web site listed above to find its MIME type. Then, go to the web.config file section show above to see if the MIME type exists and, if so, the supported media players.

Adding Players for a MIME Type

You can add to the list of supported media players for any MIME Type. To do so, open the web.config file, find the MIME type, and add the player name within the value element.

Consider this example:

```
<add key="audio/mpeg" value="WindowsMedia"/>
```

As shown, `WindowsMedia` is the only supported player for mp3 files. If you know that other players can run mp3 files, insert additional media players after `WindowsMedia`. To get the exact name of the player, review the `value` elements in web.config file section shown above.

Adding MIME Types

If you want Ektron CMS400.NET to support additional MIME Types, add them within the `<mediaSettings>` element using the following syntax:

```
<add key="MIME type/subtype" value="supported media player(s)"/>
```

For example

```
<add key="video/x-ms-asf" value="WindowsMedia"/>
```

You must also add the file type to the list of supported file types in the assetmanagement.config file. *See Also:* ”Allowing File Types” on page 298

Adding a MIME Type’s Default Player

To identify a player as the default for a MIME type, use the following syntax within web.config.

```
<add key="MIME Type/subtype" value="default player"/>
```

For example

```
<add key="video/x-msvideo-default" value="WindowsMedia"/>
```

Working with Multimedia Files in Ektron CMS400.NET

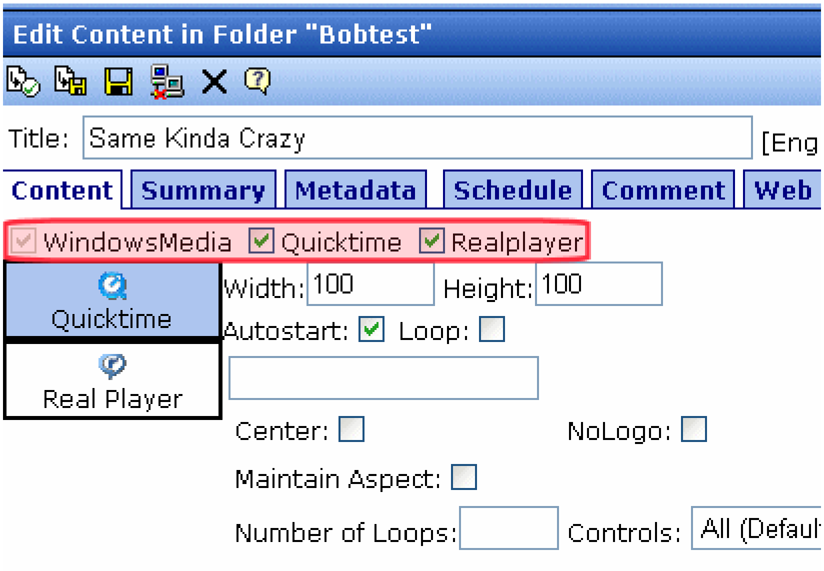
Importing Multimedia Files into Ektron CMS400.NET

You import multimedia files into **Ektron CMS400.NET** the same way you import other assets. See the **Ektron CMS400.NET** User Manual chapter “Using the Document Management Functionality” sections “Working with Managed Files” and “Importing Files via Drag and Drop.“

Once imported into Ektron CMS400.NET, a document proceeds through the same workflow as any other type of content. *See Also:* ”Setting Approval Chains” on page 556

Changing Supported Media Players

After a multimedia file is imported into **Ektron CMS400.NET**, you can view supported media players properties on the **Content** tab of the Edit Content screen. All players defined for the file’s MIME type are checked. You can uncheck any media players that you do not want to operate a particular file.



Title: Same Kinda Crazy

☑ WindowsMedia ☑ Quicktime ☑ Realplayer

Width: 100 Height: 100

Autostart: ☑ Loop: ☐

Center: ☐ NoLogo: ☐

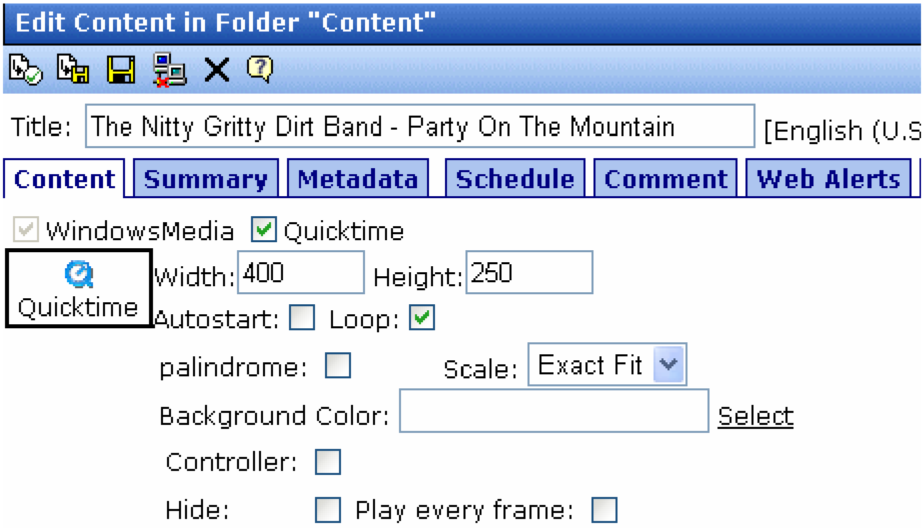
Maintain Aspect: ☐

Number of Loops: Controls: All (Defaul

If a default media player is defined for a MIME type in web.config, you cannot uncheck its checkbox. In the above graphic, WindowsMedia is the default player.

Changing File Properties

After a multimedia file is imported into **Ektron CMS400.NET**, you can edit its properties on the **Content** tab of the Edit Content screen.



Edit Content in Folder "Content"

Title: The Nitty Gritty Dirt Band - Party On The Mountain [English (U.S

☑ WindowsMedia ☑ Quicktime

Width: 400 Height: 250

Autostart: ☐ Loop: ☑

palindrome: ☐ Scale: Exact Fit

Background Color: Select

Controller: ☐

Hide: ☐ Play every frame: ☐

If the file is supported by several players, first check the player whose properties you want to modify, then edit its properties.

The **Width** and **Height** fields determine the size (in pixels) of the media player when it appears in the Workarea and on your Web site. The remaining properties are determined by the media player (QuickTime in the example above).

Inserting a Multimedia File into Content

To insert a multimedia file into content, follow these steps.

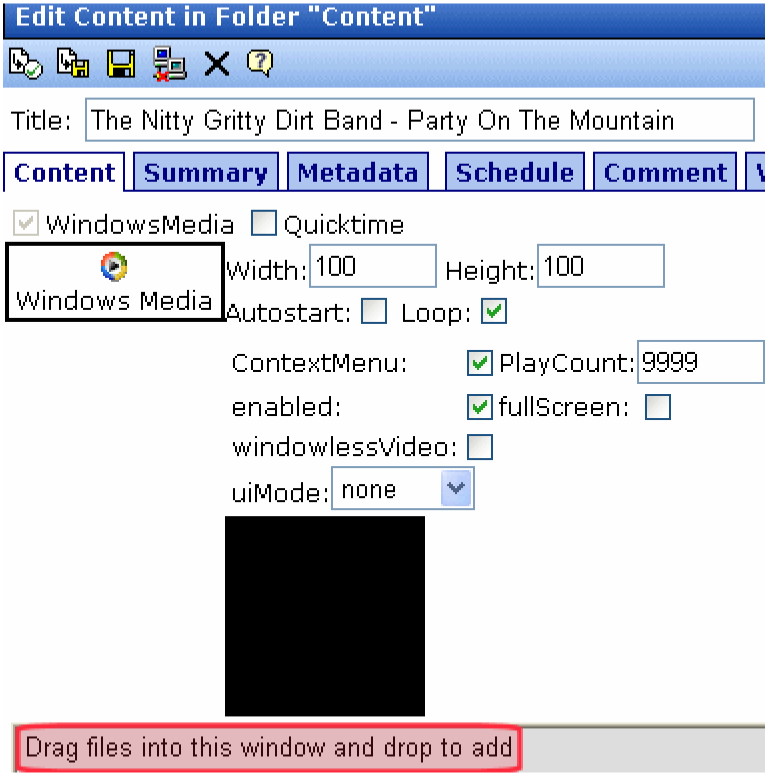
1. Either create a new HTML content item or edit an existing one.
2. Within the content, type text or insert an image that you want site visitors to click to launch the multimedia file. For example: **Click here to begin playing**.

3. Select the image or text you inserted in Step 2.
4. Apply a quicklink to the multimedia file to the selection. This procedure is described in the **Ektron CMS400.NET** User Manual section “Library Folder” > “Quicklinks and Forms.”

Replacing Multimedia Files

If you want to replace a multimedia file but maintain all CMS information about that file (for example, its properties, summary, metadata, etc.), follow these steps.

1. Browse to the multimedia content item and edit it.
2. Note that the bottom of the Edit screen has a gray rectangle with the text **Drag files into this window and drop to add**.



Edit Content in Folder "Content"

Title: The Nitty Gritty Dirt Band - Party On The Mountain

☑ WindowsMedia ☐ Quicktime

Width: 100 Height: 100

Autostart: ☐ Loop: ☑

ContextMenu: ☑ PlayCount: 9999

enabled: ☑ fullScreen: ☐

windowlessVideo: ☐

uiMode: none

Drag files into this window and drop to add

3. Open Windows Explorer and navigate to the folder that contains the updated multimedia file.
4. Drag and drop the file into the lower section of the Edit Content screen.

5. Save, Check In, or Approve the content.

Note that after you complete the replacement, you can play and restore older versions of the file through the content's history. For more information, see the **Ektron CMS400.NET** User Manual chapter "Viewing and Restoring Previous Content."

Viewing and Listening to Multimedia Files

Users in the Workarea and visitors to your Web site play interact with multimedia files in the same way.

When either type of user visits a page that hosts a multimedia file, **Ektron CMS400.NET** tries to match media players on the user's computer with those defined in the web.config file for the file's MIME type. **Ektron CMS400.NET** then displays a list of choices for every supported media player for the file. The user selects the preferred one.

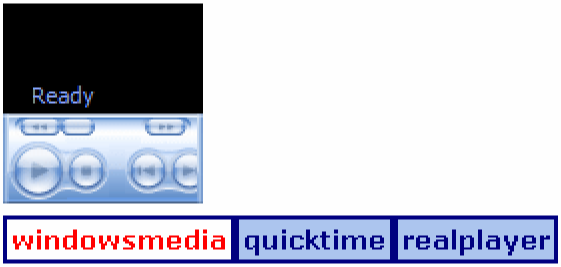
Modifying Style Properties of the Multimedia Player

You can change the multimedia player's style properties by modifying the EKTTabs.css style sheet. This file is installed to `site folder/Workarea/csslib`.

For example, you can change the color of the text that selects a player to red by changing the property highlighted below.

```
.EktTabActive

{

    padding: 2px 2px 2px 2px;

    top:10px;

    text-decoration:none;

    position: relative;

    background-color:white;

    border: solid thin navy;
    color:Red;

    font-weight:bolder;


}
```

Here is the result.



PDF Generation

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 CMS400.NET** can be automatically converted to PDF format. 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.

The following sections explain creating PDFs with the Document Management feature:

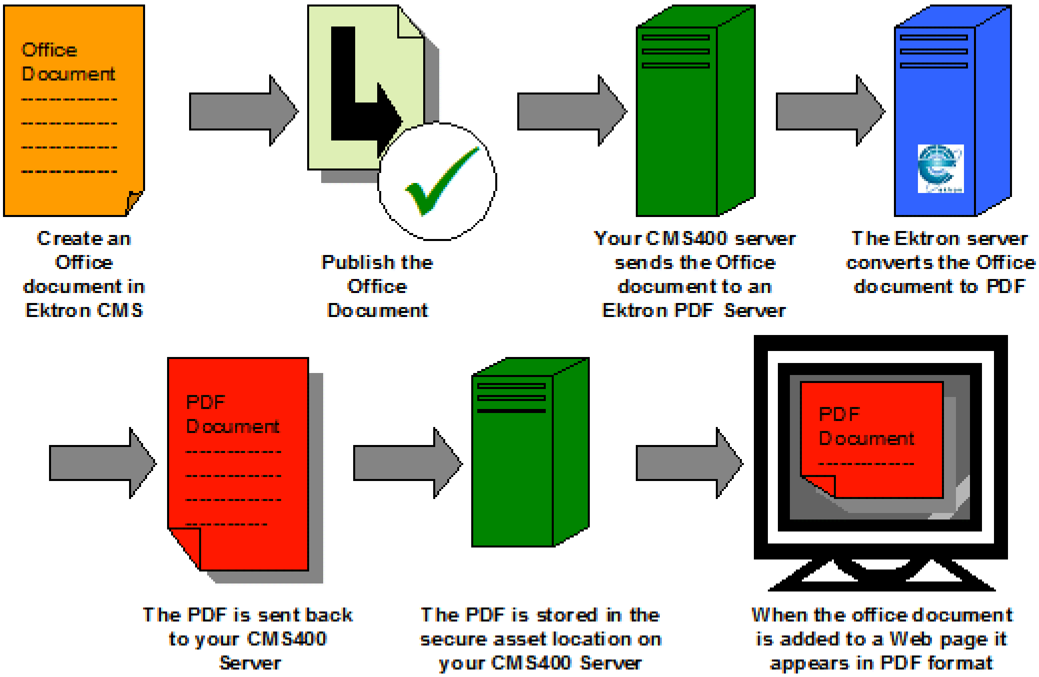
- ”PDF Conversion Process” on page 315
- ”Local PDF Generation” on page 317
- ”Enabling or Disabling PDF Generation” on page 317
- ”Designating a Folder to Generate PDFs Automatically” on page 318

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 your Asset Management server.

When the PDF returns, it doesn’t appear in the CMS400.NET Workarea -- only the originally-published Office document appears. The Ektron CMS400.NET stores the PDF file in its secure location.

Subsequent editing is done in the original Office document. Each time it’s published, a new PDF is generated.


Office Document
Create an Office document in Ektron CMS
Publish the Office Document
Your CMS400 server sends the Office document to an Ektron PDF Server
The Ektron server converts the Office document to PDF
PDF Document
The PDF is sent back to your CMS400 Server
The PDF is stored in the secure asset location on your CMS400 Server
PDF Document
When the office document is added to a Web page it appears in PDF format

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 to view any Office document on your site.

The Ektron Windows Service runs the background process that converts Office documents to PDF. *See Also:* ”Ektron Windows Service” on page 802

- ”Local PDF Generation” on page 317
- ”Enabling or Disabling PDF Generation” on page 317
- ”Designating a Folder to Generate PDFs Automatically” on page 318

Local PDF Generation

If you purchase software from a PDF generation software vendor, you can create PDF documents 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

The following sections explain setting up local PDF generation.

”Modifying the PdfGenerator Information in AssetManagement.config” on page 317

Modifying the PdfGenerator Information in AssetManagement.config

When setting up local PDF generation, use the `PdfGenerator` parameter in the AssetManagement.Config file to provide the location of the local PDF generator.

To modify the file, follow these steps.

1. Open the `AssetManagement.Config` file located in `C:\Inetpub\wwwroot\CMS400Demo`.
2. Change the location of the PDF generator.

   For example:

```
PdfGenerator=”http://aspnet20.ektron.com/PdfManager/PdfGeneratorService.asmx”
```

   might become

```
PdfGenerator=”http://localhost/PdfManager/PdfGeneratorService.asmx”
```

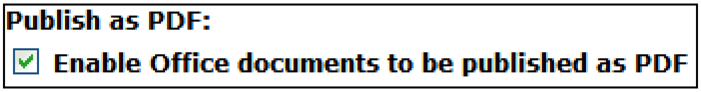
3. **Save** and **Close** the file.

Enabling or Disabling PDF Generation

Administrators decide if this feature is enabled and to which folders it applies. After enabling this feature, administrators can change any folder’s properties to allow PDF generation.

Follow these steps 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.



Publish as PDF:

☑ **Enable Office documents to be published as PDF**

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

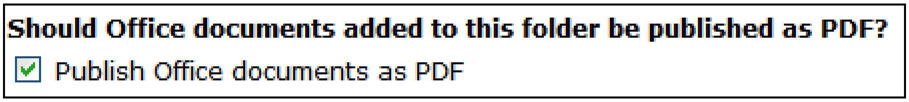
Designating a Folder to Generate PDFs Automatically

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 ”PDF Generation” on page 314.

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.



Should Office documents added to this folder be published as PDF?

☑ Publish Office documents as PDF

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

Adding Assets Automatically

The Auto Add Asset feature automatically transfers assets placed in a specified folder into **Ektron CMS400.NET**.

It's a very helpful feature if, for example, several users work with assets, you want to manage the files with **Ektron CMS400.NET**, but the users creating or updating the files have neither **Ektron CMS400.NET** licenses nor the client software installed. The users simply place the files in a folder, and the Auto Add Asset feature moves them into **Ektron CMS400.NET**.

The Auto Add Asset feature is very flexible. While setting it up, you can determine the following aspects of how it works.

- whether it uploads a single file, multiple files, a folder, or a folder and its subfolders
- the location of the uploaded files
- if subfolders are included, do you want to mirror that structure within **Ektron CMS400.NET**?
- the file types that can be uploaded
- how frequently the specified files or folders are checked for new content

The rest of this section explains the details of using the Auto Add Asset feature through the following topics.

- ”Installing the Auto Add Asset Feature” on page 319
- ”Updating the Configuration File” on page 320
- ”Start the Auto Add Asset Service” on page 324
- ”Testing the Auto Add Asset Feature” on page 325

Installing the Auto Add Asset Feature

Follow these steps to install the Auto Add Asset Feature.

1. Verify that **Ektron CMS400.NET** is running basic authentication in IIS. For information on how to do this, see http://www.microsoft.com/technet/prodtechnol/WindowsServer2003/Library/IIS/abbca505-6f63-4267-aac1-1ea89d861eb4.mspx?mfr=true.

2. Create the following directories in the file system of the computer that will be used to transfer the files to CMS400.

- **Input** - place files in this directory before uploading them to **Ektron CMS400.NET**
- **Backup** - files are moved to this directory after they are uploaded to **Ektron CMS400.NET**
- **Error** - files are moved to this directory if there was a problem moving them to the `input` folder

3. To each computer that will run the Auto Add Asset Feature, copy the `C:\Program Files\Ektron\CMS400v61\Utilities\AssetWorkerSetup.msi` file and run it.

   This program creates a new folder, `C:\Program Files\Ektron\AssetWorkerSetup`.

4. Test that the Web Services are working. To do that, browse to the following page:

   http://localhost/cms400demo/workarea/webservices/assetservice.asmx

   The page displays two Web services: **AddAsset** and **MakeFolderIfNoExists**.

Updating the Configuration File

After installing the Auto Add Asset feature, you can modify the configuration file, which lets you customize the feature to fit your particular needs.

The file's name and folder path is `C:\Program Files\Ektron\AssetWorkerSetup\maindata.config`.

The following table describes its elements.

Element	**Description**
DmsUserName	The user created during the install. If you let **Ektron CMS400.NET** install create the user, the default is EKT_ASSET_USER.

Element	**Description**
DmsPassword	The password for the user created during the install. This password is encrypted during the install. If you are changing the user and need to encrypt a new password, use the `dms400encryptpassword.exe` encryption tool located in `C:\Program Files\Ektron\CMS400v61\Utilities\DMS`.
DmsUserDomain	The domain for the user created during the install.
DmsServer	Enter the name of the server on which DMS is running.
CmsUserName	By default, **Ektron CMS400.NET** inserts the user name **vs**. This is a special user which lets you work in Visual Studio.net while signing into CMS as an administrator. Note: "Securing Ektron CMS400.NET," on page i advises you to remove the VS user. If you do, you must create a new user, assign him to the Administrators groups, and enter his username and password at these fields.
CmsPassword	By default, **Ektron CMS400.NET** inserts the password of the VS user. If you change the VS user's password, or change the CMS UserName, enter the new password here. Note: "Securing Ektron CMS400.NET," on page i advises you to remove the VS user. If you do, you must create a new user, assign him to the Administrators groups, and enter his username and password at these fields.
CmsUserDomain	Enter the Domain Name, IP Address or Machine Name. An example is `localhost`. A Web client system uses this address to open managed documents through HTTP.
Protocol	Enter the protocol that will be used to transfer the assets: `http` or `hhtps`.
CmsSite	Enter the path to your Web site root. For example, the sample site's root is `http://localhost/CMS400demo`.
DmsSite	Enter the path to your Asset Management folder. For example, the sample site's Asset Management folder is `http://localhost/CMS400demo/AssetManagement`.

Element	**Description**
ConfigType	Enter the type of file upload you want. Choices are: - file - multifile - folder - autofile - autofolder - autofoldercreate - multifolder - automultifolder - automultifoldercreate These choices are explained in "File Upload Types" on page 323.

Folder:
- Input
- Backup
- Error
	Enter paths to the folders you created in Step 2. An example is below.
	`<Input>C:\Test\Input</Input>`
	`<Backup>C:\Test\Backup</Backup>`
	`<Error>C:\Test\Error</Error>`

MultiFolder	if your choice at the `ConfigType` element is listed below, use this element to specify the folders. - multifolder - automultifolder - automultifoldercreate Separate each folder with the pipe character (|). Here is an example. `C:\AutoAddAsset\InputPhotos|C:\AutoAddAsset\InputWorddocs|C:\AutoAddAsset\InputPDFs`
CreateFolder	

Element	Description
FileTypes	Enter all file types that can be added using the Auto Add Asset feature. To identify a file type, enter an asterisk(*), a period (.) and the file's extension. Separate each file type with a comma. Here is the sample list that appears by default: `*.doc,*.xls,*.ppt,*.pdf,*.gif,*.jpg,*.jpeg,*.txt,*.log,*.vsd,*.dot,*.zip` Note: The **FileTypes** field in the Assetmanagement.config file determines which files can be used within **Ektron CMS400.NET**. You should not enter file types here that are not listed in AssetManagement.config. *See Also:* "Allowing File Types" on page 298

File Upload Types

There are nine methods for uploading files from the input folder into **Ektron CMS400.NET**. The following table explains the options and how each works.

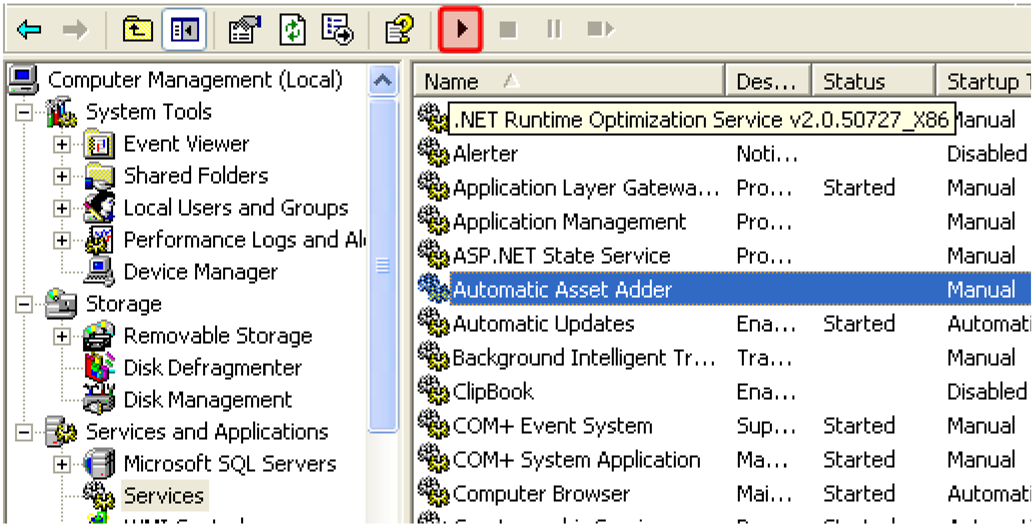
File Upload Type	What is uploaded	If folder, are subfolders also scanned for assets?	Are new files uploaded automatically?	CMS folder structure set up to match your file system?
File	One file	na	no	no
Multifile	Multiple individual files separated by a pipe	na	no	no
Folder	One folder	no	no	no
Autofile	One folder	no	yes	no

File Upload Type	What is uploaded	If folder, are subfolders also scanned for assets?	Are new files uploaded automatically?	CMS folder structure set up to match your file system?
Multifolder	All specified folders Note: Specify the folders at the Multifolder element. See "MultiFolder" on page 322	yes	yes	no
Autofolder	All files in specified folder	yes	yes	no
Autofoldercreate	All files in specified folder	yes	yes	yes
Automultifolder	All files all specified folders Note: Specify the folders at the Multifolder element. See "MultiFolder" on page 322	yes	yes	no
Automultifoldercreate	All files all specified folders Note: Specify the folders at the Multifolder element. See "MultiFolder" on page 322	yes	yes	Yes Note: Changes to files already uploaded are considered new assets

Start the Auto Add Asset Service

The Auto Add Asset feature requires a Windows Service to transfer assets to **Ektron CMS400.NET**. You must begin the service manually every time you start Windows. Follow these steps to start the Auto Add Asset Service.

1. Go to Windows **Control Panel** > **Administrative Tools** > **Computer Management**.
2. Click **Services and Applications** > **Services**.
3. Click the start button (circled below) to start the Automatic Asset Adder service.


Computer Management (Local)
System Tools
Event Viewer
Shared Folders
Local Users and Groups
Performance Logs and Al
Device Manager
Storage
Removable Storage
Disk Defragmenter
Disk Management
Services and Applications
Microsoft SQL Servers
Services

Name	Des...	Status	Startup T
.NET Runtime Optimization Service v2.0.50727_X86			Manual
Alerter	Noti...		Disabled
Application Layer Gatewa...	Pro...	Started	Manual
Application Management	Pro...		Manual
ASP.NET State Service	Pro...		Manual
Automatic Asset Adder			Manual
Automatic Updates	Ena...	Started	Automati
Background Intelligent Tr...	Tra...		Manual
ClipBook	Ena...		Disabled
COM+ Event System	Sup...	Started	Manual
COM+ System Application	Ma...	Started	Manual
Computer Browser	Mai...	Started	Automati

Testing the Auto Add Asset Feature

After completing the above steps, you should verify that the Auto Add Asset feature is working. To do this,

1. Place files of the appropriate type into the specified input folder
2. Open `C:\Program Files\Ektron\AssetWorkerSetup\AssetWorker.exe.config` with a text editor such as Notepad.
3. Change the value of the `PollInterval` element to 10000. Save and close the file.
4. The input folders will be checked for files every 10 seconds. They should appear within the **Ektron CMS400.NET** shortly.

Troubleshooting

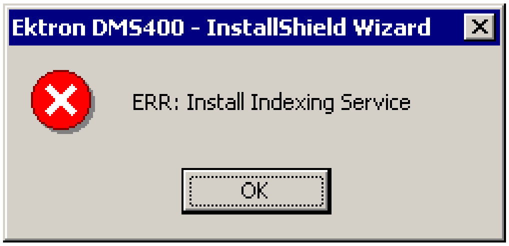
This section explains how to fix problems that may occur with **Ektron CMS400.NET**.

Symptom	See this section
Error message: Install Indexing Service	”Setting Up the Indexing Service” on page 327
A search of PDF files on Ektron CMS returns no results	”Installing the Acrobat PDF iFilter” on page 336
A search of asset files finds no assets on your Web site	”Turning on the Asset Indexing Service” on page 342
The server running **Ektron CMS400.NET** is running slowly; much of its resources are being used even though the computer is idle	”Disabling the System Indexing Service” on page 337
Error message after trying to upload documents: **Failed with error -2147217911**	”Removing aspnet_isapi.dll from the List of Wildcard Application Maps” on page 340
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 (Web Folders Setup)” on page 343
While trying to drag and drop an asset, an error message appears: **The target directory already exists**.	Check the `impersonate` element of the web.config file. If it is set to `true`, make sure the anonymous access account has at least write access to the `dmdata` and `assets` directories.
When you try to publish DMS documents, **Ektron CMS400.NET** sometimes does not allow them to update.	Make sure your production server is not running Windows XP. You cannot use XP as a production server for DMS.

Symptom	See this section
After recently moving the ASM database to a new SQL server that has never hosted an ASM database, the following error appears while adding a DMS asset: AssetManagement error: Failed to save asset. Internal Message: RAISERROR could not locate entry for error 2000000002 in sysmessages. at Ektron.ASM.Documents.Asset.Create(en AssetStatus state) at	”ERRMSG: AssetManagement error: Failed to save asset” on page 346

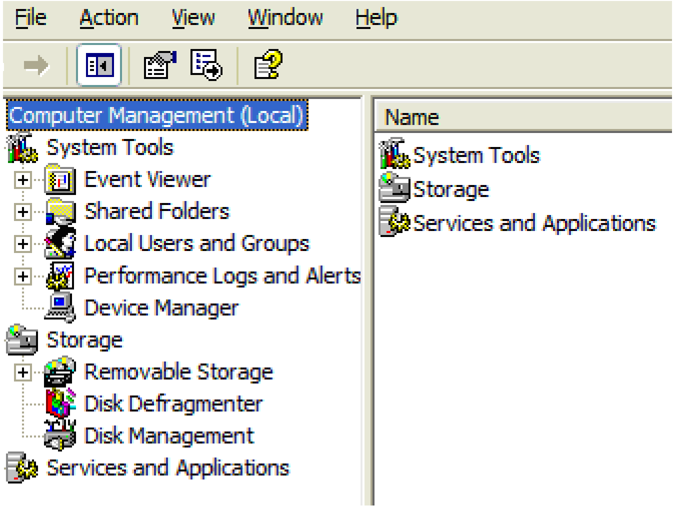
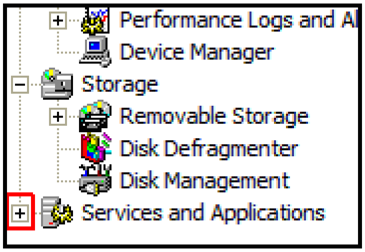
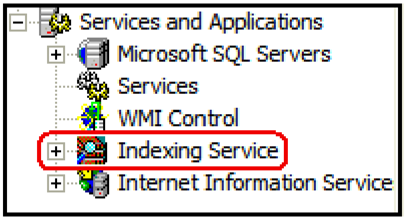
Setting Up the Indexing Service

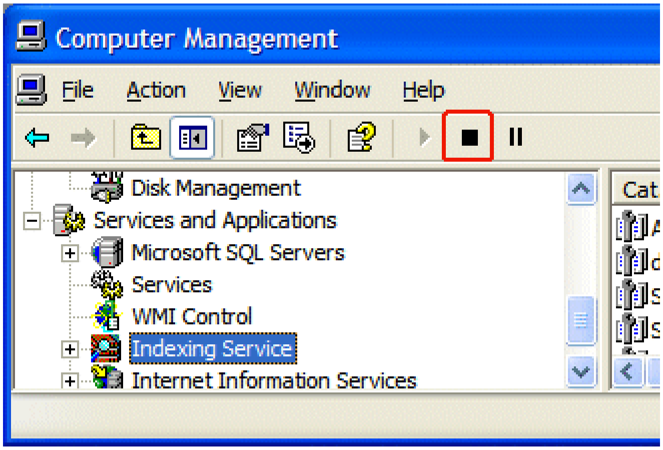
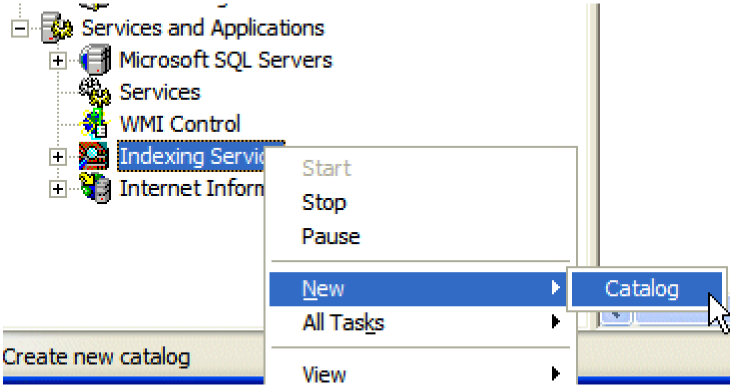
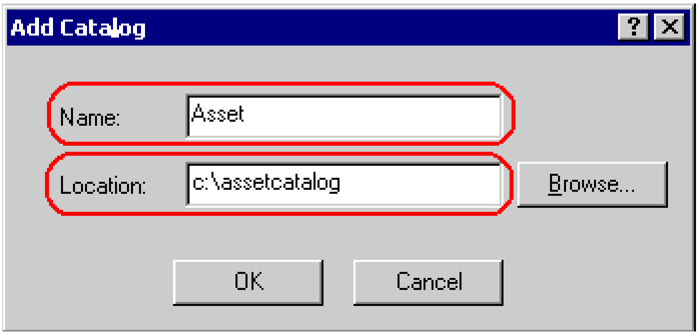
If you see the following error during installation, you need to set up the indexing service manually.

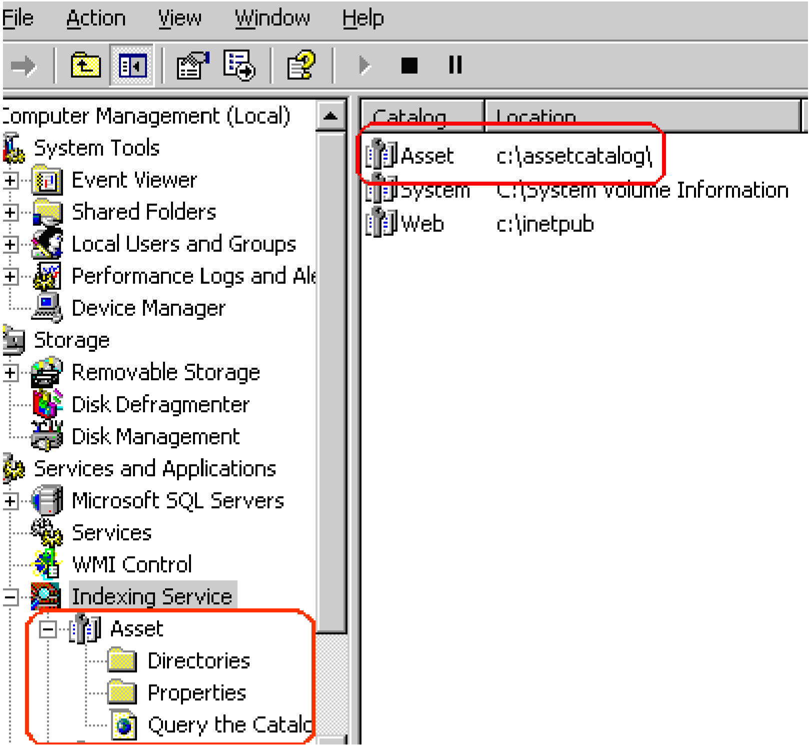
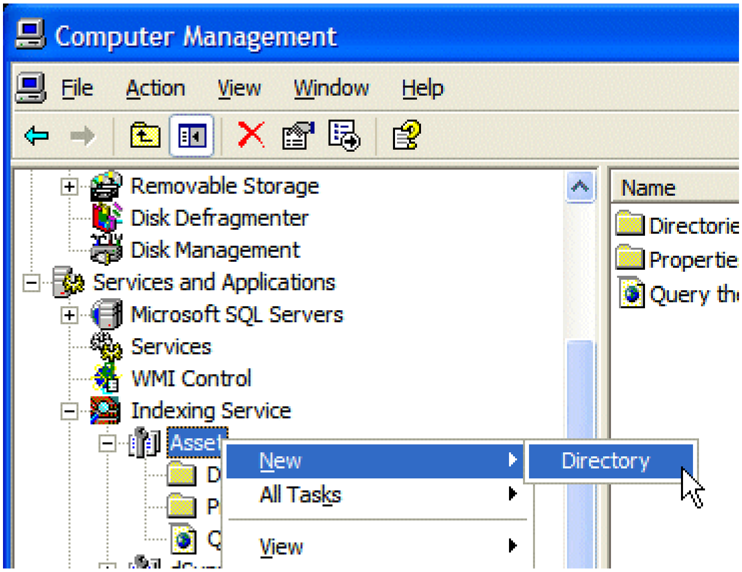


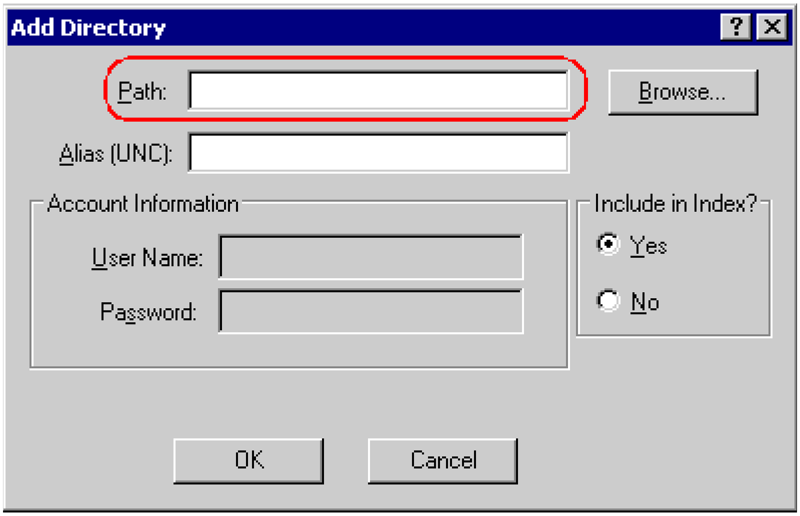
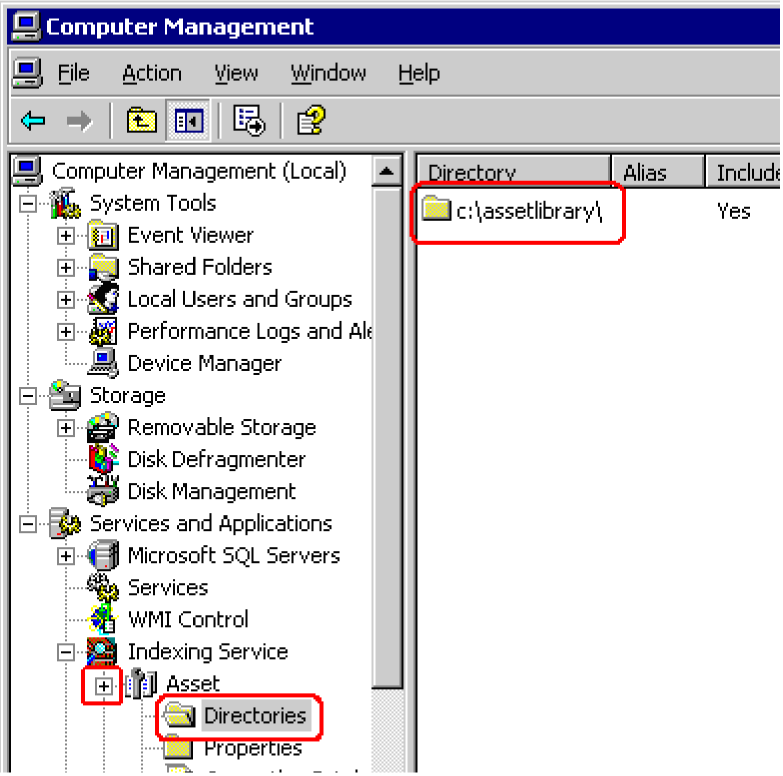
ERR: Install Indexing Service

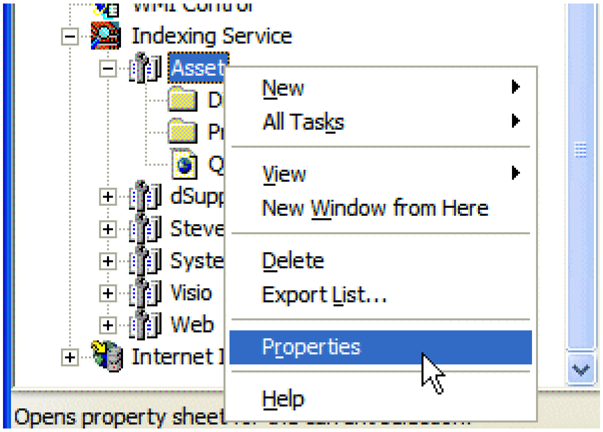
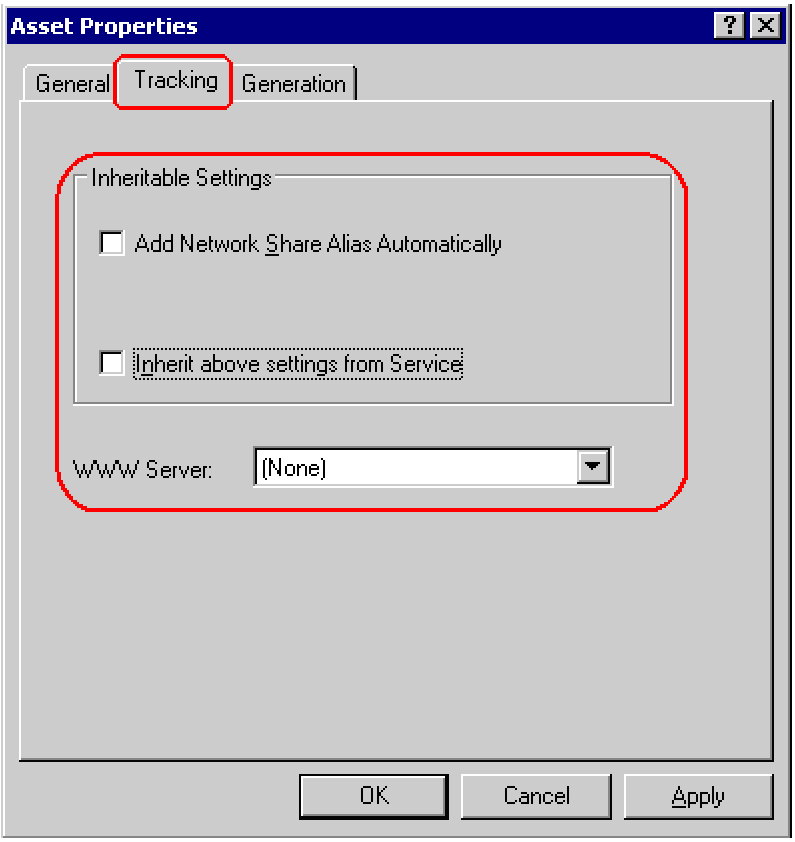
The following steps explain how to do that.

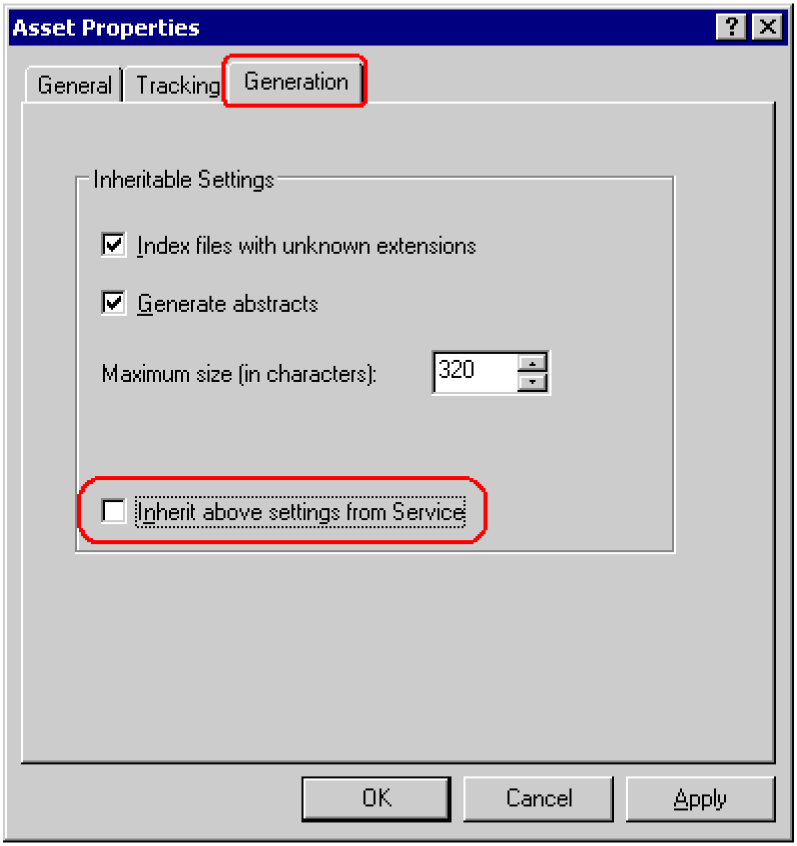
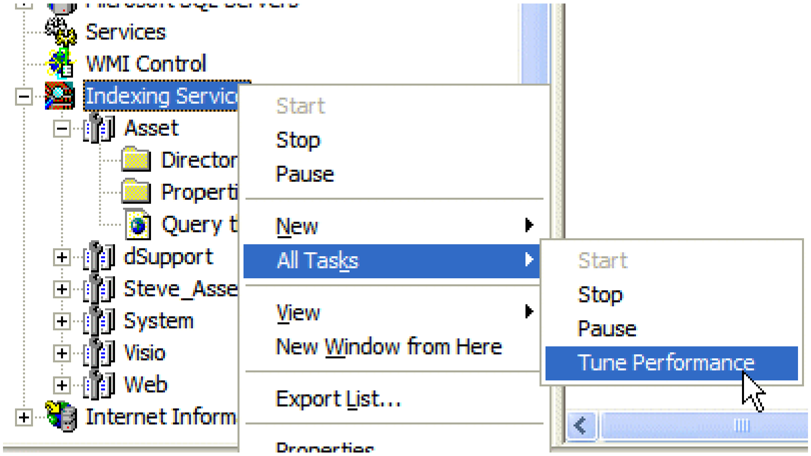
Step	Screen
1. Click **Start > Control Panel > Administrative Tools > Computer Management**. The Computer Management screen appears.	 File Action View Window Help Computer Management (Local) System Tools Event Viewer Shared Folders Local Users and Groups Performance Logs and Alerts Device Manager Storage Removable Storage Disk Defragmenter Disk Management Services and Applications Name System Tools Storage Services and Applications
2. Click the plus sign (**+**) next to **Services and Applications**.	 Performance Logs and Al Device Manager Storage Removable Storage Disk Defragmenter Disk Management Services and Applications
3. Click **Indexing Service**.	 Services and Applications Microsoft SQL Servers Services WMI Control Indexing Service Internet Information Service

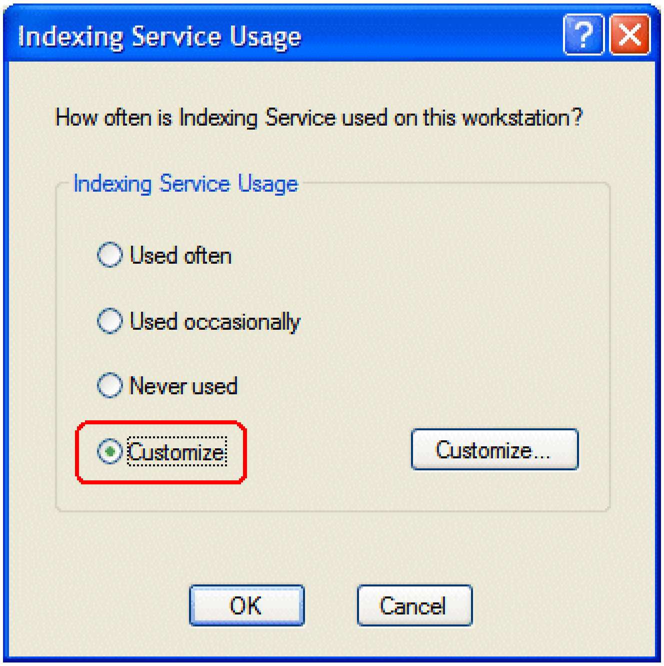
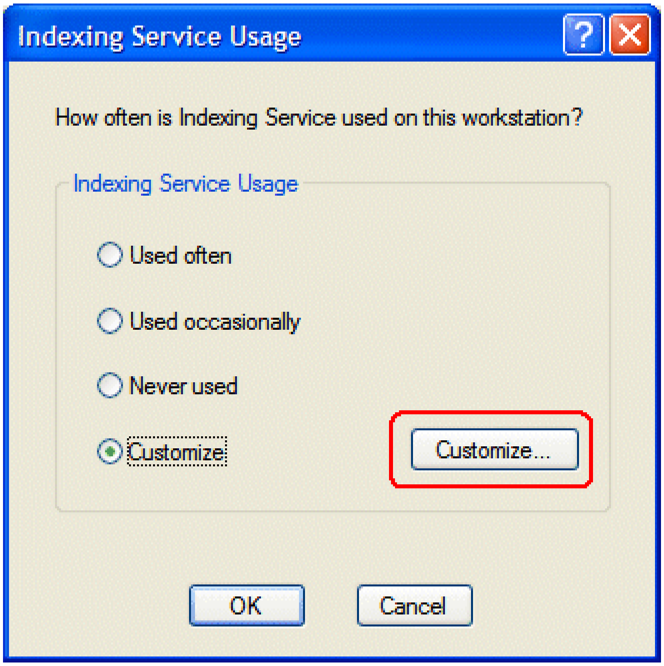
Step	**Screen**
4. Click the stop button to halt the indexing service if it is running. Note: If the Index service is running, the start button ▶ is grayed out.	 Computer Management File Action View Window Help Disk Management Services and Applications Microsoft SQL Servers Services WMI Control Indexing Service Internet Information Services Cat
5. Right click **Indexing Service,** then click **New > Catalog**.	 Services and Applications Microsoft SQL Servers Services WMI Control Indexing Servic Internet Inforn Start Stop Pause New All Tasks View Catalog Create new catalog
6. At the Add Catalog Screen: • In the **Name** field, add the catalog name. • In the **Location** field, identify the folder that will store the asset catalog. Note: By default, during installation, **Ektron CMS400.NET** names the catalog **Asset** and associates it with the location `c:\assetcatalog`. The installer can change the default location.	Add Catalog Name: Asset Location: c:\assetcatalog Browse... OK Cancel

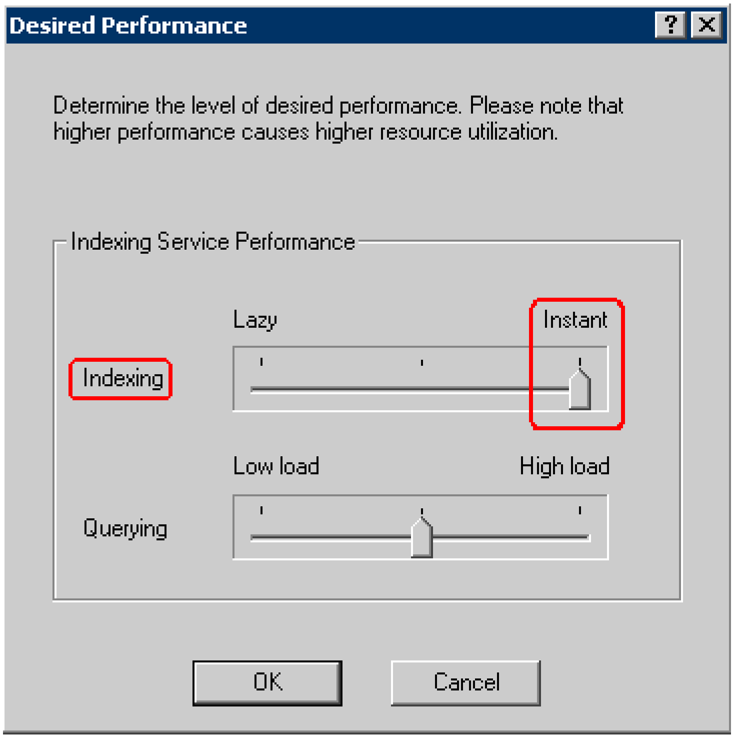
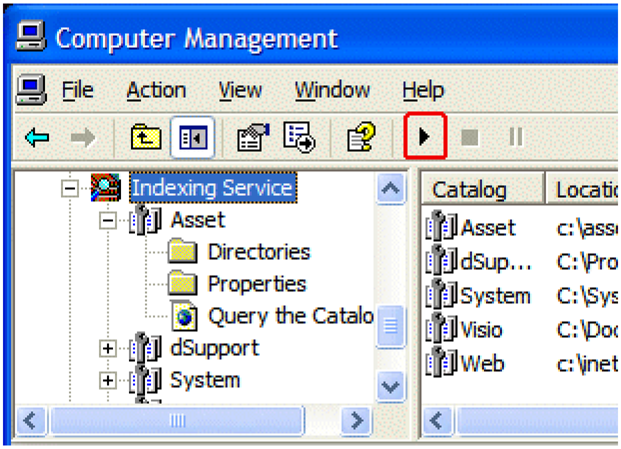
Step	Screen
7. Click **OK**. The Computer Management screen shows your new Indexing Service.	 File Action View Window Help Computer Management (Local) System Tools Event Viewer Shared Folders Local Users and Groups Performance Logs and Ale Device Manager Storage Removable Storage Disk Defragmenter Disk Management Services and Applications Microsoft SQL Servers Services WMI Control Indexing Service Asset Directories Properties Query the Catalo Catalog Location Asset c:\assetcatalog\ System C:\System Volume Information Web c:\inetpub
8. Right click the **Asset** catalog, then click **New > Directory**. This is the directory the service indexes.	 Computer Management File Action View Window Help Removable Storage Disk Defragmenter Disk Management Services and Applications Microsoft SQL Servers Services WMI Control Indexing Service Asset New All Tasks View Directory Name Directorie Propertie Query th

Step	Screen
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**. Note: By default, during installation, **Ektron CMS400.NET** uses `c:\(Domain Name, IP Address or Machine Name)\assetlibrary`.	 Add Directory Path: Browse... Alias (UNC): Account Information User Name: Password: Include in Index? ● Yes ○ No OK Cancel
10. Click **OK**. Then, click the plus sign (**+**) next to **Asset** to view the Directories folder. In the Directories folder, the new directory is displayed.	 Computer Management File Action View Window Help Computer Management (Local) System Tools Event Viewer Shared Folders Local Users and Groups Performance Logs and Ale Device Manager Storage Removable Storage Disk Defragmenter Disk Management Services and Applications Microsoft SQL Servers Services WMI Control Indexing Service Asset Directories Properties Directory: c:\assetlibrary\ — Alias: — Include: Yes

Step	Screen
11. Right click **Assets**, then click **Properties**.	 Indexing Service Assets dSupp Steve Syste Visio Web Internet I New All Tasks View New Window from Here Delete Export List... Properties Help Opens property sheet
12. On the **Tracking** tab, uncheck all boxes and choose **None** for **WWW Server**.	 Asset Properties General Tracking Generation OK Cancel ApplyInheritable Settings ☐ Add Network Share Alias Automatically ☐ Inherit above settings from Service WWW Server: (None)

Step	**Screen**
13. On the **Generation** tab, uncheck **Inherit above settings from Service**. Then click **OK**. The **Index files with unknown extensions** and **Generate abstracts** check boxes can be checked or empty. It is your choice.	 Asset Properties Inheritable Settings ☑ Index files with unknown extensions ☑ Generate abstracts Maximum size (in characters): 320 ☐ Inherit above settings from Service General Tracking Generation OK Cancel Apply
14. Right click **Indexing Service**, then click **All Tasks > Tune Performance**.	 Services WMI Control Indexing Servic Asset Director Properti Query t dSupport Steve_Asse System Visio Web Internet Inform Start Stop Pause New All Tasks View New Window from Here Export List... Properties Start Stop Pause Tune Performance

Step	Screen
15. Click the **Customize** radio button.	 Indexing Service Usage How often is Indexing Service used on this workstation? Indexing Service Usage ○ Used often ○ Used occasionally ○ Never used ● Customize Customize... OK Cancel
16. Click the **Customize button**.	 Indexing Service Usage How often is Indexing Service used on this workstation? Indexing Service Usage ○ Used often ○ Used occasionally ○ Never used ● Customize Customize... OK Cancel

Step	Screen
17. Change **Indexing** to **Instant**.	
18. Click **OK** and **OK** again to close both dialog boxes.	
19. Click the **Start** button to start the service again.	

Desired Performance

Determine the level of desired performance. Please note that higher performance causes higher resource utilization.

Indexing Service Performance
Lazy
Instant
Indexing
Low load
High load
Querying
OK
Cancel

Computer Management
File
Action
View
Window
Help
Indexing Service
Asset
Directories
Properties
Query the Catalo
dSupport
System
Catalog
Locatio
Asset
c:\ass
dSup...
C:\Pro
System
C:\Sys
Visio
C:\Do
Web
c:\inet

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

Follow these steps to make sure that the Adobe PDF iFilter is installed correctly.

Step	Screen
1. Ensure your server meets one of the following requirements.	• 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 Each environment must contain Microsoft Indexing Services.
2. Download the PDF iFilter from http://www.adobe.com/support/downloads/detail.jsp?ftpID=2611to the machine where you wish to install it.	

Step	**Screen**
3. Stop all appropriate clients, using one or more of the following methods.	• 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.
4. Uninstall any previous version of PDF iFilter.	
5. Double-click the downloaded PDF iFilter 6.0 EXE file and follow the on-screen instructions.	
6. Start all appropriate clients, using one or more of the following methods.	• 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.
7. Re-index your system with the appropriate clients, using the following method.	• 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 CMS400.NET** is running slowly; much of its resources are being used even when the computer is idle.

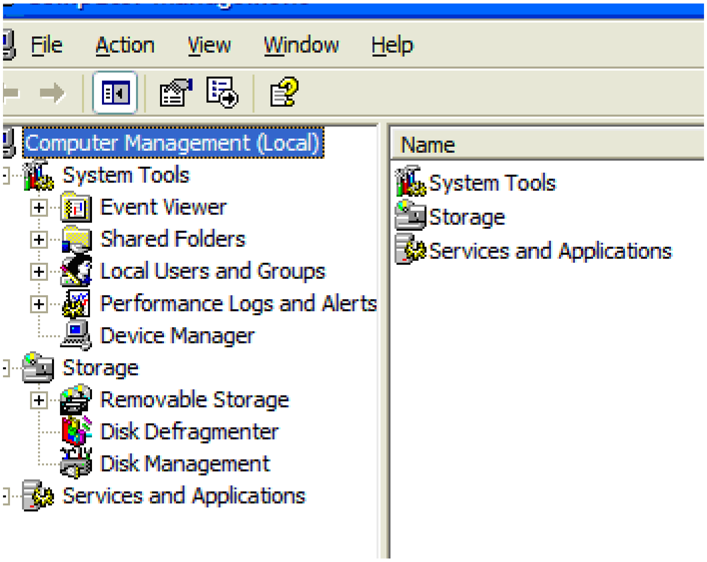
Cause

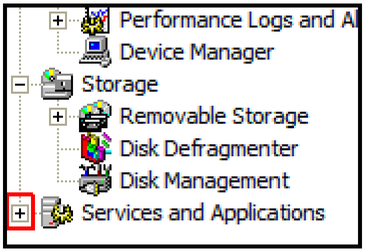
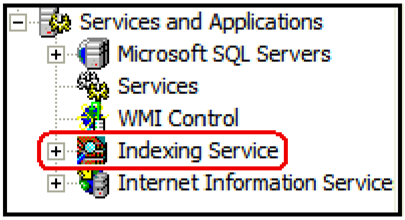
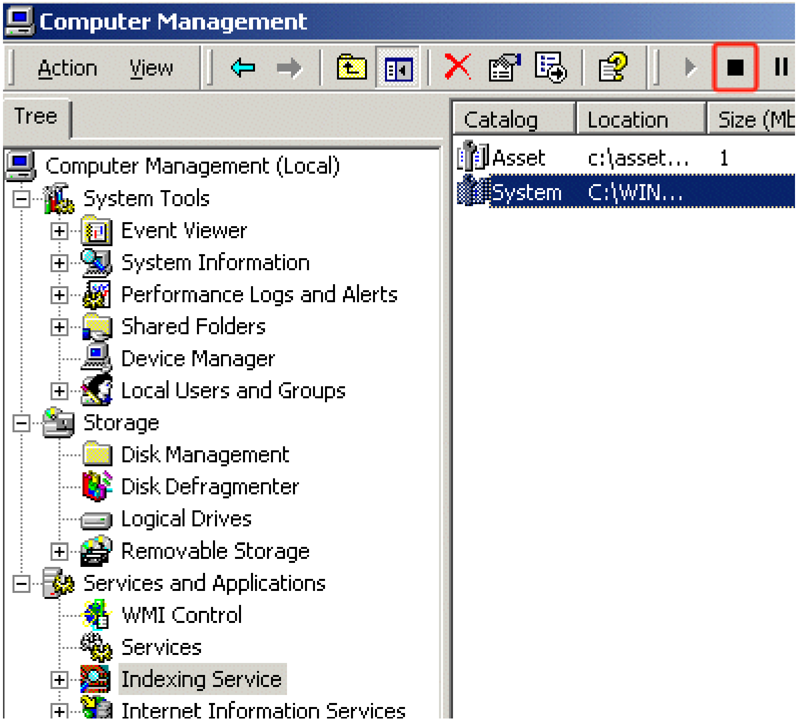
The Microsoft Windows Indexing service is turned on during installation. This service indexes every file on the server, and the resources required to carry out that task slow down other activities.

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
1. Click **Start > Control Panel > Administrative Tools > Computer Management**. The Computer Management screen appears.	 File Action View Window Help Computer Management (Local) System Tools Event Viewer Shared Folders Local Users and Groups Performance Logs and Alerts Device Manager Storage Removable Storage Disk Defragmenter Disk Management Services and Applications Name System Tools Storage Services and Applications

Step	Screen
2. Click the plus sign (**+**) next to **Services and Applications**.	 Performance Logs and Al Device Manager Storage Removable Storage Disk Defragmenter Disk Management Services and Applications
3. Click **Indexing Service**.	 Services and Applications Microsoft SQL Servers Services WMI Control Indexing Service Internet Information Service
4. Click the Stop button to stop the indexing service.	 Computer Management Action View Tree Catalog Location Size (Mb Asset c:\asset... 1 System C:\WIN... Computer Management (Local) System Tools Event Viewer System Information Performance Logs and Alerts Shared Folders Device Manager Local Users and Groups Storage Disk Management Disk Defragmenter Logical Drives Removable Storage Services and Applications WMI Control Services Indexing Service Internet Information Services

Removing aspnet_isapi.dll from the List of Wildcard Application Maps

Symptom

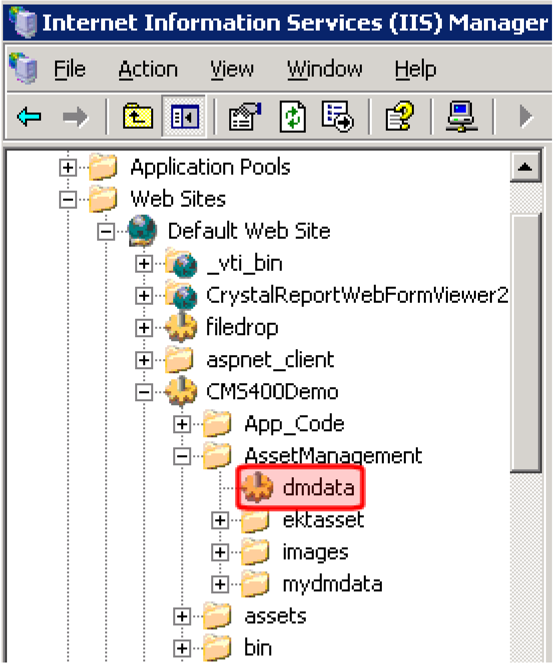
When you try to upload an asset, you get the error message “Failed to upload documents.”

Cause

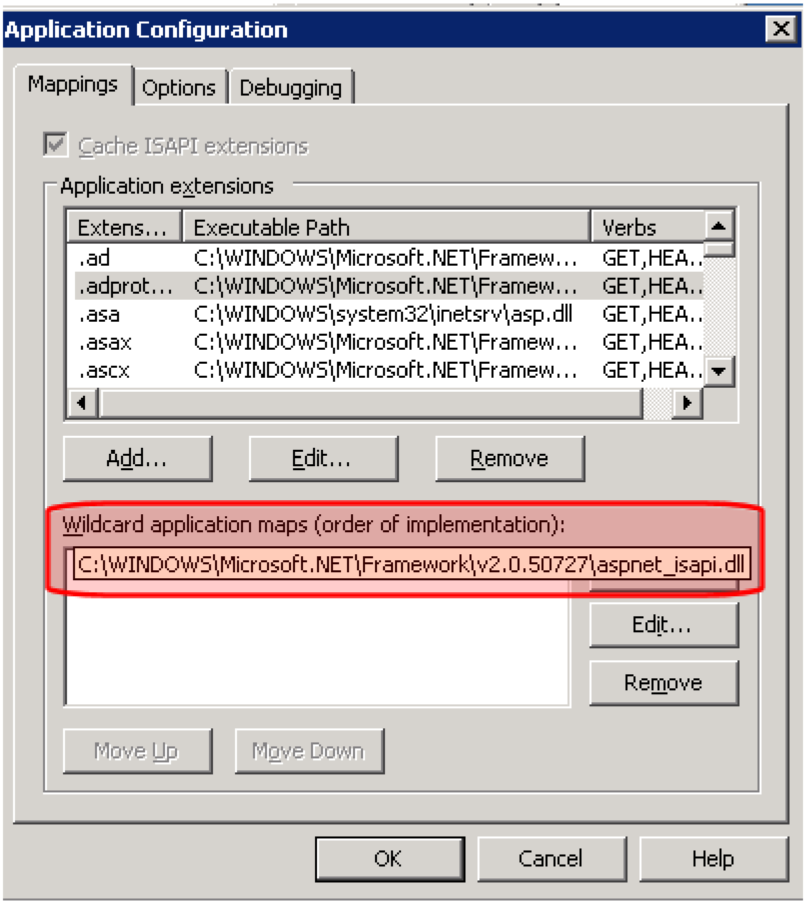
Remove the aspnet_isapi.dll from the list of Wildcard Application Maps.

Resolution

1. Open IIS.
2. Go to your **Ektron CMS400.NET** Web site.
3. Underneath the Web site, click **Asset Management** > **dmdata**.


Internet Information Services (IIS) Manager
File
Action
View
Window
Help
Application Pools
Web Sites
Default Web Site
_vti_bin
CrystalReportWebFormViewer2
filedrop
aspnet_client
CMS400Demo
App_Code
AssetManagement
dmdata
ektasset
images
mydmdata
assets
bin

4. Right click **dmdata** and choose **Properties**.
5. Click the **Virtual Directory** tab.
6. Click the **Configuration** button.
7. Look in the **Wildcard Application Maps** area. If aspnet_isapi.dll appears, remove it.


Application Configuration
Mappings
Options
Debugging
Cache ISAPI extensions
Application extensions
Add...
Edit...
Remove
Edit...
Remove
Move Up
Move Down
OK
Cancel
Help

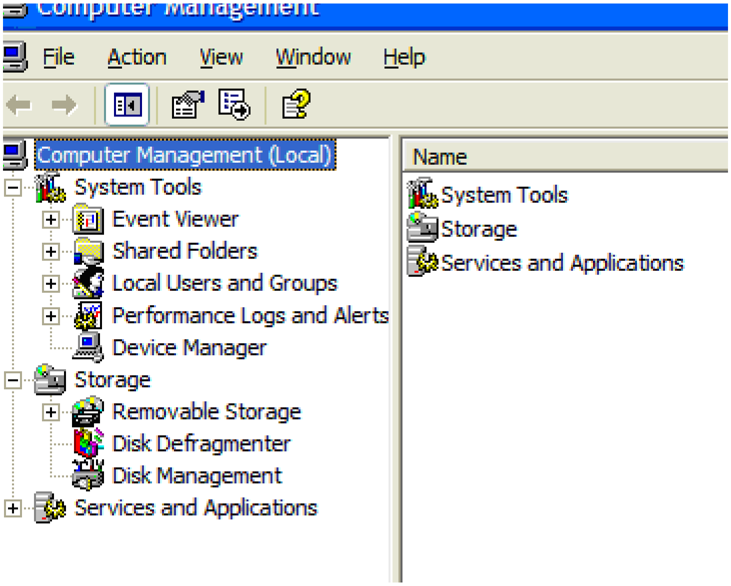
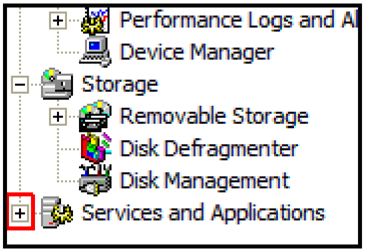
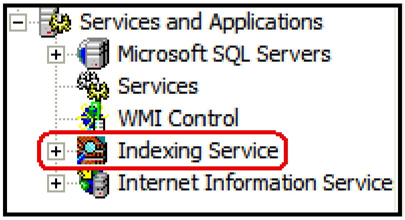
Extens...	Executable Path	Verbs
.ad	C:\WINDOWS\Microsoft.NET\Framew...	GET,HEA...
.adprot...	C:\WINDOWS\Microsoft.NET\Framew...	GET,HEA...
.asa	C:\WINDOWS\system32\inetsrv\asp.dll	GET,HEA...
.asax	C:\WINDOWS\Microsoft.NET\Framew...	GET,HEA...
.ascx	C:\WINDOWS\Microsoft.NET\Framew...	GET,HEA...

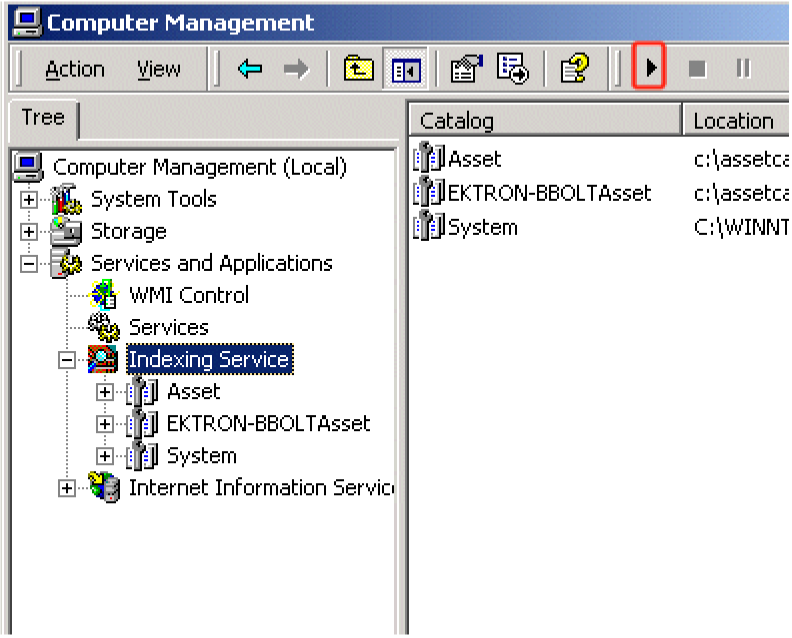
Wildcard application maps (order of implementation):

C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_isapi.dll

8. Click **OK**.

Turning on the Asset Indexing Service

Step	Screen
1. Click **Start > Control Panel > Administrative Tools > Computer Management**. The Computer Management screen appears.	 Computer Management File Action View Window Help Computer Management (Local) System Tools Event Viewer Shared Folders Local Users and Groups Performance Logs and Alerts Device Manager Storage Removable Storage Disk Defragmenter Disk Management Services and Applications Name System Tools Storage Services and Applications
2. Click the plus sign (**+**) next to **Services and Applications**.	 Performance Logs and Al Device Manager Storage Removable Storage Disk Defragmenter Disk Management Services and Applications
3. Click **Indexing Service**.	 Services and Applications Microsoft SQL Servers Services WMI Control Indexing Service Internet Information Service

Step	Screen
4. Click the Start button to start the indexing service.	

Computer Management
Action
View
Tree
Catalog
Location
Computer Management (Local)
System Tools
Storage
Services and Applications
WMI Control
Services
Indexing Service
Asset
EKTRON-BBOLTAsset
System
Internet Information Servic
Asset
c:\assetca
EKTRON-BBOLTAsset
c:\assetca
System
C:\WINNT

Using Microsoft Windows Server 2003 as a Client (Web Folders Setup)

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 Windows2003 (not Office 2003) and install the WebFolders client. Doing so will keep you compliant with licensing.

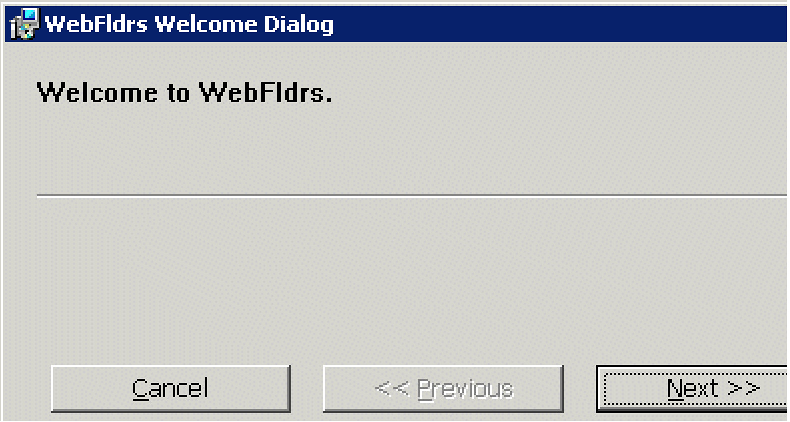
Installing WebFolders from Office 2003 is only allowed if you have an Office 2003 license for each Windows2003 server you plan to install WebFolders on.

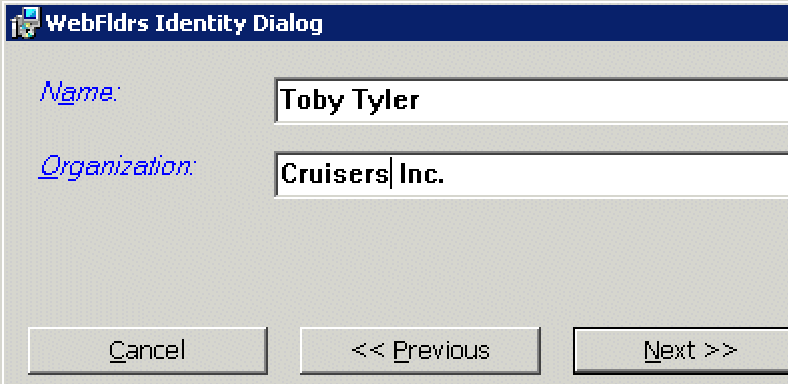
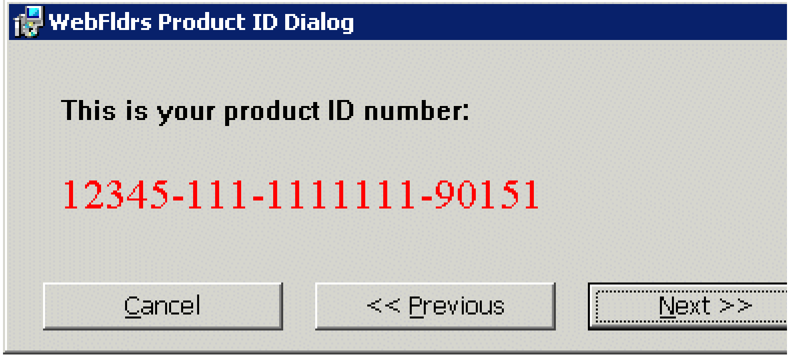
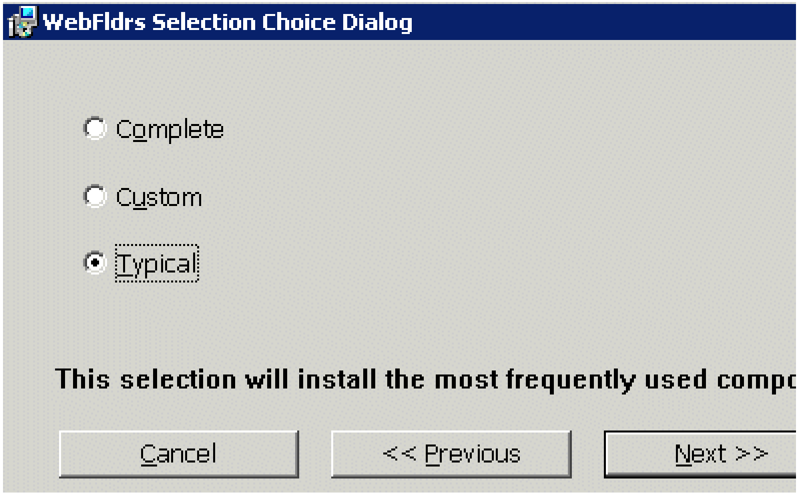
Web Folders Setup for Microsoft Windows Server 2003

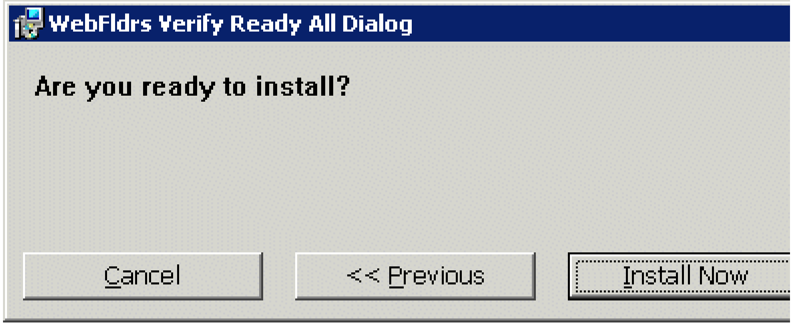
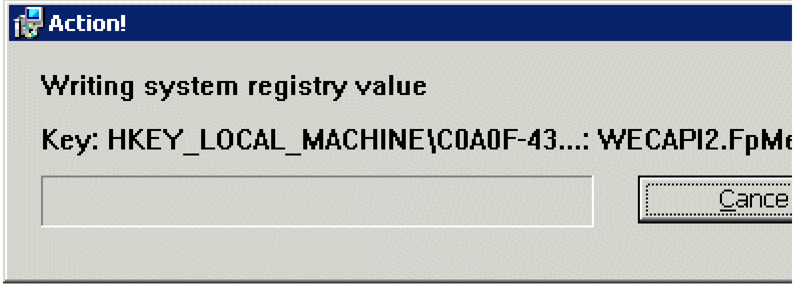
NOTE You only need to run the Web Folders Setup if there is a problem during the install. The **Ektron CMS400.NET** install performs the setup when needed.

The MSDAIPP.DLL is no longer shipped with Microsoft Windows Server 2003, making communication with Web folders impossible. To correct this, **Ektron CMS400.NET** setup runs the Web folder setup when it detects Microsoft Windows Server 2003.

The following steps explains installing Web Folders. You will need to obtain a copy of the webfldrs.msi file.

Step	Setup Screen
1. Double click the **webfldrs.msi** file.	
2. The Web Folders install screen appears. Click **Next** to continue.	 WebFldrs Welcome Dialog Welcome to WebFldrs.

Step	Setup Screen
3. The Web Folders Identity dialog box appears. - Add your **Name**. - Add your **Organization**. - Click **Next**.	 WebFldrs Identity Dialog Name: Toby Tyler Organization: Cruisers Inc.
4. The Web Folders Product ID dialog box appears. This dialog box displays the your product ID number. - Click **Next**.	 WebFldrs Product ID Dialog This is your product ID number: 12345-111-1111111-90151
5. The Web Folders Selection Choice dialog box appears. - **Complete** - installs all components. - **Custom** - you choose the components to install. - **Typical** - installs the most frequently used components. After making a selection, click **Next**.	 WebFldrs Selection Choice Dialog ○ Complete ○ Custom ● Typical This selection will install the most frequently used compo

Step	Setup Screen
6. The Verify Ready All dialog box appears. Click **Install Now**.	 WebFldrs Verify Ready All Dialog Cancel << Previous Install Now Are you ready to install?
7. The Action dialog box appears. The Setup is installing Web folders.	 Writing system registry value Key: HKEY_LOCAL_MACHINE\C0A0F-43...: WECAPI2.FpMe
8. The We Are Done dialog box appears. Click **OK**.	

ERRMSG: AssetManagement error: Failed to save asset

Symptom

After recently moving the ASM database to a new SQL server that has never hosted an ASM database, the following error appears while adding a DMS asset.

```
AssetManagement error: Failed to save asset. Internal Message: RAISERROR could not locate entry
for error 2000000002 in sysmessages. at Ektron.ASM.Documents.Asset.Create(enAssetStatus state)
at Ektron.ASM.Documents.AbstractAssetManagement.Create(AssetMetaData assetMetaData,
enAssetStatus state) at Ektron.ASM.PluginManager.PluginHandler.Create(AssetMetaData
assetMetaData, enAssetStatus state) at
AssetManagement.AssetManagementService.Create(AssetMetaData assetMetaData, enAssetStatus
state) at Mojave.AssetManagementProxy.Create(AssetMetaData assetMetaData, enAssetStatus state)
at Ektron.Cms.DataIO.EkContentRW.AddContentv2_0(Collection ContObj) at
Ektron.Cms.EkException.ThrowException(Exception ex) at
Ektron.Cms.DataIO.EkContentRW.AddContentv2_0(Collection ContObj) at
Ektron.Cms.Content.EkContent.AddNewContentv2_0(Collection ContObj)
```

Cause

During the creation of the ASM database, a total of 7 messages are written to the sysmessages table in SQL Server's master database. Each installation of SQL Server has its own master database and, in a typical move from one location to another, changes to the master database are not brought over.

If the ASM database was moved, and these messages are not in the sysmessages table in the new location's master table, the above error appears instead of a standard error message.

Resolution

Run this set of SQL scripts against your database. They add appropriate messages to the sysmessages table in the master database.

```
/
**********************************************************************************************
***/
sp_addmessage 2000000001, 10, N'Error in %s: Error %d inserting into %s. %s', US_ENGLISH,
FALSE, REPLACE
go

/
**********************************************************************************************
***/
sp_addmessage 2000000002, 10, N'Error in %s: Insert into %s returned %d rows. %s', US_ENGLISH,
FALSE, REPLACE
go

/
**********************************************************************************************
***/
sp_addmessage 2000000003, 10, N'Error in %s: Failed creating record because primary key already
exists. %s', US_ENGLISH, FALSE, REPLACE
go

/
**********************************************************************************************
***/
sp_addmessage 2000000004, 10, N'Error in %s: Error %d updating into %s. %s', US_ENGLISH, FALSE,
REPLACE
go

/
**********************************************************************************************
***/
```

```
sp_addmessage 2000000005, 10, N'Error in %s: Update into %s returned %d rows. %s', US_ENGLISH,
FALSE, REPLACE
go

/
**********************************************************************************************
***/
sp_addmessage 2000000007, 10, N'Error in %s: Error %d deleting into %s. %s', US_ENGLISH, FALSE,
REPLACE
go

/
**********************************************************************************************
***/
sp_addmessage 2000000008, 10, N'Error in %s: Delete into %s returned %d rows. %s', US_ENGLISH,
FALSE, REPLACE
go
```

This snippet utilizes the sp_addmessage stored procedure from the master database, which adds the appropriate messages to the correct table.

NOTE Although it is possible to recode these as an INSERT statement that can run directly against the sysmessages table, that procedure is not recommended.

Managing Tasks

NOTE Much of the Task functionality is documented in the **Ektron CMS400.NET** Users Manual section “Managing Tasks”. As an administrator, you should familiarize yourself with this information.

Tasks are typically assigned to content to help you monitor and manage changes to your Web site. Within Ektron CMS400.NET, users can assign tasks to themselves and other users. Tasks may include updating content, publishing content, updating an image and reordering a collection.

There are two kinds of tasks:

- Tasks not assigned to content
- Tasks assigned to content

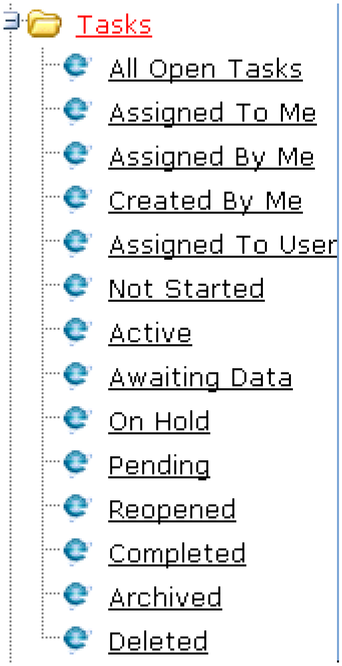
A standard Ektron CMS400.NET user only sees tasks that are either assigned to or by himself. However, an administrator can view all tasks regardless of who they are assigned to or by.

This chapter explains how to access, manage, and assign tasks via the following topics:

- ”The Tasks Folder” on page 350
- ”Task Permissions” on page 350
- ”Task Categories and Types” on page 351
- ”Automatic Creation of Tasks Associated with Content” on page 360
- ”Task States” on page 368
- ”Task View Options” on page 371
- ”Email Notification” on page 375
- ”Archiving a Task” on page 375
- ”Deleting a Task” on page 377
- ”Purging a Task” on page 377

The Tasks Folder

The tasks folder in the Smart Desktop contains all tasks in the Web site.



Tasks
- All Open Tasks
- Assigned To Me
- Assigned By Me
- Created By Me
- Assigned To User
- Not Started
- Active
- Awaiting Data
- On Hold
- Pending
- Reopened
- Completed
- Archived
- Deleted

Task Permissions

Assign task-related permissions on the screens indicated below.

Permission	Where assigned
Create task	Manage Members for Role: Task-Create
Redirect task (that is, assign to another user)	Manage Members for Role: Task-Delete
Delete task	Manage Members for Role: Task-Redirect

For more information about the screens listed above, see "Using the Roles Screens" on page 564.

Task Categories and Types

Tasks can be assigned a Task Category, then a Task Type. This gives users an additional way to filter their tasks.

Task Categories and Task Types have a hierarchical relationship: the Task Category is the parent, and the Task Type is the child. So, several types can be assigned to each category.

Some examples of Task Categories might be Engineering, Sales, Documentation, or Web Design. Examples of Task Types might be Edit Content, Update Documents, or Contact Customer.

NOTE Only members of the Administrator User Group or users assigned the following roles can view, add, or edit task categories and types: Task-Create, Task-delete, Task-Redirect. *See Also:* "Defining Roles" on page 564

You can create Task Categories and Task Types from these locations.

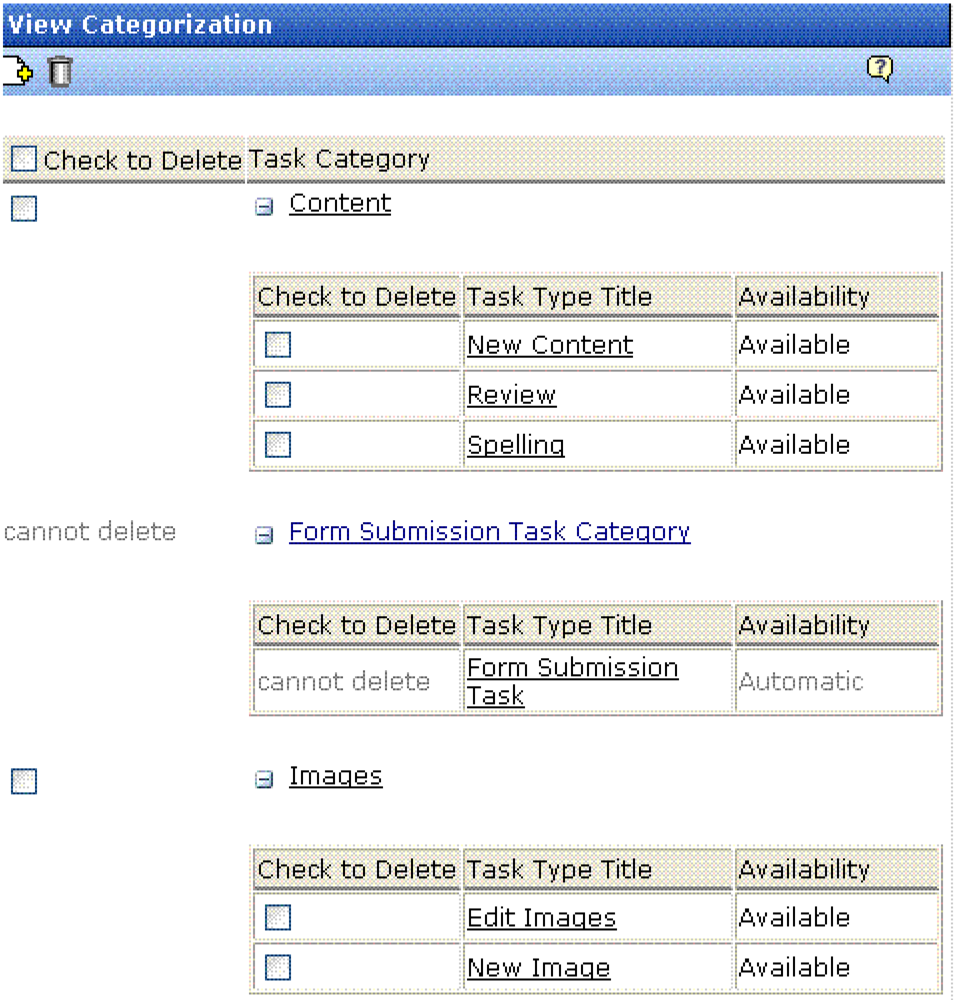
- When adding a task. *See Also:* **Ektron CMS400.NET** User Manual section "Managing Tasks" > "Creating a Task via the Task Folder" When editing a task.
- When working in the View Categorization screen.

View Categorization Screen

The View Categorization screen allows administrators to work with Task Categories and Task Types. From this screen you can create, edit, and delete them.

To access the View Categorization Screen, access the **Workarea** > **Settings** > **Configuration** > **Task Types**.

The following screen appears.



View Categorization

☐ Check to Delete	Task Category
☐	⊟ Content

Check to Delete	Task Type Title	Availability
☐	New Content	Available
☐	Review	Available
☐	Spelling	Available

cannot delete	⊟ Form Submission Task Category

Check to Delete	Task Type Title	Availability
cannot delete	Form Submission Task	Automatic

☐	⊟ Images

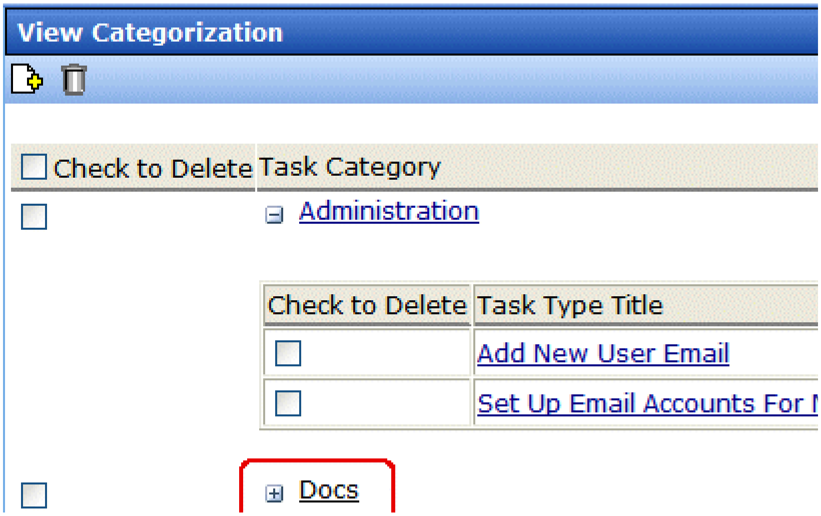
Check to Delete	Task Type Title	Availability
☐	Edit Images	Available
☐	New Image	Available

Viewing Task Categories

Note The View Categorization screen has a system-defined category (Form Submission Task) that can only be used with forms. You can change its name but cannot delete it. For more information, see the Forms chapter of the Ektron CMS400.NET User Manual.

While in the View Categorization screen, you can collapse and expand Task Categories. To collapse a Task Category, click the (⊟) button next to the Task Category name. To expand one, click the (⊞) button next to the Task Category name.

The following example shows the View Categorization screen with one Task Category minimized.



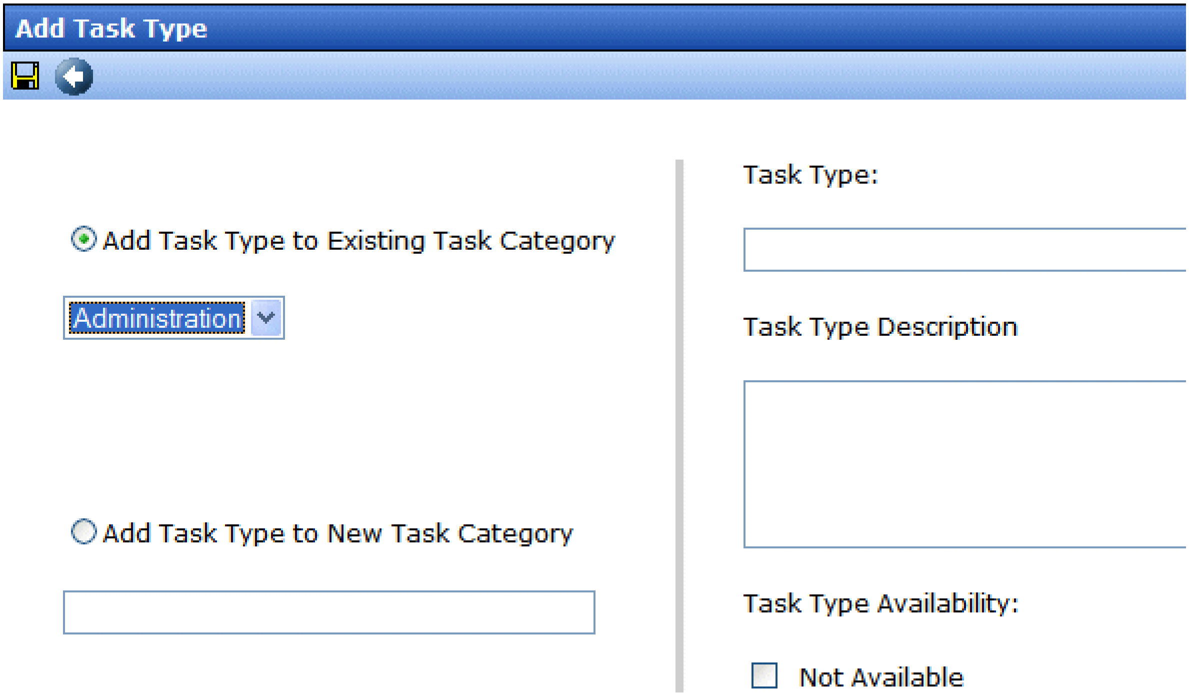
View Categorization

☐ Check to Delete	Task Category
☐	⊟ Administration
☐	⊞ Docs

Check to Delete	Task Type Title
☐	Add New User Email
☐	Set Up Email Accounts For N

Creating Task Categories and Task Types

From the View Categorization screen, you can create Task Categories and Task Types by clicking the Add Task Button (). When you do, the following screen appears.



Add Task Type

● Add Task Type to Existing Task Category

Administration

○ Add Task Type to New Task Category

Task Type:

Task Type Description

Task Type Availability:

☐ Not Available

From this screen, you can perform these tasks.

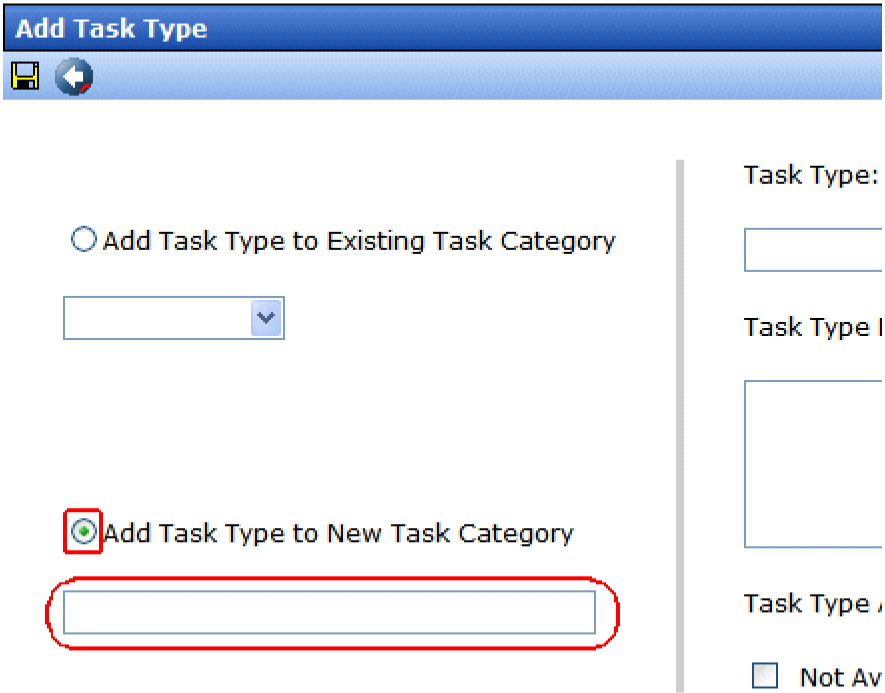
- ”Adding a New Task Category and Task Type” on page 354
- ”Adding a New Task Type to an Existing Task Category” on page 355
- ”Editing Task Category” on page 356
- ”Editing a Task Type” on page 357
- ”Task Type Availability” on page 358

Adding a New Task Category and Task Type

To add new Task Category and Task Type, follow these steps.

1. Click the **Add Task Type** button ().
2. The Add Task Type Screen appears.

3. Click the **Add Task Type to New Task Category** radio button or in the text box.
4. Enter a name in the **New Task Category** field.


Add Task Type
○ Add Task Type to Existing Task Category
● Add Task Type to New Task Category
Task Type:
Task Type I
Task Type /
☐ Not Av

5. Add a Task Type name in the **Task Type** field.
6. Enter a **Task Type Description**.
7. Choose a Task Type Availability. *See Also:* ”Task Type Availability” on page 358
8. Click **Save** (💾).
9. Your new Task Categories and Task Types appear on the View Categorization screen.

Adding a New Task Type to an Existing Task Category

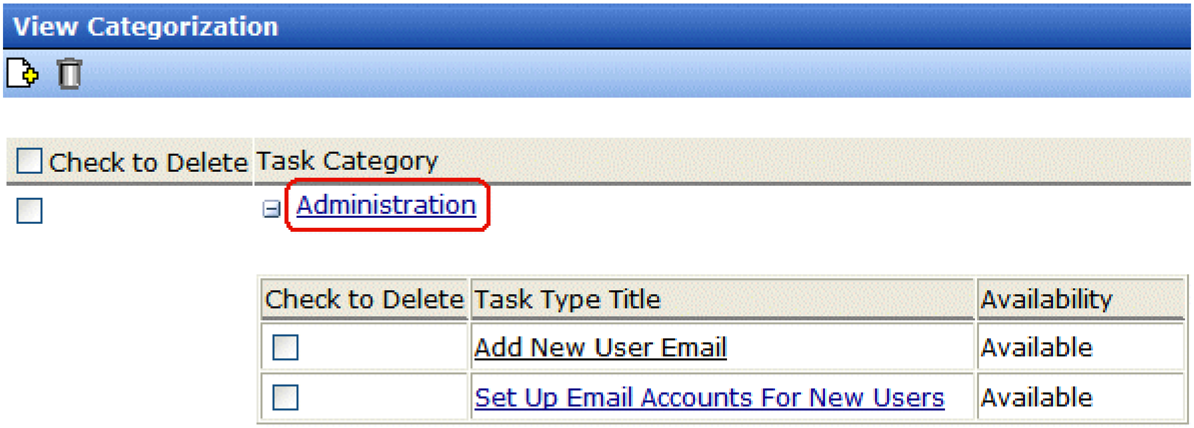
To add a new Task Type to an existing Task Category, follow these steps.

1. Click the **Add Task Type** button (📄)
2. The Add Task Type Screen appears.

3. Click the **Add Task Type to New Task Category** radio button or click the drop down box.
4. Choose a category from the drop down box.
5. Add a Task Type name in the **Task Type** field.
6. Enter a **Task Type Description**.
7. Choose a Task Type Availability. *See Also:* "Task Type Availability" on page 358
8. Click **Save** (💾).
9. Your new Task Categories and Task Types appear on the View Categorization screen.

Editing Task Category

You can edit a Task Category names. To edit a Task Category, click the Task Category link.

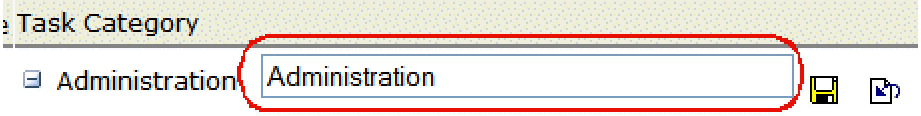


View Categorization

☐ Check to Delete	Task Category
☐	⊟ Administration

Check to Delete	Task Type Title	Availability
☐	Add New User Email	Available
☐	Set Up Email Accounts For New Users	Available

A text box screen appears next to the category name. Use the text box to change the name.



⊟ Administration [Administration]

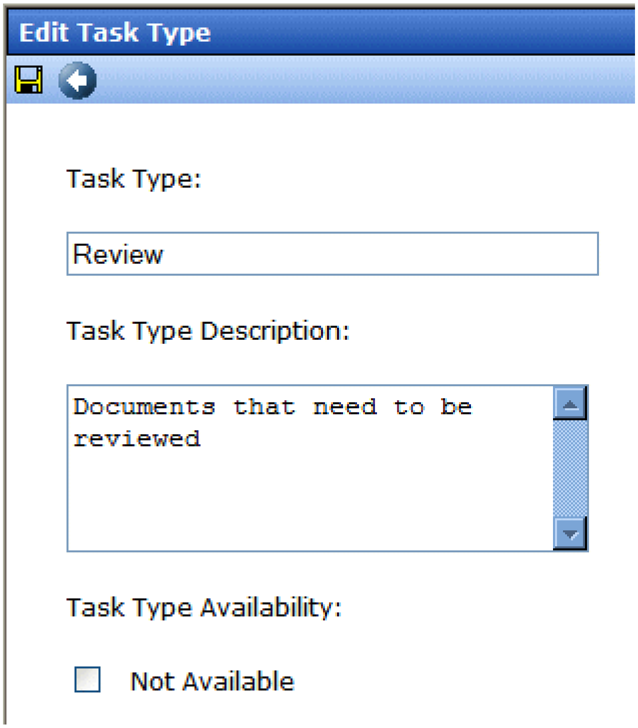
You can either save (💾) the changes, or cancel (↩) the edit.

Editing a Task Type

From the View Categorization screen, you can edit a Task Type. This allows you to change the Task Type name, Task Type description, and Task Type availability.

To edit a Task Type, follow these steps.

1. On the View Categorization screen, click a Task Type.
2. The Edit Task Type screen appears.



Task Type:

Review

Task Type Description:

Documents that need to be reviewed

Task Type Availability:

☐ Not Available

From this screen you can edit the following:

- Task Type
- Task Type Description

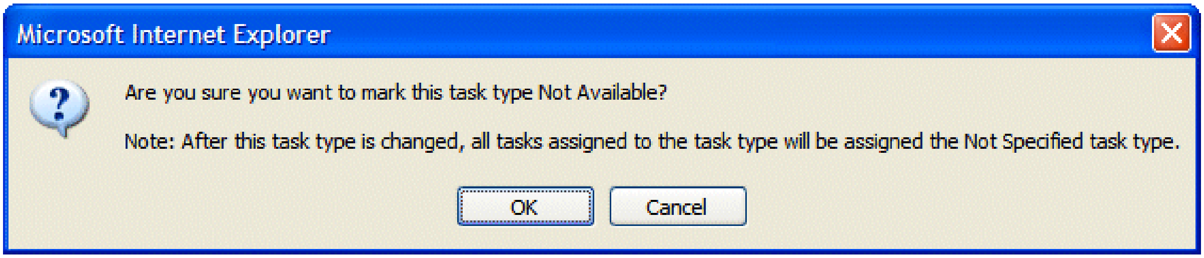
- Task Type Availability. *See Also:* ”Task Type Availability” on page 358

3. Edit the information.
4. Click Save (🖫).
5. The Task Type information is changed.

Task Type Availability

Task Types can be hidden from users by clicking the Not Available check box in the Add Task Type and Edit Task Type screens. By making a Task Type not available, you can suppress without deleting it.

When you make a Task Type not available, you see the following warning.



Are you sure you want to mark this task type Not Available?

Note: After this task type is changed, all tasks assigned to the task type will be assigned the Not Specified task type.

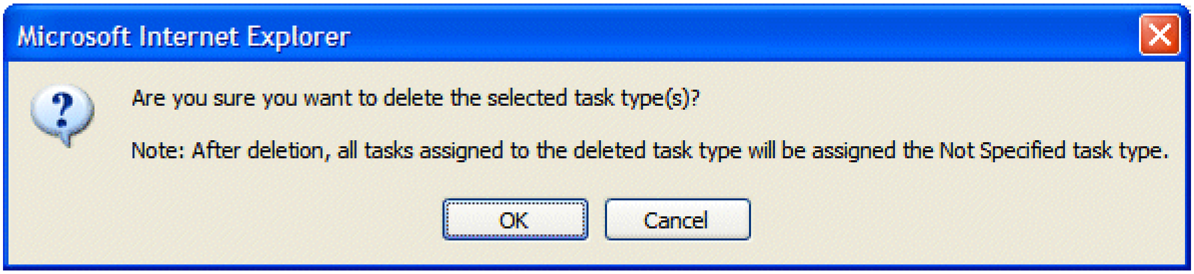
After you make a Task Type not available, the assigned tasks’ Type and Category are changed to **Not Specified**.

Deleting Task Categories and Task Types

You can delete Task Types by Task Category or individually.

To delete a Task Type, click the check box next to the Task Type, then click the Delete (🗑) button.

When you delete a Task Type, the following appears.

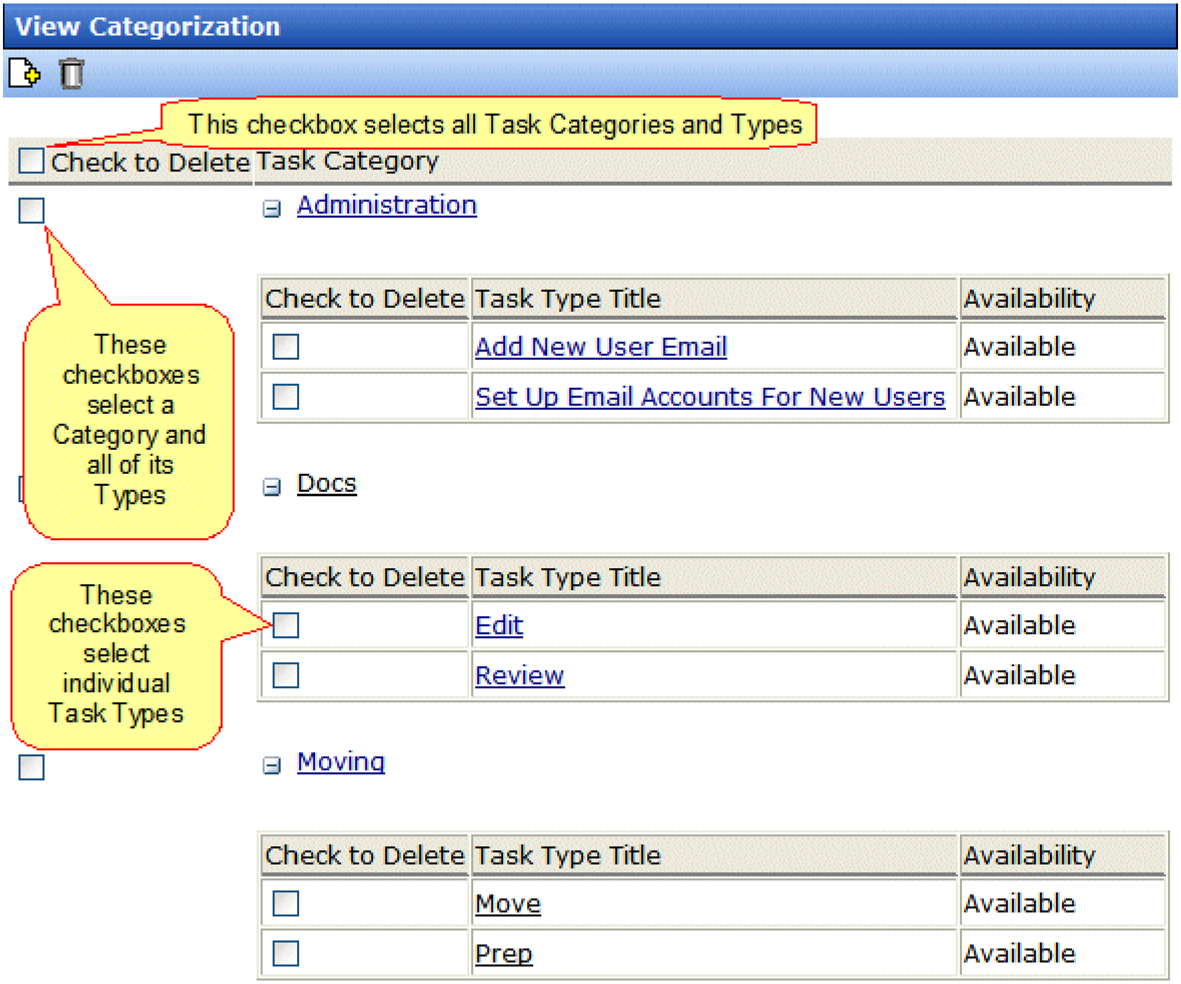


Are you sure you want to delete the selected task type(s)?

Note: After deletion, all tasks assigned to the deleted task type will be assigned the Not Specified task type.

To delete all Task Types, check the **Delete all** check box.

The following example shows which check boxes on the screen are associated with All Task Types, Task Categories, and individual Task Types.



View Categorization

This checkbox selects all Task Categories and Types

☐ Check to Delete | Task Category

These checkboxes select a Category and all of its Types

These checkboxes select individual Task Types

☐ Administration

Check to Delete	Task Type Title	Availability
☐	Add New User Email	Available
☐	Set Up Email Accounts For New Users	Available

☐ Docs

Check to Delete	Task Type Title	Availability
☐	Edit	Available
☐	Review	Available

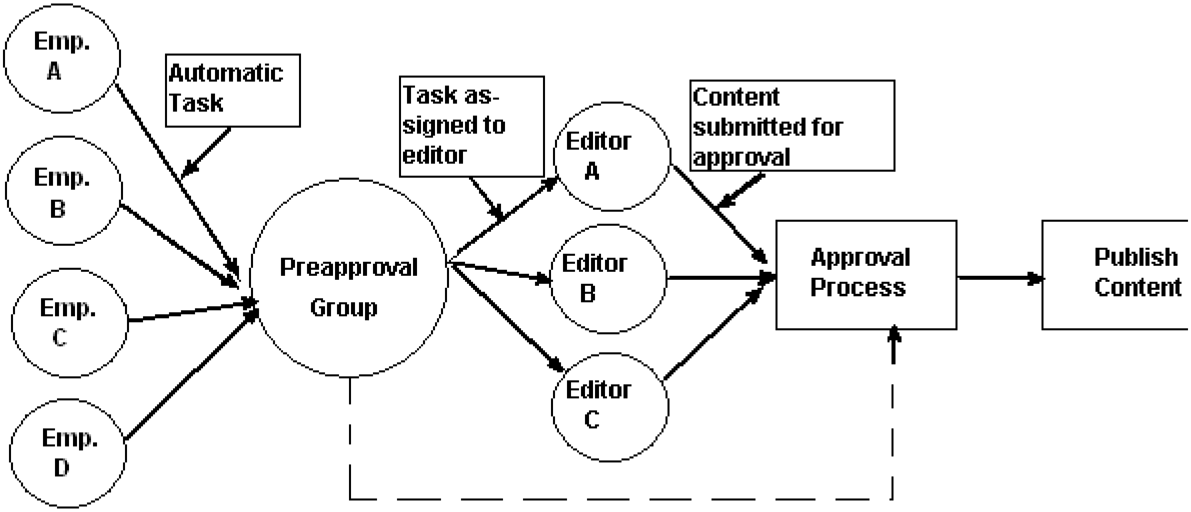
☐ Moving

Check to Delete	Task Type Title	Availability
☐	Move	Available
☐	Prep	Available

Automatic Creation of Tasks Associated with Content

In addition to the manual assignment of tasks, they can be automatically generated whenever content, an asset, or a form is created. You would enable and use the Automatic Task Creation feature if you want to set up a *preapproval* process, which requires one or more users to review and approve content before it enters the regular approval process. (The regular approval process is described in ”Setting Approval Chains” on page 556.)

The most common scenario illustrated below.


Emp. A
Emp. B
Emp. C
Emp. D
Automatic Task
Preapproval Group
Task assigned to editor
Editor A
Editor B
Editor C
Content submitted for approval
Approval Process
Publish Content

Optional: Submit directly for approval

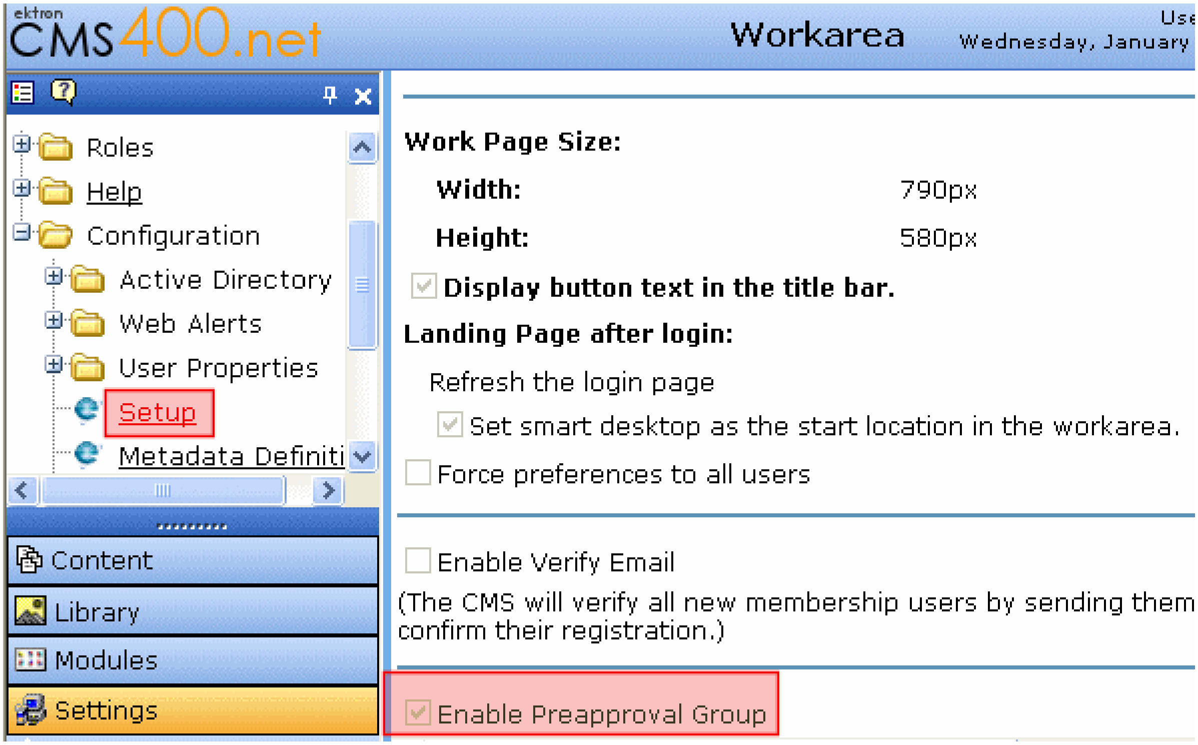
In this example, an automatically-generated task assigns the content to a preapproval group. When any member of that group reviews his tasks, he inspects the corresponding content and assigns it to an editor. After the editor reviews and possibly edits the content and submits it for approval, it enters the normal approval process.

This section explains the automatic task creation process through the following subtopics:

- ”Enabling Automatic Task Creation” on page 361
- ”Assigning a Preapproval Group to a Folder” on page 362
- ”How Automatic Task Creation Works” on page 364

Enabling Automatic Task Creation

The Settings > Configuration > Application Setup screen’s **Enable PreApproval Group** field controls **Ektron CMS400.NET**’s Automatic Task feature. Check this box to turn Automatic Tasks on.


ektron CMS400.net
Workarea
Use
Wednesday, January
Roles
Help
Configuration
Active Directory
Web Alerts
User Properties
Setup
Metadata Definiti
Content
Library
Modules
Settings

Work Page Size:

Width: 790px

Height: 580px

☑ **Display button text in the title bar.**

Landing Page after login:

Refresh the login page

☑ Set smart desktop as the start location in the workarea.

☐ Force preferences to all users

☐ Enable Verify Email

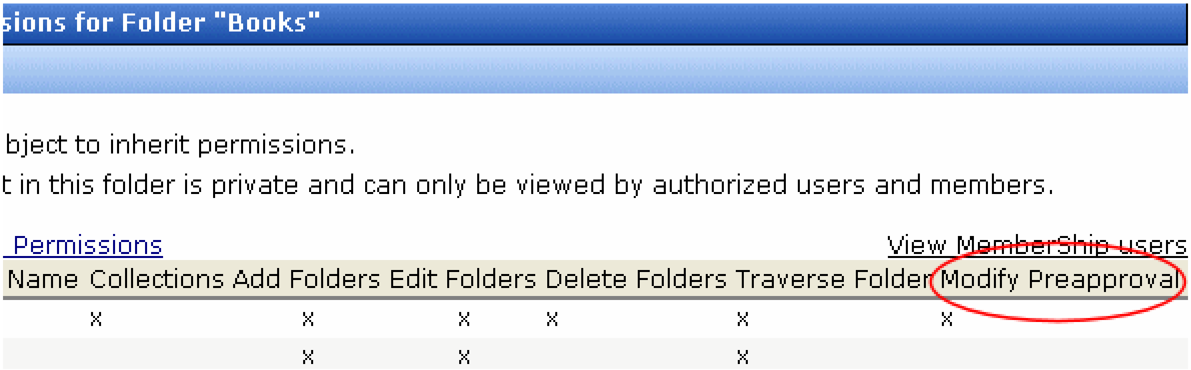
(The CMS will verify all new membership users by sending them
confirm their registration.)

☑ Enable Preapproval Group

Next, you create user groups and assign them to folders whose content must complete the preapproval process before it enters the regular approval process. See ”Managing User Groups” on page 505 and ”Assigning a Preapproval Group to a Folder” on page 362.

Assigning a Preapproval Group to a Folder

The ability to select or update a folder’s preapproval group is determined by the advanced permission **Modify Preapproval**. Only users with this permission can see the Modify Preapproval button ( ) when viewing the Folder Properties screen. *See Also:* ”Standard & Advanced Permissions” on page 549


sions for Folder "Books"

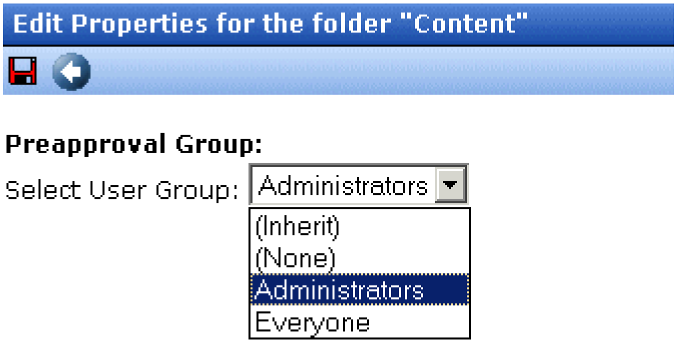
bject to inherit permissions.

t in this folder is private and can only be viewed by authorized users and members.

Name	Collections	Add Folders	Edit Folders	Delete Folders	Traverse Folder	Modify Preapproval
	x	x	x	x	x	x
		x	x		x	

If you have permission to modify a folder’s preapproval group, go to the Folder Properties screen and click the Modify Preapproval button () to access the **PreApproval Group** field. (The field only appears if you have enabled the Preapproval Feature. See ”Enabling Automatic Task Creation” on page 361.)

If you assign a user group, an automatic task can be assigned to that group whenever content in that folder is created or updated.


Edit Properties for the folder "Content"

Preapproval Group:

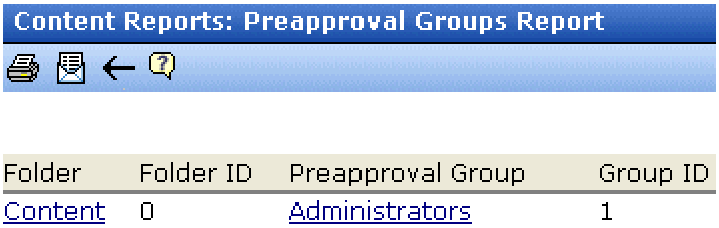
Select User Group: Administrators

If you select **Inherit**, this folder gets its preapproval group from the parent folder. If you select **None**, you disable the preapproval feature for the folder.

Preapproval Groups Report

The Preapproval Groups Report lists all preapproval groups assigned to folders within **Ektron CMS400.NET**. To access it, go to **Smart Desktop** > **Reports** > **Preapproval Groups**. *See Also:*

Ektron CMS400.NET User Manual > “The Workarea and Smart Desktop” > “Understanding the Smart Desktop.”



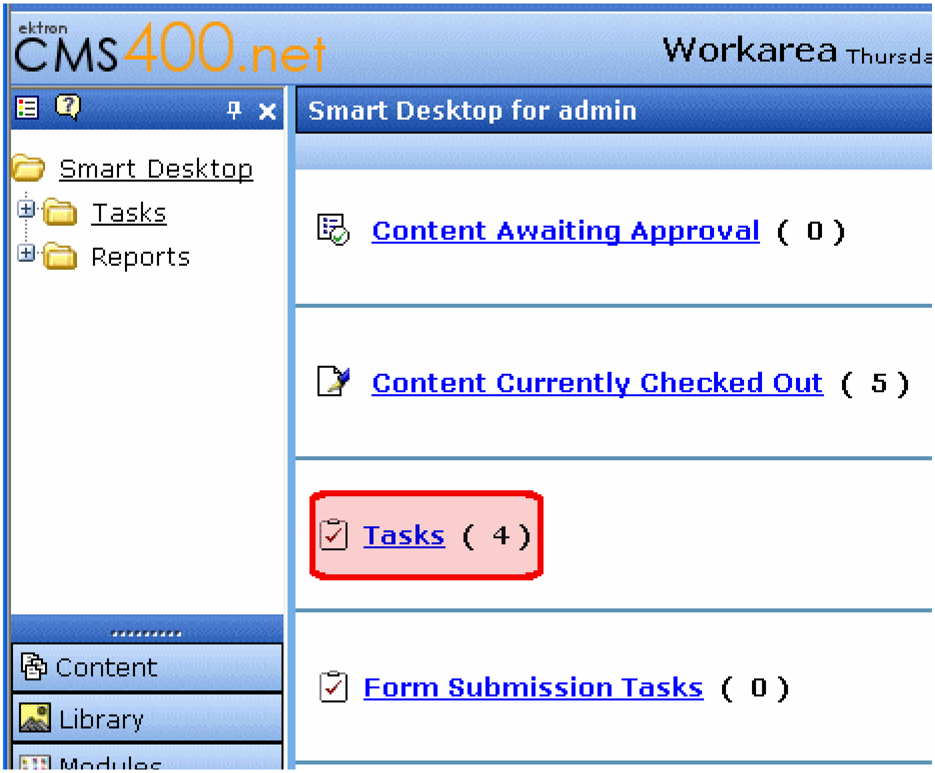
Content Reports: Preapproval Groups Report

Folder	Folder ID	Preapproval Group	Group ID
Content	0	Administrators	1

How Automatic Task Creation Works

When a user submits a content item for approval, **Ektron CMS400.NET** checks to see if an open task exists for it. (An open task is one whose state is Not Started, Active, Awaiting Data, on Hold, or Pending.) If none exists and a preapproval group is assigned to its folder, a task is created and associated with the content.

At this point, all members of the folder's preapproval group see the task on their Smart Desktop.


ektron CMS400.net
Workarea Thursda
Smart Desktop for admin
Smart Desktop
Tasks
Reports
Content Awaiting Approval (0)
Content Currently Checked Out (5)
Tasks (4)
Form Submission Tasks (0)
Content
Library
Modules

The task has the following information.

Field	Value
Title	A string formulated by joining the • content title • content ID number • underscore • Task For example, `Private Content2_Task`
Assigned to	The preapproval group
Assigned by	The user who submitted the content

Field	Value
Content	The content being submitted for approval
Priority	Normal
State	Not Started
Due date	none
Start date	none
Created by	User who submitted content
Description	none

Next, the task can be reviewed by any member of the preapproval group. The member then has two choices.

- review the content and submit it for publishing. This action completes the preapproval process and submits the content into the regular approval chain.
- assign the task to another user, such as an editor. (The user to whom the task is being assigned must have permission to edit the content.) The editor reviews the content, updates it as needed, and submits it into the regular approval chain.

NOTE The user submitting the content does not need permission to create tasks. Also, the user assigned to the task should not change its state using the task system. Instead, he should review and approve content using the regular content workflow mechanism. That mechanism automatically changes the task's state.

The tables below explain the sequence of changes to content and its associated task. All changes are logged into the task's history. *See Also:* **Ektron CMS400.NET** User Manual > "Managing Tasks" > "Viewing a Task's History"

Also, email is automatically generated for automatic tasks as it is for manually-created tasks. *See Also:* "Email Notification" on page 375

Sequence of Task/Content Statuses (Author Lacks Permission to Approve Content)

Event	Content Status	Task Status
Content is created and checked in	Checked In	No auto task assigned
Content is submitted for approval Note: The above action creates the automatic task for the content.	Waiting for completion of associated tasks	Not Started
Content is assigned by a member or preapproval group to an editor	Waiting for completion of associated tasks	Not Started
Editor updates content then checks it in	Checked In	Active
Content is submitted for approval; it enters any approval chain set for the folder Note: Since the task requires an approval, it appears in the task list of the current approver. When the content is approved, the task is moved to the next approver's task list.	Submitted for Approval	Pending
Approver denies request	Checked In	Reopened
Approver approves content	Approved	Complete

Sequence of Task/Content Statuses (Author Can Approve Content)

Event	Content Status	Task Status
Content is created then checked in	Checked In	No auto task assigned

Event	Content Status	Task Status
Content is edited then checked in	Checked In	Active
Content is submitted for approval Note: Although an author can approve content, he must click publish twice: once to change content status to Awaiting Completion of Associated Task, and a second time to change it to Approved.	Waiting for completion of associated tasks	Not Started
Content is published	Approved	Complete

Task States

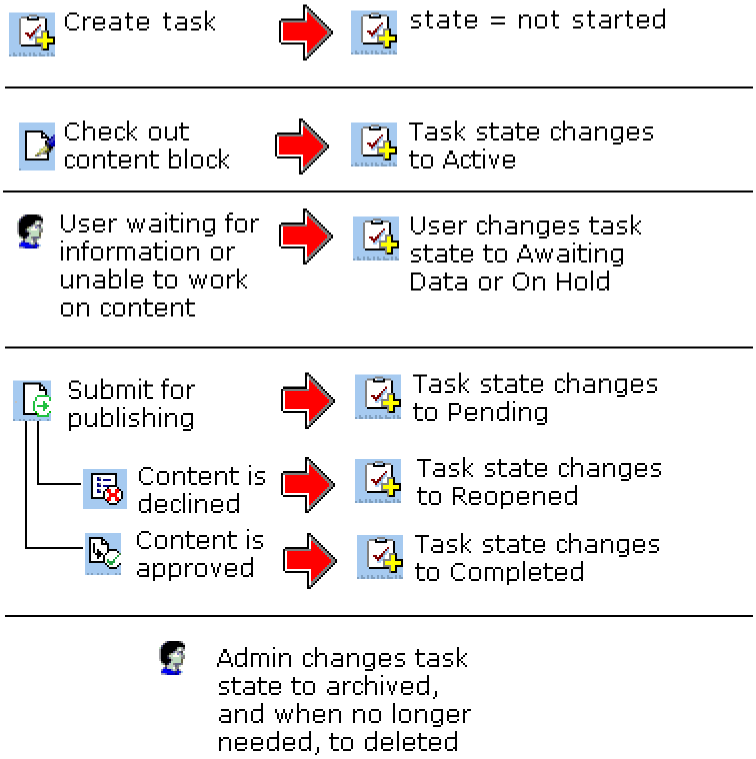
During the life of a task assigned to content, it normally progresses through a series of states. The state helps track a task's progress from creation to completion and even removal from the database. When reviewing the history of a task, the state can be used to review which actions changed the task's state by whom and when.

User-Assigned versus System-Assigned States

Some states can only be assigned by users while others are only assigned when an event occurs to the associated content. For example, when content is first submitted for approval, the associated task's state changes to Not Started.

IMPORTANT! The administrator user can always change a task's state to any other state.

The following graphic illustrates the sequence of user and system actions that change a task's state.


Create task
state = not started
Check out content block
Task state changes to Active
User waiting for information or unable to work on content
User changes task state to Awaiting Data or On Hold
Submit for publishing
Task state changes to Pending
Content is declined
Task state changes to Reopened
Content is approved
Task state changes to Completed
Admin changes task state to archived, and when no longer needed, to deleted

Progression of Task States

State	Description	Assigned by
Not Started	Assigned when task is created.	User
Active	The task's content is checked out.	System
Awaiting Data	The task is started but the assigned-to user is awaiting data from an external source. You can use comments to indicate the data being waited for.	User
On Hold	Task cannot be worked on at this time.	User

State	Description	Assigned by
Pending	The content is submitted for approval. A task remains pending while its content is in the approval process. When the last person in the approval chain approves the content, the task's state changes to Completed. If any approver declines the content, the task's state changes to Reopened. If an editor edits the content and then checks it back in, the task's state changes to Reopened.	System
Reopened	Content is declined by an approver in the approval process. Also, if someone edits content whose task state is pending, the tasks's state changes to Reopened.	System
Completed	The last user in the approval chain approves the content and it is being published.	System
Archived	After a task is completed, administrators can assign this state. It no longer appears on open task lists but is kept for reviews and reports. Only the administrator can view Archived tasks. *See Also:* "Archiving a Task" on page 375	User
Deleted	When an archived task is no longer needed for reporting or reviewing, administrators can assign this state. While in this state, the task remains in the database. *See Also:* "Deleting a Task" on page 377 When you purge the task, it and all of its transactions are removed from the database. *See Also:* "Purging a Task" on page 377	User (user with delete permission can delete; only admin and user with Task-Delete role can purge)

Restrictions on the Task Flow Process

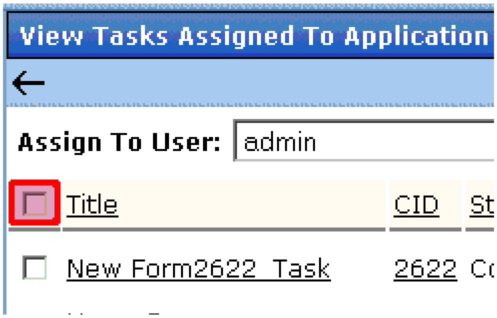
- Only users with archive and delete permissions can set a task's status to archived or deleted. This can be done at any stage of the task flow process.
- Notes can be entered for the task at any time.

- An administrator can assign a task to any state at any time.

Task View Options

Beneath the main task module folder, 14 view screens display all tasks filtered by specified categories. The categories appear in "The Tasks Folder" on page 350.

After viewing tasks in any category, most screens let you perform an action on the tasks (the actions are included in the table below). For example, you can redirect your tasks to another user. To select all tasks on a screen, click the check box in the header row (illustrated below).



Assign To User: admin

Folder	Displays these tasks	Action you can perform from view screen
Tasks	Open tasks assigned to yourself, and open tasks you have assigned to other users.	• Create a new task • Delete a task • View a task • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
All Open Tasks	All open tasks (that is, tasks in one of these states) for all users • not started • active • awaiting data • on hold • reopened • pending	• Edit a task • Sort tasks by column
Assigned To Me	All open tasks assigned to you	• Assign tasks to a different user • View a task • Sort tasks by column
Assigned By Me	All open tasks you assigned to yourself or others	• Assign tasks to a different user • View a task • Sort tasks by column
Created by Me	All open tasks you created	• View a task • Sort tasks by column
Assigned to User	All open tasks assigned to a user you select	• Select any user and view all tasks assigned to that user. To do so, select new user from **Assign to User** drop down list and click **Get Tasks**. • View a task • Sort tasks by column
Not Started	All whose state is Not Started *See Also:* ”Task States” on page 368	• Change to any other state • View a task • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
Active	All whose state is Active	• Change to any other state • View a task • Sort tasks by column
Awaiting Data	All whose state is Awaiting Data	• Change to any other state • View a task • Sort tasks by column
On Hold	All whose state is On Hold	• Change to any other state • View a task • Sort tasks by column
Pending	All whose state is Pending	• Change to any other state • View a task • Sort tasks by column
Reopened	All whose state is Reopened	• Change to any other state • View a task • Sort tasks by column
Completed	All whose state is Completed	• Change to any other state • View a task • Sort tasks by column
Archived	All whose state is Archived	• Change to any other state • View a task • Sort tasks by column
Deleted	All whose state is Deleted	• Change to any other state • Purge tasks • View a task • Sort tasks by column

Determining Which Tasks a User Can View

To provide security, **Ektron CMS400.NET** restricts which users can use the task views. These restrictions are listed on the following table.

View option	Administrator group member	User or group to whom task assigned	User who assigned task	User who created task	All users
All Open *	**X**				
Assigned by Me		**X**	**X**		
Assigned to Me *		**X**			
Created by Me *				**X**	
Assigned to User	**X**	**X**	**X**	**X**	**X**
Not Started	all tasks in specified state	only tasks assigned to user in specified state			
Active	**l**	**l**			
Awaiting data	**l**	**l**			
On hold	**l**	**l**			
Pending	**l**	**l**			
Reopened	**l**	**l**			
Completed	**l**	**v**			

View option	Administrator group member	User or group to whom task assigned	User who assigned task	User who created task	All users
Archived	l				
Deleted	V				

* - user can only view open tasks, that is, not started, active, awaiting data, on hold, pending, or reopened

Email Notification

email notification is sent on these occasions.

- A task is assigned to a user.
- A task is redirected to a user.
- A task is submitted for content approval. Sent to the first user in the approval chain.
- The approval process moves on to the next approver.
- The content is declined at an approval stage. This is sent to the assigned user.
- The content is published. This goes to the creator, assigned user, and the approvers.

“Configuring E-Mail Notifications” in the **Ektron CMS400.NET** Setup Manual

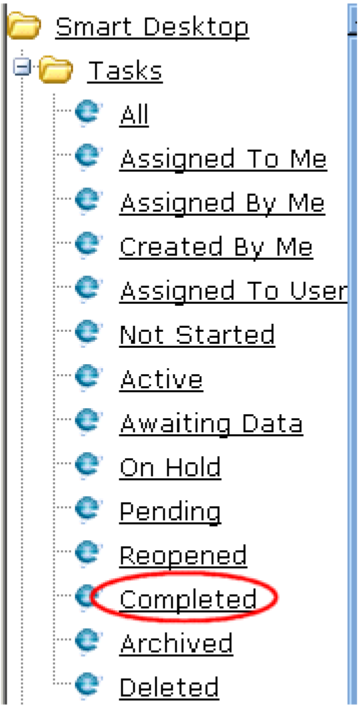
Archiving a Task

After a task is completed, you may want to change its state to Archived. Archiving moves selected tasks from the Completed tasks list to the archived list. This change cleans up the completed tasks list and makes it and easier to use.

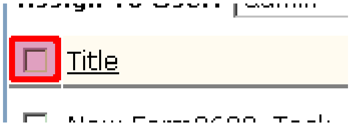
Archived tasks are typically kept for a predetermined time period, at which point an administrator deletes them (depending on your organization’s policies).

To archive a task, follow these steps.

1. From the Smart Desktop, open the Tasks folder.
2. Click the view option corresponding to the state of tasks you want to archive. Typically, you would archive completed tasks.


Smart Desktop
Tasks
All
Assigned To Me
Assigned By Me
Created By Me
Assigned To User
Not Started
Active
Awaiting Data
On Hold
Pending
Reopened
Completed
Archived
Deleted

3. A list of Completed tasks appears. Select tasks one at a time, or click the check box on the top left corner to select all.



4. Next to the **Change to State** field, click the down arrow to display the drop down list and select **Archived**.
5. Click the Set button.

Deleting a Task

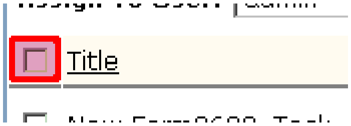
You can easily delete tasks no longer needed on the Web site. Although an administrator can change a task's state to deleted at any time, you typically do so after it is completed or archived, depending on your organization's policies.

Note that a deleted task remains in the system until you purge it. It is only visible on the View Deleted Tasks option. *See Also:* "Deleted" on page 370.

Tasks can be deleted either one at a time, or several at once.

To delete tasks, follow these steps.

1. From the Smart Desktop, click the **Tasks** folder.
2. Click the view option corresponding to the state of tasks you want to delete. Typically, you would delete archived tasks.
3. Select tasks one at a time, or click the check box on the top left corner to select all.



4. Next to the **Change to State** field, click the down arrow to display the drop down list and select **Deleted**.
5. Click the Set button.

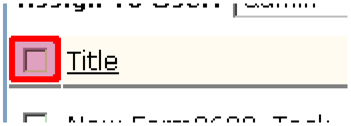
Purging a Task

If you want to remove deleted tasks from the system, you purge them. Upon purging, a task and its history are removed from the database.

To purge one or more tasks, follow these steps.

1. From the Smart Desktop, click the Tasks folder.
2. Click the **Deleted** view option.

3. Select tasks one at a time, or click the check box on the top left corner to select all.



4. Click the Purge button.

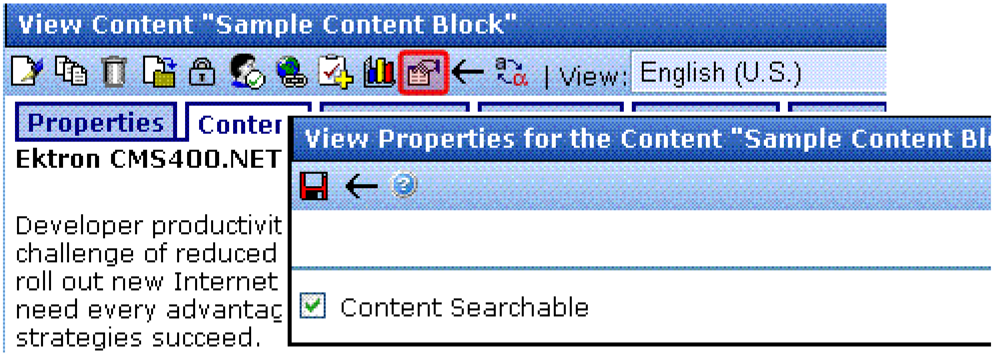
Searching Web Site Content

NOTE This section explains how to use the search function on a browser page. For information about inserting the search function into an Ektron CMS400.NET Web template, refer to the Ektron CMS400.NET Developer Manual.

NOTE This section describes the search on your Web site. To learn about searching content within your Workarea, see "Search Content Folder" on page 60.

Ektron CMS400.NET has a search function that can be easily integrated into any Ektron CMS400.NET template. The search command looks through your Web site content, then displays links to the content found by the search.

IMPORTANT! Each content item includes a **Content Searchable** field. The search only considers content for which the field is checked. See illustration below.


View Content "Sample Content Block"
| View:
English (U.S.)
Properties
Conter
View Properties for the Content "Sample Content Bl

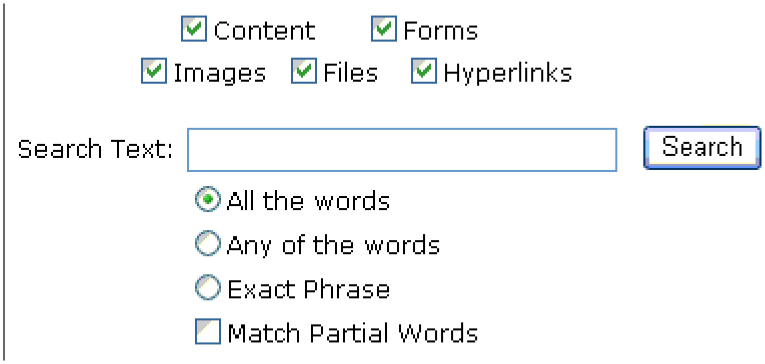
Ektron CMS400.NET

Developer productivit
challenge of reduced
roll out new Internet
need every advantac
strategies succeed.

☑ Content Searchable

By default, this field is checked for content items.

When you insert the search function onto a template, it looks something like this on the Web site.



The above is only an example of the search screen. Your Web developer can customize it using the Search Server Control. For more information, see the **Ektron CMS400.NET** Developer Manual section “Standard ASP.NET Methods” > “Standard Methods” > “Search Server Control.”

When performing a search, the user enters one or more words into the text box, selects search preferences, then clicks the **Search** button.

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

Your system administrator can add custom search fields that only appear if a user is logged in. For more information, see ”Metadata” on page 94.

NOTE To help track words and phrases site visitors are entering on the search screen, the Search Phrase Report provides a count of all phrases searched within a date range. In **Ektron CMS400.NET**, this report is available from the **Smart Desktop > Reports**. Documentation for this report is available in the **Ektron CMS400.NET** User Manual section “Content Workflow Reports” > “Search Phrase Report”.

Search Options

Before you select the search preferences, you should understand the difference among them. The explanations below assume you entered these words into the search text field.

- partners
- content
- Monday
- employee
- green

All the Words

All the Words works like an “and” function. The search returns only content that has the words partners *and* content *and* Monday *and* employee *and* green.

Any of the Words

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

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

Exact Phrase

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

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

Match Partial Words

Although you cannot search for wild cards, the Match Partial Words option does almost the same. For example, enter at into the search text field, then check off the Match Partial Words box. The search returns all content with the letters “at”. This search finds words such as **At**, B**at**, Ch**at**ter, **At**oll, **AT**M, etc.

Limitations of the Search

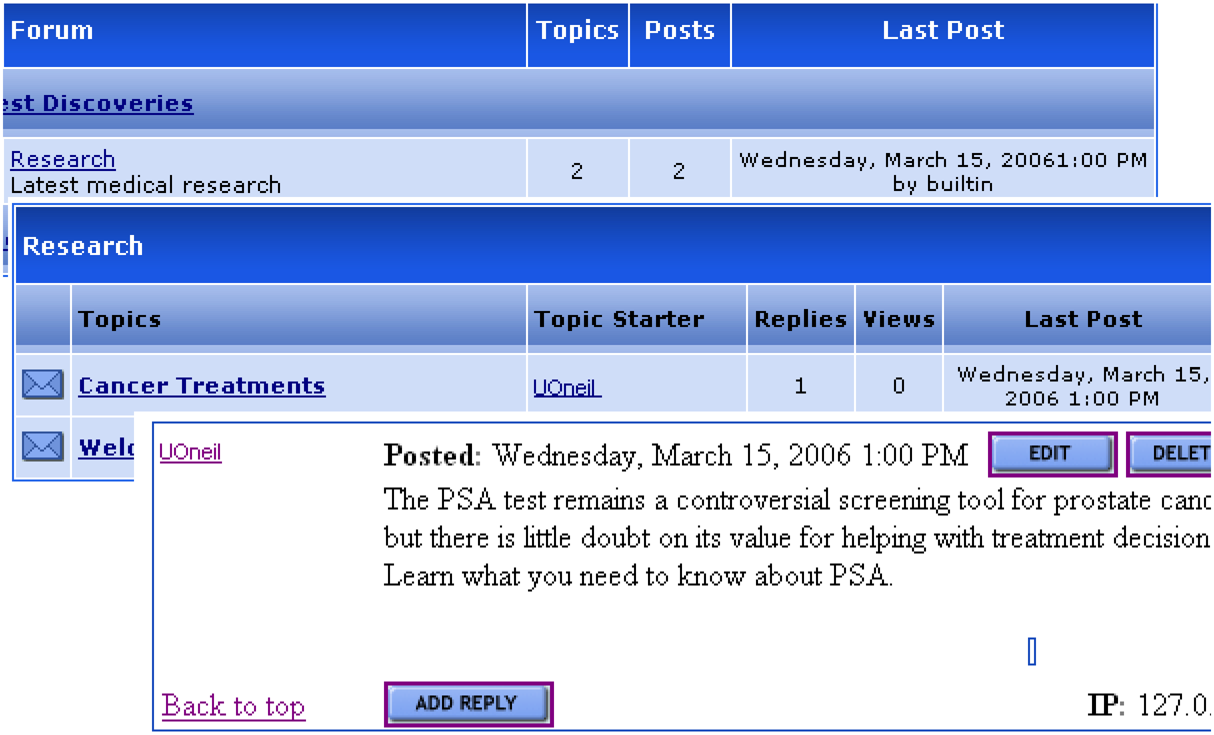
- The search cannot find text within Open Office Documents
- The search cannot find Discussion Forum posts; Discussion Forums have their own search feature
- The search cannot find calendar events

Discussion Boards

Overview

The Discussion Board feature provides a forum where topics can be discussed on your Web site. An administrator creates a topic and posts a starter question. Any site visitor can then reply. An example of a Discussion Board is below.

As you can see, the first screen has general topics, the second screen's topics are more specific, and a third screen displays posts to the forum.



Forum	Topics	Posts	Last Post
st Discoveries			
Research Latest medical research	2	2	Wednesday, March 15, 20061:00 PM by builtin

Research

	Topics	Topic Starter	Replies	Views	Last Post
✉	Cancer Treatments	UOneil	1	0	Wednesday, March 15, 2006 1:00 PM
✉	Welc				

UOneil

Posted: Wednesday, March 15, 2006 1:00 PM

The PSA test remains a controversial screening tool for prostate canc but there is little doubt on its value for helping with treatment decision Learn what you need to know about PSA.

IP: 127.0.

As an administrator, you can determine the following Discussion Board features.

- The subjects being discussed
- A starter post, designed to initiate the discussion of a topic
- If users must sign in before posting to the forum
- If a post appears as soon as someone submits it, or must be approved first
  - If a post requires approval, you can edit or delete it before it appears

Whether or not posts must be approved, anyone with permission to the board can perform the following tasks on a post from the Workarea

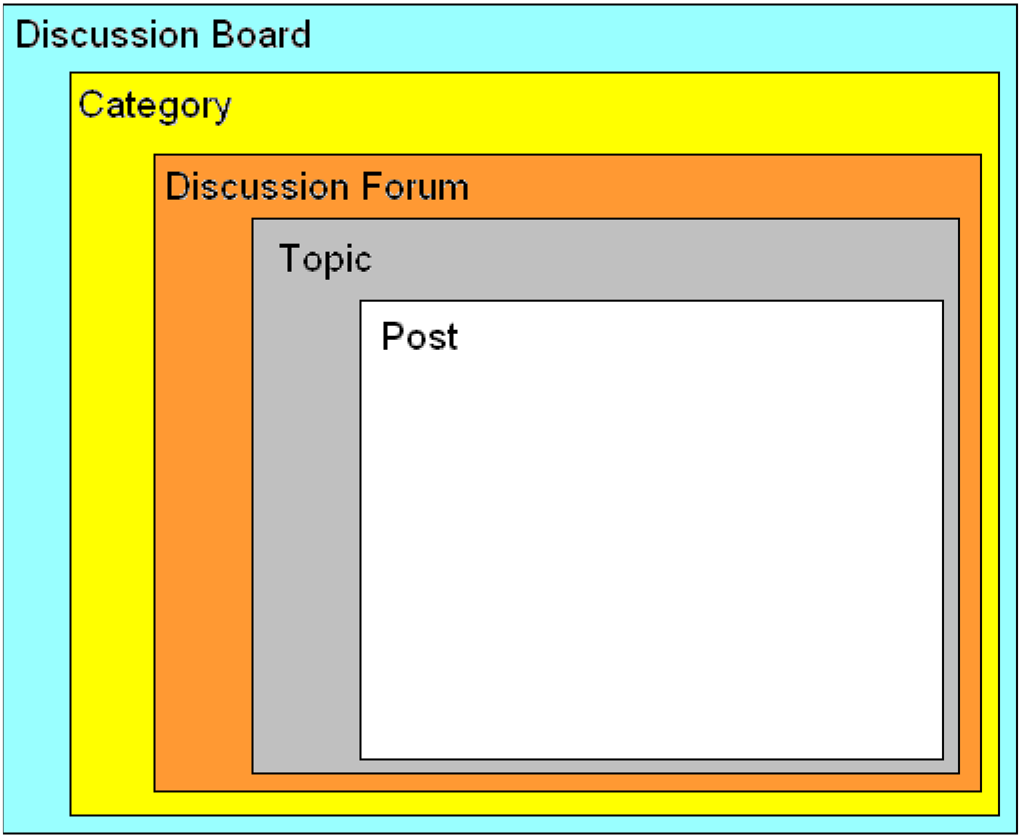
- edit
- delete
- reply

This section explains Discussion Boards through the following topics.

- ”Hierarchy of Discussion Board Elements” on page 384
- ”Implementing Discussion Boards” on page 388
- ”Assigning Permissions to a Discussion Board” on page 406
- ”Inserting the Forum Server Control” on page 412
- ”Using Discussion Boards on Your Web Site” on page 412

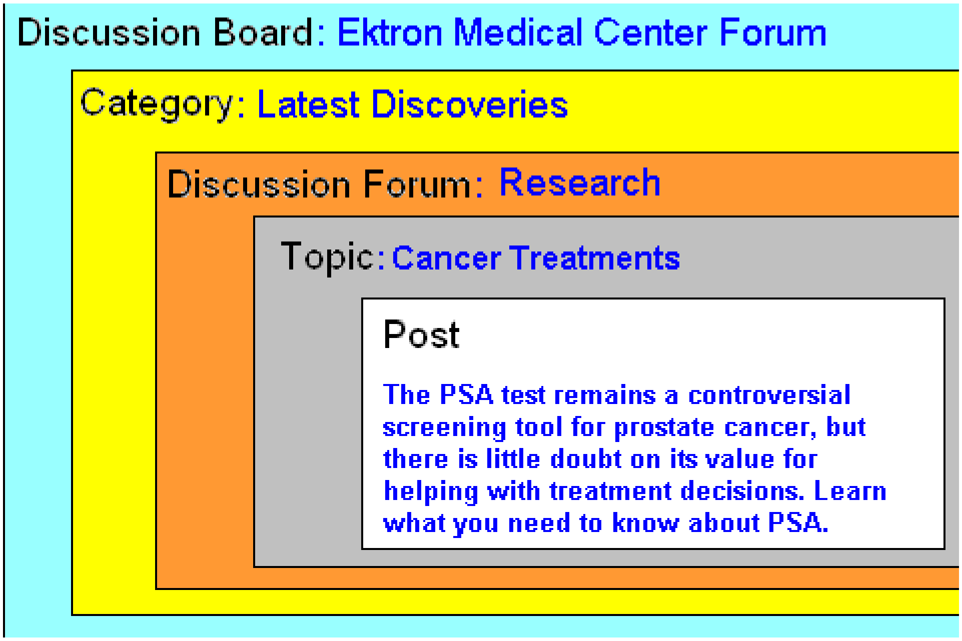
Hierarchy of Discussion Board Elements

A Discussion Board consists of a five-level hierarchy, illustrated below. Before creating a Discussion Board, it is important to understand the elements of the hierarchy.


Discussion Board
Category
Discussion Forum
Topic
Post

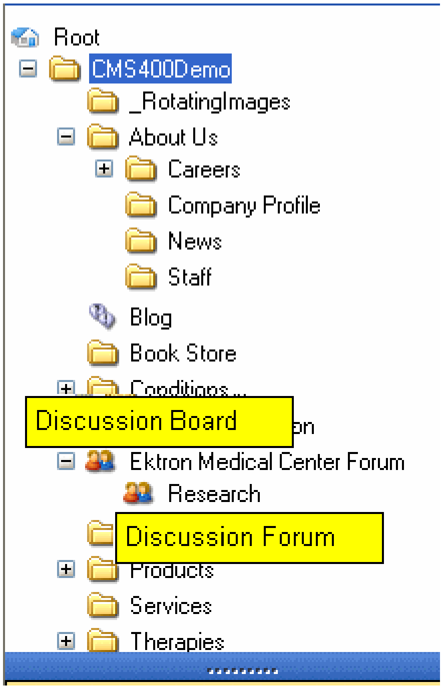
Ektron CMS400.NET supports an unlimited number of Discussion Boards. Each board must follow the hierarchy.

Below is the hierarchy with sample data, to explain how each element is used.

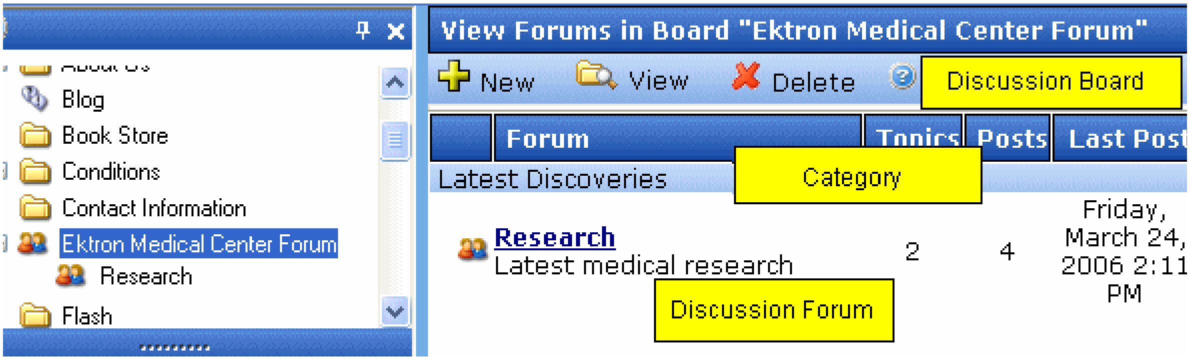

Discussion Board: Ektron Medical Center Forum
Category: Latest Discoveries
Discussion Forum: Research
Topic: Cancer Treatments
Post

The PSA test remains a controversial screening tool for prostate cancer, but there is little doubt on its value for helping with treatment decisions. Learn what you need to know about PSA.

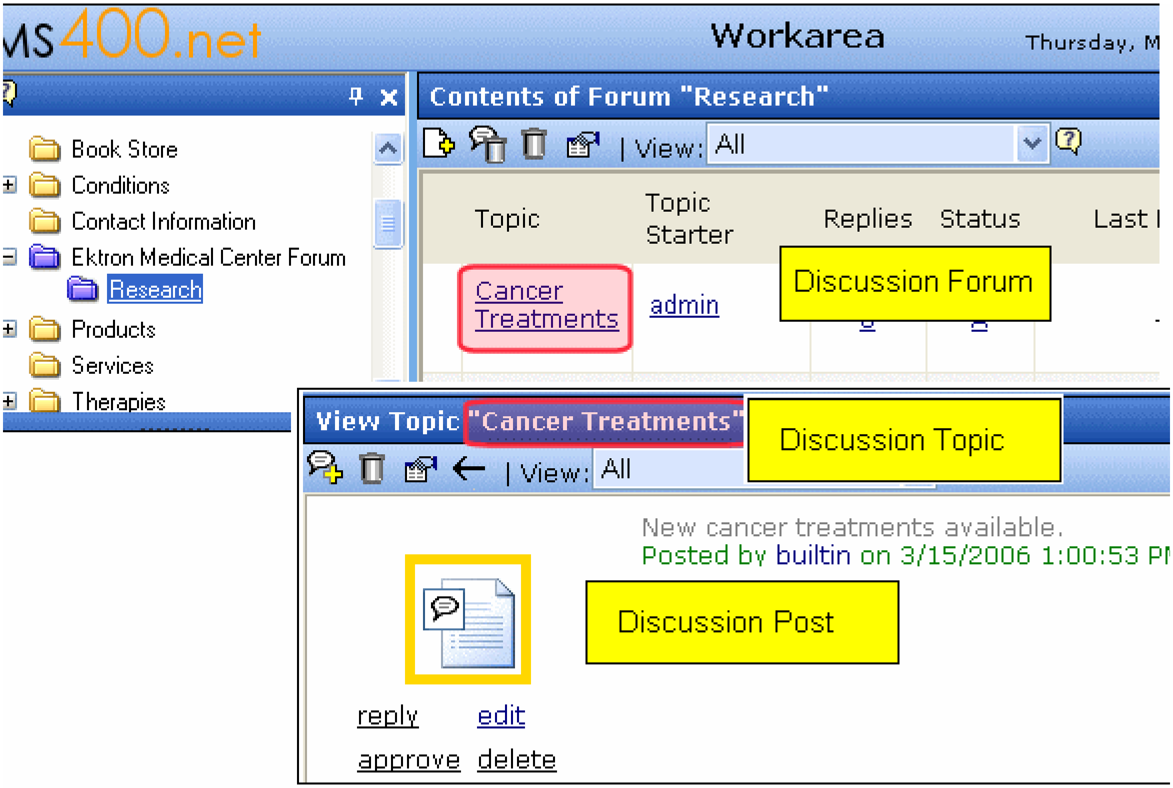
Within the Workarea, Discussion Boards appear as top-level folders in the folder structure. Forums appears under them. Both folders use the people icon (👥) to distinguish them from content and blog folders.


Root
CMS400Demo
_RotatingImages
About Us
Careers
Company Profile
News
Staff
Blog
Book Store
Conditions...
Discussion Board
Ektron Medical Center Forum
Research
Discussion Forum
Products
Services
Therapies

If you click a Discussion Board, you see its Categories and Forums on the right side of the Workarea, as shown below.


Blog
Book Store
Conditions
Contact Information
Ektron Medical Center Forum
Research
Flash
View Forums in Board "Ektron Medical Center Forum"
New
View
Delete
Discussion Board
Forum
Topics
Posts
Last Post
Latest Discoveries
Category
Research
Latest medical research
2
4
Friday, March 24, 2006 2:11 PM
Discussion Forum

If you click a Discussion Forum, you see its topics. If you click a topic, you see its posts, as shown below.


MS400.net
Workarea
Thursday, M
Book Store
Conditions
Contact Information
Ektron Medical Center Forum
Research
Products
Services
Therapies
Contents of Forum "Research"
View: All
Topic
Topic Starter
Replies
Status
Last
Cancer Treatments
admin
Discussion Forum
View Topic "Cancer Treatments"
Discussion Topic
View: All
New cancer treatments available.
Posted by builtin on 3/15/2006 1:00:53 PM
Discussion Post
reply
edit
approve
delete

Implementing Discussion Boards

To implement a Discussion Board into your Web site, place a Forum server control on a Web page. While doing this, you select a Discussion Board.

All Categories and Forums within that board appear on the Web page. You cannot selectively suppress Categories or Forums. Keep this in mind when determining the contents of a Discussion Board.

This is more fully explained through the following topics.

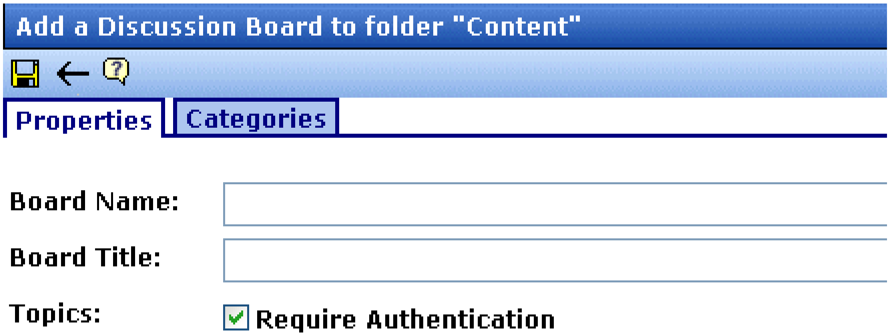
- ”Working with Discussion Boards and Categories” on page 389
- ”Working with Forums” on page 394
- ”Working with Topics” on page 397

- ”Working with Posts” on page 402
- ”Assigning Permissions to a Discussion Board” on page 406

Working with Discussion Boards and Categories

Creating a Discussion Board

1. To create a Discussion Board, follow these steps. (From the Workarea’s **Content** tab, go to the folder in which you want to place the Discussion Board.
2. Click **New > Discussion Board**.
3. The **Add a Discussion Board to folder** screen appears.



Add a Discussion Board to folder "Content"

Board Name:

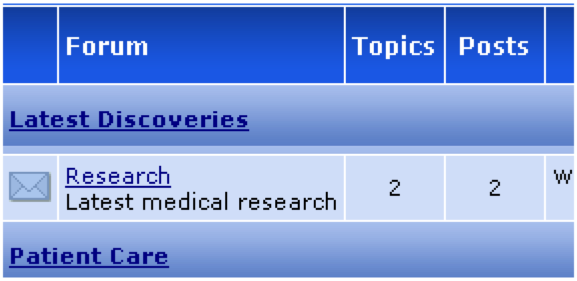
Board Title:

Topics: ☑ Require Authentication

Complete the screen using the following table.

Field	Description
Board Name	Enter the name of the Discussion Board. This text describes the board within the Workarea. It does not appear on your Web site.
Board Title	Enter the title of the board.

Field	**Description**
Require Authentication	**Effect of this Field on the Web Site** Check this box if someone must sign in before he can post to the Discussion Board. If the user cannot access a login screen, he cannot post. If this box is unchecked, site visitors are not required to sign in before posting. **Effect of this Field within the Workarea** If this field is checked, only users with Add Topic or Edit Topic permissions for the Discussion Board can create or reply to posts. *See Also:* ”Assigning Permissions to a Discussion Board” on page 406
CSS Theme	Choose a style sheet to determine the appearance of the Discussion Board on your Web site. Select any theme available in the CSS Theme dropdown. Note: Below the **CSS Theme** field is the path to the selected style sheet relative to your Web root. You can use this information to identify and update the style sheet’s elements if desired.
Quick Deploy: Replicate Folder Contents	Determines whether content in this folder is updated when Quick Deploy is run. *See Also:* ”Quick Deploy” on page 730

Field	Description
Categories (separate tab)	Enter as many Categories as you wish. Each Category contains one or more Discussion Forums. You *must* create at least one Category for each Discussion Board. For more information about how Categories fit into the Discussion Board hierarchy, see "Hierarchy of Discussion Board Elements" on page 384. Note: You can also add a Category by selecting a Discussion Board then selecting **New > Categories**. **Category Sort Order** Categories are the highest level of the hierarchy that appears on your Web site. In the sample Forum below, **Latest Discoveries** and **Patient Care** are Categories.  Forum | Topics | Posts Latest Discoveries Research Latest medical research | 2 | 2 | W Patient Care Categories appear in alphabetical order unless you use the **Sort Order** field. The **Sort Order** field accepts a number and uses it to arrange the Categories of a Discussion Board on the Web site. The lowest numbers appear near the top of the page. To access the **Sort Order** field, follow these steps. 1. Save the Discussion Board. 2. Click the Discussion Board in the Workarea. 3. Click **View > Properties**. 4. Click the **Categories** tab. 5. Modify the number in the **Sort Order** field as needed.

6. Click Save (💾).

Viewing a Discussion Board

To view a Discussion Board, select it from the Folders display. When viewing the Board, you see all of its forums. You can click any forum to see details about it.

See Also: ”Implementing Discussion Boards” on page 388; ”Discussion Boards” on page 383

Editing a Discussion Board

When editing a Discussion Board, you can change all information entered when it was created plus its style sheet.

To edit a Discussion Board, follow these steps.

1. Click the Workarea’s **Content** tab.
2. Form the folder structure in the left frame, click the Discussion Board.
3. Click **View > Properties**.
4. Click the Edit button (📝).
5. Update the screen as needed. Most fields are described in ”Complete the screen using the following table.” on page 389.
6. Click Save (💾).

Deleting a Discussion Board

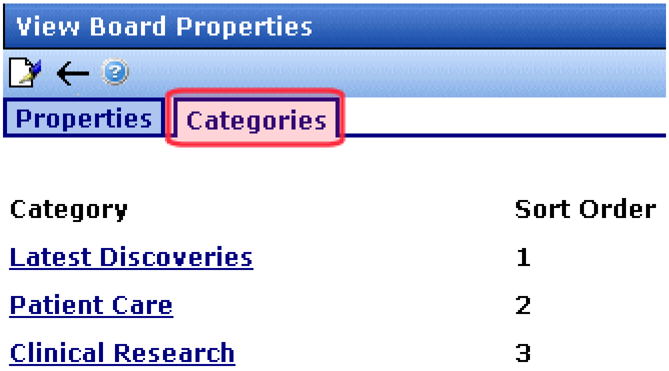
You can delete any Discussion Board. When you do, its Categories, Forums, and posts are also deleted. Once deleted, they cannot be retrieved.

1. Click the Workarea’s **Content** tab.
2. From the folder structure in the left frame, click the Discussion Board.
3. Click **Delete > This folder**.
4. A message appears asking you to confirm.
5. Press **OK** If you are sure.

Editing Category Name and Sort Order

You can change any Category's name or sort order. To do so, follow these steps.

1. Click the Workarea's **Content** tab.
2. From the folder structure in the left frame, click the Discussion Board that contains the Categories.
3. Click **View > Properties**.
4. Click the **Categories** tab.



Category	Sort Order
Latest Discoveries	1
Patient Care	2
Clinical Research	3

5. Click the Category that you want to edit.
6. The current Category name and sort order appear on a new screen. Edit as needed. *See Also:* "Category Sort Order" on page 391.
7. Click Save ( ).

Creating a New Category

Use this procedure when you want to add a new Category to a Discussion Board.

NOTE For more information about how Categories fit into the Discussion Board hierarchy, see "Hierarchy of Discussion Board Elements" on page 384.

1. Click the Workarea's **Content** tab.
2. From the folder structure in the left frame, click the Discussion Board to which you want to add a Category.
3. Click **New > Category**.

4. Enter a Category name and sort order. *See Also:* ”Category Sort Order” on page 391

5. Click Save (💾).

Working with Forums

A Forum is a particular thread within a Discussion Board. To learn about how Forums fit into the Discussion Board hierarchy, see ”Hierarchy of Discussion Board Elements” on page 384.

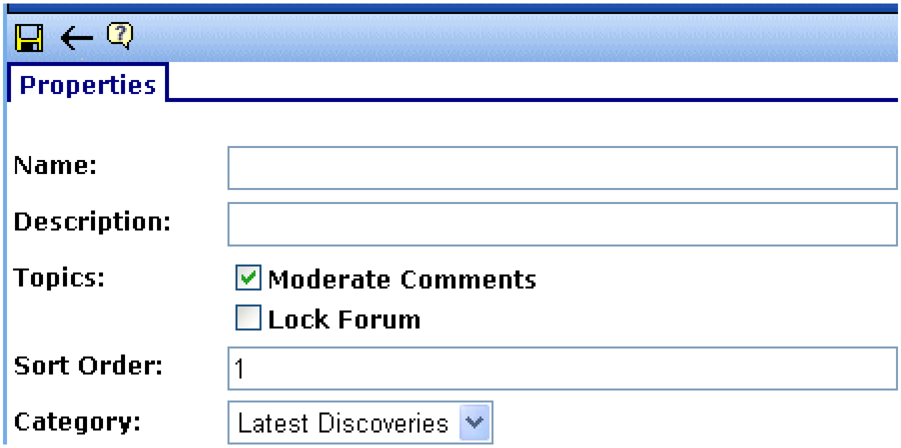
For each Forum, you define the following:

- name and Description
- whether posts to it must be approved before appearing on your Web site
- if it’s accepting new postings
- its sort order, which determines its sequence on the Web page within its Category
- its Category

Creating a Forum

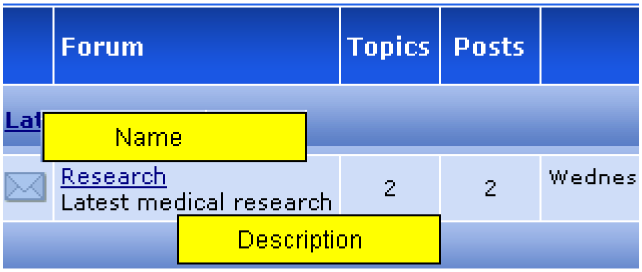
You can only create a Forum after a Discussion Board and at least one Category have been created.

1. In the Workarea, click **Content** then select a Discussion Board.
2. Click **New > Discussion Forum**.
3. The **Add a Discussion Forum to Board** screen appears.


Properties

Name:	
Description:	
Topics:	☑ Moderate Comments ☐ Lock Forum
Sort Order:	1
Category:	Latest Discoveries

Complete the screen using the following table.

Field	Description
Name	Enter the name of the discussion Forum. The name identifies this Forum next to a purple folder in the left frame of the Workarea. It also appears on the Web site (see example below).  Forum Topics Posts Lat Name Research Latest medical research 2 2 Wednes Description
Description	Enter a more detailed description of the Forum. The description appears on the Web site, as illustrated above.
Moderate Comments	Check this box if you want comments to be approved before being posted to the Web site. Only users who are granted **Moderate** permission can approve comments, thereby allowing them to be published on the site. *See Also:* "Discussion Board Permissions" on page 408

Field	Description
Lock Forum	Check this box if you want to prevent all posting to this Forum. You can do this temporarily or permanently. If a Forum is locked, only members of the Administrators user group can post to it, or edit or delete posts. Those users can post from the Web site or the Workarea.
Sort Order	Enter a number if you want to arrange the sequence of Forums within the Category. If you do not, Forums appear in alphabetical order within a Category.
Category	Enter the Category within which this Forum will appear on the Web site. To learn more about the relationship of Categories to Forums, see ”Hierarchy of Discussion Board Elements” on page 384.

4. Click Save (💾).

Editing a Forum

Follow these steps if you want to change any information about a Forum.

1. Click the Workarea’s **Content** tab.
2. From the folder structure in the left frame, click the Discussion Board that contains the Forum
3. Click the Forum.
4. Click **View > Properties**.
5. Click the Edit button (📝).
6. Update the screen as needed. The fields are described in ”Complete the screen using the following table.” on page 395.
7. Click Save (💾).

Deleting a Forum

You can delete any Forum. When you do, its topics and posts are also deleted. Once deleted, they cannot be retrieved.

To delete a Forum, follow these steps.

1. Click the Workarea’s **Content** tab.
2. From the folder structure in the left frame, click the Discussion Board that contains the Forum
3. Click the Forum.
4. Click the Delete Forum button (🗑).
5. A message appears asking you to confirm.
6. Press **OK** if you are sure.

Working with Topics

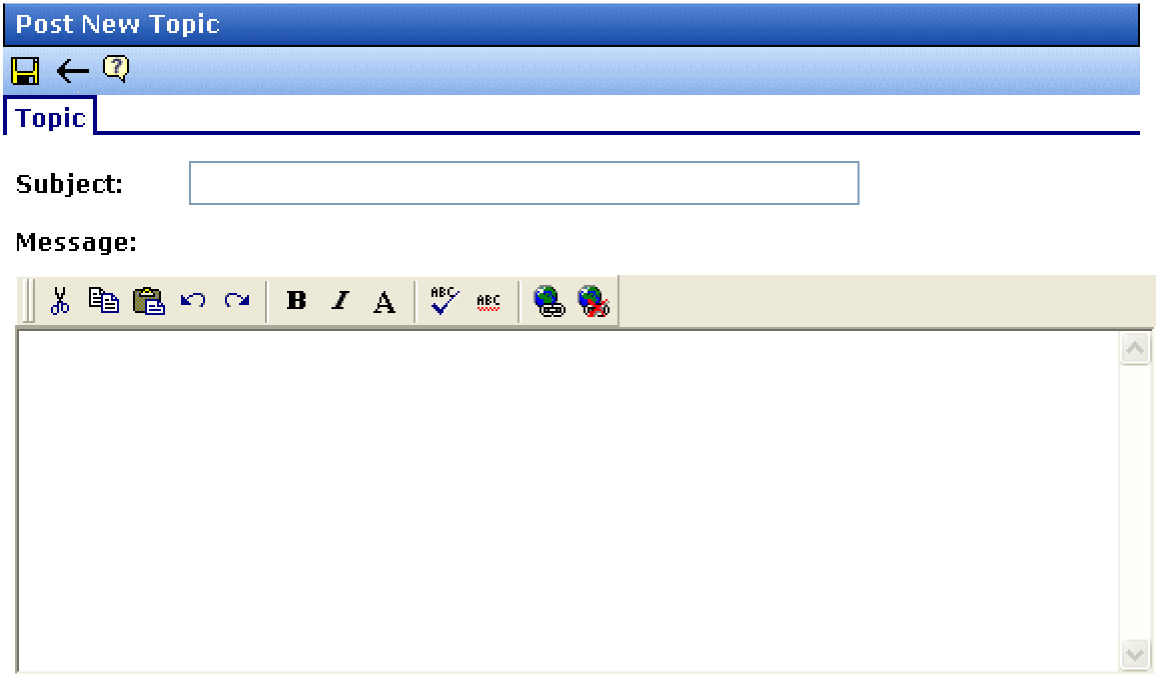
Topics are specific issues to be discussed in a Forum. For example, in a medical research Forum, a topic might be New Cancer Treatments. Topics can only be started within the Workarea.

Before creating a topic, you must create a Forum into which to place it. To learn more about how Topics fit into the Discussion Board hierarchy, see ”Hierarchy of Discussion Board Elements” on page 384.

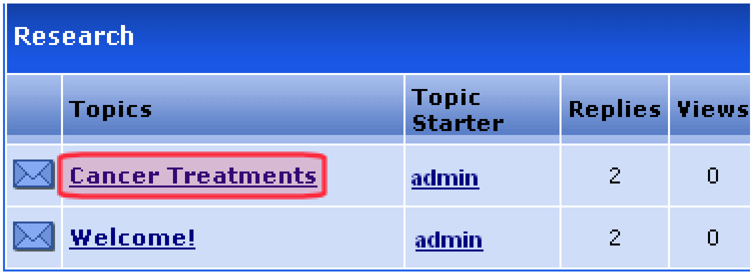
Adding a Topic to a Forum

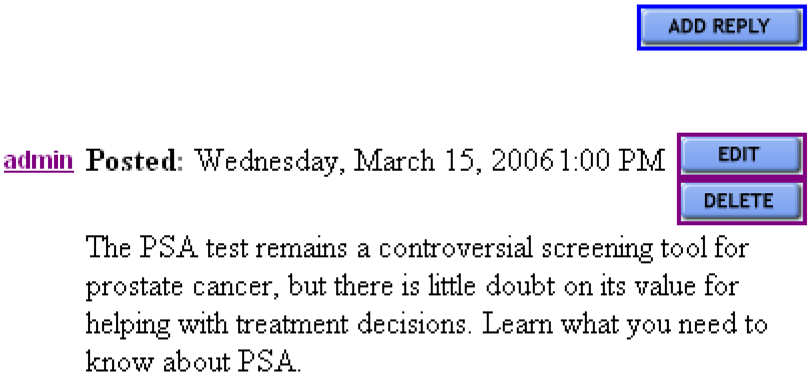
To create a Topic, follow these steps.

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. Click the New Topic button (🗋).
3. The Post New Topic screen appears.



Complete the screen using the following table.

Field	Description
Subject	Enter a short description of the topic. The Topic Subject appear on the Forum page, as shown below.  Research | | Topics | Topic Starter | Replies | Views | |---|---|---|---|---| | ✉ | Cancer Treatments | admin | 2 | 0 | | ✉ | Welcome! | admin | 2 | 0 |

Field	**Description**
Message	Enter the entire text of the topic. The Topic Message appears on a new Web page after a Web site visitor clicks a Topic’s Subject line.  admin **Posted:** Wednesday, March 15, 2006 1:00 PM The PSA test remains a controversial screening tool for prostate cancer, but there is little doubt on its value for helping with treatment decisions. Learn what you need to know about PSA.

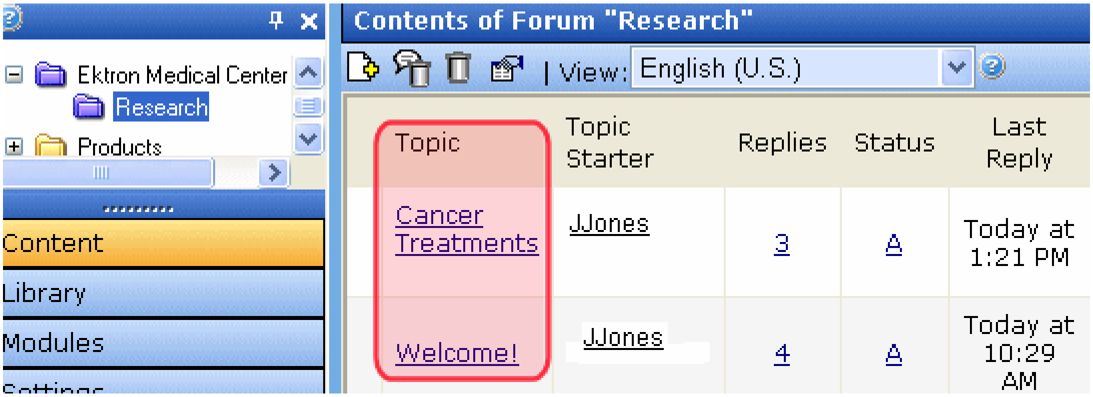
4. Click Save (💾).

Viewing a Topic

NOTE To learn about viewing a topic from your Web site, see ”Using Discussion Boards on Your Web Site” on page 412.

To view a topic from the Workarea, follow these steps.

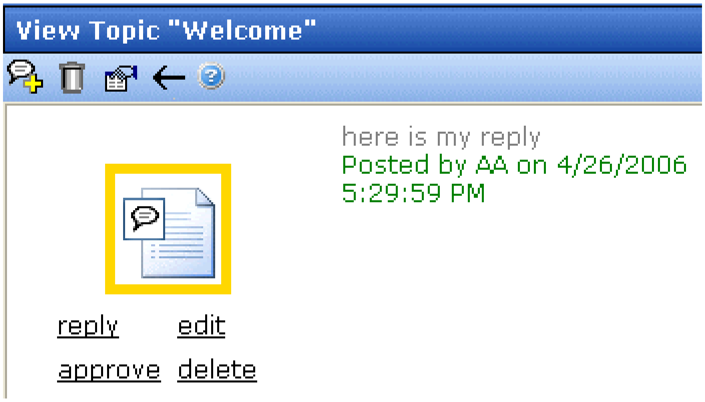
1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. The Forum’s topics appear in the right frame. Click the one that you want to view.


Ektron Medical Center
Research
Products
Content
Library
Modules
View:
English (U.S.)

Contents of Forum "Research"

Topic	Topic Starter	Replies	Status	Last Reply
Cancer Treatments	JJones	3	A	Today at 1:21 PM
Welcome!	JJones	4	A	Today at 10:29 AM

The main body of the Topic screen displays each post within the topic. If the post is surrounded by a yellow border (as illustrated below), it must be approved before it appears on the Web site. Only users with Moderate permission can approve a post. *See Also:* ”Assigning Permissions to a Discussion Board” on page 406


reply
edit
approve
delete

View Topic "Welcome"

here is my reply
Posted by AA on 4/26/2006 5:29:59 PM

The following options may appear across the top of the screen, depending on your permissions.

Button	Description	For more information, see
🗨	Post a new reply to the topic	

Button	Description	For more information, see
🗑	Delete topic and all of its posts	”Deleting a Topic” on page 402
📋	View and edit the topic’s title	”Editing a Topic’s Title” on page 401
←	Return to previous screen	

Under each post is a set of options that you may be able to perform on any post, depending on your permissions and the status of the post. If the option is *underlined*, you have authority to perform it. if not, you cannot.

For example, if a post’s status is approved, the approve option is not underlined, because it is already approved.

See Also:

- ”Approving a Post” on page 403
- ”Adding a Reply to a Post” on page 402
- ”Editing a Post” on page 404
- ”Deleting a Post” on page 404

Editing a Topic’s Title

The only part of topic you can edit is its title.

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. The Forum’s topics appear in the right frame. Click the one that you want to edit.
3. Click the View Properties button (📋).
4. The Edit Topic screen appears. Modify the title as needed.
5. Click Save (💾).

Deleting a Topic

You can delete any Topic. When you do, its posts are also deleted. Once deleted, they cannot be retrieved.

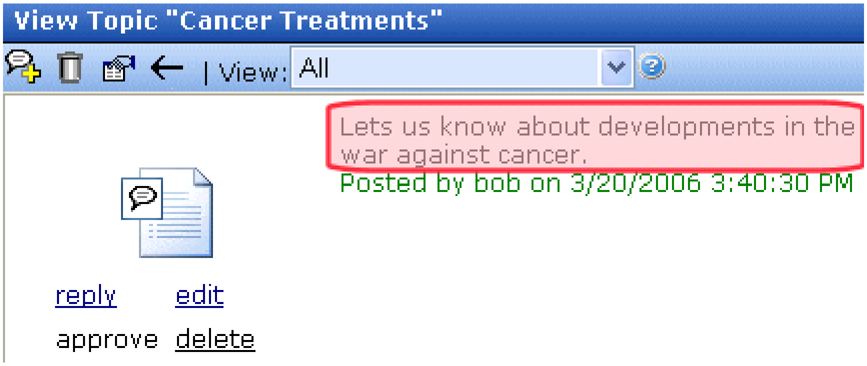
1. In the Workarea, click the **Content** tab, select a Discussion Board, then select a Forum from the folder structure.
2. The Forum's topics appear in the right frame. Click the one that you want to delete.
3. The View Topic screen appears.
4. Click the Delete Topic button (🗑).
5. A confirmation message appears.
6. Click **OK** if you are sure you want to delete it.

Working with Posts

Adding a Reply to a Post

NOTE You can also reply to a post from the Web site. See "Posting a Reply" on page 412.

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. The Forum's topics appear in the right frame. Click the one that has the post that you want to reply to.
3. The next screen, View Topic, displays all posts to the selected topic.
4. Find the post that you want to reply to by reading its text (illustrated below).



Lets us know about developments in the war against cancer.
Posted by bob on 3/20/2006 3:40:30 PM

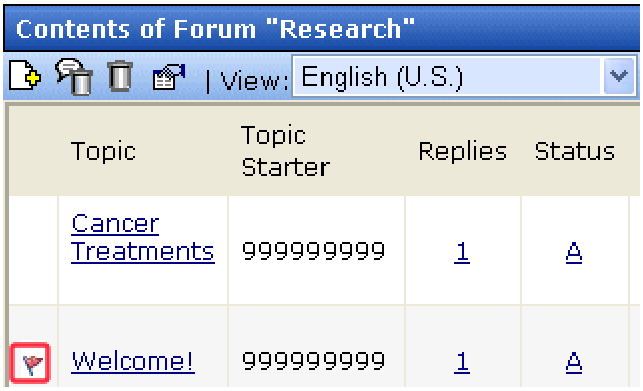
5. Click reply.
6. Enter a **Title** for the post.
7. In the **Description** field, enter the text of your post.

Approving a Post

When defining a Forum, you can check the **Moderate Comments** field. If you do, posts to the Forum must be approved before they appear on the Web site. Only users who are assigned the **Moderate** permission are allowed to approve a post. *See Also:* "Discussion Board Permissions" on page 408

To approve a post, follow these steps.

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. The Forum's topics appear in the right frame. Click the one that has the post that you want to reply to. (Unapproved posts have a red flag in the left column, as illustrated below.)

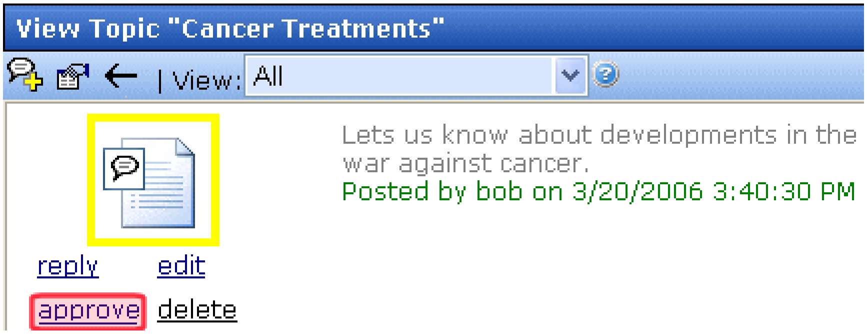


Contents of Forum "Research"

| View: English (U.S.)

	Topic	Topic Starter	Replies	Status
	Cancer Treatments	999999999	1	A
	Welcome!	999999999	1	A

3. The next screen, View Topic, displays all posts to the selected topic.
4. Find the post you want to reply to. Unapproved posts have a yellow border (Illustrated below).



Lets us know about developments in the war against cancer.
Posted by bob on 3/20/2006 3:40:30 PM

5. Click approve under the post icon.

Editing a Post

You can edit the text of a post but you cannot edit its title.

NOTE You can also edit a post from the Web site. See "Using Discussion Boards on Your Web Site" on page 412.

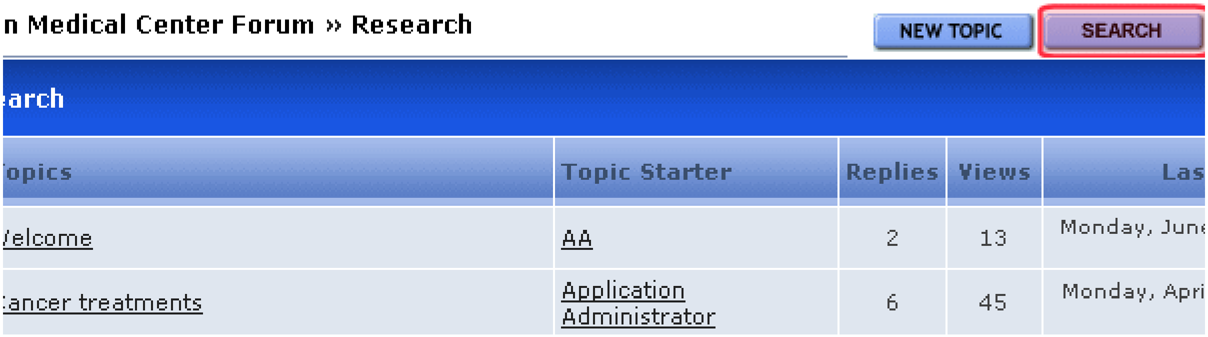
1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. The Forum's topics appear in the right frame. Click the one that has the post that you want to edit.
3. The next screen, View Topic, displays all posts to the selected topic.
4. Find the post that you want to edit.
5. Click edit under the post icon.
6. The Edit Reply screen appears. Within the editor, update the text as needed.
7. Click Save (💾).

Deleting a Post

1. In the Workarea, click the **Content** tab then select a Forum from the folder structure.
2. The Forum's topics appear in the right frame. Click the one that has the post you want to delete.
3. The next screen, View Topic, displays all posts to the selected topic.
4. Find the post that you want to delete.
5. Click delete under the post icon.

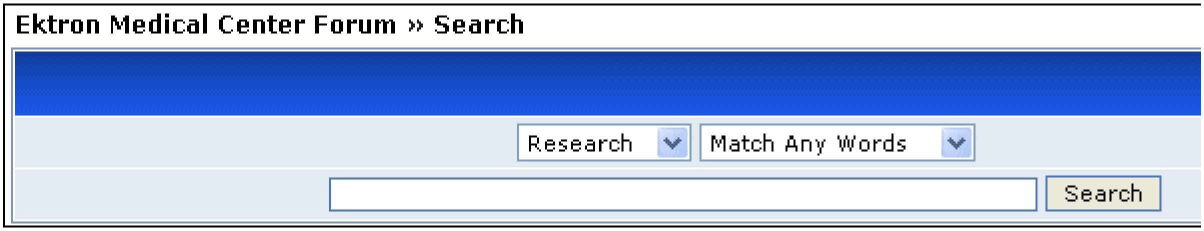
Searching a Forum's Posts

The Forum server control includes a search feature that lets site visitors searches through all posts on your site. Any user can access the search from the Forum screen (see below).



n Medical Center Forum » Research

opics	Topic Starter	Replies	Views	Las
elcome	AA	2	13	Monday, June
ancer treatments	Application Administrator	6	45	Monday, Apri



Ektron Medical Center Forum » Search

When a site visitor clicks **Search**, he can search the current forum (the default value), select a different forum, or search all forums.

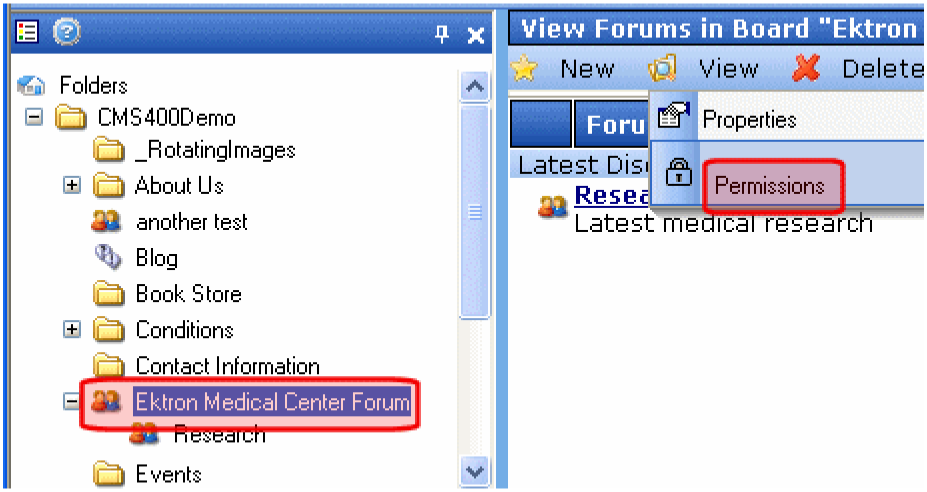
NOTE Forums posts cannot be found by the Workarea or Web site search.

Assigning Permissions to a Discussion Board

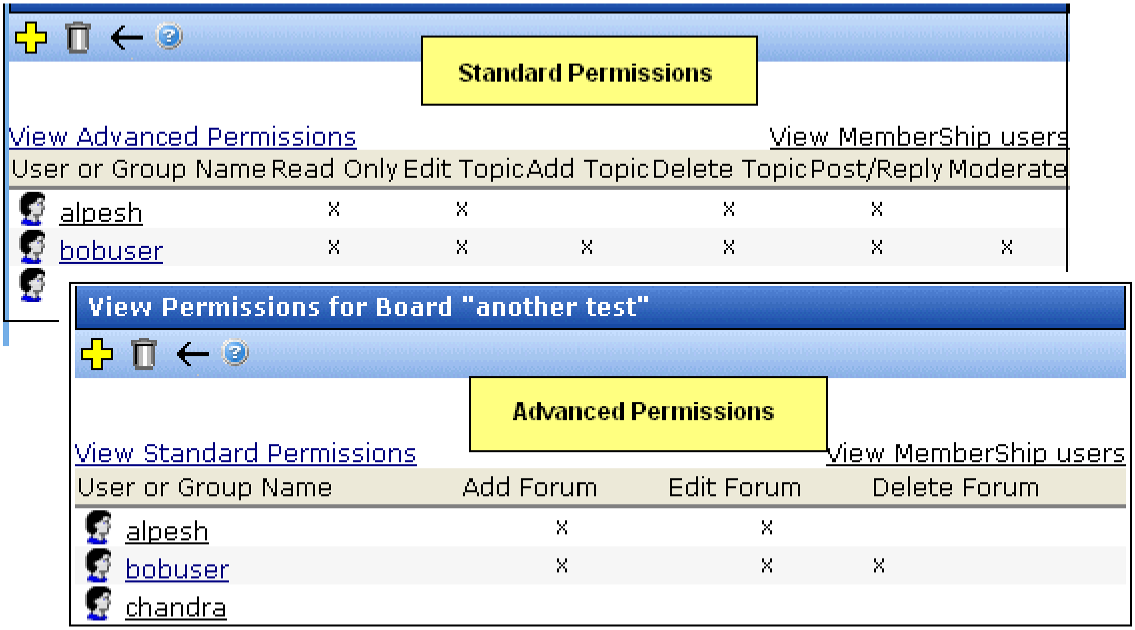
Like regular content folders, Discussion Boards have a permission table that lets you determine which users can perform which functions. (To learn more about folder permissions, see ”Setting Permissions” on page 547.) Because Discussion Boards have different functions than folders, their permission table is slightly different.

To access a Discussion Board’s permission table, navigate to and click on the board so it appears in the Workarea. Then, click **View > Permissions**.

NOTE Only Administrators group members can access the Discussion Board Permission Table.


Folders
CMS400Demo
_RotatingImages
About Us
another test
Blog
Book Store
Conditions
Contact Information
Ektron Medical Center Forum
Research
Events
View Forums in Board "Ektron
New
View
Delete
Foru
Properties
Latest Disc
Permissions
Resea
Latest medical research

Below is an example of a Discussion Board permission table for regular users. Membership users have fewer permissions. *See Also:* ”Discussion Board Permissions” on page 408



Standard Permissions

View Advanced Permissions

View MemberShip users

User or Group Name	Read Only	Edit Topic	Add Topic	Delete Topic	Post/Reply	Moderate
alpesh	x	x		x	x	
bobuser	x	x	x	x	x	x

View Permissions for Board "another test"

Advanced Permissions

View Standard Permissions

View MemberShip users

User or Group Name	Add Forum	Edit Forum	Delete Forum
alpesh	x	x	
bobuser	x	x	x
chandra			

Discussion Board permissions are more fully explained through the following topics.

- ”Initialization of Permission Values” on page 407
- ”Discussion Board Permissions” on page 408
- ”Discussion Forum Permissions for Membership Users” on page 409
- ”Granting Discussion Board Permissions to Users and User Groups” on page 410
- ”Removing Discussion Board Permissions from Users and User Groups” on page 411
- ”Editing Discussion Board Permissions for Users and User Groups” on page 411

Initialization of Permission Values

When you create a Discussion Board, **Ektron CMS400.NET** seeds its permission table with values from the parent folder, as described in the following table.

Parent Folder Permission	Discussion Board Permission
Read only	Read only
Edit	Edit Topic
Add	Add Topic
Delete	Delete Topic
Add Folders	Add Forum
Edit Folders	Edit Forum
Delete Folders	Delete Forum

NOTE Because there are no corresponding permissions for the Discussion Board's **Moderate** and **Post/reply** permissions, their initial value is blank.

So for example, if the user JSmith has permission to perform all functions for a folder, and a Discussion Board is created in that folder, JSmith initially receives all permissions listed above for the Discussion Board. However, you can edit the permissions as needed.

As soon as you create a Discussion Board, it is disconnected from the parent folder's permission table. Subsequent changes to the parent's permissions have no effect on Discussion Board permissions.

Discussion Board Permissions

The following table lists all permissions that may be granted to regular users. Note that only some can be granted to membership users (that is, site visitors who register to participate in the forum).

Permission	**Give the user ability to**	**Can be assigned to membership users**	**For more information, see**
Read only	View forums and posts; cannot submit a post	Yes	
Edit Topic	Edit a topic’s title	No	”Editing a Topic’s Title” on page 401
Add Topic	Add new topics	Yes	”Adding a Topic to a Forum” on page 397
Delete Topic	Delete a topic	No	”Deleting a Topic” on page 402
Post/Reply	Post a new topic or reply to an existing one, either from the Workarea or the site	Yes	”Adding a Topic to a Forum” on page 397; ”Adding a Reply to a Post” on page 402
Moderate	Approve posts; only applicable if the Forum’s Properties field **Moderate Comments** is checked	No	”Moderate Comments” on page 395
Add Forum	Create a new forum	No	”Creating a Forum” on page 394
Edit Forum	Edit a forum	No	”Editing a Forum” on page 396
Delete Forum	Delete a forum	No	”Deleting a Forum” on page 396

Discussion Forum Permissions for Membership Users

By default, membership users are assigned the following permissions:

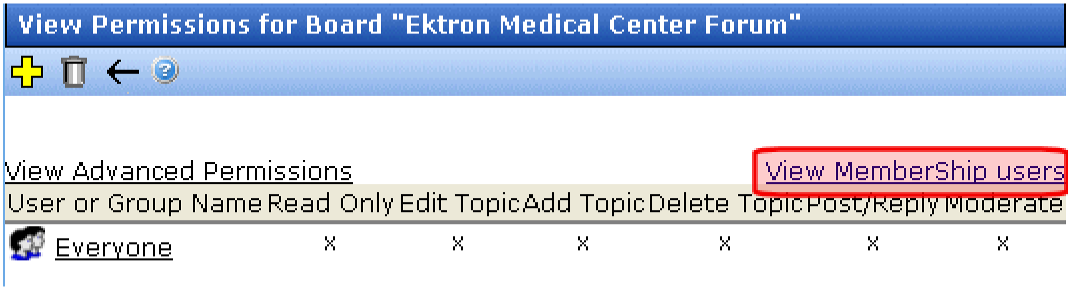
- Read only
- Add Topic

- Post Reply

They cannot be granted Edit, Delete or Moderate topic nor advanced permissions (Add, Edit or Delete forum).

To change the default permissions, follow these steps.

1. Navigate to and click on the Discussion Board so it appears in the Workarea.
2. Click **View > Permissions**.
3. Click **View Membership Users**.



View Permissions for Board "Ektron Medical Center Forum"

View Advanced Permissions

View MemberShip users

User or Group Name	Read Only	Edit Topic	Add Topic	Delete Topic	Post/Reply	Moderate
Everyone	x	x	x	x	x	x

4. The View Permissions for Board screen appears. From here, you can add new member users and groups, remove them, or change their permissions.

Granting Discussion Board Permissions to Users and User Groups

To give a user or user group permissions to work with a Discussion Board, follow these steps.

1. Navigate to and click on the Discussion Board so it appears in the Workarea.
2. Click **View > Permissions**.
3. Click the Add button (✚).
4. All users and groups who are not currently assigned permissions appear. Click any user or group.
5. The Add Permission for Folder screen appears with the selected user or group.

6. Assign appropriate standard and advanced permissions then click the Save button (💾). *See Also:* ”Assigning Permissions to a Discussion Board” on page 406

Removing Discussion Board Permissions from Users and User Groups

To remove a user or user group from the Discussion Board permission table, follow these steps. After you remove the user, Discussion Boards do not appear within his Workarea.

1. Navigate to and click the Discussion Board so it appears in the Workarea.
2. Click **View > Permissions**.
3. Click the Delete icon (🗑).
4. Select the user or group that you want to remove from the Permission table.
5. A confirmation message. Click **OK**.
6. The user is removed.

Editing Discussion Board Permissions for Users and User Groups

To edit a user or user group’s Discussion Board permissions, follow these steps.

1. Navigate to and click the Discussion Board so it appears in the Workarea.
2. Click **View > Permissions**.
3. Click the user or group whose permissions you want to edit.
4. The Edit Permissions screen appears.
5. Change the settings as appropriate. *See Also:* ”Discussion Board Permissions” on page 408
6. Click the Save button (💾).

Inserting the Forum Server Control

After creating at least one hierarchy of Discussion Board elements, place a Forum server control on a Web page. That procedure is described in the **Ektron CMS400.NET** Developer's Manual section "Introduction to Ektron CMS400.NET Server Controls" > "Forum Server Control."

If you want require authentication by site visitors, the template that hosts the Forum should also contain

- a Membership server control (or a link to page that has one). This lets site visitors/membership users register for Discussion Boards.
- a Login server control that lets the site visitor/membership user log in

NOTE Ektron recommends adding text below the Login server control to remind the site visitor to enter his email address at the **User** field. For example, "At the **User** field, enter your email address."

Using Discussion Boards on Your Web Site

Posting a Reply

1. Go to the Web page that hosts the Discussion Board.
2. Click the Forum of interest.
3. Click **Post Reply**.

There are two editors that site visitors can use when replying:

- eWebEditPro (scaled-down version)
- eWebWP

For users who sign in before posting, this decision is made for the user at the **Forum Editor** field on the Edit User screen.

If users does not sign in, ewebWP is the editor.

Editing a Post

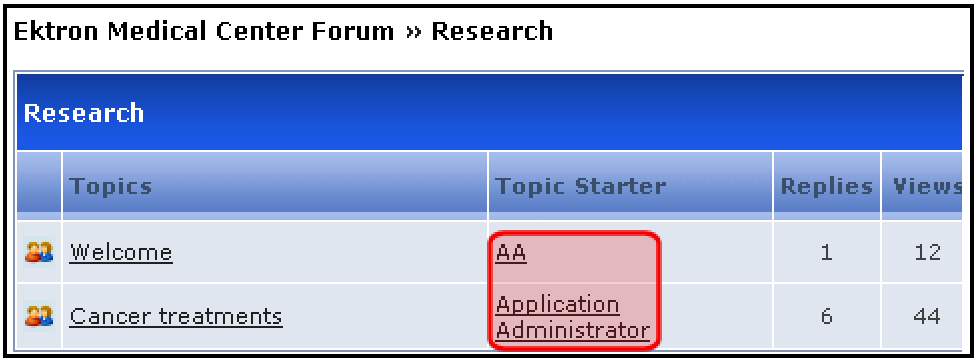
1. Go to the Web page that hosts the Discussion Board.
2. Click the Forum of interest.
3. Find the topic you want to edit.
4. Click **Edit**.

Deleting a Post

1. Go to the Web page that hosts the Discussion Board.
2. Click the Forum of interest.
3. Find the topic you want to delete.
4. Click **Delete**.

Suppressing User Information from the Forum Profile Display

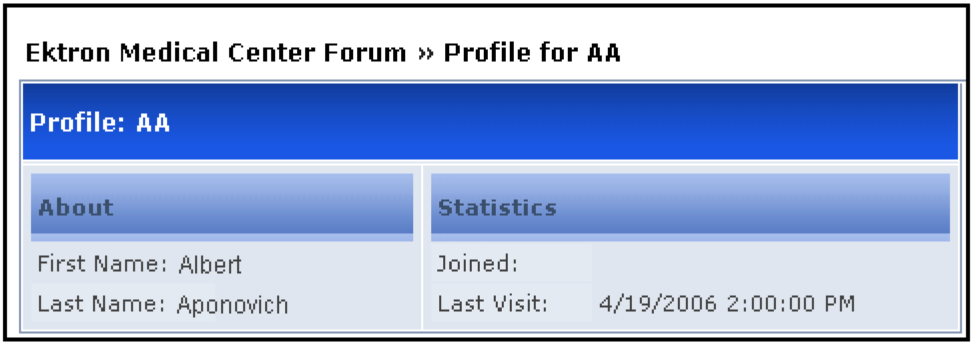
When a Discussion Forum appears on your Web site, anyone browsing to the forum can view information about contributors to the forum. To do this, they click on the user name, as shown below.



Ektron Medical Center Forum » Research

Research

	Topics	Topic Starter	Replies	Views
	Welcome	AA	1	12
	Cancer treatments	Application Administrator	6	44



Ektron Medical Center Forum » Profile for AA

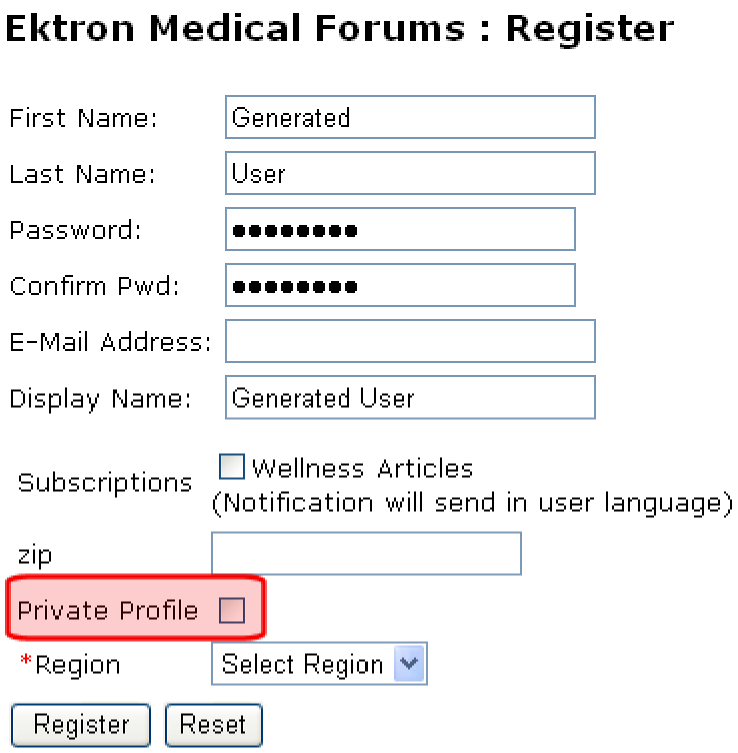
Profile: AA

About	
First Name:	Albert
Last Name:	Aponovich

Statistics	
Joined:	
Last Visit:	4/19/2006 2:00:00 PM

How Users Suppress Profile Information

Users can adjust this setting for themselves by modifying the **Private Profile** checkbox on the Forum Registration screen (shown below). If the box is checked, profile information is suppressed.



Ektron Medical Forums : Register

First Name:	Generated
Last Name:	User
Password:	●●●●●●●●●
Confirm Pwd:	●●●●●●●●●
E-Mail Address:	
Display Name:	Generated User
Subscriptions	☐ Wellness Articles (Notification will send in user language)
zip	
Private Profile ☐	
*Region	Select Region

NOTE The Forum Registration screen appears wherever your developer inserts the Membership Server Control. For more information, see the **Ektron CMS400.NET** Developers Manual.

How Administrators Suppress Profile Information

If you want to suppress the display of user names as an administrator, follow these steps.

1. If the user is a *regular user*, go to **Settings > Users** and select the user whose information you want to suppress.

   If the user is a *membership user*, go to **Modules > Memberships > Users** and select the user whose information you want to suppress.
2. In the User Properties area of the screen, check the **Private Profile** checkbox.

Ektron Explorer

The **Ektron CMS400.NET** User Manual section “Using Ektron Explorer” provides the following information:

- general description
- installation instructions
- how to view it

Since that information is not repeated here, you should read that before reading this section.

This section has the following topics:

- ”Access to Ektron CMS400.NET” on page 416
- ”Configuring Ektron Explorer” on page 416
- ”Viewing Administrative Information” on page 424

Access to Ektron CMS400.NET

By default, when someone signs on to Ektron Explorer, the sign-in uses a special membership user, EkExplorerUser. This user has read-only access to every folder, so he can *view* all published content, both public and private, but not *edit* content.

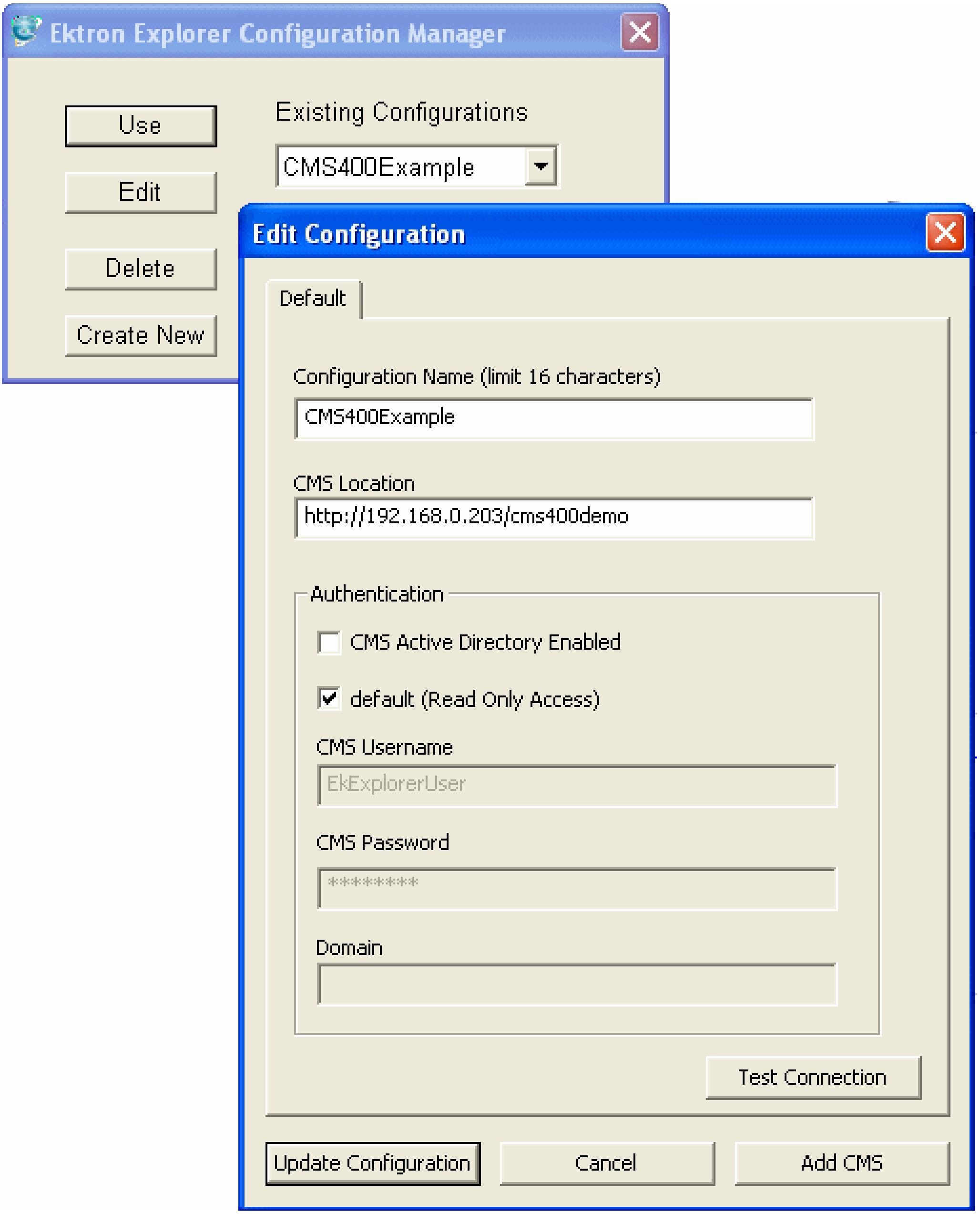
To allow a user to work with content as allowed in the Permission table, change his configuration so that the sign-on uses his username and password. *See Also:* ”Configuring Ektron Explorer” on page 416

Configuring Ektron Explorer

When the Ektron Explorer is installed to a client PC, it assumes the following information:

- location of **Ektron CMS400.NET** - specified during installation
- username and password - a default user is created in **Ektron CMS400.NET** for the purpose of viewing CMS content. That user cannot edit the content.

You can change these values using the Explorer's Configuration Manager (illustrated below).


Ektron Explorer Configuration Manager
Use
Edit
Delete
Create New
Edit Configuration
Default
Authentication
Test Connection
Update Configuration
Cancel
Add CMS

Existing Configurations: CMS400Example

Configuration Name (limit 16 characters): CMS400Example

CMS Location: http://192.168.0.203/cms400demo

☐ CMS Active Directory Enabled

☑ default (Read Only Access)

CMS Username: EkExplorerUser

CMS Password: *********

Domain:

If you change the **CMS Username** and **CMS password** in an existing or new configuration, users who sign on under that configuration are granted the editing privileges assigned in the Permission table. *See Also:* ”Setting Permissions” on page 547

For example, a user whose user name and password you enter has permission to edit all content in **Ektron CMS400.NET**. To edit the content, the user browses to it, right clicks the mouse and selects **Edit** from the popup menu. The content is surrounded by a colored border that indicates if it is eligible for editing. For more information, see ”Recognizing Content” on page 14.

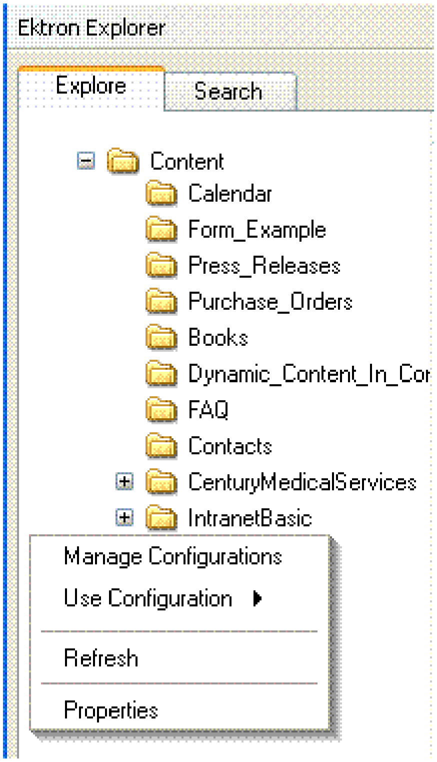
NOTE To learn how to access **Ektron CMS400.NET** content from the Ektron Explorer, see the **Ektron CMS400.NET** User Manual section “Using Ektron Explorer.”

Accessing the Configuration Manager

Click the Windows **Start** button then follow this path:

Programs > Ektron > Ektron Explorer > Configuration Manager

When Explorer is open, you can access Configuration Manager by placing the cursor in the left frame and right clicking the mouse.


Ektron Explorer
Explore
Search
Content
Calendar
Form_Example
Press_Releases
Purchase_Orders
Books
Dynamic_Content_In_Cor
FAQ
Contacts
CenturyMedicalServices
IntranetBasic
Manage Configurations
Use Configuration
Refresh
Properties

Configuration Manager Options

The Explorer Configuration Manager provides four buttons, described below.

Button	Description
Use	Lets you determine, via the **Existing Configurations** dropdown list, which CMS to explore. *See Also:* ”Switching Between Configurations” on page 423
Edit	For any configuration, change the name, location or authentication information. *See Also:* ”Editing a Configuration” on page 421

Button	**Description**
Delete	Remove a configuration. *See Also:* "Deleting a Configuration" on page 424
Create New	Create a new configuration. *See Also:* "Creating a New Configuration" on page 422

Editing a Configuration

To edit an existing configuration, follow these steps.

1. Access the Configuration Manager as described in "Accessing the Configuration Manager" on page 419.
2. Click the **Edit** button.
3. The Edit Existing Configuration screen appears. Use the following table to guide you through each field.

Fields on the Edit Existing Configuration Screen

Field	**Description**
Configuration name	Update the configuration name. You use this name to identify which configuration to log into.

CMS Location	Enter the full path to the **Ektron CMS400.NET** version that you will access via this configuration. For example, `http://bills_computer/cms400demo`
	The default location is the local PC:
	`http://localhost/cms400demo`
	You can also use a static IP address followed by your Web site root folder. For example:
	`http://192.168.25.874/cms400demo`

Authentication	
CMS Active Directory Enabled	If your site is using Active Directory for sign in, check this box. If you do, the **Domain** field (below) becomes active, so that you can enter the Domain as part of the login information.

Field	Description
default (Read Only Access)	Check this checkbox if, when accessing Ektron Explorer via this configuration, you want to submit the default user name and password. In this case, the user can view all CMS content but not edit. If you want to edit CMS content, change the CMS login name and password to a user with editing privileges.
CMS Login	(Only available if **default** is not checked.) Enter your CMS username, as entered in the CMS Add/ Edit User screen. *See Also:* "Creating a New User" on page 501 Within Ektron Explorer, you will have the same privileges for working with content that you have in **Ektron CMS400.NET**. *See Also:* "Setting Permissions" on page 547
CMS Password	(Only available if **default** is not checked.) Enter your CMS password, as entered in the CMS Add/ Edit User screen. *See Also:* "Creating a New User" on page 501 Within Ektron Explorer, you will have the same privileges for working with content that you have in **Ektron CMS400.NET**. *See Also:* "Setting Permissions" on page 547
Domain	(Only available if **CMS Active Directory Enabled** is checked.) Enter the user's Active Directory domain.
Test Connection	Use this button to run a quick test of the configuration information. The test results indicate if the connection is successful. If it is not, an error message appears to help you diagnose the problem.

4. Click **Update Configuration**.

Creating a New Configuration

You might want to create a new configuration to

- sign in to a different instance of **Ektron CMS400.NET** (for example, one on a different computer)

- sign in as a different user

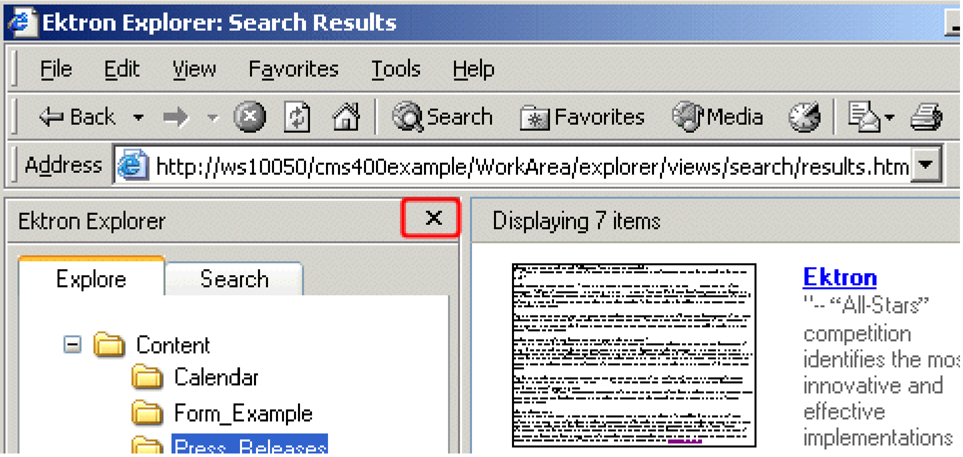
To create a new configuration, follow these steps.

1. Access the Configuration Manager, as described in ”Accessing the Configuration Manager” on page 419.
2. Click **Create New**.
3. Complete the fields on the screen. See ”Fields on the Edit Existing Configuration Screen” on page 421.
4. Press the **Test Connection** button. When you do, the CMS location, username, and password are tested for validity.
5. Click the **Add New** button.

Switching Between Configurations

If you have two or more configurations and want to sign off one and sign on to the other, follow these steps.

1. Click the small **X** on the top right corner of the Ektron Explorer frame (illustrated below).


Ektron Explorer: Search Results
File Edit View Favorites Tools Help
Back
Search
Favorites
Media
Address
http://ws10050/cms400example/WorkArea/explorer/views/search/results.htm
Ektron Explorer
Displaying 7 items
Explore
Search
Content
Calendar
Form_Example
Press_Releases
Ektron
"-- “All-Stars” competition identifies the mos innovative and effective implementations

2. The Ektron Explorer closes.
3. Access the Configuration Manager, as described in ”Accessing the Configuration Manager” on page 419.

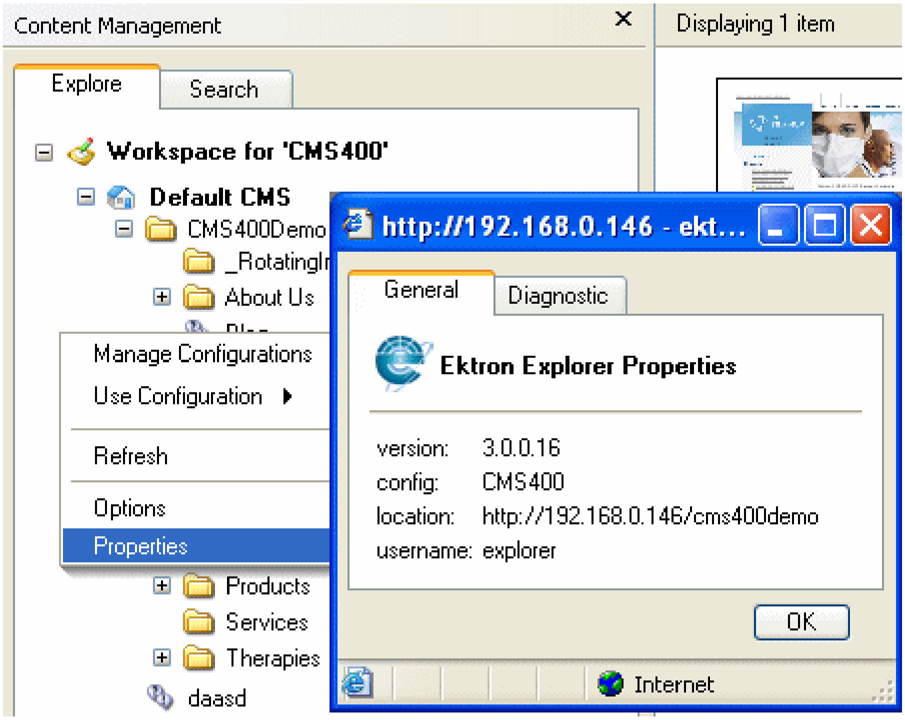
4. Pull down the **Existing Configurations** drop down list and select the configuration that you want to use.
5. Click the **Use** button.
6. Sign back on to Ektron Explorer.

Deleting a Configuration

1. Access the Configuration Manager, as described in ”Accessing the Configuration Manager” on page 419.
2. Pull down the **Existing Configurations** drop down list and select the configuration that you want to delete.
3. Click the **Delete** button.

Viewing Administrative Information

The Explorer Properties screens provide information to help system administrators evaluate and troubleshoot problems related to Ektron Explorer. To access it, place the cursor in the left panel but do not select a folder. Then, right click the mouse and select **Properties**.


Content Management
Displaying 1 item
Explore
Search
Workspace for 'CMS400'
Default CMS
CMS400Demo
_RotatingI
About Us
Manage Configurations
Use Configuration
Refresh
Options
Properties
Products
Services
Therapies
daasd
http://192.168.0.146 - ekt...
General
Diagnostic
Ektron Explorer Properties
OK
Internet

version: 3.0.0.16
config: CMS400
location: http://192.168.0.146/cms400demo
username: explorer

The following table explains the information provided on both tabs of the Ektron Explorer Properties screen.

Tab	Field	Description
General	Version	The version of Ektron Explorer installed on the client.
	Config	The name of the configuration being used. *See Also:* ”Configuring Ektron Explorer” on page 416
	Location	The path to the server that contains the CMS linked to Ektron Explorer.
	username	The name of the user signed in to Ektron Explorer.
Diagnostic	Server name	The server that contains the CMS linked to Ektron Explorer.

Tab	Field	Description
	Local Address	The client that contains Ektron Explorer.
	Application Path	The folder that contains the Web services and Explorer folders.
	Client version	The version of Ektron Explorer installed on the client.
	Server version	The version of **Ektron CMS400.NET** installed on the server.
	Configuration name	The name of the configuration being used. *See Also:* "Configuring Ektron Explorer" on page 416
	Configuration username	The user signed in to Ektron Explorer using the configuration listed above.
	Configuration location	The path to the server that contains the CMS linked to Ektron Explorer, as defined in the configuration listed above.
	Web Services: HTTP Status	Ektron Explorer requires Web Services to be working. This field indicates the status of Ektron Explorer's Web Service. Green - Web Service is working Red - Web Service is not working
	Dependencies: Ektbartb.dll, EktAsset2.ocx	Ektron Explorer requires these two files on the client. Green - the file resides on the client Red - the file is missing

Calendars

The Calendars feature allows you to create event calendars for your Web site. Once created, users may add calendar events that are posted to the calendar for visitors to see.

NOTE The User Manual section “Working with Calendars“ explains calendar concepts and procedures that end users need to know. This section does not repeat that information. So, you should be familiar with that information before reading this.

Also, the Ektron CMS400.NET Developer’s Manual provides instructions on using the Calendar server control/custom function.

This chapter explains **Ektron CMS400.NET** calendars through the following topics.

- ”Calendar Toolbar Buttons” on page 428
- ”Accessing the Workarea Using Calendars” on page 429
- ”Calendar Permissions” on page 429
- ”Adding a New Calendar” on page 430
- ”Editing a Calendar” on page 435
- ”Deleting a Calendar” on page 435
- ”Calendar Event Types” on page 435
- ”Displaying Calendars on Web Pages” on page 438
- ”Creating a Foreign Language Calendar” on page 439

Calendar Toolbar Buttons

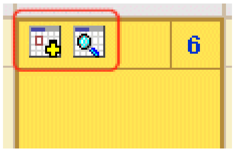
Within the Calendars feature, several buttons (described below) help you perform actions.

Button	Name	Lets you	More Information
📅	Add Calendar	Access Add Calendar screen	”Adding a New Calendar” on page 430
💾	Save	Save calendar or calendar event	
31	Show Calendar	Display calendar in Workarea	“Viewing a Calendar” in the **Ektron CMS400.NET** User Manual chapter “Working with Calendars ”
☰	Manage Event Types	Add, edit, and delete Event Types to and from a calendar	”Calendar Event Types” on page 435
📅	Add Calendar Event	Access Add Calendar Event screen in the Workarea	“Adding a Calendar Event” in the **Ektron CMS400.NET** User Manual chapter “Working with Calendars”
📝	Edit	Edit calendar or event name	”Editing a Calendar” on page 435; ”Editing the Event Type Name” on page 437
🗑	Delete	Delete calendar or calendar event	”Deleting a Calendar” on page 435
🗑	Delete all recurring events	Delete all events in a recurring series	“Deleting All Events in a Recurring Series” in the **Ektron CMS400.NET** User Manual chapter “Working with Calendars”

Button	Name	Lets you	More Information
	Add Calendar Event	Access the Add Calendar Event screen from calendar on Web page	"Adding a Calendar Event" in the **Ektron CMS400.NET** User Manual chapter "Working with Calendars"
	View Date	View calendar events for selected day	"Viewing a Calendar Event" in the **Ektron CMS400.NET** User Manual chapter "Working with Calendars"
	Add Library	Select a library Quicklink for an event.	Hyperlink field description in the **Ektron CMS400.NET** User Manual chapter "Working with Calendars"

Accessing the Workarea Using Calendars

To access the Workarea after viewing a calendar, you cannot right click the mouse then choose Workarea from the context-sensitive menu as you can with content. Instead, after logging in, click either the Add Events or View Events icon (circled below) to access the Workarea.



Calendar Permissions

Calendar permissions are derived from the content folder assigned to the calendar. This section explains the permissions you can set for a calendar.

Administrator Permissions

Members of the following groups have full control over all calendar features (as they do for content). Only these users can add, edit, or delete a calendar.

- administrator user group
- users and user groups defined on the Manage Members for Role: Calendar-Admin screen. (For more information, see ”Defining Roles” on page 564.)

Administrators may also add, edit, and delete calendar events.

User Permissions

Users who are not in one of the groups listed in ”Administrator Permissions” on page 430 *cannot* add, edit, or delete calendars.

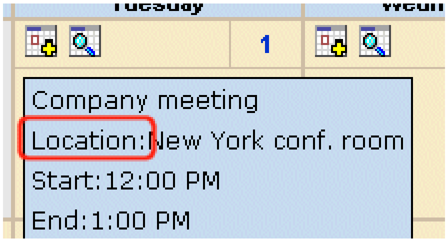
Non-administrator users can add, edit, or delete calendar events *if* they have add, edit, and delete permissions for the calendar’s content folder. *See Also:* ”Setting Permissions for a Content Folder” on page 551

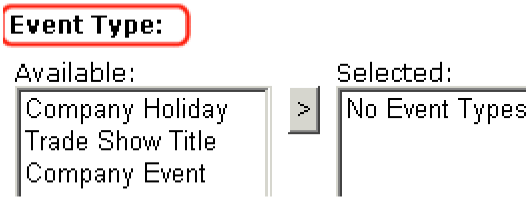
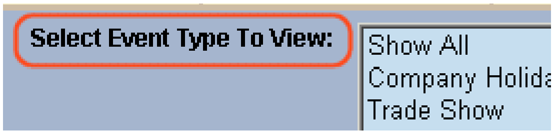
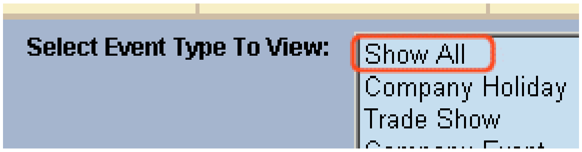
Adding a New Calendar

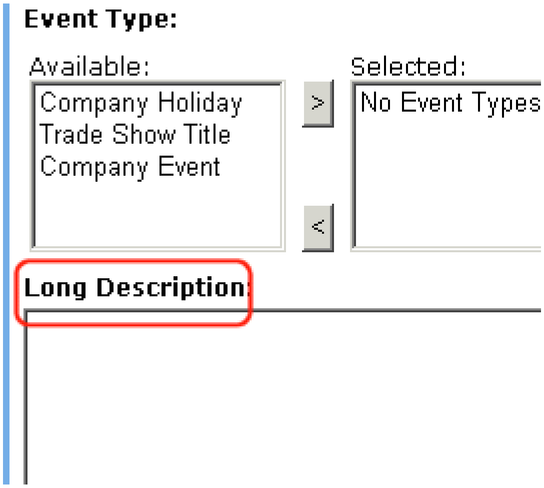
To add a new calendar, follow these steps.

See Also: ”Calendar Permissions” on page 429

1. Click **Modules > Calendar**.
2. Click the Add Calendar button ().
3. The Add or Edit Calendars screen appears. The following table explains each field on the screen.

Section	Description
Title	Enter a calendar title, which identifies the calendar in the Workarea.
Description	Enter a calendar description, which appears on the Calendar Modules screen to help identify the calendar.
Location Label	Specify the label text for the location field. The location appears with the detail of a calendar event.  1 Company meeting Location:New York conf. room Start:12:00 PM End:1:00 PM
Start Time Label	Specify a label for the start time. A calendar event can display the start time.
End Time Label	Specify a label for the end time. A calendar event can display the end time.
Display Weekends	Place a check in this box if you want the calendar to display Saturdays and Sundays along with weekdays. To display weekdays only, remove the check. *See Also:* ”Display Weekends” on page 434
Forward Only	To have the calendar display only events from the date when someone views the calendar forward (but no past events), place a check in the box next to **Show only events that fall after the viewing day** However, a logged-in user can view past calendar events.

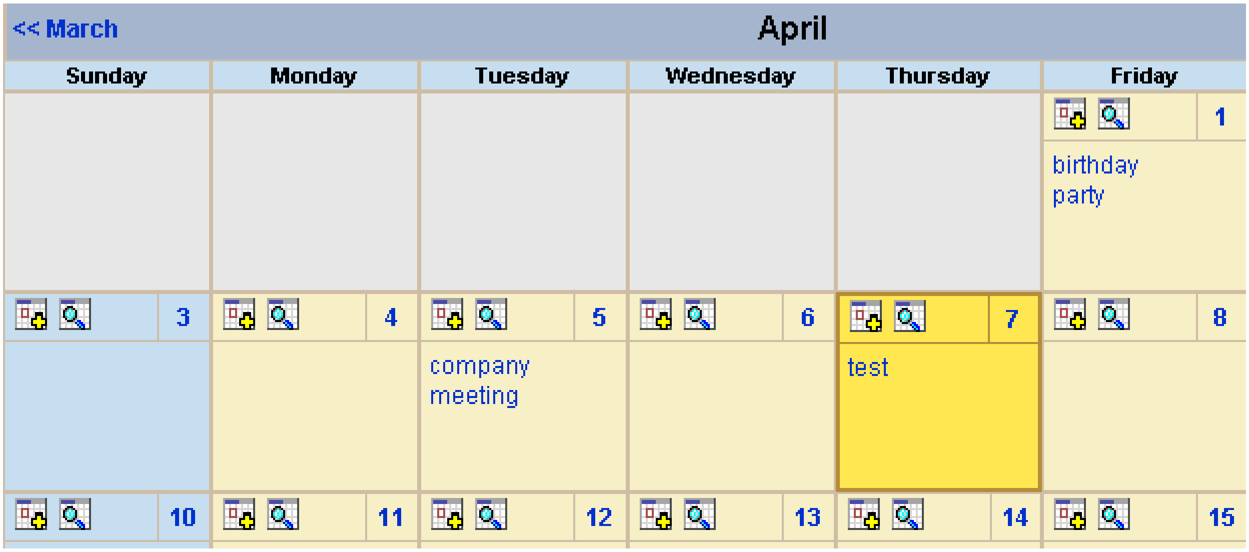
Section	Description
Event Type Label	One section of the Add Calendar Events screen displays available event types and lets the user assign them to the event.  Event Type: Available: Company Holiday Trade Show Title Company Event > Selected: No Event Types By default, this text is **Event Type:**. To change the default text, edit this field.
Event Types Available	If you want to allow users to assign event types to events on this calendar, check this box.
Event Types Required	If you want to require users to assign event types when adding events, check this box. This checkbox can only be checked if **Event Types Available** is checked.
Instructions	If you allow users to filter a calendar view by event type, text appears at the bottom of the screen that explains how to use the selection box. By default, this text is **Select Event Type To View**.  Select Event Type To View: Show All Company Holida Trade Show If you want to change this text, edit this field.
Show All label	If you allow users to filter a calendar view by event type, the list of event types appears at the bottom of the screen. On top of the list is text indicating that all event types will appear on the calendar. By default, this text is **Show All**.  Select Event Type To View: Show All Company Holiday Trade Show If you want to change this text, edit this field.

Section	Description
Long Description	This field can allow the user to enter additional information about a calendar event.  Event Type: Available: Company Holiday Trade Show Title Company Event > < Selected: No Event Types Long Description: Your choices are: • **No Long Description** - no additional description is allowed • **Text Only** - while adding an event, a user can enter text into a **Long Description** box. No formatting is allowed within this text. This text appears in the Event View screen and in the XML Packet. Because the text is not formatted, the XSL creator is responsible for its display. • **Rich Text Description** - works the same as the Text Only option (see above) except the user can format text using Ektron's eWebEditPro editor.
Content Folder	Specify the calendar's content folder. To understand how folder assignment affects calendar use, see "Calendar Permissions" on page 429.

4. Click the Save button ( ).

Display Weekends

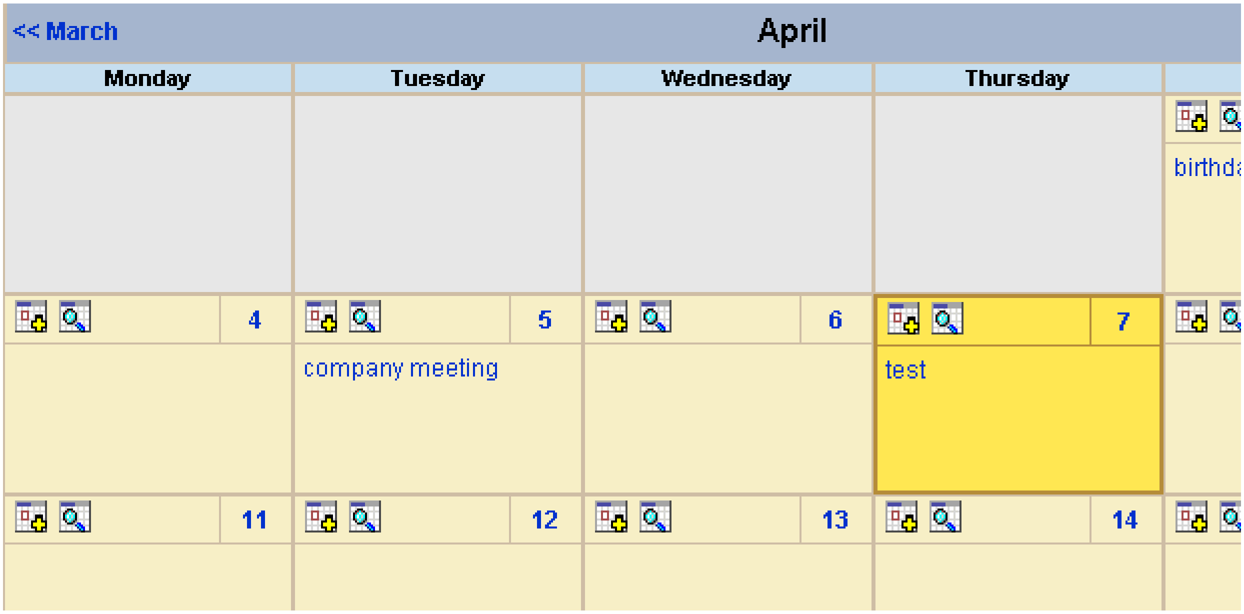
To display seven day weeks (for example, Sunday to Saturday), as opposed to five day weeks (Monday to Friday), check this box.



<< March April

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
					1 birthday party
3	4	5 company meeting	6	7 test	8
10	11	12	13	14	15

Do Not Display Weekends



<< March April

Monday	Tuesday	Wednesday	Thursday	
				birthda
4	5 company meeting	6	7 test	
11	12	13	14	

Editing a Calendar

All calendar information, with the exception of the ID, can be edited at any time. To edit a calendar, follow these steps.

1. Access the View Calendar screen for the calendar you want to edit.
2. Click the Edit button (📝).
3. The Add or Edit Calendar screen is displayed.
4. Make the necessary changes to the calendar, using the table in ”Adding a New Calendar” on page 430 as a reference.
5. Click the Save button (💾).

Deleting a Calendar

You can delete calendars that are no longer needed.

NOTE Deleting a calendar deletes all events assigned to it.

To delete a calendar, follow these steps.

1. Access the View Calendar Screen for the calendar you want to delete.
2. Click the Delete button (🗑).
3. A confirmation message is displayed.
4. Click **OK**.

Calendar Event Types

Any calendar event can have one or more Event Types assigned to it. An event type might be a meeting, product demonstration, or deadline. When a user views a calendar, he can change the display to view only events that are relevant to him.

This section explains how to manage calendar Event Types through the following subtopics.

- ”Enabling Event Types” on page 436
- ”Viewing Event Types” on page 436
- ”Adding Event Types” on page 437
- ”Editing the Event Type Name” on page 437
- ”Deleting Event Types” on page 438
- ”Assigning an Event Type to an Event” on page 438

Enabling Event Types

To enable event types, edit the calendar and check off the **Event Types Available** box. If desired, you can also check the **Event Types Required** box. This forces the user to specify an event type when adding a calendar event. *See Also:* ”Adding a New Calendar” on page 430

Once event types are enabled, the Manage Event Types button (☰) appears on the toolbar.

Viewing Event Types

To view available Event Types, follow these steps.

1. Access the View Calendar screen for the calendar whose event types you want to view.
2. Click Event Types button (☰).

NOTE If the Event Types button does not appear in the toolbar, you must make Event Types available. See ”Enabling Event Types” on page 436 for more information.

3. The View Event Types for [Calendar Name] screen is displayed with a list of Event Types.

From this screen, you can add, edit, and delete Event Types.

Adding Event Types

1. Access the Event Types screen, as described in ”Viewing Event Types” on page 436.
2. Click the Add button ().
3. The Add or Edit an Event Type screen is displayed.
4. Type an Event Type name in the displayed field.
5. Click the Save button ( ).

After you add an Event Type to a calendar, it can be assigned to a calendar event by users. See ”Assigning an Event Type to an Event” on page 438 for more information.

Editing the Event Type Name

To edit the name of an event type, follow these steps.

1. Access the View Event Types for [Calendar Name] for the calendar with the Event Type you want to edit, as described in ”Viewing Event Types” on page 436.
2. Click the Event Types button ( ).
3. The View Event Types for [Calendar Name] window opens, listing all Event Types.
4. Click the Edit button ( ).
5. The Edit an Event Type screen appears.
6. Click the radio button next to the Event Type you want to edit.
7. Click the Edit button ().
8. The Add or Edit an Event Type screen is displayed. Update the Event Type name.
9. Click the Save button ().

Deleting Event Types

To delete an event type from a calendar, follow these steps.

1. Access the View Event Types for [Calendar Name] for the calendar with the Event Type you want to delete, as described in ”Viewing Event Types” on page 436.
2. Click the Event Types button (☰).
3. The View Event Types for [Calendar Name] window opens, listing all Event Types.
4. Click the Remove button (▬).
5. The Delete Event Types screen displays available Event Types.
6. Check the box next to each Event Type you want to delete.

NOTE Click either **Select All** or **Clear All** to check off all or none of the Event Types.

7. Click the Delete button (🗑) to delete the Event Type.
8. A confirmation message is displayed.
9. Click **OK**.

Assigning an Event Type to an Event

After Event Types are available, users can assign them to calendar events. This is described in the **Ektron CMS400.NET** User Manual chapter “Working with Calendars.”

After users assign Event Types to a calendar event, visitors can filter the calendar view by them.

Displaying Calendars on Web Pages

After a calendar is created, it can easily be inserted onto a Web page. For information about inserting calendars into your Web site, refer to the Ektron CMS400.NET Developers Reference Manual.

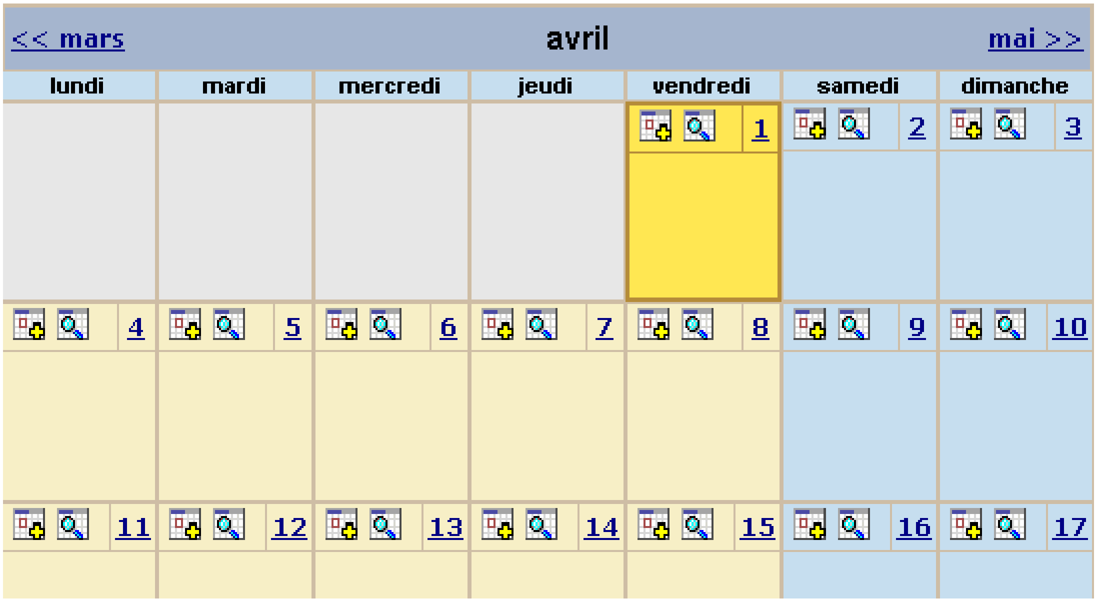
Creating a Foreign Language Calendar

As part of the comprehensive multi-language features of **Ektron CMS400.NET**, calendars can be created in any supported language.

Exception

Microsoft's .NET platform supports most languages. If a language is not supported by .NET (for example, Welsh), an English calendar appears instead.

Once you enter the calendar and event information in the foreign language, the calendar display (that is, day and month names) automatically appears in that language. Also, regional conventions for first-last days of the week, and date and time formats are maintained. As an example, see the French calendar below.



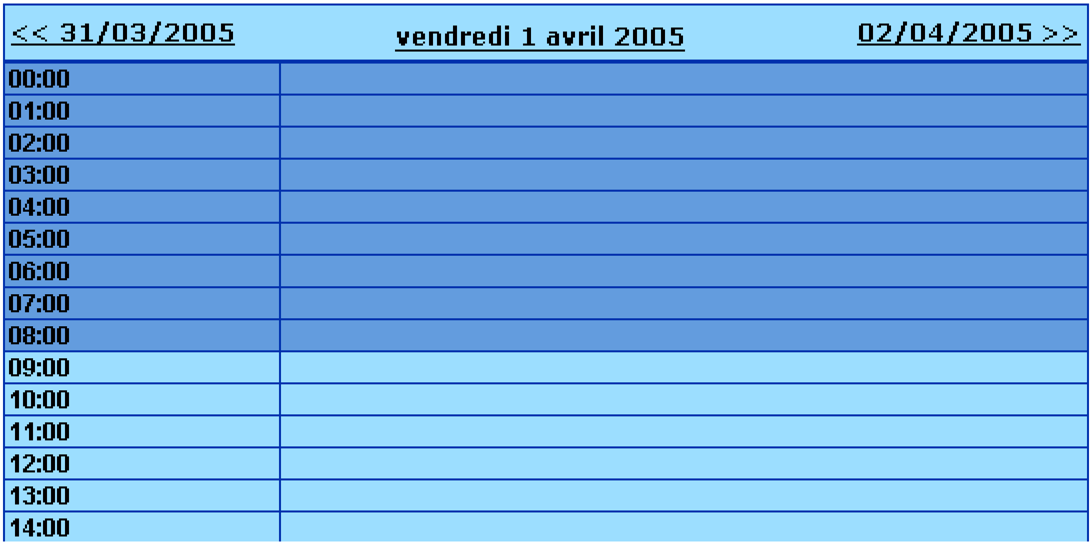
<< mars | avril | mai >>

lundi	mardi	mercredi	jeudi	vendredi	samedi	dimanche
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17

Notice that the days and months are translated, and that the week begins on Monday instead of Sunday (as in American English).

And in the daily detail (below), note that date and time format follows French conventions.

WARNING! In order to see foreign characters and accents, the client PC must have support enabled for that language in Windows. For more information, see `http://www.microsoft.com/globaldev/handson/user/2kintlsupp.mspx`.



<< 31/03/2005 vendredi 1 avril 2005 02/04/2005 >>

00:00
01:00
02:00
03:00
04:00
05:00
06:00
07:00
08:00
09:00
10:00
11:00
12:00
13:00
14:00

See Also: ”Using an Existing Calendar ID or Creating a New One” on page 440

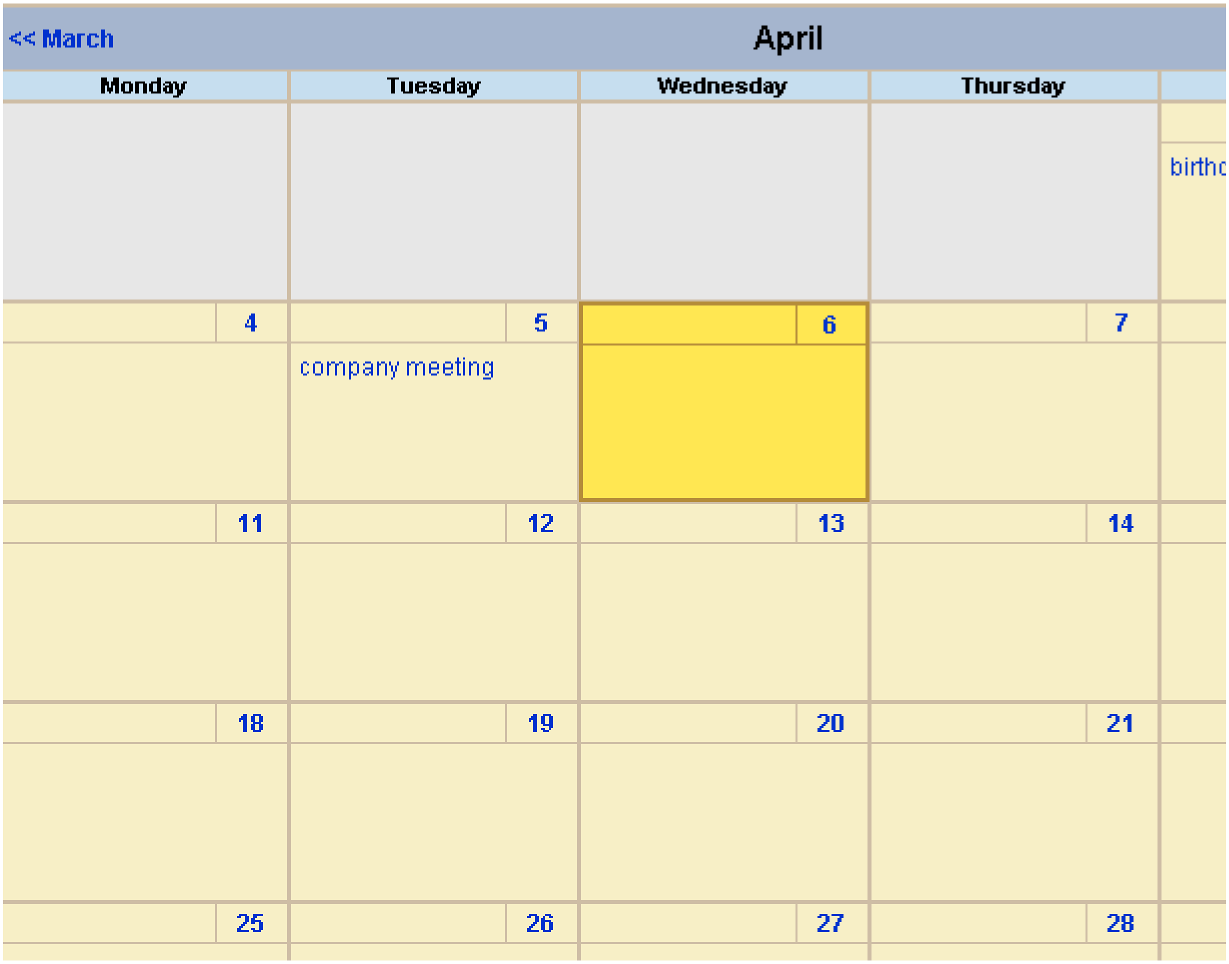
Using an Existing Calendar ID or Creating a New One

When you create a calendar in a foreign language, you can either use an existing calendar ID or create a new one.

Type	Use when...	For more information, see
Foreign language version of existing calendar ID	You want one Web page that displays a calendar in the language selected by the site visitor	”Creating a Multi-lingual Calendar Using the Same ID” on page 442
New calendar ID	The foreign calendar will be placed on its own Web page; there is no equivalent calendar in the default language	”Creating a Multilingual Calendar Using a New ID” on page 443

For example, the following is the English-language version of the sample calendar provided with the intranet. The URL of the following calendar is

```
http://localhost/CMS400EXAMPLE/intranet/
calendar.aspx?menu_id=15&calendar_id=3&TitleLabel=Company%20Calendar&LangType=1033
```

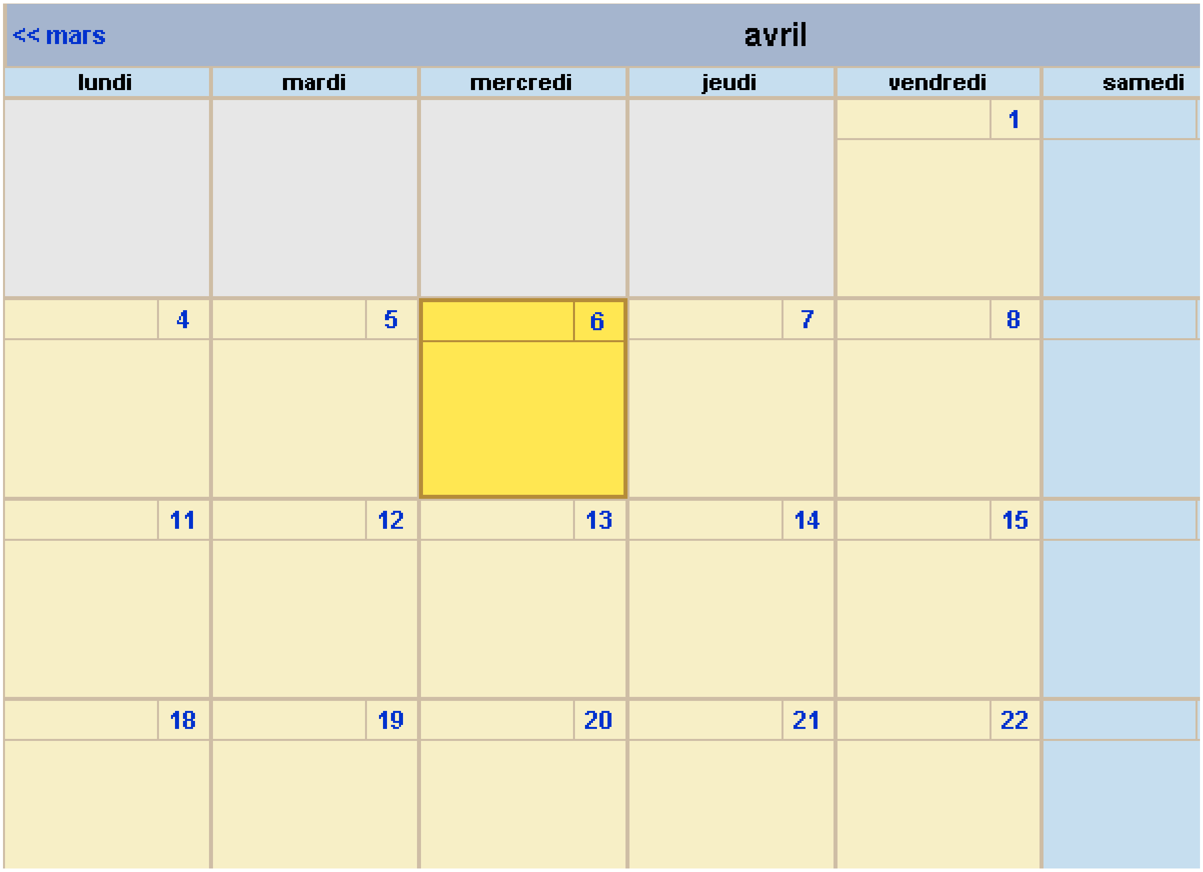


<< March
April
Monday
Tuesday
Wednesday
Thursday
birthd
4
5
company meeting
6
7
11
12
13
14
18
19
20
21
25
26
27
28

If you create a French version of that calendar, and a user navigates to the same page but views it in French, he sees the French version of the calendar (below). Note that they are separate calendars with separate event listings -- they only share the ID number.

The URL of the following calendar is

```
http://localhost/CMS400EXAMPLE/intranet/
calendar.aspx?menu_id=15&calendar_id=3&TitleLabel=Company%20Calendar&LangType=1036
```



<< mars

avril

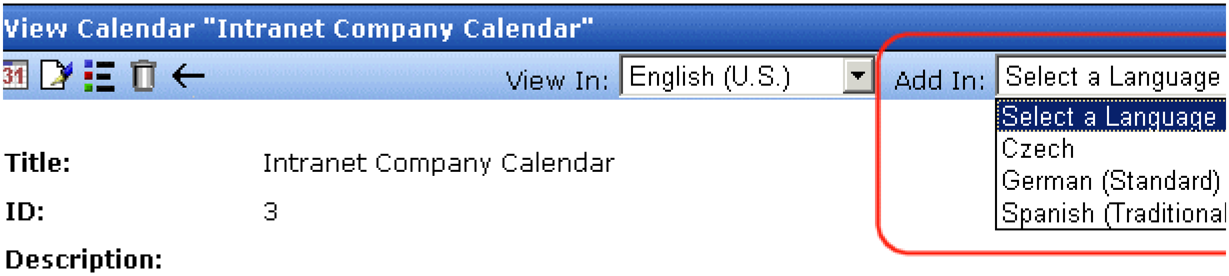
lundi	mardi	mercredi	jeudi	vendredi	samedi
				1	
4	5	6	7	8	
11	12	13	14	15	
18	19	20	21	22	

Creating a Multi-lingual Calendar Using the Same ID

To create a multi-lingual calendar using the same ID number but a different language, follow these steps.

1. Within the Workarea, select **Modules > Calendars**.
2. Select the calendar for which you want to create a version in another language.

3. When the View Calendar Screen appears, pull down the **Add In** box and select the new language.


View Calendar "Intranet Company Calendar"
View In:
English (U.S.)
Add In:
Select a Language
Select a Language
Czech
German (Standard)
Spanish (Traditional

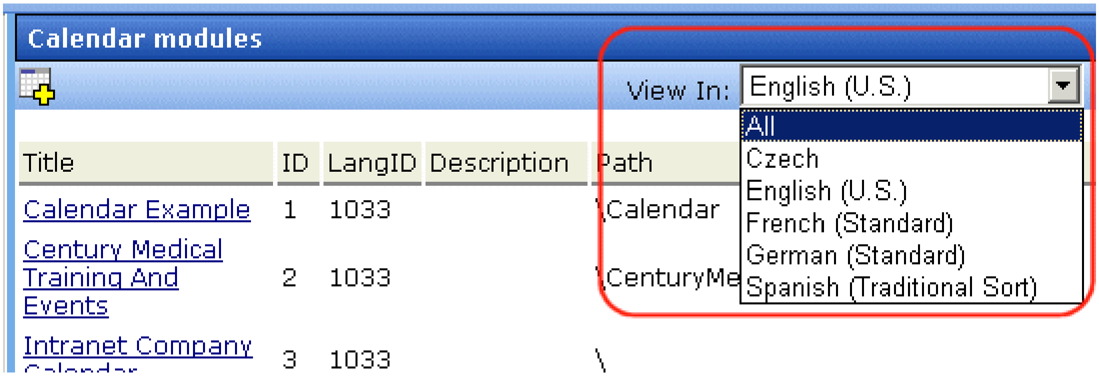
Title:	Intranet Company Calendar
ID:	3
Description:	
Location Label:	Location:
Start Time Label:	Start:

4. Complete the calendar information, as explained in "Adding a New Calendar" on page 430.

Creating a Multilingual Calendar Using a New ID

To create a multi-lingual calendar using a unique ID number, follow these steps.

1. Within the Workarea, select **Modules > Calendars**.
2. From the Calendar Modules screen, click to open the **View In** dropdown box.


Calendar modules
View In:
English (U.S.)
All
Czech
English (U.S.)
French (Standard)
German (Standard)
Spanish (Traditional Sort)

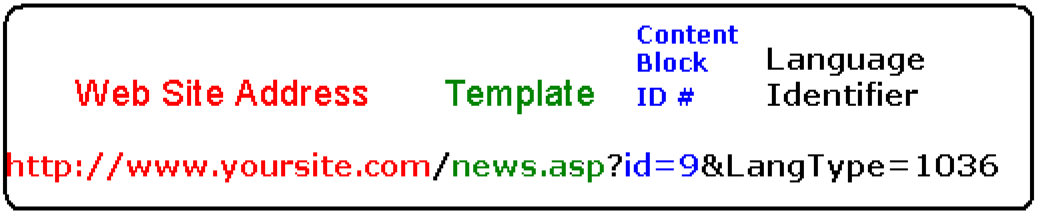
Title	ID	LangID	Description	Path
Calendar Example	1	1033		\Calendar
Century Medical Training And Events	2	1033		\CenturyMe
Intranet Company	3	1033		\

3. Select the language for the calendar.
4. The Calendar Modules screen reappears, showing only calendars in the selected language (if any exist).

Complete the calendar information, as explained in ”Adding a New Calendar” on page 430.

URL Aliasing

Aliasing is an **Ektron CMS400.NET** feature that lets you change the name of your Web site's pages. By default, **Ektron CMS400.NET** Web pages have the following format:



See Also: "Forming URLs For Ektron CMS400.NET Documents" on page 74

Sometimes, you want to change a page's name. The Aliasing feature offers two ways to do this:

- **Ektron CMS400.NET** can automatically change each page's name to a format that search engines more easily recognize. This is called *Automatic Aliasing*.
- You can manually change the name of any page to whatever you wish. For example, you can change the name of your technical support page to `http://www.YourEktronwebsite.com/help.htm` from `http://www.YourEktronwebsite.com/help.aspx?id=27`. This is called *Manual Aliasing*.

NOTE When using Manual Aliasing, you cannot alias the root of your Web site (for example, www.*yourEktronWebsite*.com). You can, however, alias everything after that.

This chapter explains how to alias pages on your Web site through the following topics.

- "Automatic vs. Manual URL Aliasing" on page 446
- "Automatic URL Aliasing" on page 446
- "Manual Aliasing" on page 449

Automatic vs. Manual URL Aliasing

Automatic URL Aliasing allows you to create a URL that does not have a URL parameter. This URL aliases the URL that contains parameters found in a regular Ektron CMS400.NET URL, such as ?id=43. With Automatic URL Aliasing, you can alias all content at once. For more information on Automatic URL Aliasing, see ”Automatic URL Aliasing” on page 446.

Manual URL Aliasing lets you choose the URL and extension that you would like to use. With Manual URL Aliasing, you must assign an alias to each content item individually. You can also assign several aliases to any content item then pick one to be the primary alias. For more information on Manual URL Aliasing, see ”Manual Aliasing” on page 449.

Automatic URL Aliasing

People looking for information on your Web site typically use search engines (such as Google.com) to find pages with the desired content. On rare occasions, some older search engines work better without the URL parameters that make up an **Ektron CMS400.NET** Web page name.

If this becomes a problem, use the Automatic URL Aliasing feature, which creates a page name that search engines easily recognize. The new name includes the template and the page's ID values.

When you use the Automatic URL Aliasing feature, **Ektron CMS400.NET** makes the following changes.

- A delimiter of `ekt` indicates the start of each parameter
- URL parameters follow each delimiter

Here is an example of aliasing content.

Original URL

```
/400Intranet/mycalendars.aspx?id=2
```

Aliased version

```
/400Intranet/mycalendars_ektid2.aspx
```

Enabling Automatic URL Aliasing

If you do not see a **URL Aliasing** option under **Settings > Configuration**, follow these steps to enable it.

NOTE Before editing your web.config file, you should close all open browsers. In some instances, you may need to do an IIS reset.

1. Open the web.config file, located in your Web site's root folder.
2. Change the value of `ek_RedirectorInstalled` to **True**.
3. Enable the httpHandlers element. To do so, uncomment the following tags by removing all dashes and the exclamation point (!):

```
<!--httpHandlers>  </httpHandlers-->
```

   The tags are separated by several lines that look like this:

```
<add verb="*" path="*.gif" type="URLRewrite.StaticFileHandler,Ektron.Cms.URLRewriter" />
```

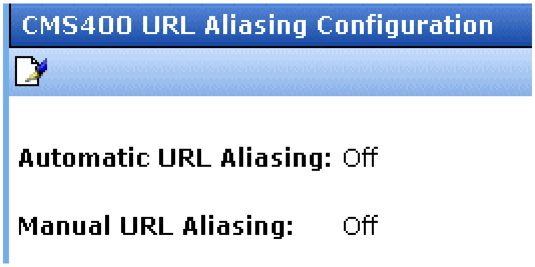
4. Save web.config.

Activating/Deactivating the Aliasing Feature

To activate the automatic aliasing feature, follow this path to the URL Aliasing Configuration screen: **Settings > Configuration > URL Aliasing**.

NOTE If you do not see a **URL Aliasing** option under **Configuration**, see "Enabling Automatic URL Aliasing" on page 447.

The screen indicates if automatic aliasing is currently on or off. To change its state, click the Edit button (📝), check or uncheck the box, and click the Save button (💾).



Automatic URL Aliasing: Off

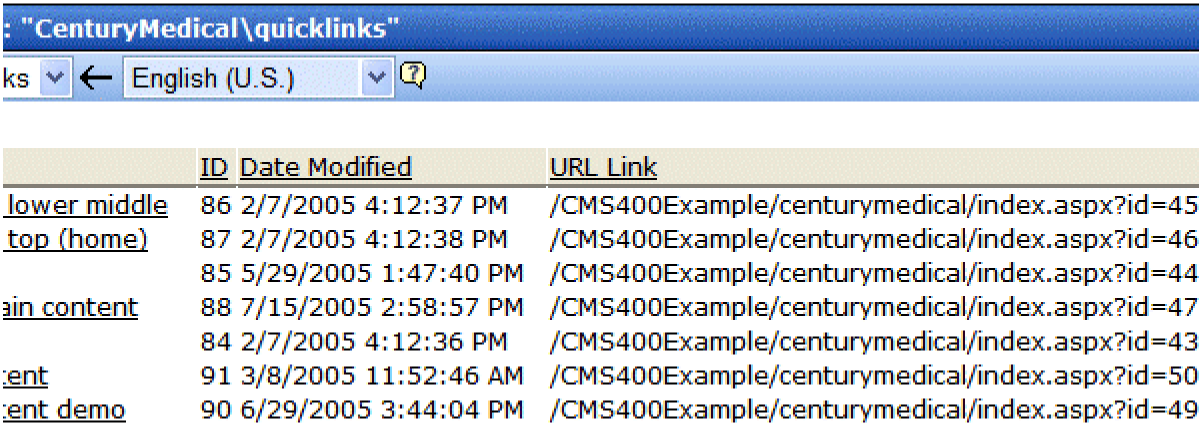
Manual URL Aliasing: Off

If **Automatic Aliasing** is turned on and you uncheck it, your page URLs return to their original format (see ”Sample Quicklinks Folder with URL Aliasing Turned Off” on page 448).

Effect of Activating Automatic URL Aliasing

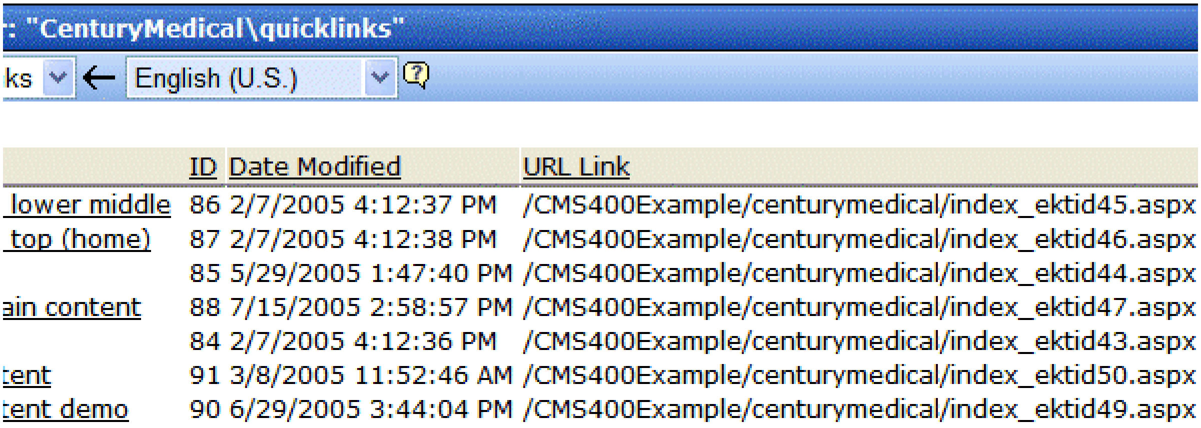
When you enable automatic URL aliasing, the feature updates every Quicklink in your **Ektron CMS400.NET** library to the new format. This may take a few moments.

Sample Quicklinks Folder with URL Aliasing Turned Off



	ID	Date Modified	URL Link
lower middle	86	2/7/2005 4:12:37 PM	/CMS400Example/centurymedical/index.aspx?id=45
top (home)	87	2/7/2005 4:12:38 PM	/CMS400Example/centurymedical/index.aspx?id=46
	85	5/29/2005 1:47:40 PM	/CMS400Example/centurymedical/index.aspx?id=44
ain content	88	7/15/2005 2:58:57 PM	/CMS400Example/centurymedical/index.aspx?id=47
	84	2/7/2005 4:12:36 PM	/CMS400Example/centurymedical/index.aspx?id=43
ent	91	3/8/2005 11:52:46 AM	/CMS400Example/centurymedical/index.aspx?id=50
ent demo	90	6/29/2005 3:44:04 PM	/CMS400Example/centurymedical/index.aspx?id=49

Sample Quicklinks Folder with URL Aliasing Turned On



	ID	Date Modified	URL Link
lower middle	86	2/7/2005 4:12:37 PM	/CMS400Example/centurymedical/index_ektid45.aspx
top (home)	87	2/7/2005 4:12:38 PM	/CMS400Example/centurymedical/index_ektid46.aspx
	85	5/29/2005 1:47:40 PM	/CMS400Example/centurymedical/index_ektid44.aspx
ain content	88	7/15/2005 2:58:57 PM	/CMS400Example/centurymedical/index_ektid47.aspx
	84	2/7/2005 4:12:36 PM	/CMS400Example/centurymedical/index_ektid43.aspx
tent	91	3/8/2005 11:52:46 AM	/CMS400Example/centurymedical/index_ektid50.aspx
tent demo	90	6/29/2005 3:44:04 PM	/CMS400Example/centurymedical/index_ektid49.aspx

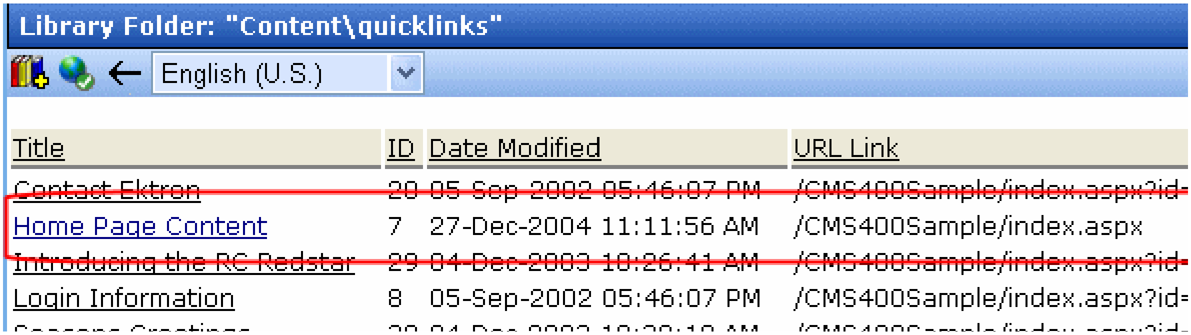
The aliasing feature does not review Quicklinks embedded in your content -- these maintain their original format. When a user or site visitor is navigating through **Ektron CMS400.NET**, either format works.

Manual Aliasing

When using manual aliasing, you choose content then assign a different URL to it. From then on, the content can be identified either by its original URL (assigned automatically by **Ektron CMS400.NET**) or its alias.

When assigning an alias, choose the name you want users to see as your URL. In the example below, the page name changed from `/cms400demo/index.aspx` to `/cms400demo/Launch.htm.` Launch.htm is the alias.

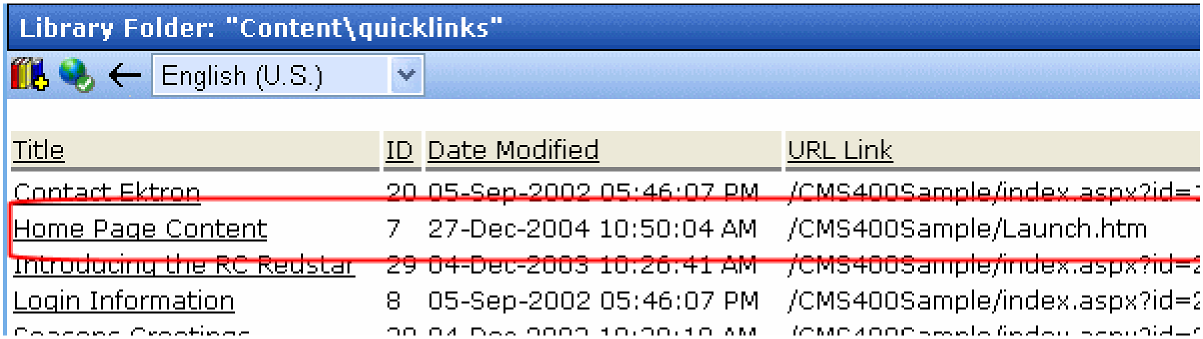
Before Manual URL Aliasing



Library Folder: "Content\quicklinks"

Title	ID	Date Modified	URL Link
Contact Ektron	20	05-Sep-2002 05:46:07 PM	/CMS400Sample/index.aspx?id=
Home Page Content	7	27-Dec-2004 11:11:56 AM	/CMS400Sample/index.aspx
Introducing the RC Redstar	29	04-Dec-2003 10:26:41 AM	/CMS400Sample/index.aspx?id=
Login Information	8	05-Sep-2002 05:46:07 PM	/CMS400Sample/index.aspx?id=

After Manual URL Aliasing



Library Folder: "Content\quicklinks"

Title	ID	Date Modified	URL Link
Contact Ektron	20	05-Sep-2002 05:46:07 PM	/CMS400Sample/index.aspx?id=
Home Page Content	7	27-Dec-2004 10:50:04 AM	/CMS400Sample/Launch.htm
Introducing the RC Redstar	29	04-Dec-2003 10:26:41 AM	/CMS400Sample/index.aspx?id=
Login Information	8	05-Sep-2002 05:46:07 PM	/CMS400Sample/index.aspx?id=

This section explains manual aliasing through the following subtopics.

- ”Benefits of Manual URL Aliasing” on page 451
- ”Enabling Manual Aliasing” on page 451
- ”Activating/Deactivating Manual Aliasing” on page 459
- ”Permissions for Manual Aliasing” on page 460
- ”Adding a Base Reference to a Template” on page 461
- ”Assigning a Manual URL Alias” on page 461
- ”Editing a Manual URL Alias” on page 465
- ”Removing a Manual URL Alias” on page 466

Benefits of Manual URL Aliasing

Manual URL Aliasing lets you completely alias a static or dynamic site. Benefits include:

- You can make your site more user-friendly by creating “human readable” URLs (for example, `/ourcompany.html` is readable, while `company.aspx?id=1` is not).
- If you have a PHP site, you can alias all php pages and use the same Query String names to pass the needed info to the new ASPX pages.

NOTE Any query strings appended to an aliased page pass to the ASPX page and may be used if necessary.

- If you have a static Web site (for example, all HTML pages) that is indexed in a search engine, you can alias your whole site and gain complete content management without affecting your search engine ranking.
- You can increase your search engine rankings by naming pages according to the context of a specific search term.

Enabling Manual Aliasing

If you do not see a **URL Aliasing** option under **Settings > Configuration**, follow these steps to enable it. First, update the web.config file. Next, update IIS Application Mappings.

Updating the Web.config File

1. Close all open browsers. In some instances, you may need to do an IIS reset.
2. Open the web.config file, located in your Web site’s root folder.
3. Change the value of `ek_RedirectorInstalled` to **True**.

NOTE You only need to perform step 4 if you want add content with an extension other than those already registered, such as .aspx. The **App Mappings** tab on the Application Configuration screen (illustrated below) indicates which extensions are registered on your server.

4. After `ek_RedirectorManualExt`, enter a comma-delimited list of Web page extensions for which you will want to create aliased pages. For example, `.aspx,.htm,.html,`. By default, .aspx is in the list.

You can enter one or more extensions. Each extension must begin with a period, and separated from other extensions by a comma.

5. Enable the `httpHandlers` section of Web.config. To do so, uncomment the following tags by removing dashes and the exclamation point (!):

   To uncomment the opening tag, remove the characters in red below:

```
<!--add verb="*" path="*.asmx"
type="System.Web.Services.Protocols.WebServiceHandlerFactory,System.Web.Services,
Version=1.0.5000.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a" validate="false"/>
```

   To uncomment the closing tag, remove the characters in red below:

```
<add verb="*" path="*" type="URLRewrite.URLRewriter,Ektron.Cms.URLRewriter" /-->
</httpHandlers>
```

6. If you want to use .htm as a file extension with your Web site, comment out the following line by adding the red characters below.

```
<!--add verb="*" path="*/*.htm" type="URLRewrite.StaticFileHandler,Ektron.Cms.URLRewriter"/-->
```

7. Add the following line below the one shown above.

```
<add verb="*" path="*.htm" type="URLRewrite.URLRewriter,Ektron.Cms.URLRewriter" /-->
```

8. Add a similar line for each file type you want to enable. For example:

```
<add verb="*" path="*.html" type="URLRewrite.URLRewriter,Ektron.Cms.URLRewriter" /-->
<add verb="*" path="*.aspx" type="URLRewrite.URLRewriter,Ektron.Cms.URLRewriter" /-->
```

9. For each folder path containing non-HTML content, add the pathway to it relative to the site root:

```
<add verb="*" path="*/FOLDERPATH/
.*" type="URLRewrite.StaticFileHandler,Ektron.Cms.URLRewriter"/>
```

   For example, for the CMS400demo site, add this:

```
<add verb="*" path="*/assets/
.*" type="URLRewrite.StaticFileHandler,Ektron.Cms.URLRewriter" />
```

10. Save web.config.

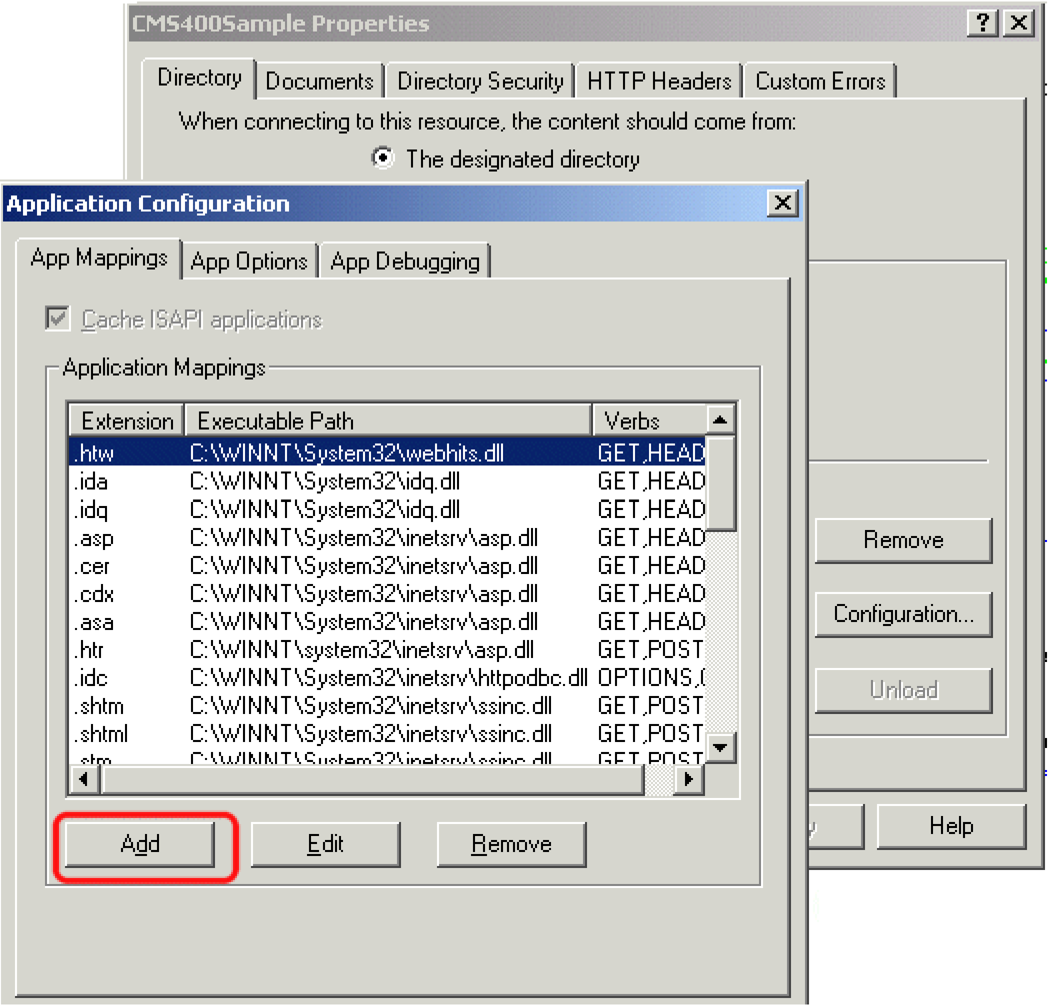
NOTE If you are using .aspx pages, you do not need to install the ISAPI filter. The following steps do not need to be performed.

Updating IIS Application Mappings for Windows 2000 and XP

See Also: "Updating IIS Application Mappings for Windows 2003 Server" on page 456

1. Open IIS, go to the Web site, and right-click **Properties**.
2. Click the **Directory** tab.
3. Click the **Configuration** button.
4. On the **Mappings** tab, click **Add**.

Windows 2000 or Windows XP


CMS400Sample Properties
?
Directory
Documents
Directory Security
HTTP Headers
Custom Errors
Application Configuration
App Mappings
App Options
App Debugging
Application Mappings
Add
Edit
Remove
Remove
Configuration...
Unload
Help

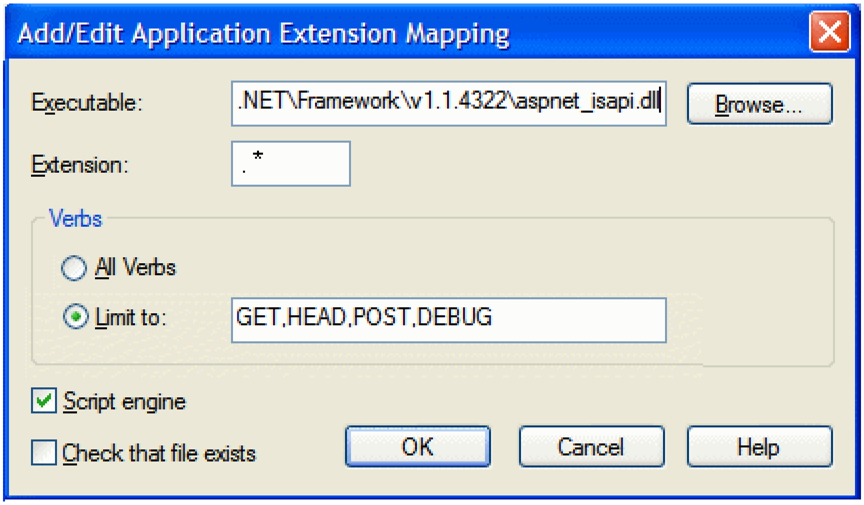
When connecting to this resource, the content should come from:

● The designated directory

☑ Cache ISAPI applications

Extension	Executable Path	Verbs
.htw	C:\WINNT\System32\webhits.dll	GET,HEAD
.ida	C:\WINNT\System32\idq.dll	GET,HEAD
.idq	C:\WINNT\System32\idq.dll	GET,HEAD
.asp	C:\WINNT\System32\inetsrv\asp.dll	GET,HEAD
.cer	C:\WINNT\System32\inetsrv\asp.dll	GET,HEAD
.cdx	C:\WINNT\System32\inetsrv\asp.dll	GET,HEAD
.asa	C:\WINNT\System32\inetsrv\asp.dll	GET,HEAD
.htr	C:\WINNT\system32\inetsrv\asp.dll	GET,POST
.idc	C:\WINNT\System32\inetsrv\httpodbc.dll	OPTIONS,
.shtm	C:\WINNT\System32\inetsrv\ssinc.dll	GET,POST
.shtml	C:\WINNT\System32\inetsrv\ssinc.dll	GET,POST

5. The Add/Edit Application Extension Mapping dialog appears.



Add/Edit Application Extension Mapping

Executable: .NET\Framework\v1.1.4322\aspnet_isapi.dll

Extension: .*

Verbs

○ All Verbs

● Limit to: GET,HEAD,POST,DEBUG

☑ Script engine

☐ Check that file exists

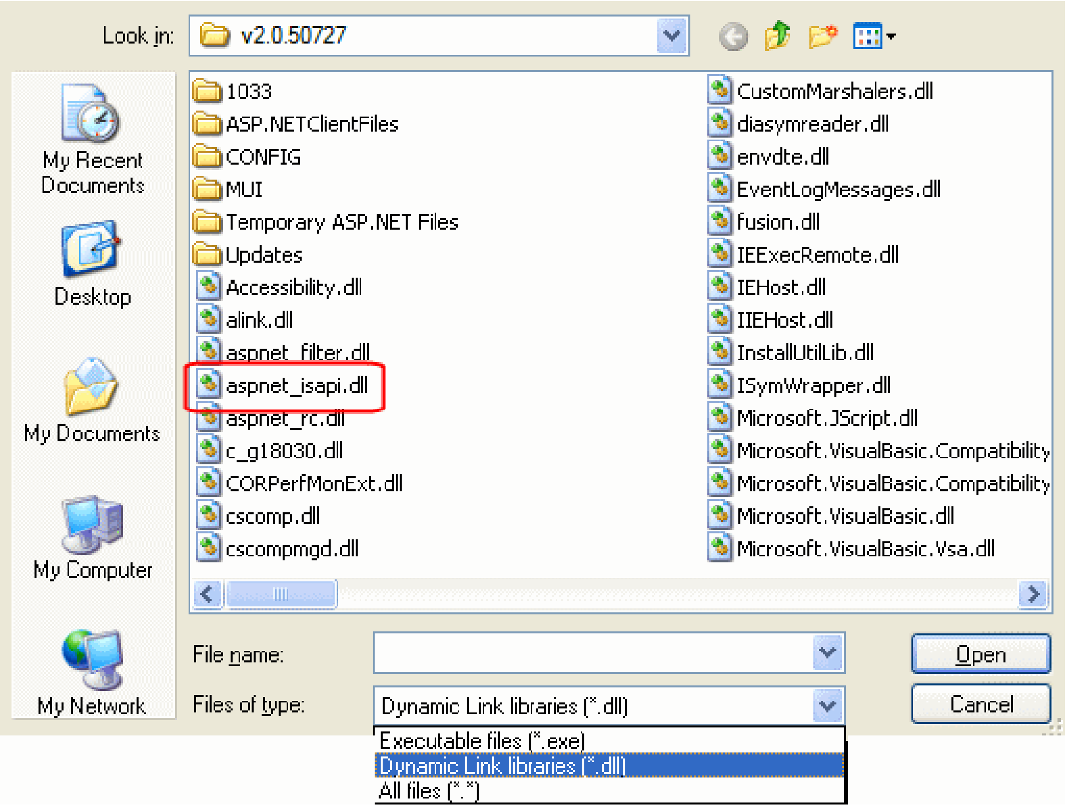
NOTE The dialog should look like the sample above when you finish.

6. In the **Executable** field, browse to the .NET Framework aspnet_isapi.dll file (illustrated below).

NOTE Use the latest version of the asp.net_isapi.dll. The default location is `c:\windows\Microsoft.NET\Framework\`***`latestversion`***`\aspnet_isapi.dll`. In the path, *`latestversion`* refers to the folder containing the latest version of the .NET framework.

WARNING! IIS sometimes abbreviates the path in the **Executable** field, causing the **OK** button to be grayed out. If the text box does not contain the full path, IIS cannot validate it. To remedy this, click in the **Executable** field. The full path appears, and the **OK** button is active.

.



Look in: v2.0.50727

Files of type: Dynamic Link libraries (*.dll)

My Recent Documents
Desktop
My Documents
My Computer
My Network
1033
ASP.NETClientFiles
CONFIG
MUI
Temporary ASP.NET Files
Updates
Accessibility.dll
alink.dll
aspnet_filter.dll
aspnet_isapi.dll
aspnet_rc.dll
c_g18030.dll
CORPerfMonExt.dll
cscomp.dll
cscompmgd.dll
CustomMarshalers.dll
diasymreader.dll
envdte.dll
EventLogMessages.dll
fusion.dll
IEExecRemote.dll
IEHost.dll
IIEHost.dll
InstallUtilLib.dll
ISymWrapper.dll
Microsoft.JScript.dll
Microsoft.VisualBasic.Compatibility
Microsoft.VisualBasic.Compatibility
Microsoft.VisualBasic.dll
Microsoft.VisualBasic.Vsa.dll
File name:
Open
Cancel
Executable files (*.exe)
Dynamic Link libraries (*.dll)
All files (*.*)

NOTE When browsing to the aspnet_isapi.dll folder, you may need to change the **Files of Type** dropdown to **.dll** or **all files**. It is set to .exe by default.

7. In the **Extension** field, enter characters to allow all extensions.

Server Platform	Your entry in the Extension field
Windows 2000	*.*
Windows XP	.*

8. Under **Verbs**, check **Limit to**. Then, enter **GET, HEAD, POST, DEBUG**.

9. Uncheck **Check** (or **Verify**) **that file exists**.

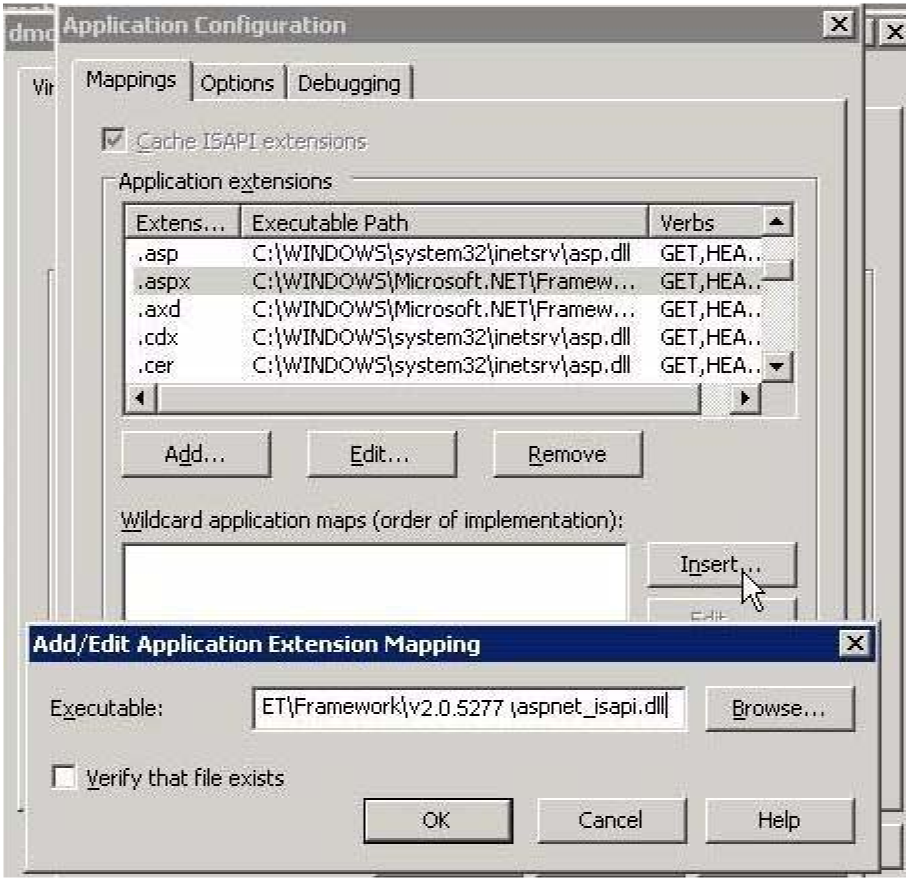
Important! Don’t skip step 9!

10. Click **OK**.

Updating IIS Application Mappings for Windows 2003 Server

See Also: ”Updating IIS Application Mappings for Windows 2000 and XP” on page 452

1. Open IIS, go to the Web site, and right click **Properties**.
2. Click the **Home Directory** tab.
3. Click the **Configuration** button.
4. On the **Mappings** tab, click **Insert**.


Application Configuration
Mappings
Options
Debugging
Application extensions
Add...
Edit...
Remove
Wildcard application maps (order of implementation):
Insert...
Add/Edit Application Extension Mapping
Browse...
OK
Cancel
Help

☑ Cache ISAPI extensions

Extens...	Executable Path	Verbs
.asp	C:\WINDOWS\system32\inetsrv\asp.dll	GET,HEA...
.aspx	C:\WINDOWS\Microsoft.NET\Framew...	GET,HEA...
.axd	C:\WINDOWS\Microsoft.NET\Framew...	GET,HEA...
.cdx	C:\WINDOWS\system32\inetsrv\asp.dll	GET,HEA...
.cer	C:\WINDOWS\system32\inetsrv\asp.dll	GET,HEA...

Executable: ET\Framework\v2.0.5277 \aspnet_isapi.dll

☐ Verify that file exists

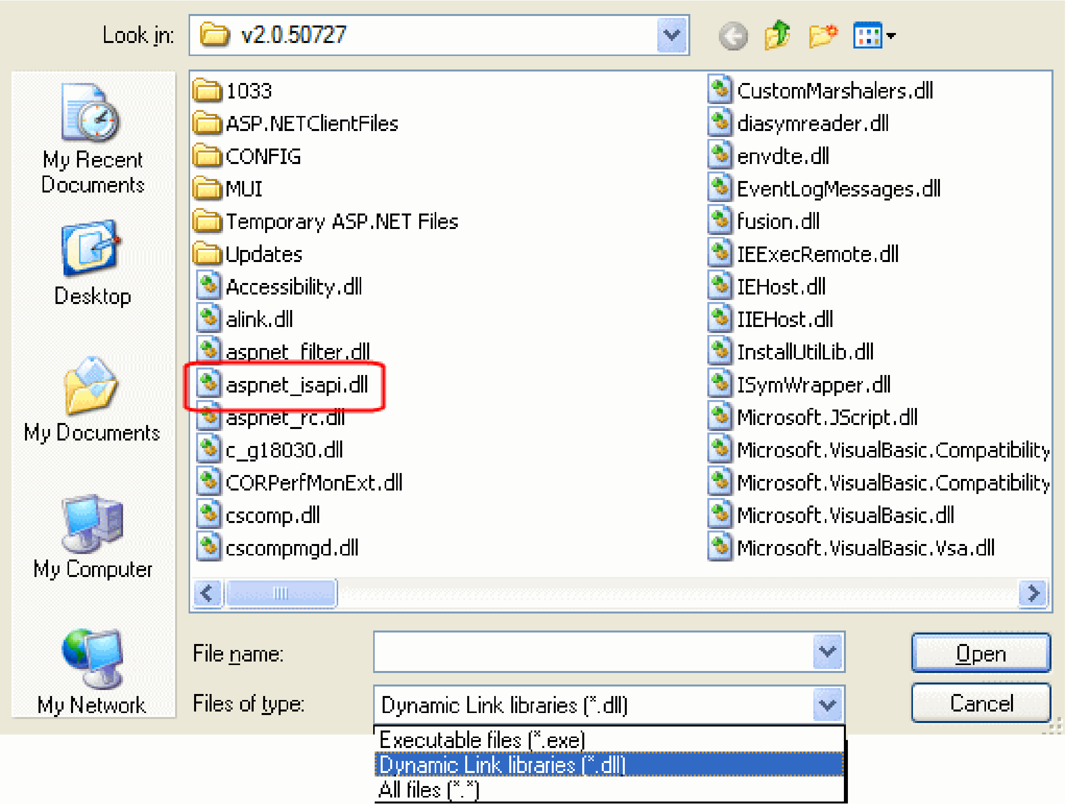
5. The Application Extension Mapping dialog appears (see above).

6. In the **Executable** field, click **Browse** to navigate to the .NET Framework aspnet_isapi.dll file (illustrated below).

NOTE Use the latest version of the asp.net_isapi.dll. The default location is `c:\windows\Microsoft.NET\Framework\`***`latestversion`***`\aspnet_isapi.dll`. In the path, ***latestversion*** refers to the v2.0.50727 folder or the folder that contains the latest version.

WARNING! IIS sometimes abbreviates the path in the **Executable** field, causing the **OK** button to be grayed out. If the text box does not contain the full path, IIS cannot validate it. To remedy this, click in the **Executable** field. The full path appears, and the **OK** button is active.

.

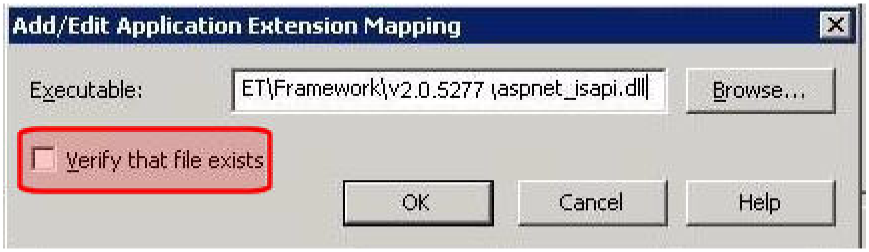

Look in: v2.0.50727

Files of type: Dynamic Link libraries (*.dll)

My Recent Documents
Desktop
My Documents
My Computer
My Network
1033
ASP.NETClientFiles
CONFIG
MUI
Temporary ASP.NET Files
Updates
Accessibility.dll
alink.dll
aspnet_filter.dll
aspnet_isapi.dll
aspnet_rc.dll
c_g18030.dll
CORPerfMonExt.dll
cscomp.dll
cscompmgd.dll
CustomMarshalers.dll
diasymreader.dll
envdte.dll
EventLogMessages.dll
fusion.dll
IEExecRemote.dll
IEHost.dll
IIEHost.dll
InstallUtilLib.dll
ISymWrapper.dll
Microsoft.JScript.dll
Microsoft.VisualBasic.Compatibility
Microsoft.VisualBasic.Compatibility
Microsoft.VisualBasic.dll
Microsoft.VisualBasic.Vsa.dll
File name:
Open
Cancel
Executable files (*.exe)
Dynamic Link libraries (*.dll)
All files (*.*)

NOTE When browsing to the aspnet_isapi.dll folder, you may need to change the **Files of Type** dropdown to **.dll** or **all files**.

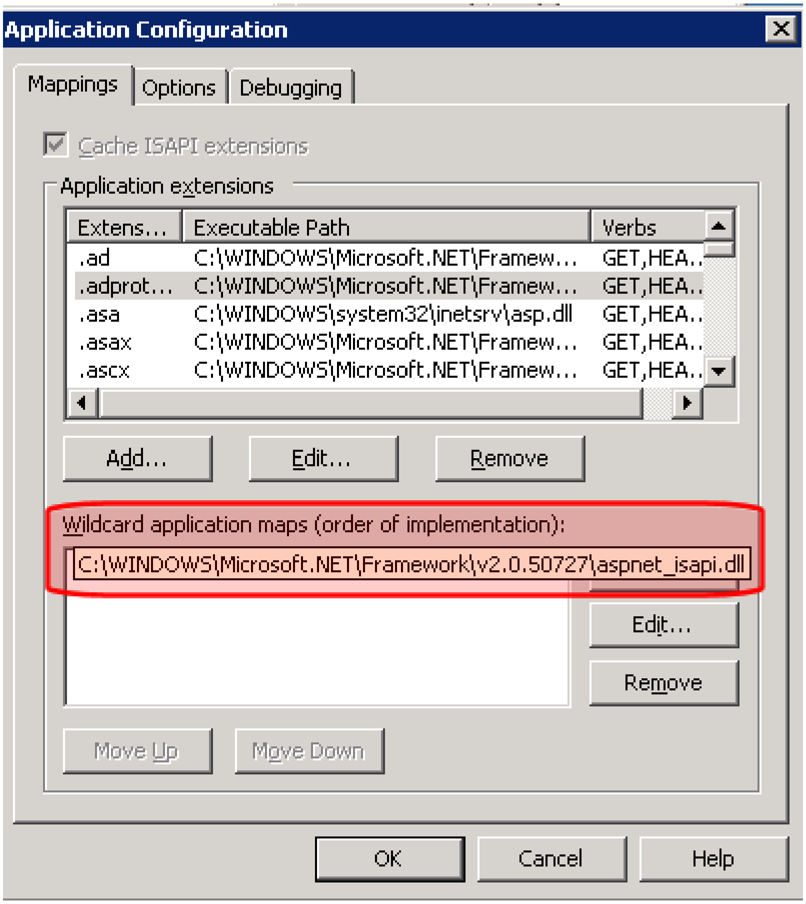
7. Make sure **Verify that file exists** is not checked.


Add/Edit Application Extension Mapping
Executable:
Browse...
OK
Cancel
Help

ET\Framework\v2.0.5277 \aspnet_isapi.dll

☐ Verify that file exists

8. Click **OK**.
9. In IIS, underneath your Web site, click **Asset Management** > **dmdata**.
10. Right click **dmdata** and choose **Properties**.
11. Click the **Virtual Directory** tab.
12. Click the **Configuration** button.
13. In the **Wildcard Application Maps** area, if aspnet_isapi.dll if appears, remove it.


Application Configuration
Mappings
Options
Debugging
Add...
Edit...
Remove
Edit...
Remove
Move Up
Move Down
OK
Cancel
Help

☑ Cache ISAPI extensions

Application extensions

Extens...	Executable Path	Verbs
.ad	C:\WINDOWS\Microsoft.NET\Framew...	GET,HEA..
.adprot...	C:\WINDOWS\Microsoft.NET\Framew...	GET,HEA..
.asa	C:\WINDOWS\system32\inetsrv\asp.dll	GET,HEA..
.asax	C:\WINDOWS\Microsoft.NET\Framew...	GET,HEA..
.ascx	C:\WINDOWS\Microsoft.NET\Framew...	GET,HEA..

Wildcard application maps (order of implementation):

C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_isapi.dll

14. Click **OK**.

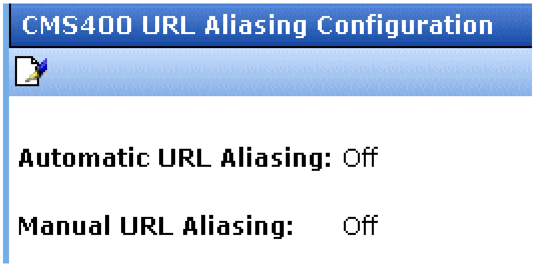
Activating/Deactivating Manual Aliasing

To activate the aliasing feature, follow this path to the URL Aliasing Configuration screen: **Settings > Configuration > URL Aliasing**.

NOTE If you do not see a **URL Aliasing** option under **Configuration**, see "Enabling Manual Aliasing" on page 451.

The screen indicates if Manual Aliasing is currently on or off. To change its state, click the Edit button (), check or uncheck the box, and click the Save button.

See Screen Sample



CMS400 URL Aliasing Configuration

Automatic URL Aliasing: Off

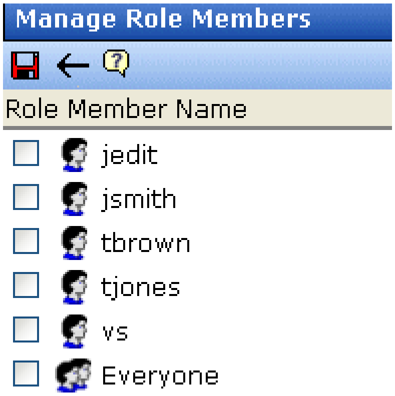
Manual URL Aliasing: Off

If Aliasing is turned on and you uncheck it, your page URLs return to their original format (see "Sample Quicklinks Folder with URL Aliasing Turned Off" on page 448).

Permissions for Manual Aliasing

To give users or groups permission to assign a manual alias to content, follow these steps.

1. Go to the Ektron CMS400.NET Workarea and select **Settings** > **Roles**.
2. Select **Built-In** > **System-Wide** > **Alias-Edit**.
3. The Manage Members for Role: Alias-Edit screen appears.
4. Click the Add button (✚).
5. Click the check box next to all users and user groups that have permission to manually alias content.



Manage Role Members

Role Member Name

☐ jedit
☐ jsmith
☐ tbrown
☐ tjones
☐ vs
☐ Everyone

6. Click the Save button (💾).

See Also: ”Defining Roles” on page 564

Adding a Base Reference to a Template

When aliasing a Web page, you must add a reference to the base URL into the `<Head>` section of the template. Otherwise, any relative links on the page use the alias as the base URL.

For example, you have the file winners.gif on a Web page. The page’s URL is `http://www.ekexample.com/baseball/team.aspx?id=37`. The alias for this page is `http://www.ekexample.com/2004/worldchamps.aspx`. When the page tries to find winners.gif, it looks in the `/2004/` directory. The page should look in the `/baseball/` directory, because that is where the file is located.

Here is the syntax used in the `<Head>`.

```
<BASE HREF=”baseURL”
TARGET=”WindowName”>
```

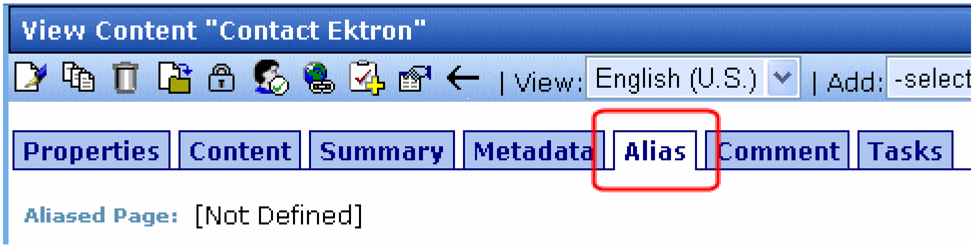
Here is an example:

```
<HEAD>

<BASE HREF=”http://www.ekexample.com/baseball/”>

<HEAD>
```

Assigning a Manual URL Alias

There are two ways to manually assign an alias.

- Use the Page Name Maintenance screen. This method is for administrators only.
- Use the Alias tab in View Content area of the content. This method can be used by content editors or administrators.


View Content "Contact Ektron"
| View: English (U.S.)
| Add: -select
Properties
Content
Summary
Metadata
Alias
Comment
Tasks

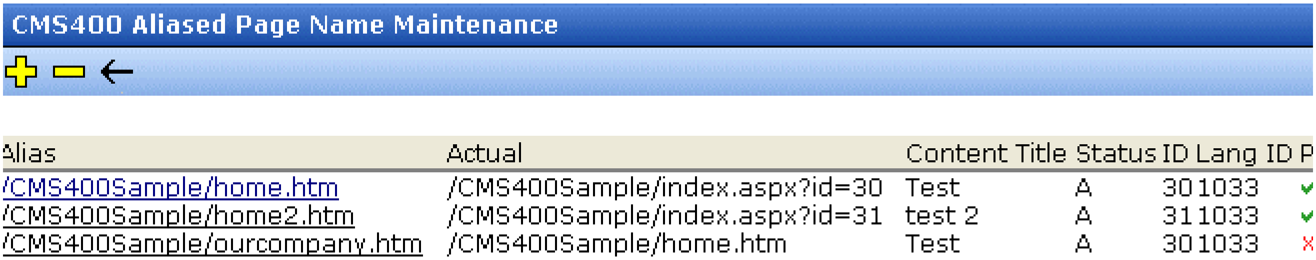
Aliased Page: [Not Defined]

Each method is explained below.

Adding a Manual Alias via the Page Name Maintenance Screen

NOTE Make sure you have enabled URL Aliasing and given the administrator's group permissions for aliasing. See "Enabling Manual Aliasing" on page 451 and "Viewing the Users in a User Group" on page 507.

1. Go to **Workarea > Settings > Configuration > URL Aliasing**.
2. Click the Page Name Maintenance button (☰).
3. The Page Name Maintenance screen appears.


CMS400 Aliased Page Name Maintenance

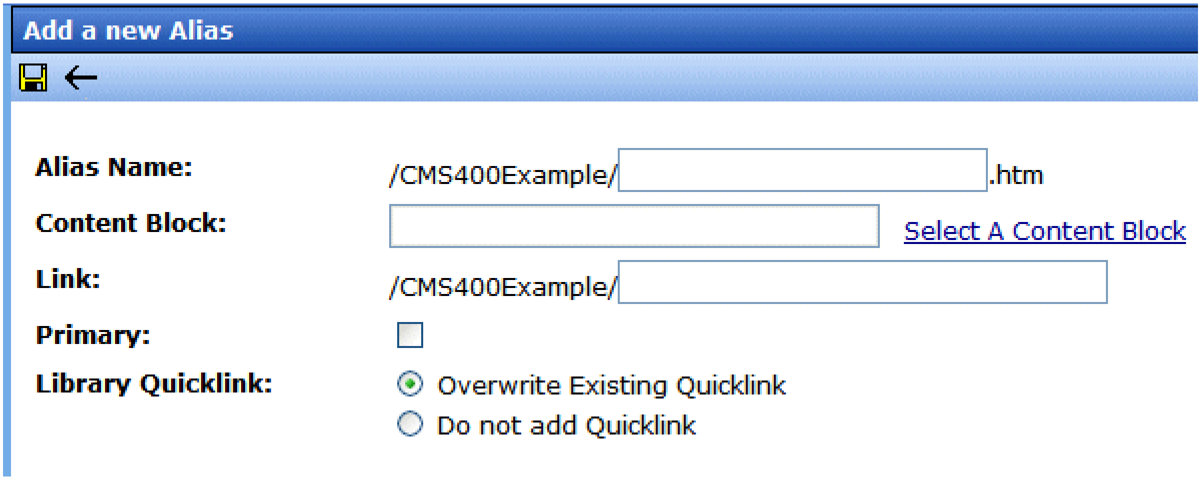
Alias	Actual	Content Title	Status	ID	Lang ID	P
/CMS400Sample/home.htm	/CMS400Sample/index.aspx?id=30	Test	A	30	1033	✓
/CMS400Sample/home2.htm	/CMS400Sample/index.aspx?id=31	test 2	A	31	1033	✓
/CMS400Sample/ourcompany.htm	/CMS400Sample/home.htm	Test	A	30	1033	✗

The following explains the columns on the screen.

Field	Description
Alias	The URL as it appears aliased.
Actual	The actual URL before aliasing.
Content Title	The title of the content.
Status	The status of the content. *See Also:* "Content Status" on page 19.

Field	Description
ID	The content’s ID number.
Lang ID	The language code for the content. *See Also:* ”Appendix C: List of Supported Languages” on page 890
Primary	The alias a content editor sees when editing an alias via the Alias tab. *See Also:* ”Adding a Manual URL Alias via the Alias Tab” on page 464 ✓ = Primary Alias for that URL

4. Click the Add Alias button (➕). The Add a New Alias screen appears.



Add a new Alias

Alias Name:	/CMS400Example/ .htm
Content Block:	Select A Content Block
Link:	/CMS400Example/
Primary:	☐
Library Quicklink:	● Overwrite Existing Quicklink ○ Do not add Quicklink

5. In the **Alias Name** field, choose the name you want to use for an alias.
6. Click **Select a Content Block** to choose content.
7. The QuickLink Select window appears.
8. Choose content.
9. Check the **Primary** box if you want to make this the primary alias, that is, the alias a content editor sees when editing an alias via the **Alias** tab.
10. Choose a Quicklink option.

- **Overwrite Existing Quicklink** overwrites the existing Quicklink for the content.

WARNING! When you choose to overwrite an existing Quicklink, you permanently delete it. There is no way to revert back to the old Quicklink. If you want to use the old Quicklink again, you need to add a new one. For more information on creating Quicklinks, see Ektron CMS400.NET User Manual > “Library Folder” >”Quicklinks””Quicklinks and Forms” on page 170.

- **Do not add Quicklink** does not create a Quicklink for this alias.

11. Click the Save button ().

Adding a Manual URL Alias via the Alias Tab

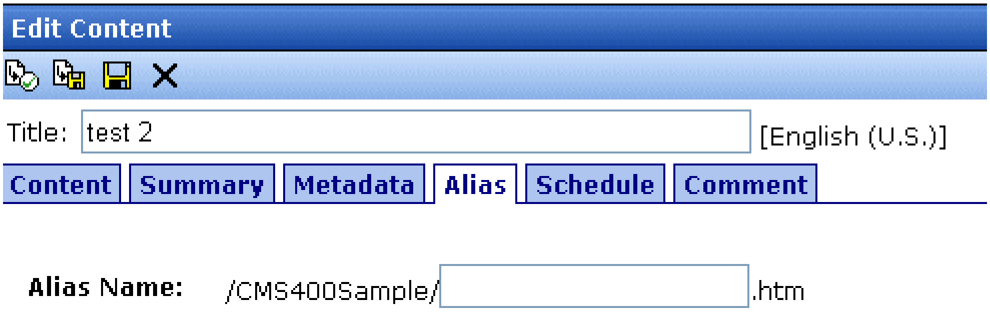
NOTE Make sure you have enabled URL Aliasing and given the administrator’s group permissions for aliasing. For information on Enabling URL Aliasing, see ”Benefits of Manual URL Aliasing” on page 451. For information on User Group Permissions, see ”Viewing the Users in a User Group” on page 507.

On the Alias tab, **Alias Name** has the message, **[Not Defined]**. There are two reasons this message appears:

- No alias is defined
- An alias is defined in Page Name Maintenance, but it is not set to be a primary alias

1. In the Workarea, click the content you want to work with.
2. Click the Edit button ().The Edit Content screen appears.

.



Title: test 2 [English (U.S.)]

Alias Name: /CMS400Sample/ .htm

3. Click the **Alias** tab.

4. In the **Alias Name** field, enter the name you want to use for an alias.
5. Save and publish the content.

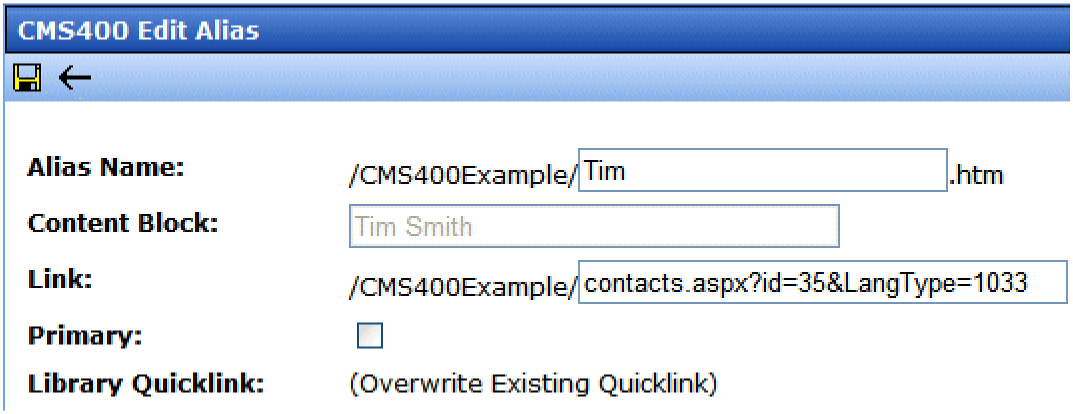
NOTE An alias goes live only after content is published.

Editing a Manual URL Alias

You can edit an alias by going to the Page Name Maintenance screen. This lets you change the alias name and Quicklink properties. You can also change the primary alias if you have more than one for a content item.

To edit a Manual URL Alias, follow these steps.

1. Go to **Workarea > Settings > Configuration > URL Aliasing**.
2. Click the Page Name Maintenance button (☰).
3. On Page Name Maintenance screen, click the link you want to edit.
4. The Edit Alias screen appears.



Alias Name: /CMS400Example/ Tim .htm

Content Block: Tim Smith

Link: /CMS400Example/ contacts.aspx?id=35&LangType=1033

Primary: ☐

Library Quicklink: (Overwrite Existing Quicklink)

NOTE When editing an Alias, you can only change the **Alias Name** and **Primary** fields.

5. Make any changes. To learn about the fields, see "Adding a Manual Alias via the Page Name Maintenance Screen" on page 462.

6. Click the Save button (💾).

Removing a Manual URL Alias

To remove a Manual URL Alias, follow these steps.

1. Go to **Workarea > Settings > Configuration > URL Aliasing**.
2. Click the Page Name Maintenance button (☰).
3. On Page Name Maintenance screen, click the **Remove button (▭)**.
4. Check the boxes of the aliases you would like to remove.
5. Click the Delete button (🗑).
6. Click **OK** to confirm.

Business Rules

Introduction

Business Rules allow you to define conditions for Web pages on your site. You choose an action based on whether the conditions are true or false when a site visitor browses your site. For example:

- **Condition** - a site visitor visits your site for the first time
- **Action** - add a cookie to the site visitor’s system and pop up a welcome message

With Business Rules, you do not write code to set conditions and initiate actions. You simply complete the information requested in the Business Rules wizard, have your developer add a Business Rules server control to your Web form, and assign the server control the Business Rules Ruleset.

NOTE For Information on the Business Rules server control, see the Developer Manual Section “Introduction to Server Controls” > “Business Rules Server Control”.

Business Rules start out with a Ruleset that is assigned an ID. Each Ruleset is made up of one or more rules. Rules are made up of conditions and actions. There are several predefined conditions and actions for rules in CMS400.NET.

Conditions include:

- Cookie Parameter = value
- Form Parameter = value
- QueryString Parameter = value
- Server Variable = value
- Custom Parameter = value

Actions include:

- Displaying a calendar

- Displaying a message
- Opening a URL in a new window
- Popping up a message
- Redirecting to a new URL
- Setting a cookie value
- Displaying a content block.

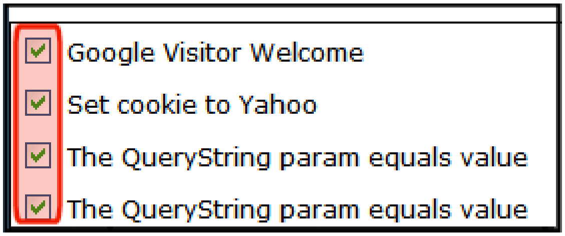
Once a rule is defined, you can add it to multiple Rulesets. This is useful if you have several groups of rules that use a common rule.

Business Rules are more fully explained through the following topics.

- ”Selecting a Rule” on page 468
- ”Creating a New Business Rule Ruleset” on page 469
- ”Working with Rulesets” on page 470

Selecting a Rule

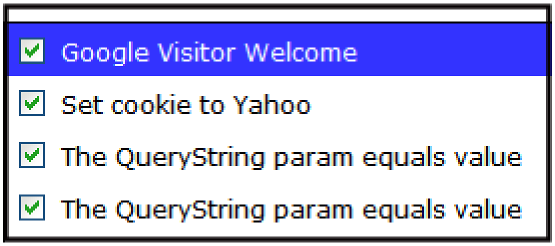
There are two ways to select a rule. The first, check boxes, allows you to select a rule by clicking the check box. This method is used when turning a rule on or off in the Ruleset. Checked, the rule is active. Unchecked the rule is inactive.



☑ Google Visitor Welcome
☑ Set cookie to Yahoo
☑ The QueryString param equals value
☑ The QueryString param equals value

The second, highlighting a rule, is used to when you want to work with the rule. For example, you want to add or remove a rule from a

Ruleset. To highlight a rule, click its title. Once a rule is highlighted, it is ready for an action, such as Remove or Edit.

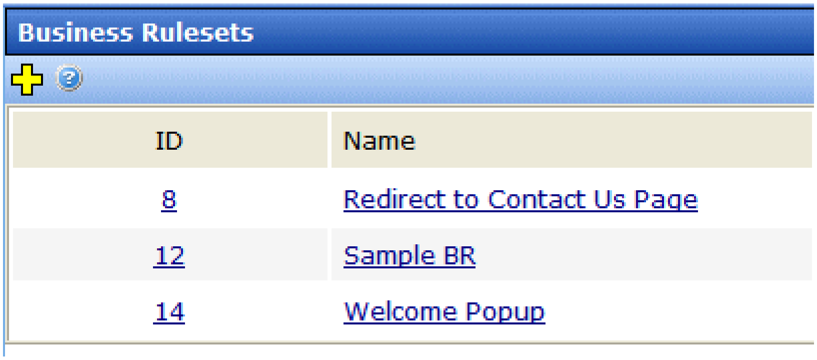


☑ Google Visitor Welcome
☑ Set cookie to Yahoo
☑ The QueryString param equals value
☑ The QueryString param equals value

Creating a New Business Rule Ruleset

NOTE Only members of the Administrators group or those defined in Manage Members for Role: Rule Editor screen can create or edit Business Rules and Rulesets. *See Also:* "Defining Roles" on page 564

You create Business Rules Rulesets from the Business Ruleset screen in the Workarea.



ID	Name
8	Redirect to Contact Us Page
12	Sample BR
14	Welcome Popup

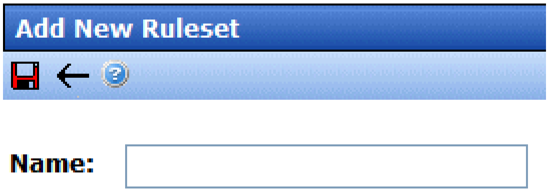
The Business Ruleset screen contains these columns:

- **ID** - the numerical ID assigned to the Ruleset.
- **Name** - a unique name you give to the Ruleset to help you understand what the Ruleset does.

To add a new Ruleset, follow these steps:

1. In the Workarea, click **Modules** > **Business Rules**.
2. Click the Add New Ruleset button (✚).

3. The **Add New Ruleset** screen appears.

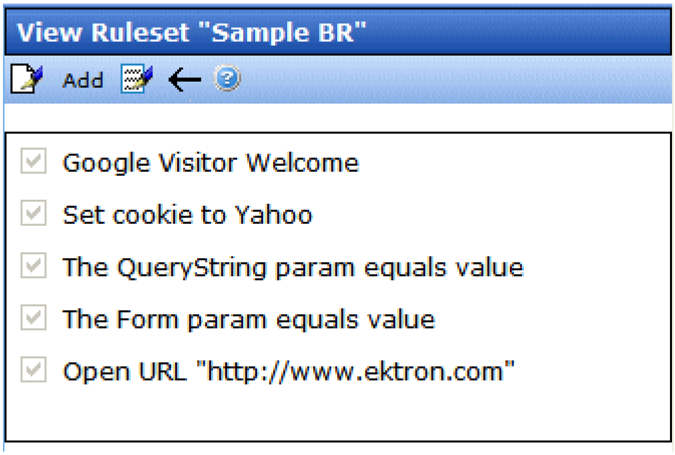


4. In the **Name:** text box, add a name for the rule.
5. Click the Save button (💾).
6. The View Ruleset screen appears.

At this point, you can continue on to ”Add a New Rule to a Ruleset” on page 474 or ”Add an Existing Rule to a Ruleset” on page 479 to add a rule or click the Back button (←) and return to add a rule later.

Working with Rulesets

After creating a Ruleset, you typically add rules to it. To do this you would use the View Ruleset screen.



☑ Google Visitor Welcome
☑ Set cookie to Yahoo
☑ The QueryString param equals value
☑ The Form param equals value
☑ Open URL "http://www.ektron.com"

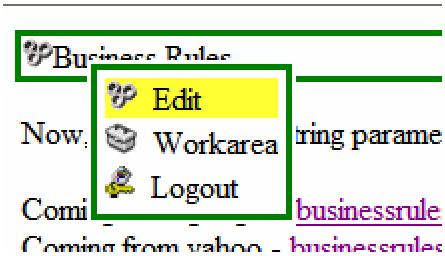
The View Ruleset screen is the launch pad for working with existing Rulesets. From this screen you can:

- ”Edit a Ruleset” on page 471
- ”Remove a Rule From a Ruleset” on page 472
- ”Change the Order of Rules in the Ruleset” on page 473

- ”Delete a Ruleset” on page 473
- ”Add a New Rule to a Ruleset” on page 474
- ”Add an Existing Rule to a Ruleset” on page 479
- ”Edit a Rule in a Ruleset” on page 481
- ”Viewing a Rule in a Ruleset” on page 482

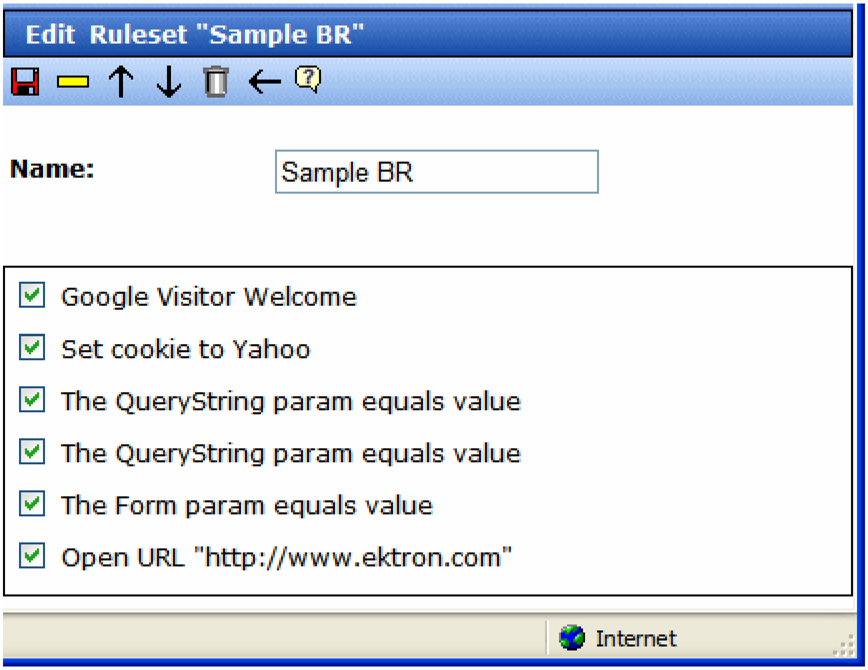
Edit a Ruleset

You can initiate editing a Ruleset from two different locations, the Web page or the Workarea. To edit a Ruleset from the Web page, navigate to Business Rule on a Web page while logged in. Then, right click the Business Rule icon and click Edit.


Business Rules
Edit
Workarea
Logout
Now,
tring parame
Comi
businessrule
Coming from yahoo - businessrules

If editing from the Workarea, click **Modules** > **Business Rules** and then click the Ruleset to edit. Next, click the Edit button (📝) on the View Ruleset screen.

The Edit Ruleset screen appears.



Name: Sample BR

☑ Google Visitor Welcome
☑ Set cookie to Yahoo
☑ The QueryString param equals value
☑ The QueryString param equals value
☑ The Form param equals value
☑ Open URL "http://www.ektron.com"

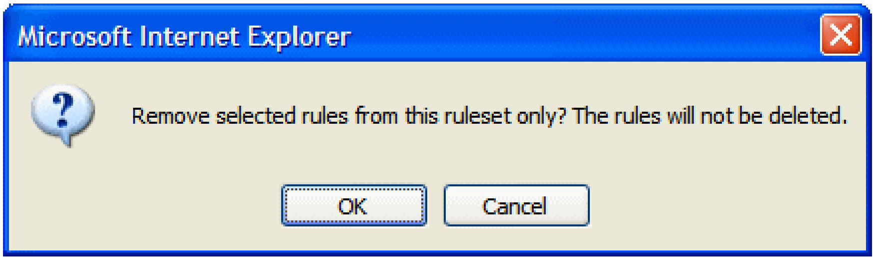
Remove a Rule From a Ruleset

Follow these steps to remove a rule from the Ruleset:

1. Navigate to the Edit Ruleset screen, as explained in "Edit a Ruleset" on page 471.
2. Highlight the rule you want to remove.

WARNING! The check box associated with the rule must be empty for you to remove the rule. If the check box is not empty, the rule will look as though it has been removed

3. Click the Remove Rule button (▬).
4. A pop up appears letting you know that the rule will be removed from this Ruleset only.



Remove selected rules from this ruleset only? The rules will not be deleted.

5. Click OK.
6. The rule is removed from the Edit Ruleset screen.
7. Click the Save button (💾).

Change the Order of Rules in the Ruleset

The order of rules in a Ruleset affects the way the rules are applied when a site visitor views a page. For example, you might want to have a welcome message pop-up before a piece of content is displayed. Thus, you would move the rule for popping up the welcome message above the rule for displaying a piece of content.

The following steps explain how to change the order of the rules in the Ruleset.

1. Navigate to the **Edit Ruleset** screen as explained in ”Edit a Ruleset” on page 471.
2. Highlight the rule you want to reorder.
3. Click the Move Up or Move Down buttons (↑) (↓) to move the rule up or down the list.
4. Click the Save button (💾).
5. The View Ruleset screen appears with the rule in the new location.

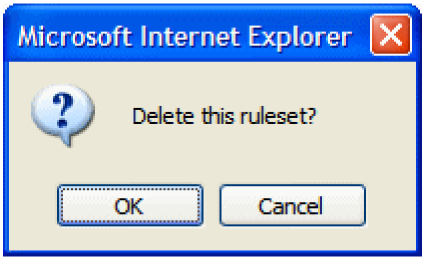
Delete a Ruleset

When you delete a Ruleset, it is removed from the system permanently. However, the rules that are a part of the Ruleset do not get deleted. This is to ensure that a rule that is used in multiple Rulesets does not get deleted.

The following steps explain how to delete a Ruleset.

1. Navigate to the **Edit Ruleset** screen as explained in ”Edit a Ruleset” on page 471.
2. Click the Delete Ruleset button (🗑).

3. A dialog box appears asking you to confirm the deletion.


Microsoft Internet Explorer
OK
Cancel

Delete this ruleset?

4. Click **OK**.
5. The Ruleset is deleted and you are redirected back to the main Business Rules screen.

Add a New Rule to a Ruleset

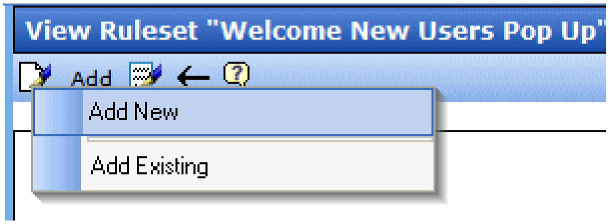
Adding a new rule is easy with Ektron CMS400.NET. Just click the Add button on the View Ruleset screen and the Rules Wizard launches. The Rules Wizard helps you define your rules.

The steps below explain how to add a new rule to your Ruleset.

1. If you arrived here from the "Creating a New Business Rule Ruleset" on page 469 section, continue on to the next step.

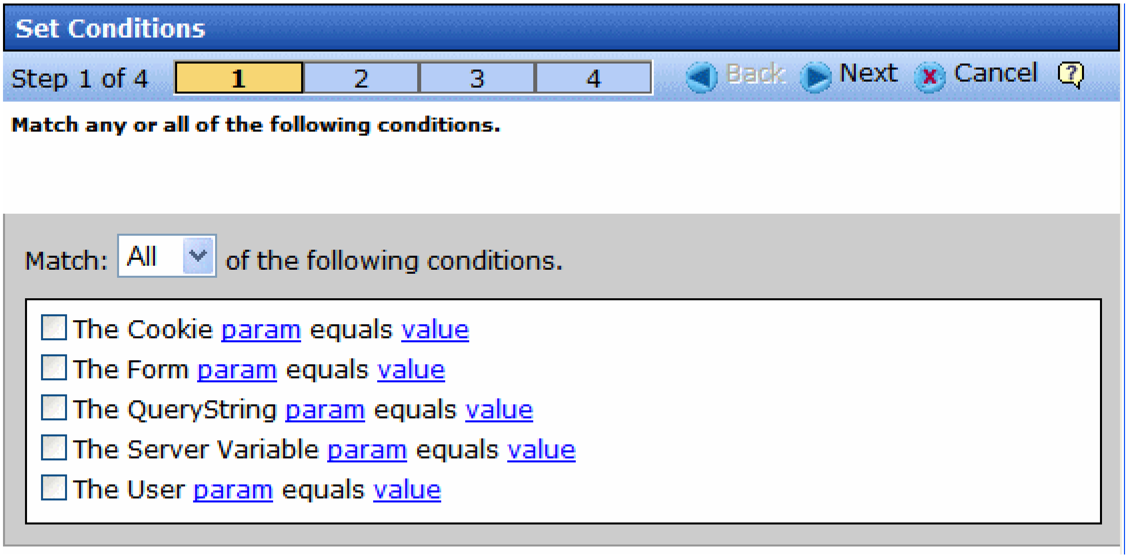
   Otherwise:

   Navigate to the Business Rules screen in the Workarea by clicking **Modules** > **Business Rules**. Next, click the name of the Business Rule for which you want to create a new rule.
2. Click the Add button (Add).
3. Click **Add New** from the menu.


View Ruleset "Welcome New Users Pop Up"
Add
Add New
Add Existing

4. The Rules Wizard launches.

.



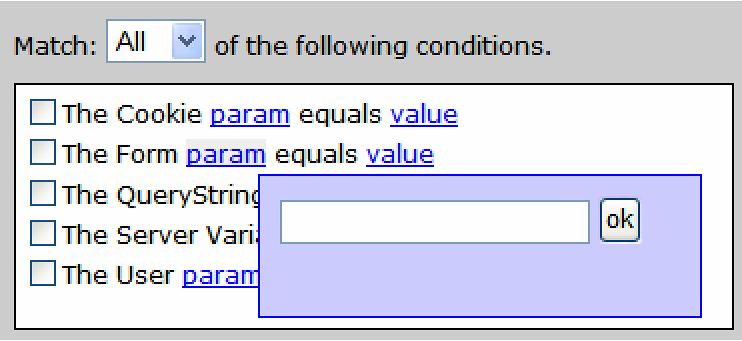
Match any or all of the following conditions.

Match: All of the following conditions.

☐ The Cookie param equals value
☐ The Form param equals value
☐ The QueryString param equals value
☐ The Server Variable param equals value
☐ The User param equals value

5. Step 1 in the Wizard allows you to create conditions for the rule and decide whether a site visitor needs to match Any or All of the conditions. Clicking the param and value links opens a dialog to enter information.

.



Match: All of the following conditions.

☐ The Cookie param equals value
☐ The Form param equals value
☐ The QueryString
☐ The Server Vari
☐ The User param

Place a check in the box next to any of the conditions you want to use. Use the table below to help you fill out the param and value fields.

Conditions Table

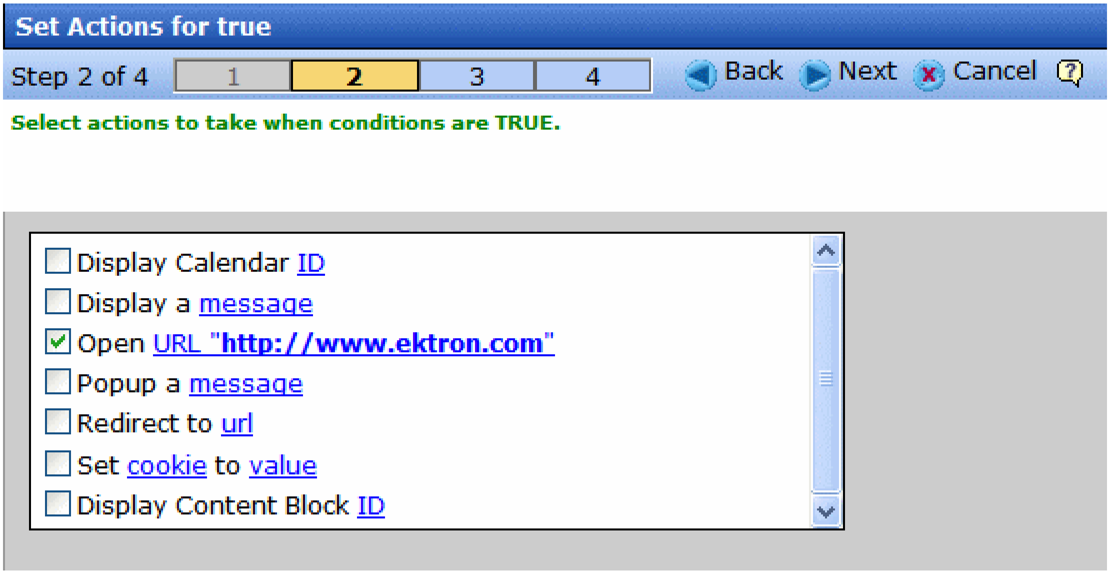
Condition	Description	Example
The Cookie param equals value	Use a cookie for this condition. **param** - enter **Name** in this field. **value** - enter the name of the cookie in this field.	Does the site visitor's system have an Ektron cookie? **Usage**: The Cookie param “Name” equals value “Ektron”
The Form param equals value	Use a form elements field name and match the value entered into the element. **param** - enter a form’s element Field Name from a form. **value** - enter the value you want the form element to match.	A form has a Choices Field element with the Field Name “Favorite_Food” and choices of Pizza, Steak and Chicken. When a site visitor chooses Pizza and clicks submit, your rule launches a Pizza company’s Web site. **Usage**: The Form param “Favorite_Food” equals value “Pizza”
The QueryString param equals value	Use the QueryString for this condition **param** - the name of the QueryString. For example, ID. **value** - the value associated with the parameter. For example, 18.	Is content with the ID of 18 being displayed? **Usage**: The QueryString param “ID” equals value “18”
The Server Variable param equals value	Use server variables from the site visitor. **param** - enter the name of a server variable. For example, HTTPS. **value** - the value associated with the parameter. For example, On.	Is the site visitor’s browser using SSL? **Usage**: The Server Variable param “HTTPS” equals value “On” A list of server variables and their descriptions can be found at http://windowssdk.msdn.microsoft.com/library/default.asp?url=/library/en-us/iissdk/html/21b3be8f-d4ed-4059-8e21-6cba2c253006.asp.

Condition	Description	Example
The Custom param equals value	Use custom parameters from the user. User parameters are defined in the codebehind of a web page. **param** - enter the name of a custom parameter. For example, AcctBlnc **value** - the value associated with the parameter. For example, 1000	Is the user's account balance $1000? **Usage**: The Custom param "AcctBlnc" equals value "1000"

6. Once you have entered all of the information, click **Next**.

Step 2 of the Wizard lets you select an action to take if the conditions are true. Check the boxes for the actions you want to use. Click the blue links to add the appropriate information.

.



Select actions to take when conditions are TRUE.

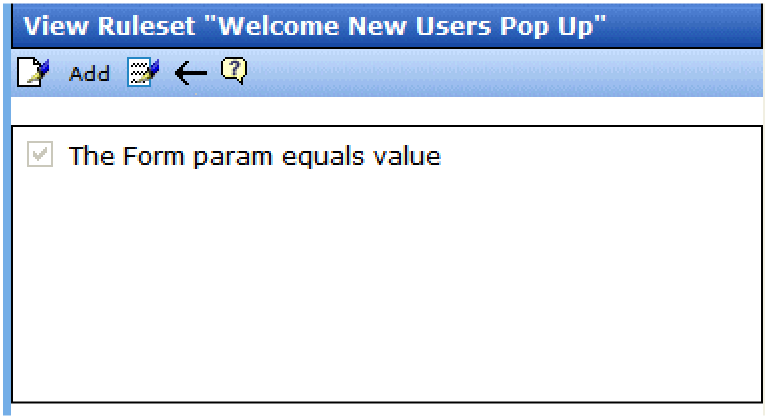
- ☐ Display Calendar ID
- ☐ Display a message
- ☑ Open URL "http://www.ektron.com"
- ☐ Popup a message
- ☐ Redirect to url
- ☐ Set cookie to value
- ☐ Display Content Block ID

Conditions Table

Action	Description
Display Calendar ID	Enter a CMS400.NET Calendar ID.
Display a Message	Enter a message to be displayed.
Open URL	Enter a URL. This opens a new window with the URL.
Popup A Message	Enter a message that appears in a popup dialog box.
Redirect to a URL	Enter a URL to redirect a the site visitor's browser.
Set Cookie to Value	Creates a cookie on the site visitor's system. Enter **Name** for Cookie and the name of the cookie for Value.
Display Content Block ID	Enter a CMS400.NET content block's ID.

7. After you enter all appropriate information, click **Next**.
8. Step 3 of the Wizard allows you to select actions to take when the conditions are false. This works the same way as Step 2 of the Rules Wizard. All actions are the same and work the same way. For descriptions of the actions, see "Conditions Table" on page 476.
9. After you enter all appropriate information, click **Next**.
10. Step 4 of the Wizard asks you to enter a name for the rule in the text box.
11. Click **Done**.

12. The View Ruleset screen appears. Your rule appears in the Ruleset box.


View Ruleset "Welcome New Users Pop Up"
Add

☑ The Form param equals value

Add an Existing Rule to a Ruleset

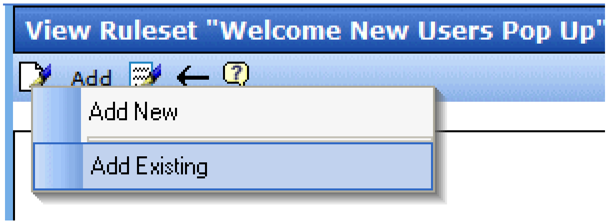
Because rules are not tied to a Ruleset once they are created, you can add a rule to more than one Ruleset. To add an existing rule to a Ruleset, follow these steps:

1. If you arrived here from the ”Creating a New Business Rule Ruleset” on page 469 section, continue on to the next step.

   Otherwise:

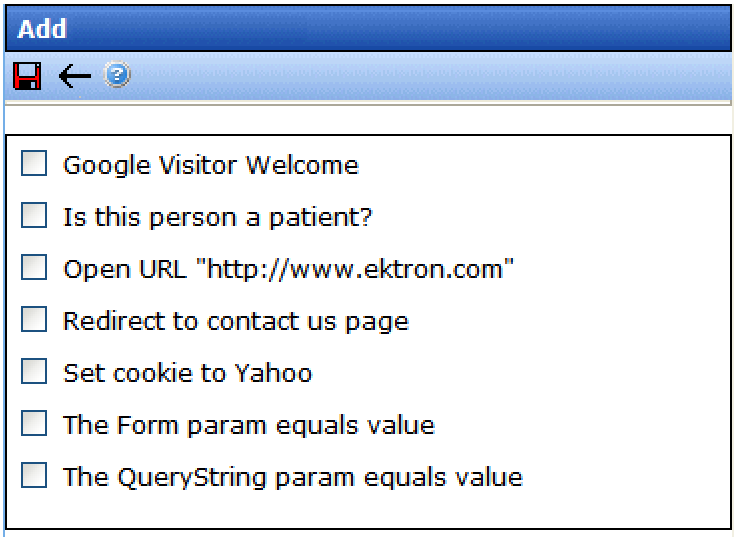
   Navigate to the Business Rules screen in the Workarea by clicking **Modules** > **Business Rules**. Next, click the name of the Business Rule for which you want to add an existing rule.

2. Click the Add button (Add).
3. Click **Add Existing** from the menu.


View Ruleset "Welcome New Users Pop Up"
Add
Add New
Add Existing

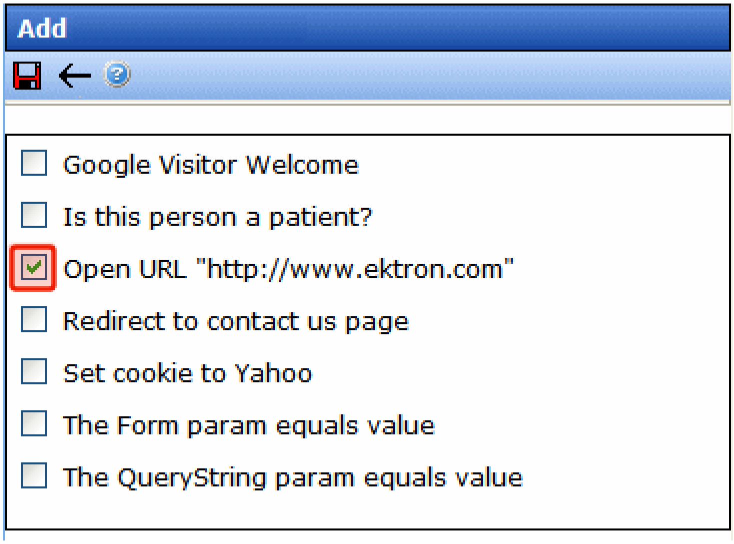
4. The Add an Existing Rule Screen Appears

.



☐ Google Visitor Welcome
☐ Is this person a patient?
☐ Open URL "http://www.ektron.com"
☐ Redirect to contact us page
☐ Set cookie to Yahoo
☐ The Form param equals value
☐ The QueryString param equals value

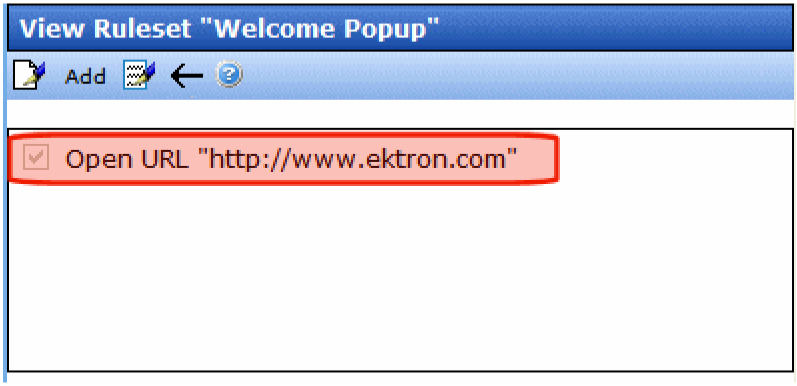
5. Place a check mark in the check box for the rule you want to add to the Ruleset.



☐ Google Visitor Welcome
☐ Is this person a patient?
☑ Open URL "http://www.ektron.com"
☐ Redirect to contact us page
☐ Set cookie to Yahoo
☐ The Form param equals value
☐ The QueryString param equals value

6. Click the Save button (💾).

7. The View Ruleset screen appears with the existing rule added.

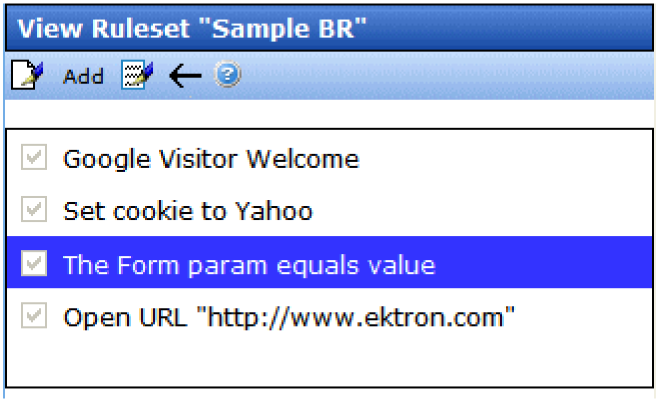


View Ruleset "Welcome Popup"
Add
Open URL "http://www.ektron.com"

Edit a Rule in a Ruleset

The following steps explain how to edit a rule in a Ruleset.

1. In the Workarea, navigate to **Modules** > **Business Rules**.
2. Select the Ruleset that contains the rule to be changed.
3. Highlight the rule to be changed.



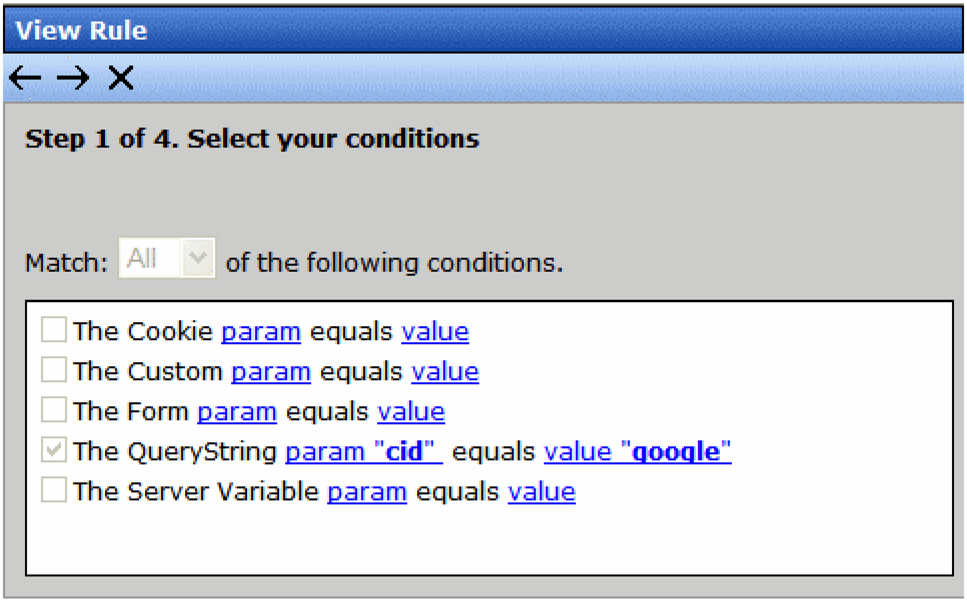
View Ruleset "Sample BR"
Add
Google Visitor Welcome
Set cookie to Yahoo
The Form param equals value
Open URL "http://www.ektron.com"

4. Click the Edit Rule button (📝).
5. The Rules Wizard appears with the rule loaded. The Rules Wizard is explained in "Add a New Rule to a Ruleset" on page 474.

Viewing a Rule in a Ruleset

To help you understand the contents of a rule, a (View) link appears next to each rule in a Ruleset. Clicking this link launches a view window for the rule. In this window, you can view the settings for each Rules Wizard step applied to a rule.

NOTE The steps are not editable from this window. To edit rules in a Ruleset, see ”Edit a Rule in a Ruleset” on page 481.



View Rule

Step 1 of 4. Select your conditions

Match: All of the following conditions.

☐ The Cookie param equals value
☐ The Custom param equals value
☐ The Form param equals value
☑ The QueryString param **"cid"** equals value **"google"**
☐ The Server Variable param equals value

To navigate through the steps, use the Previous and Next Step buttons (← →). To close the window, click the Close button (✕).

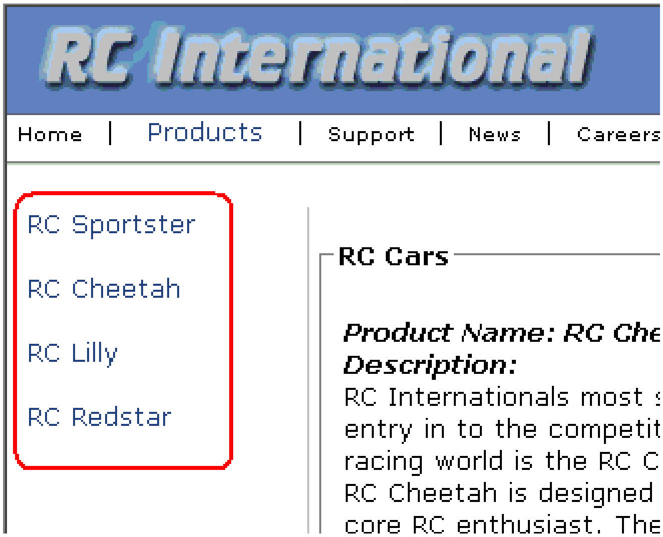
Permission to Work with Business Rules

Only members of the Administrators user group or those defined in the Manage Members for Role: Add Role Member Business Rule Editor screen can work with Business Rules. *See Also:* ”Defining Roles” on page 564

Web Site Navigation Aids

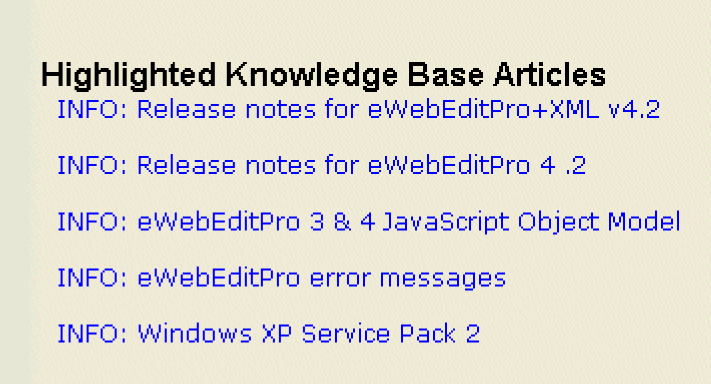
Collections

Ektron CMS400.NET’s Collection feature lets users create a list of content that can be placed on a Web page to offer readers links to them. In the following illustration, the circled content is an example of a collection on a Web page.


RC International
Home
Products
Support
News
Careers
RC Sportster
RC Cheetah
RC Lilly
RC Redstar
RC Cars

Product Name: RC Che
Description:
RC Internationals most s
entry in to the competit
racing world is the RC C
RC Cheetah is designed
core RC enthusiast. The

Collections can also be used to display listings such as job postings, press releases, and Knowledge Base articles. The following graphic illustrates the use of a collection on the landing page of Ektron’s Knowledge Base.



Highlighted Knowledge Base Articles

INFO: Release notes for eWebEditPro+XML v4.2

INFO: Release notes for eWebEditPro 4 .2

INFO: eWebEditPro 3 & 4 JavaScript Object Model

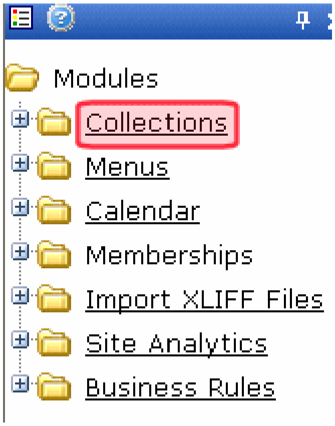
INFO: eWebEditPro error messages

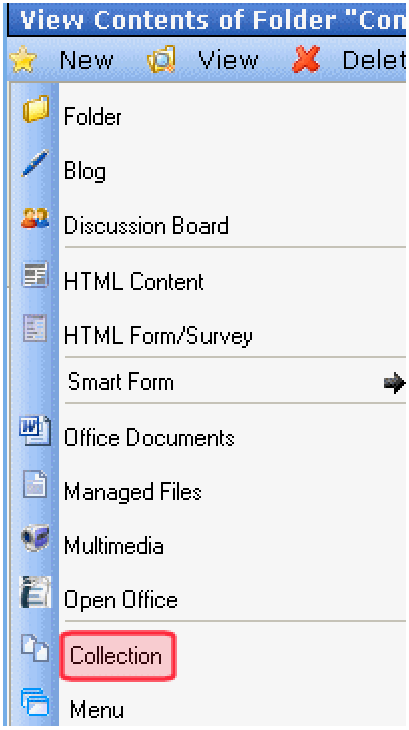
INFO: Windows XP Service Pack 2

This section only describes managing permissions to use the Collections feature. For more information about the Collections feature, see the **Ektron CMS400.NET** User Manual section “Working with Collections.”

Collection Permissions

There are two ways that you can create a Collection, and each has its own permission model.

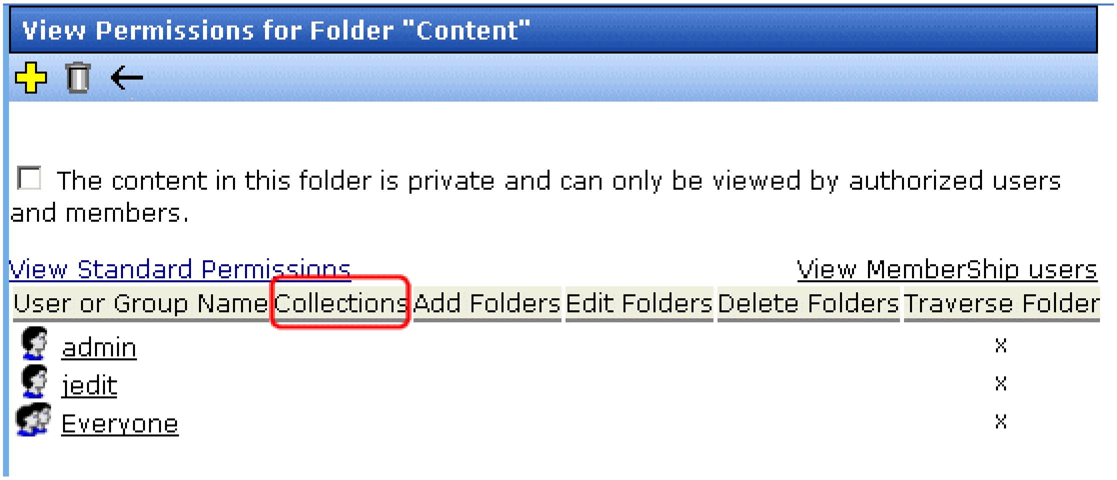
Collection Creation Method	Illustration	How to set permissions
Via the Workarea’s Modules tab	 Modules Collections Menus Calendar Memberships Import XLIFF Files Site Analytics Business Rules	The user must be either a member of the administrators user group or be assigned the Collection and Menu Admin role. *See Also:* ”Defining Roles” on page 564

Collection Creation Method	Illustration	How to set permissions
Via the View Contents of Folder screen’s New > Collection option	 View Contents of Folder "Con New View Delet Folder Blog Discussion Board HTML Content HTML Form/Survey Smart Form Office Documents Managed Files Multimedia Open Office Collection Menu	See ”Permissions for Collections Created from the View Contents of Folder Screen” on page 485

Permissions for Collections Created from the View Contents of Folder Screen

Permissions for collections are set in the content folder permissions table, in the advanced permissions section.

”Setting Permissions” on page 547



View Permissions for Folder "Content"

☐ The content in this folder is private and can only be viewed by authorized users and members.

View Standard Permissions

View MemberShip users

User or Group Name	Collections	Add Folders	Edit Folders	Delete Folders	Traverse Folder
admin					X
jedit					X
Everyone					X

Personalization Feature

Ektron CMS400.NET's Personalization feature can be used in a couple of different ways. It allows

- a signed-in (typically membership) user to determine a page's layout and content. This user can *personalize* the page, displaying whatever interests him in an arrangement of his own design.
- an **Ektron CMS400.NET** administrator to build a page's content without Visual Studio.Net

IMPORTANT! The Personalization feature requires Internet Explorer 5 or higher. You cannot use other browsers.

Most personalization features are described in the **Ektron CMS400.NET** User Manual section "Personalizing Your Web Page." Also, the **Ektron CMS400.NET** Developer Manual describes how to create a template that supports personalization.

This section only describes permissions that affect someone's ability to personalize a page. So, Ektron recommends familiarizing yourself with the User Manual section "Personalizing a Web Page" and the Developer Manual section "Personalization Server Controls" before reading this section.

Sample Pages

When using the sample site provided by Ektron, the Web page `http://localhost/cms400demo/mypage.aspx` gives users basic access to the Personalization feature. For example, they can edit, move, and add new content by selecting from a few folders.

Ektron also provides a more advanced page, `http://localhost/cms400demo/mypageadvance.aspx`, that lets users add content by selecting a content type then navigating through the CMS to find items of that type. The advanced page also provides an example of how to use the page catalog.

Permissions that Affect Personalization

A CMS user who is a member of the Administrators groups has full privileges to do everything. Other users, both CMS and membership, can be selectively granted permissions via Personalization roles screens. One screen grants all permissions, while the others grant a single permission.

To assign a role to a user, go to **Workarea > Settings > Roles > Built-In > System Wide > Personalization**. Choose any screen under that folder, click the Add button (✚) and select user(s) to whom assign the role. *See Also:* ”Defining Roles” on page 564

The following table explains the permissions granted by each role.

Personalization Role	**Description**	**Add content**	**Edit content**	**Move content**	**Change page for unauthenticated users**
Admin	Can do everything (Administrators group members also have these permissions)	✓	✓	✓	✓
Add Web parts	Add new content to page; new selections controlled by developer who creates template	✓		✓	
Edit Web parts	Replace current content with other content of same type; cannot change type		✓	✓	
Move Web parts	Move content among Web part zones			✓	

The right column indicates the ability to customize a page for all *unauthenticated* site visitors. However, if a membership or CMS user signs in and views a page that he has personalized, his version of the page appears.

NOTE If you assign the Edit Web part role to a user or group, those users have access to all content in your **Ektron CMS400.NET** Web site (except private content). Folder permissions are ignored.

Web Configuration Tags that Affect Personalization

The following tags in the web.config file (located in your site root folder) affect some aspects of how Personalization works.

When using the Personalization feature, the web config file's `authentication mode` tag must be set to `Forms`.

```
<webParts>
   <personalization defaultProvider="EktronPersonalizationProvider">
       <providers>
          <addconnectionStringName="Ektron.DbConnection"name="EktronPersonalizationProvider"
type="Ektron.Cms.EktronPersonalizationProvider" />
        </providers>
        <authorization>
               <allow users="*" verbs="enterSharedScope"/>
               <allow users="*" verbs="modifyState"/>
        </authorization>
   </personalization>
</webParts>
```

By default, Personalization is set up for use with MSSQL. If you are using an Oracle database, change the following elements between the `<providers>` tags from

```
name="EktronPersonalizationProvider"
type="Ektron.Cms.EktronPersonalizationProvider"
```

to

```
name="EktronOraclePersonalizationProvider"
type="Ektron.Cms.EktronOraclePersonalizationProvider"
```

Tag or Attribute	Description
webparts	Overall tag that surrounds other personalization tags.
personalization	Tags that surround personalization section of web.config.
defaultprovider	If `EktronPersonalizationProvider` appears, Ektron's personalization controls are used instead of Microsoft's.

Tag or Attribute	Description
providers	Tag that surrounds provider information.
add connectionStringName	Tells the .NET control to use the database being used by **Ektron CMS400.NET**.
name	Tells the .NET control to use **Ektron CMS400.NET** personalization feature instead of the .NET personalization controls.
type	Tells the .NET control to use **Ektron CMS400.NET** personalization feature instead of the .NET personalization controls.
authorization	Tag that surrounds the `<allow users>` tags.
allow users, enter SharedScope and modifyState	Tells Microsoft .NET to let users authorized by the **Ektron CMS400.NET** control the personalization features.

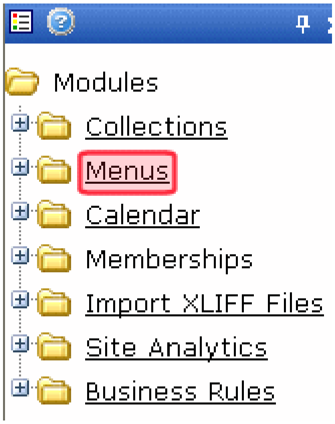
Menu Feature

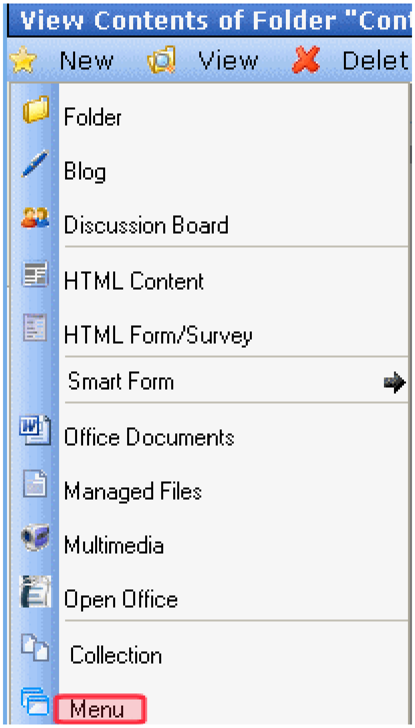
Ektron CMS400.NET's Menu feature lets users create and maintain a dropdown menu navigation system for your Web site. Like Collections, the Menu feature gives you the flexibility to display links to content, library assets, external hyperlink and submenus.

This section only describes managing permissions to use the Menus Feature, suggestions for implementing it, and how folder associations work. For more information about using the Menus feature, see the **Ektron CMS400.NET** User Manual.

Permission to Use the Menus Feature

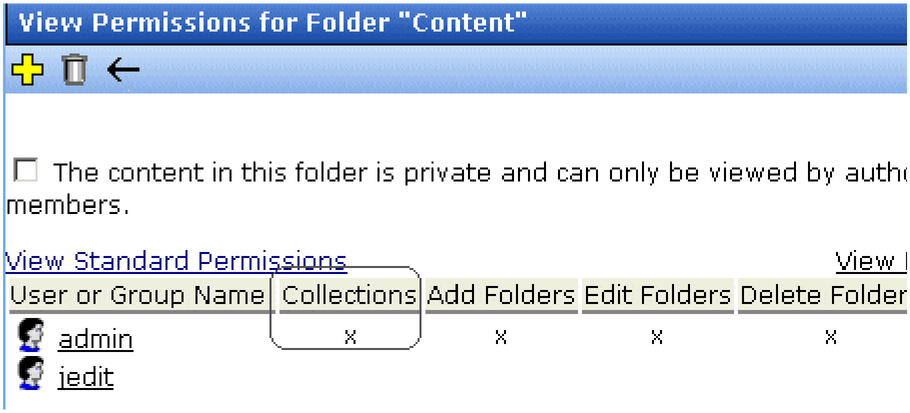
There are two ways to create a menu. Each has its own permission model.

Menu Creation Method	Illustration	How to set permissions
Via the Workarea's Modules tab	 Modules Collections Menus Calendar Memberships Import XLIFF Files Site Analytics Business Rules	The user must be one of the following. • a member of the Administrators user group • assigned the Collection and Menu Admin role. *See Also:* "Defining Roles" on page 564 • granted permissions to Collections for the root folder. This is advanced permission. *See Also:* "Setting Permissions through the Permissions Table" on page 547

Menu Creation Method	Illustration	How to set permissions
Via the View Contents of Folder screen's New > Menu option	 View Contents of Folder "Cont New View Delet Folder Blog Discussion Board HTML Content HTML Form/Survey Smart Form Office Documents Managed Files Multimedia Open Office Collection Menu	See "Permissions for Menus Created from the View Contents of Folder Screen" on page 492

Permissions for Menus Created from the View Contents of Folder Screen

Only users with permission to use the Collections feature (illustrated below) for a folder can work with menus. If user does not have permission to Collections, the **Menu** option does not appear on the **New** menu.



View Permissions for Folder "Content"

☐ The content in this folder is private and can only be viewed by auth
members.

View Standard Permissions

User or Group Name	Collections	Add Folders	Edit Folders	Delete Folder
admin	x	x	x	x
jedit				

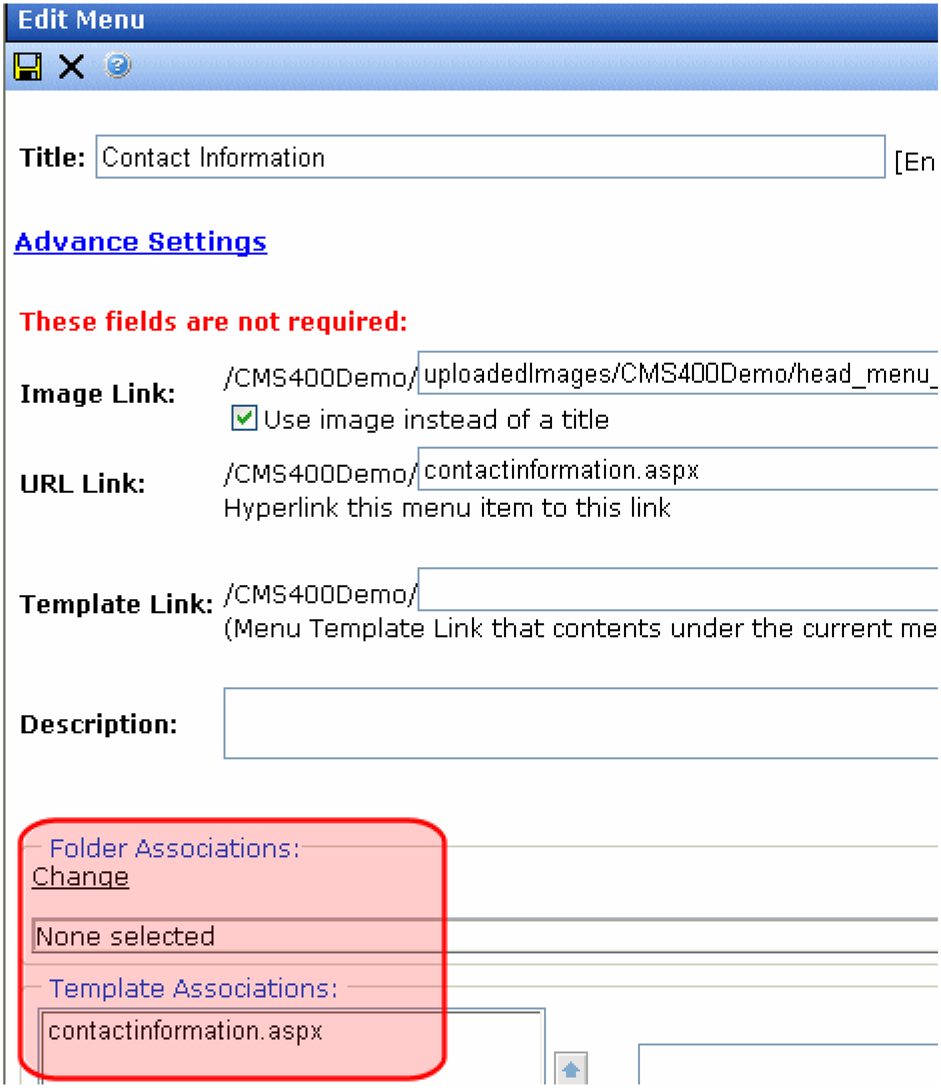
Also, if a user has permission to Collections but Read Only permission for content and the library, he cannot add content from a navigation link.

Implementation of the Menus Feature

In order for a menu to appear on your Web site, your Web developer must modify a page template to display it. This procedure is described in the **Ektron CMS400.NET** Developer Manual sections “Ektron CMS400.NET Server Controls” > “List of Server Controls” > “Menu Server Control”, “Smart Menu Server Control”, and “DhtmlMenu Server Control.”

Assigning Folders and /or Templates to a Menu

The Advanced Settings on the Edit Menu screen has **Folder Associations** and **Template Associations** sections (see image below). Any folders or templates currently assigned to the menu appear.



Title: Contact Information

These fields are not required:

Image Link: /CMS400Demo/uploadedImages/CMS400Demo/head_menu_

☑ Use image instead of a title

URL Link: /CMS400Demo/contactinformation.aspx

Hyperlink this menu item to this link

Template Link: /CMS400Demo/

(Menu Template Link that contents under the current me

Description:

Folder Associations:

None selected

Template Associations:

contactinformation.aspx

This section now explains the effect of assigning a folder to a menu. To learn about the menu/template association, see

Effect of Assigning a Folder to a Menu

If

- you assign a folder to a menu

  and

- a user navigates to any content item that resides in the folder and
- a Smart Menu whose `EnableSmartOpen` property is **true** appears on the screen

the Smart Menu automatically displays the items on the associated submenu.

NOTE Navigation to the content item can consist of clicking a quicklink, a menu option, a list summary item, the result of a search, etc.

In effect, you are instructing **Ektron CMS400.NET** to expose a menu whenever a content item that resides in one or more selected folders appears on the screen. As a result, a user who begins looking for a specific content item sees similar items on the screen.

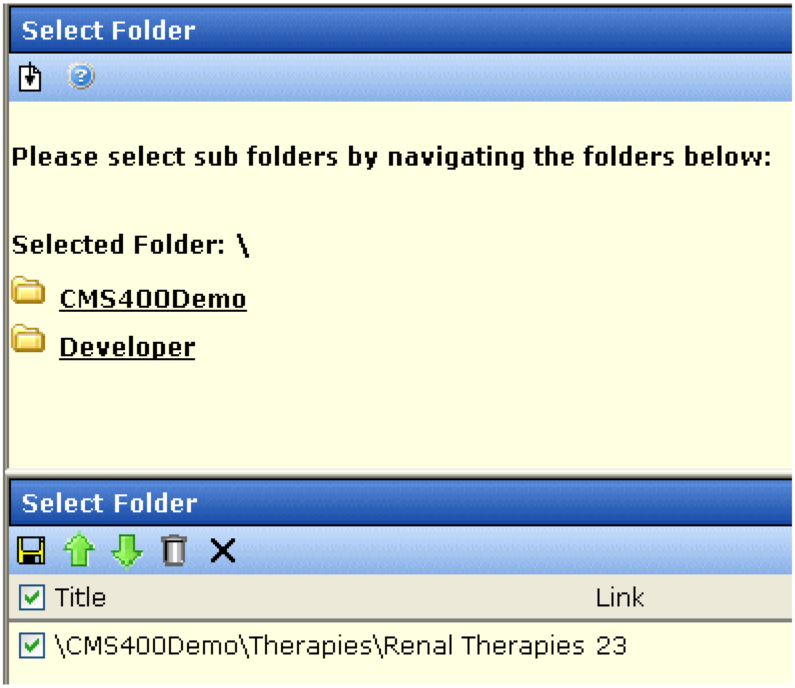
As an example, assume your Web site sells books, and your folders are organized by genre. One of your folders is “Teen Fiction.” You create a submenu that contains the top five sellers in “Teen Fiction.” You then associate the Teen Fiction folder with that submenu.

If a site visitor uses the site search to find any book in that category, and proceeds to a page describing the book, the Smart Menu in the page’s left column displays the five top Teen Fiction titles.

Using the Select Folder Screen

The Select Folder screen lets you assign new folders to the menu, reorder the folders, and delete folders from the menu association. These procedures are described below.

When you click **Change**, the Select Folder screen appears (see image below).



Please select sub folders by navigating the folders below:

Selected Folder: \

☑ Title	Link
☑ \CMS400Demo\Therapies\Renal Therapies	23

Adding New Folders to the Menu

To add a new folder, follow these steps.

1. In the top portion of the screen, navigate to the folder then click the Add Selection button (🡇).
2. The folder appears in the lower section of the screen.
3. Repeat Step 1 to add as many folders as desired.
4. Click the Save button (💾) to finalize the folder association.

Deleting a Folder from the Menu

To delete a folder from a menu association, follow these steps.

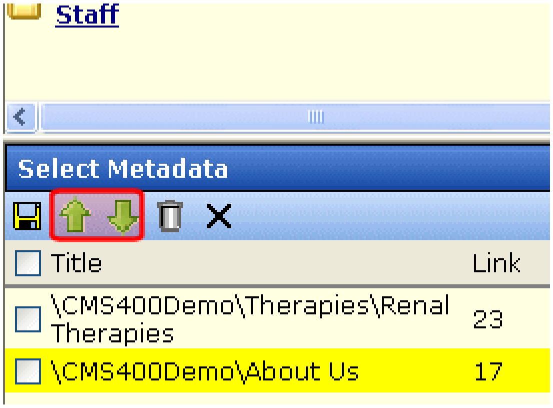
1. In the lower section of the screen, click to the left of the folder that you want to delete.
2. A check mark appears next to the folder.
3. Click the delete button (🗑).

Reordering the Folders on the Menu

NOTE The sequence in which folders appear has no impact on how they are used. They merely affect the appearance of the folders on the Select Folders screen.

To change the order of menus associated with the folder, follow these steps.

1. Move to the lower section of the Select Folders screen.
2. Click on a folder that you want to move. It becomes highlighted.
3. Use the up and down arrows to move the menu item up or down.



☐ Title	Link
☐ \CMS400Demo\Therapies\Renal Therapies	23
☐ \CMS400Demo\About Us	17

Effect of Assigning a Template to a Menu

If

- you assign a template to a menu

  and

- a user navigates to any content item that uses the template

  and

- a Smart Menu whose `EnableSmartOpen` property is **true** appears on the screen

the Smart Menu automatically displays the items on the associated submenu.

NOTE Navigation to the content item can consist of clicking a quicklink, a menu option, a list summary item, the result of a search, etc.

In effect, you are instructing **Ektron CMS400.NET** to expose a menu whenever a content item that uses one or more selected templates appears on the screen. As a result, a user who begins looking for a specific content item sees similar items on the screen.

As an example, assume your Web site sells books, and your templates are organized by genre. One of your templates is “Teen Fiction.” You create a submenu that contains the top five sellers in “Teen Fiction.” You then associate the Teen Fiction template with that submenu.

If a site visitor uses the site search to find any book in that category, and proceeds to a page describing the book, the Smart Menu in the page’s left column displays the five top Teen Fiction titles.

Assigning a Template to a Menu

To add a new template, follow these steps.

1. Move to the **Template Associations** area of the Edit menu screen.
2. In the box on the right, enter the template that you are assigning to this menu. It can be a CMS template, or any file that you wish.
3. Click **Add**.

To later change or remove the template, select it then click **Change** or **Remove**.

Managing Users and Permissions

Managing Users & User Groups

Users are people who administer the Web site, create content, or publish content. Without users, the Web site would be blank. In Ektron CMS400.NET, you can add, edit, and delete users to and from the application through the Settings folder in the Workarea.

Every Ektron CMS400.NET user belongs to a User Group. User groups are used when creating permissions and an approval chain for content folders. User groups can be departments in your company (Human Resources, Sales, Engineering) or indicate a user's role (Publishers, Administrators, Editors, etc.).

IMPORTANT! If your system uses the Active Directory Integration Feature, proceed to "Active Directory Feature" on page 569 to learn about user management functions. This chapter only applies to systems that do not use Active Directory Integration.

IMPORTANT! If your system uses LDAP Authentication, proceed to "LDAP Authentication" on page 622. Some functionality in this chapter does apply to LDAP. The LDAP chapter explains which information is applied.

This section explains the most common actions that you will perform on users and user groups. These actions include:

- "Accessing the Users and User Groups Folders" on page 500
- "Creating a New User" on page 501
- "Viewing a User" on page 503

- ”Editing a User” on page 503
- ”Deleting a User” on page 504
- ”Assigning Users To User Groups” on page 506

NOTE Only members of the Administrators User Group and those defined in the Manage Members for Role: User Admin screen can view, add, or edit users and user groups.

Accessing the Users and User Groups Folders

All user and user group information is accessible from the Workarea.

Accessing the User Folder

To access the user folder in Ektron CMS400.NET, follow these steps.

1. Access the Workarea.
2. Click the **Settings** button in the lower left frame.
3. Click the **Users** folder from the folder tree.
4. All Ektron CMS400.NET users appear.

From this screen, you can add, edit, and delete users. These procedures are explained in the next sections.

Accessing the User Group Folder

To access the user group folder in Ektron CMS400.NET, follow these steps.

1. Access the Workarea.
2. Click the **Settings** folder from the left frame of the Workarea window.
3. Click the **User Group** folder.
4. All user groups appear.

From this screen, you can add, edit, and delete user groups. These procedures are explained in the next sections.

Managing Users

IMPORTANT! If you are using Active Directory to Manage users, see ”Associating User Information in AD with Ektron CMS400.NET” on page 583.

The following topics explain how to manage users.

- ”Creating a New User” on page 501
- ”Viewing a User” on page 503
- ”Editing a User” on page 503
- ”Deleting a User” on page 504
- ”Removing Users from User Groups” on page 505

Creating a New User

IMPORTANT! If you are using Active Directory to add a new user, see ”Adding User Information from AD to Ektron CMS400.NET” on page 583. If you are using LDAP, see ”Adding User Information from an LDAP Server to Ektron CMS400.NET” on page 628.

Before you can assign a user to a user group, you must add the user to the system. To create a new user, follow these steps.

1. Access the User folder, as described in ”Accessing the User Folder” on page 500.
2. Click the Add User button ().
3. The Add a New User to the System screen appears.
4. Enter the following information about the user.

Field	Description
Username	Insert a username for the user you want to create.
Organization Organizational Unit Domain	These fields are only available when using LDAP Authentication. *See Also:* ”Adding User Information from an LDAP Server to Ektron CMS400.NET” on page 628.
First Name	Enter the first name of the user.

Field	Description
Last Name	Enter the last name of the user.
Password	Enter a password for the user. Note: Passwords can be either case-sensitive or case-insensitive. For more information, see "Making Passwords Case Sensitive" on page 6.
Confirm Password	Confirm the password by typing it again.
User Language	Select the language in which the user will view Ektron CMS400.NET screens and messages. The language also determines the default value whenever a drop-down list of languages appears within **Ektron CMS400.NET**. The dropdown list of choices at this field is derived from the Language Settings screen, available from the **Settings> Configuration** folder. Do not confuse the system language with the user's ability to create and edit foreign editions of content. This field does not prevent a user from working with multiple language content. *See Also:* "Multi-Language Support" on page 640 Note: If the selected language is not English, French or German, it is only supported after you download the **Ektron CMS400.NET** Language Support Program from Ektron and translate the Web site.
Email Address	Enter the email address of the user.
Forum Editor	Determines which editor will be used when this user replies to a Discussion Board. *See Also:* "Using Discussion Boards on Your Web Site" on page 412
Disable Receiving of System Notification Email	Select to disable the email notifications for the user. If you do, the user will not receive the automatic email notification described in "Automatic eMail Notification" on page 828. However, this field has no effect on the user's ability to receive instant email.
Any custom user properties	See "Custom User Properties" on page 527

NOTE If email notification is turned off in the setup page, you are notified when editing, adding, or viewing a user.

5. Click the Save button (💾).
6. The View Users in Group Everyone screen appears with the new user included in the table.

NOTE When you add a new user, he is automatically placed in the Everyone user group. To assign users to other groups, see ”Assigning Users To User Groups” on page 506.

7. Continue this process until you add all users of your Web site, or are allowed to depending on your license.

NOTE Contact Ektron Sales for pricing of adding more users to your license.

Viewing a User

After adding a user, you can view that information. While viewing a user, you can edit or delete the user.

To view a user, follow these steps.

1. Access the user folder as described in ”Accessing the User Folder” on page 500.
2. Click the **Username** of the user you want to view.
3. The View User Information screen is displayed.

   To learn about the fields, see ”Viewing a User” on page 503 and ”The following fields are only available when editing a user.” on page 504

From the View User screen, you can edit or delete users. These actions are described in the next sections.

Editing a User

IMPORTANT! If you are using Active Directory to edit a user, see ”Editing User Information in Ektron CMS400.NET” on page 585.

When editing a user, you can change the username, first name, last name, password, user language, and email address. Also, while editing, you can change three fields that were not available when the user was created.

- Account Locked
- Work Page Size

- Landing Page after login

To edit a user, follow these steps.

1. Access the view user screen of the user you want to edit as described in ”Viewing a User” on page 503.
2. Click the **Username** of the user you want to edit.
3. The View User Information screen is displayed.
4. Click the Edit button (📝).
5. The Edit User screen is displayed. To learn about the fields, see ”Viewing a User” on page 503.

   The following fields are only available when editing a user.

.

Field	**Description**
Account Locked	See ”Restricting Login Attempts” on page 6
Forum Editor	Determines which editor will be used when this user replies to a Discussion Board. *See Also:* ”Using Discussion Boards on Your Web Site” on page 412
Work Page Size	See ”Work Page Size” on page 28
Landing Page after login	See ”Landing Page after login” on page 29

6. Make the necessary changes to the user information.
7. Click the Update button (💾).

Deleting a User

IMPORTANT! If you are using Active Directory to delete a user, see ”Deleting Users” on page 586.

When you need to remove a user from the application, you can easily do it from the User’s Folder in the Workarea.

WARNING! Once a user is deleted from the database, he is deleted permanently. The process cannot be undone.

To delete a user, follow these steps.

1. Access the view user screen for the user you want to delete, as described in ”Viewing a User” on page 503.
2. Click the **Username** of the user you want to delete.
3. The View User Information screen is displayed.
4. Click the Delete button (🗑).
5. A confirmation message is displayed.
6. Click **OK**.

Removing Users from User Groups

IMPORTANT! If you are using Active Directory to remove a user from a group, see ”Removing Users from a Group” on page 591.

NOTE Removing a user from a user group does not delete the user from Ektron CMS400.NET. Also, you cannot remove users from the Everyone or Admin user groups.

To remove a user from a user group, follow these steps.

1. Access the User Groups folder, as described in ”Accessing the User Group Folder” on page 500.
2. Click the User Group that includes the user you want to remove.
3. Members of the selected group appear.
4. Click the user to remove.
5. The View User Information screen is displayed.
6. Click the Delete button (🗑) to delete the user from the group.
7. A confirmation message is displayed.
8. Click **OK**.

Managing User Groups

The following topics explain how to manage User Groups.

- ”Creating a New User Group” on page 506
- ”Assigning Users To User Groups” on page 506
- ”Viewing the Users in a User Group” on page 507
- ”Editing a User Group” on page 508
- ”Deleting a User Group” on page 509
- ”Removing Users from User Groups” on page 505

Creating a New User Group

To create a new User Group in Ektron CMS400.NET, follow these steps.

1. Access the User Groups folder in the administrator Workarea, as described in ”Accessing the User Group Folder” on page 500.
2. Click the Add User Group button ().
3. The Add a New User Group to the System screen is displayed.
4. Enter a name and brief description of the user group you want to create.
5. Click the Save button ().

Assigning Users To User Groups

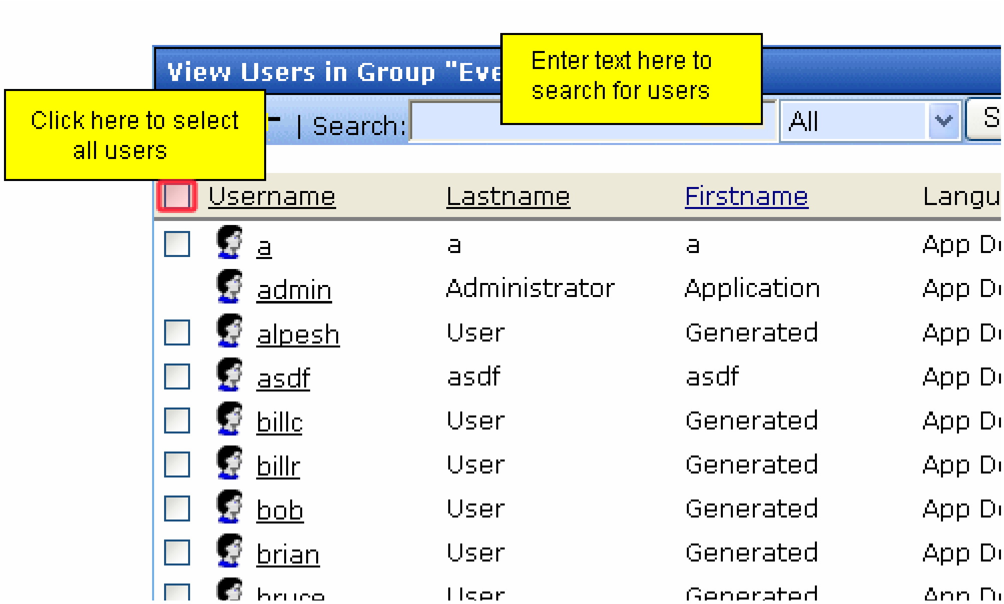
To add a user to a user group, follow these steps.

1. Access the User Groups folder in the Workarea.
2. Click the user group to which you want to add a user.
3. The View Users in Group screen appears with all current members of the group.

NOTE When you create a new user group, no user assigned to it initially.

Note that you can select any number of users by checking the box to the left of their name. To select all users, check the box in the column header row.

You can also sort the display by **Username**, **Lastname** or **Firstname**.



View Users in Group "Eve
Enter text here to search for users
Click here to select all users
| Search:
All
S

		Username	Lastname	Firstname	Langu
☐	☐				
☐		a	a	a	App D
		admin	Administrator	Application	App D
☐		alpesh	User	Generated	App D
☐		asdf	asdf	asdf	App D
☐		billc	User	Generated	App D
☐		billr	User	Generated	App D
☐		bob	User	Generated	App D
☐		brian	User	Generated	App D
☐		bruce	User	Generated	App D

And, you can enter characters into the **Search** field and find only users that match them. For example, you could enter **bill**, click the **Search** button, and see only users with those characters in their name.

4. Click the Add User button ( ).
5. Users who do not belong to the group appear.
6. Click the user you want to add.
7. A confirmation message is displayed.
8. Click **OK**.
9. The selected user is now a member of the selected group.
10. Continue this process until you add all users into User Groups.

Viewing the Users in a User Group

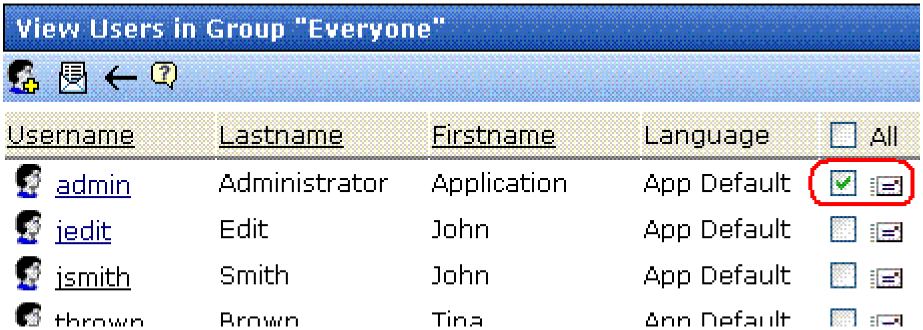
To view a list of users who are members of a user group, follow these steps.

1. Access the User Group folder in the administrator Workarea, as described in "Accessing the User Group Folder" on page 500.
2. Click the user group whose members you want to view.

3. The View Users in Group screen appears with a list of users who are members of the group.

From this screen, you can edit or delete user groups, as well as add and remove users to and from the user group.

You can also send an email to any group member by clicking the checkbox next to the email icon on the same line as the user’s name.



Username	Lastname	Firstname	Language	☐ All
admin	Administrator	Application	App Default	☑
jedit	Edit	John	App Default	☐
jsmith	Smith	John	App Default	☐
tbrown	Brown	Tina	App Default	☐

After selecting all users to receive email, click the email toolbar button ( ). A new screen appears that lets you compose the email.

Editing a User Group

When editing a User Group, you can only change its name.

NOTE You cannot edit the default Administrators and Everyone user groups.

To edit a user group, follow these steps.

1. Access the View Users in Group screen for the user group you want to edit, as described in ”Viewing the Users in a User Group” on page 507.
2. Click the User Group you want to edit.
3. The View Users In Group screen is displayed.
4. Click the Edit button ( ).
5. The Edit User Group screen is displayed.
6. Make the necessary changes.

7. Click the Update button (💾).

Deleting a User Group

When you do not need a User Group anymore, you can delete it from the system.

NOTE You cannot delete the Administrator and Everyone groups.

To delete a user group, follow these steps.

1. Access the View Users in Group screen for the user group you want to delete, as described in ”Viewing the Users in a User Group” on page 507.
2. Click the User Group you want to delete.
3. The View Users In Group screen is displayed.
4. Click the Delete button (🗑).
5. A confirmation message is displayed.
6. Click **OK**.
7. The User Group is deleted from the Ektron CMS400.NET Web site.

Removing Users from User Groups

See ”Removing Users from User Groups” on page 505.

Membership Users and Groups

Membership users are a category of users who have limited privileges to **Ektron CMS400.NET**. Unlike regular CMS users, they cannot use the Workarea. When a membership user logs in, he can only *view* content -- all other functionality is disabled. Once logged in, only a logout button is displayed.

A big advantage of membership users is that they do not count against your user license. So, if you have a ten (10) user license, your CMS can have hundreds of membership users.

Membership groups are used to group similar membership users.

Privileges of Membership Users

- They can view private content after log in. *See Also:* ”Private Content” on page 522
- They can self-subscribe to receive Web Alerts. *See Also:* ”Web Alert Feature” on page 765
- If a Discussion Board requires sign in, they can view and post to them. *See Also:* ”Discussion Boards” on page 383
- If a blog requires authentication, they can post blog comments. *See Also:* ”Blogs” on page 376
- If a poll or survey is set up to track participating users, membership users’ names appear on the Form reports.

Membership User/User Group Example

A typical membership scenario is a Partners section of your Web site that contains private content for partners only. However, you don’t want partners to perform any Ektron CMS400.NET-related activities.

You can set up a membership user group to include users from your partner’s organization. The group is given read-only permissions to the Partners section, which contains private content. Any partner can log into Ektron CMS400.NET and view the private content.

This topic is more fully explained through the following subtopics.

- ”Accessing the Membership Module Folder” on page 511
- ”Working with Membership Users” on page 512
- ”Membership User Groups” on page 516
- ”Assigning Permissions for Memberships” on page 520
- ”Troubleshooting Problems with Membership Users and Groups” on page 521

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Accessing the Membership Module Folder

Use the Membership Module folder to enter and edit membership users and user groups. To access the folder, follow these steps.

1. Navigate to the Workarea.
2. From the left frame of the Workarea, click the **Modules** folder button.
3. The Modules folder hierarchy is displayed.
4. Click the **Memberships** folder to view its subfolders.

Folder Name	More Information
Users	”” on page 511
Users not Verified	”What Happens if Verification email is Used” on page 797
User Groups	”Membership User Groups” on page 516
Messages	”What Happens if Verification email is Used” on page 797

Working with Membership Users

The following sections explain all actions that may be performed on membership users via the following topics.

- ”Adding Membership Users” on page 512
- ”Adding Membership Users to a Membership User Group” on page 513
- ”Setting Permissions on Private Content for Membership Users” on page 513
- ”Viewing Membership User Information” on page 513
- ”Editing Membership Users” on page 515
- ”Deleting Membership Users” on page 516

Adding Membership Users

NOTE If you are using the Web Alert feature, visitors to your site can sign up to be membership users. That represents another way to add membership users to Ektron CMS400.NET. For more information, see ”How Users Sign up for Subscriptions” on page 796.

To add a new membership user, follow these steps.

1. Access the membership users folder, as described in ”Accessing the Membership Module Folder” on page 511.
2. Click the Add Membership User button ( ).
3. The Add Membership User screen is displayed.
4. Complete the form using the following table as a reference.

Field	Description
Username	Enter a unique username for the membership user.
First Name	Enter the first name of the user.
Last Name	Enter the last name of the user.
Password	Enter a password for the user.
Confirm Pwd.	Re-type the password to confirm it is correct.

Field	Description
Email Address	Enter an email address for the user.

5. Click the Save button (💾).

Adding Membership Users to a Membership User Group

See ”Adding Membership Users to a Membership User Group” on page 518.

Setting Permissions on Private Content for Membership Users

See ”Assigning Permissions for Memberships” on page 520.

Viewing Membership User Information

To view membership user information, follow these steps.

1. Access the membership users folder, as described in ”Accessing the Membership Module Folder” on page 511.

NOTE The `ek_PageSize` setting in the web.config file determines the maximum number of users that can appear on a page before it “breaks.” When a page breaks, additional entries appear on another screen, and the following text appears near the bottom of the list:
Page 1 of 2
[First Page] [Previous Page] [Next Page] [Last Page]

The View Users in Group All_Members screen lets you add new users, as well as sort and search for existing users. See ”Sorting Membership Users” on page 513 and ”Searching for Membership Users” on page 514.

2. Click the user you want to view.
3. The View Membership User Information screen is displayed.

From this screen, you can edit or delete membership users.

Sorting Membership Users

You can arrange users on the View Users in Group All_Members screen by clicking the following column headers:

- Username

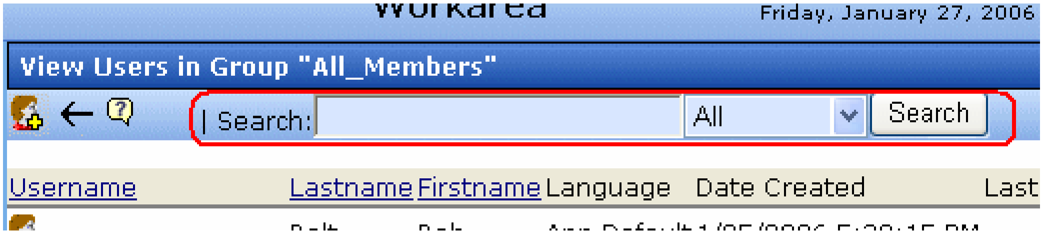
- Last Name
- First Name

By default, users are arranged alphabetically by Username, starting with the beginning of the alphabet. To switch that arrangement so that users whose username is *last* when sorted alphabetically, click the column header. To revert to the original arrangement, click the header again.

You can also sort the list by last name or first name. Like username, clicking the column header reverses the arrangement.

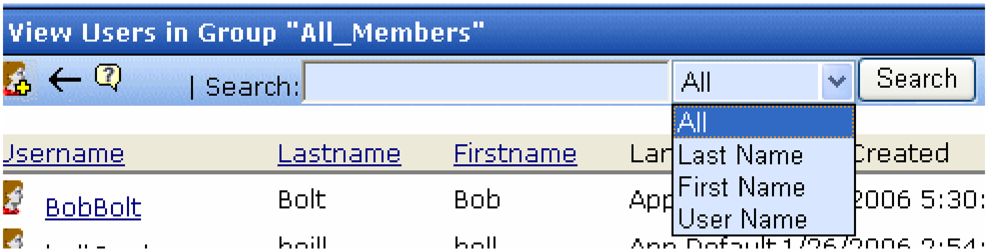
Searching for Membership Users

You can use the **Search** field (circled below) to display only users who meet your criteria. This would be especially helpful to filter out a large number of membership users.


Friday, January 27, 2006
View Users in Group "All_Members"
| Search:
All
Search
Username
Lastname
Firstname
Language
Date Created
Last

Use the **Search** field to enter unique characters to find members you seek. For example, to find all members whose username includes **@yahoo.com**, enter that into the **Search** field and click the **Search** button. Only users with those characters in that exact sequence in their username, first name, or last name appear on the screen.

You can also search by First and Last name fields. Click the down arrow to the left of the **Search** button to select a field to search.


View Users in Group "All_Members"
| Search:
All
Search
All
Last Name
First Name
User Name
Jsername
Lastname
Firstname
Lar
Created
BobBolt
Bolt
Bob
App
2006 5:30:

The sequence of search characters must match your entry in the **Search** field. For example, if you are searching by last name and enter **MI**, anyone whose name is *Smith* appears. But, if you enter **IM,** users with the last name of *Smith* do not appear.

Also, the search is case-insensitive, so **MI** produces the same results as **mi**.

Editing Membership Users

To edit a membership user, follow these steps.

1. Access the View Membership User screen of the membership user you want to edit, as described in ”Viewing Membership User Information” on page 513.
2. Click the Edit button ().
3. The Edit Membership User Information screen is displayed.
4. Use the following table to assist with editing the membership user’s information.

Field	Description
Username	Enter a unique username for the membership user.
First Name	Enter the first name of the user.
Last Name	Enter the last name of the user.
Password	Enter a password for the user.
Confirm Pwd.	Re-type the password to confirm it is correct.

Field	Description
Email Address	Enter an email address for the user.

5. Click the Update button (💾).

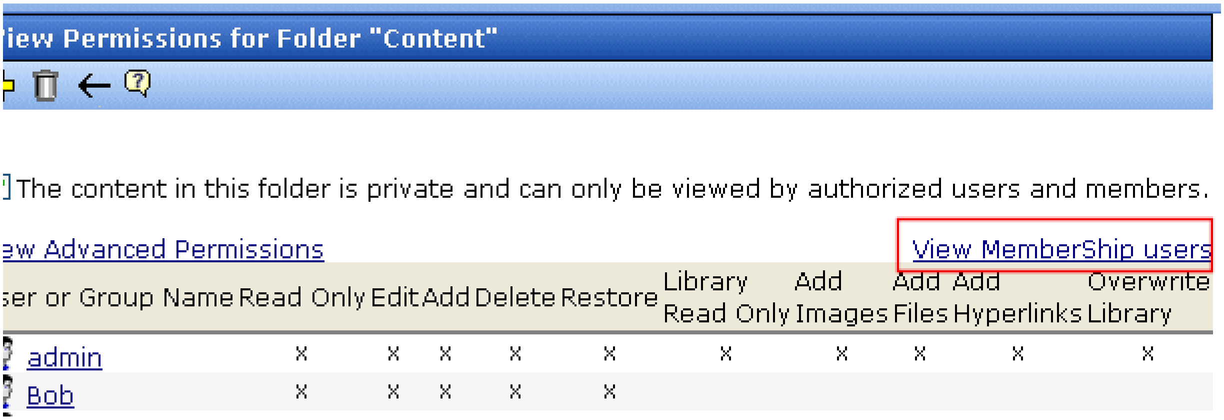
Deleting Membership Users

To delete a membership user, follow these steps.

1. Access the View Membership User screen of the membership user you want to edit, as described in ”Viewing Membership User Information” on page 513.
2. Click the Delete button (🗑).
3. A confirmation message is displayed.
4. Click **OK**.

Membership User Groups

Membership user groups organize similar membership users, reducing the effort required to assign identical permissions to many users. You can assign them Read-only permission to any folder by going to **Folder Properties** > **View Permissions for Folder** > **View MemberShip users**.



iew Permissions for Folder "Content"

The content in this folder is private and can only be viewed by authorized users and members.

ew Advanced Permissions

View MemberShip users

ser or Group Name	Read Only	Edit	Add	Delete	Restore	Library Read Only	Add Images	Add Files	Add Hyperlinks	Overwrite Library
admin	x	x	x	x	x	x	x	x	x	x
Bob	x	x	x	x	x					

The following sections explain membership user group management.

- ”Adding Membership User Groups” on page 517
- ”Viewing Users in a Membership User Group” on page 518
- ”Adding Membership Users to a Membership User Group” on page 518
- ”Setting Permissions on Private Content for Membership User Groups” on page 518
- ”Editing Membership User Group Name” on page 518
- ”Deleting User from Membership User Group” on page 519
- ”Deleting Membership User Groups” on page 519

Adding Membership User Groups

To create a new membership user group, follow these steps.

1. Access the membership user group folder, as described in ”Accessing the Membership Module Folder” on page 511.
2. Click the Add Membership User Group button ( ).
3. The Add a New User Group screen is displayed.
4. Enter a unique name for the group.
5. Click the Save button ( ).

See Also: ”Membership User Groups” on page 516

Viewing Users in a Membership User Group

To view the information about a membership user group, follow these steps.

1. Access the membership user group folder, as described in ”Accessing the Membership Module Folder” on page 511.
2. Click the membership user group you want to view.
3. The View Users In Group screen is displayed.

See Also: ”Membership User Groups” on page 516

Adding Membership Users to a Membership User Group

To add a membership user to a membership user group, follow these steps.

NOTE Only membership users can be added to membership user groups.

1. Access the View Membership User Group screen for the membership user group to which you want to add a membership user, as described in ”Viewing Users in a Membership User Group” on page 518.
2. Click the Add Membership User button ( ).
3. The Add User to Group screen is displayed.

NOTE Only membership users who do not belong to the group appear.

4. Click the user you want to add.
5. A confirmation message is displayed.
6. Click **OK**.

See Also: ”Membership User Groups” on page 516

Setting Permissions on Private Content for Membership User Groups

See ”Assigning Permissions for Memberships” on page 520

Editing Membership User Group Name

To edit a membership user group name, follow these steps.

NOTE The membership user group, All_members, cannot be edited.

1. Access the View Membership User Group screen for the membership group you want to edit, as described in ”Viewing Users in a Membership User Group” on page 518.
2. Click the Edit button (📝).
3. The Edit User Group screen is displayed.
4. Change the membership group name.
5. Click the Update button (💾).

See Also: ”Membership User Groups” on page 516

Deleting User from Membership User Group

To remove a user from a membership user group, follow these steps.

1. Access the View Membership User Group screen for the membership user group that contains the membership user you want to delete, as described in ”Viewing Users in a Membership User Group” on page 518.
2. Click the name of the membership user you want to remove.
3. The View User Information screen is displayed.
4. Click the Delete button (🗑).
5. A confirmation message is displayed.
6. Click **OK**.

Deleting Membership User Groups

To delete a membership user group, follow these steps.

1. Access the View Membership User Group screen for the membership user group you want to delete, as described in ”Viewing Users in a Membership User Group” on page 518.
2. Click the Delete button (🗑).
3. A confirmation message is displayed.
4. Click **OK**.

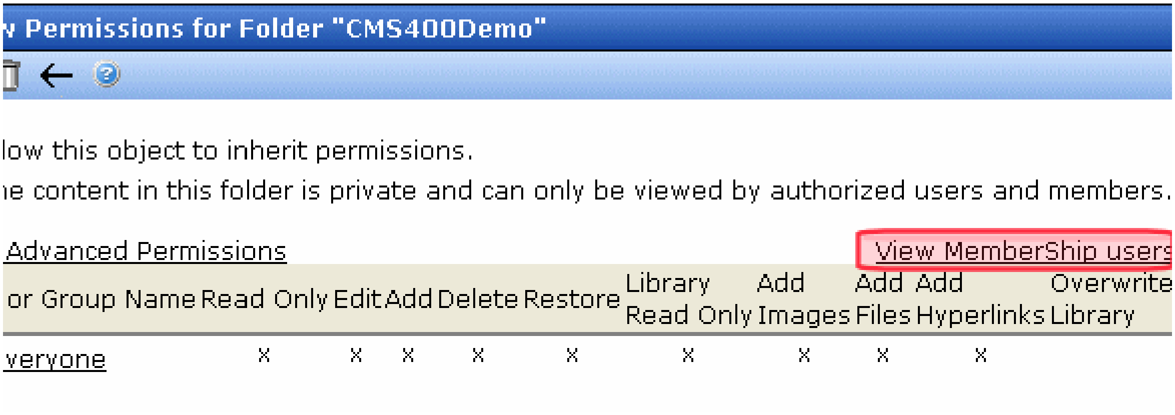
Assigning Permissions for Memberships

After you create membership users and groups, you can assign them permissions to content folders. To do so, follow these steps.

1. Access the permissions table for the content or folder you want to assign membership permissions for.

For	See
Content folders	”Setting Permissions for a Content Folder” on page 551
Content	”Setting Permissions for Content” on page 554

2. If necessary, break the inheritance for the content or folder. *See Also:* ”Inheritance” on page 548
3. Set the content folder or item to **Private**. *See Also:* ”Private Content” on page 522
4. Click **View MemberShip Users** on the right side of the permissions table.



v Permissions for Folder "CMS400Demo"

low this object to inherit permissions.

ie content in this folder is private and can only be viewed by authorized users and members.

Advanced Permissions

View MemberShip users

or Group Name	Read Only	Edit	Add	Delete	Restore	Library Read Only	Add Images	Add Files	Add Hyperlinks	Overwrite Library
veryone	x	x	x	x	x	x	x	x	x	

5. The membership users/user groups added to the permissions table are displayed.
6. Click the Add button (✚).
7. The Add Permissions screen is displayed.
8. Click a username or user group name to add to the permissions table.

9. The Add Permissions Options screen is displayed.
10. Check **Read-only** if you want the membership user or user group to be able to view the private content when logged in.
11. Click the Save button (💾).

The membership user or user group is saved and added to the permissions table.

Troubleshooting Problems with Membership Users and Groups

Symptom	**Problem**	**Solution**

Error message:
`Response object error 'ASP 0251 : 80004005'`
`Response Buffer Limit Exceeded`
	Response Buffer exceeded its limit	Increase limit. To do so, follow these steps.
		1. Stop IIS.
		2. Locate the file `%WinDir%\System32\Inetsrv\Metabase.xml`
		3. Modify the AspBufferingLimit value.
		4. Restart IIS.
		The default value is 4194304, which is about 4 MB. Suggest changing it to 20MB (20971520) and see if that helps.

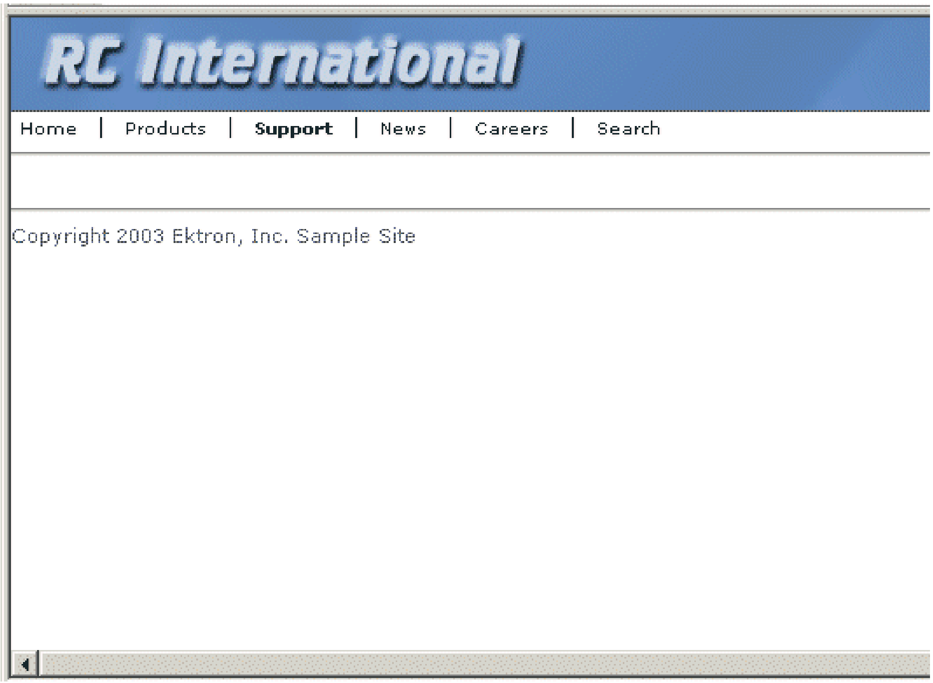
Private Content

Private content is only visible to CMS or membership users with at least Read-Only permissions for a folder. Those users must log in to see the private content. Regular site visitors cannot see it.

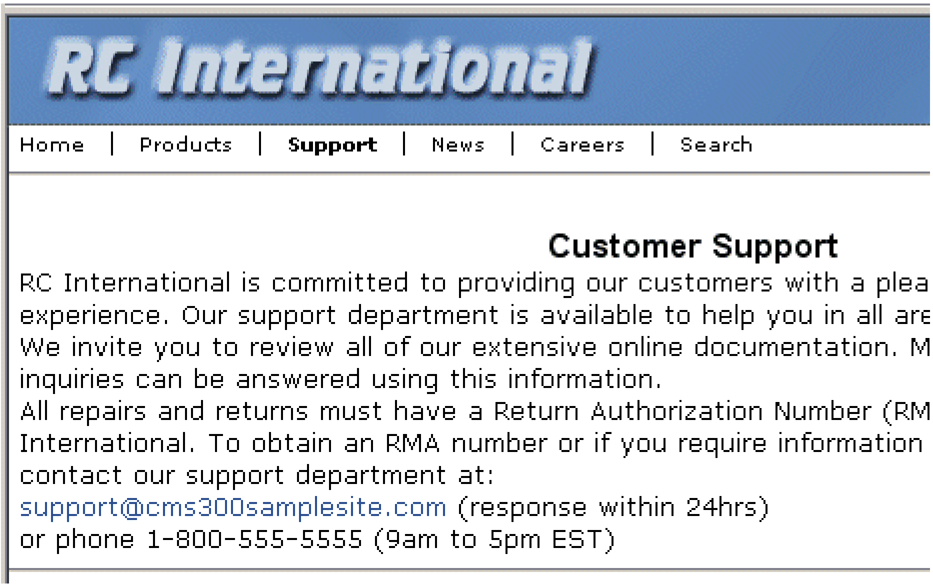
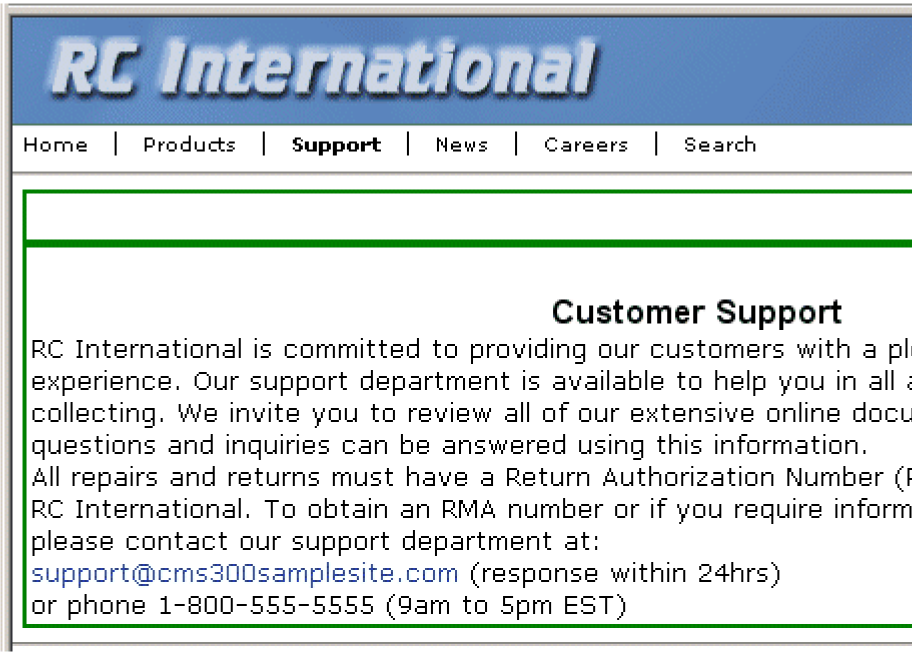
You can designate a folder to be private. In that case, all content in it and its subfolders is private (if they inherit permissions). Alternatively, you can designate specific content items as private.

To demonstrate private content, the following table shows how the user's status affects the display of content in three scenarios.

.

Scenario	**Web Page Display**
Site visitor accesses private content	

RC International
Home
Products
Support
News
Careers
Search
Copyright 2003 Ektron, Inc. Sample Site

Scenario	Web Page Display
Logged in user with read-only permissions accesses private content	 RC International Home Products Support News Careers Search **Customer Support** RC International is committed to providing our customers with a plea experience. Our support department is available to help you in all are We invite you to review all of our extensive online documentation. M inquiries can be answered using this information. All repairs and returns must have a Return Authorization Number (RM International. To obtain an RMA number or if you require information contact our support department at: support@cms300samplesite.com (response within 24hrs) or phone 1-800-555-5555 (9am to 5pm EST)
Logged-in user with edit permissions accesses private content	 RC International Home Products Support News Careers Search **Customer Support** RC International is committed to providing our customers with a pl experience. Our support department is available to help you in all collecting. We invite you to review all of our extensive online docu questions and inquiries can be answered using this information. All repairs and returns must have a Return Authorization Number (RC International. To obtain an RMA number or if you require inform please contact our support department at: support@cms300samplesite.com (response within 24hrs) or phone 1-800-555-5555 (9am to 5pm EST)

Making a Folder Private

NOTE You can only set content to private when inheritance is broken.

To make a folder private, follow these steps.

1. In the **Ektron CMS400.NET** Workarea, navigate to the folder that you want to make private.
2. Click **View > Folder Properties**.
3. Click the View Permissions button (🔒).
4. If necessary, uncheck the box that says **Allow this object to inherit permissions**. (Inheritance must be disabled before you can make the content private.)
5. Check the box that says **The content in this folder is private and can only be viewed by authorized users and members**.
6. A confirmation message is displayed.
7. Click **OK**.

The content in that folder is now private.

Making Content Private

To make any content private, follow these steps. *See Also:* ”Making Assets Private” on page 525

1. In the **Ektron CMS400.NET** Workarea, navigate to the folder that contains the content you want to make private.
2. Click the content item you want to make private.
3. Click the View Permissions button (🔒).
4. If necessary, uncheck the box that says **Allow this object to inherit permissions**. (Inheritance must be disabled before you can make the content private.)
5. Check the box that says **This content is private and is NOT viewable on the public Web site**.
6. A confirmation message is displayed.
7. Click **OK**.

The content is now private.

Making Assets Private

If assets are set to private, they are handled like other private content with one important exception: Unless you follow the procedure described below, anyone can access the asset by *typing the URL of the asset into the browser's address field*.

If a user attempts to access the asset in any other way (such as, linking to it from a Web page), the regular methods of making content private work. See "Making a Folder Private" on page 524 and "Making Content Private" on page 524.

To make assets private even if someone types their URL into the browser's address field, follow these steps.

NOTE If site users receive a 404 Page Not Found Error when trying to view private assets, make sure the you have completed all of the step below.

1. In the web.config file, change the ek_RedirectorInstalled key to True.

   ```
   <add key="ek_RedirectorInstalled" value="True"/>
   ```

2. Ensure the following line is uncommented. It is uncommented by default. To do so, remove dashes and the exclamation point (!):

```
<!--add verb="*" path="*/Assets/*.*" type="Ektron.ASM.FileHandler.AssetHttpHandler"/-->
```

3. Add the following code directly below the line from the previous step.

```
<add verb="*" path="default.aspx" type="URLRewrite.StaticFileHandler,Ektron.Cms.URLRewriter"/>
```

   Adding this line prevents default.aspx from producing a 404 Page Not Found error when you add wildcard mapping in IIS.

4. Enable the `httpHandlers` section of Web.config. To do so, uncomment the following tags by removing dashes and the exclamation point (!):

   To uncomment the opening tag, remove the characters in red below:

```
<!--add verb="*" path="*.asmx"

type="System.Web.Services.Protocols.WebServiceHandlerFactory,
System.Web.Services, Version=1.0.5000.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a"
validate="false"/>
```

To uncomment the closing tag, remove the characters in red below:

```
<add verb="*" path="*" type="URLRewrite.URLRewriter,Ektron.Cms.URLRewriter" /-->
</httpHandlers>
```

5. Update the IIS Application Mappings. See ”Updating IIS Application Mappings for Windows 2000 and XP” on page 452 and ”Updating IIS Application Mappings for Windows 2003 Server” on page 456.
6. Make either the asset (content) or its folder private. See ”Making a Folder Private” on page 524 or ”Making Content Private” on page 524.

Custom User Properties

Custom User Properties allow you to create custom fields. These custom fields appear on the User Properties and Membership User Properties screens, and on the Membership server control. They are used to define information about a user beyond the standard Ektron CMS400.NET user properties, such as Username, First Name, Password and email Address.

Examples of Custom User Properties might be:

- employee ID
- phone number
- phone extension
- instant message screen name
- position
- start date
- department
- birthday
- the IP address of the user's machine

Your ability to create and manage custom user properties is explained through the following topics.

- ”The View Custom Properties Screen” on page 528
- ”Adding a Custom User Property” on page 529
- ”Editing a Custom User Property” on page 539
- ”Deleting a Custom User Property” on page 540
- ”Setting the Custom User Properties Order” on page 541
- ”Using Custom User Properties for Non-English Languages” on page 543

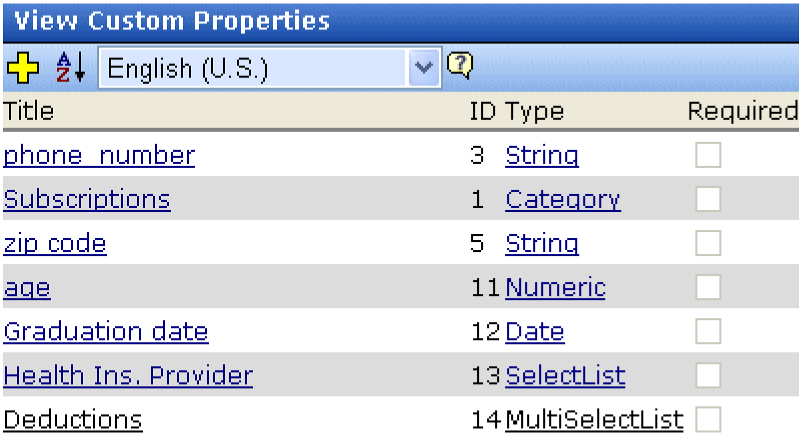
NOTE Only members of the Administrator User Group can work with Custom User Properties.

The View Custom Properties Screen

Use the View Custom Properties screen to create custom properties for users and membership users. From the View Custom Properties screen, you can:

- add a new custom property. See ”Adding a Custom User Property” on page 529
- edit a custom property. See ”Editing a Custom User Property” on page 539
- reorder the way custom properties appear on the users and membership users screen. See ”Setting the Custom User Properties Order” on page 541
- work with custom properties in different languages. See ”Using Custom User Properties for Non-English Languages” on page 543

Below is an example of the View Custom Properties screen.



Title	ID	Type	Required
phone_number	3	String	☐
Subscriptions	1	Category	☐
zip code	5	String	☐
age	11	Numeric	☐
Graduation date	12	Date	☐
Health Ins. Provider	13	SelectList	☐
Deductions	14	MultiSelectList	☐

The table below describes the View Custom Properties screen.

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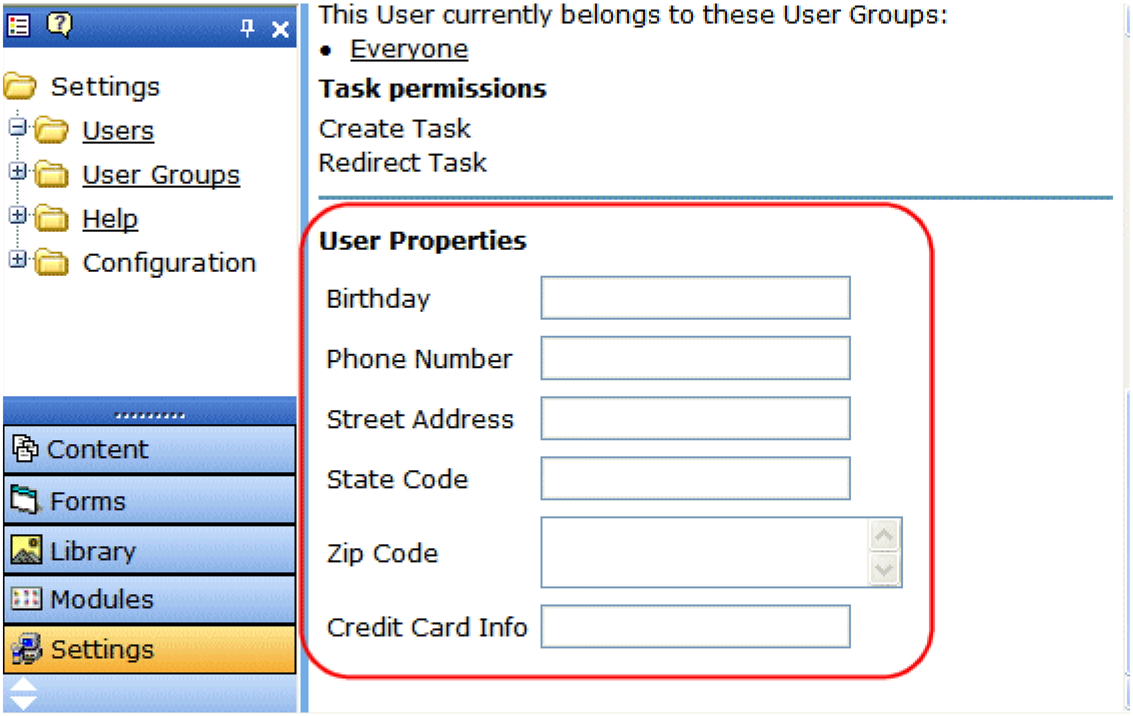
Buttons, Dropdown Boxes or Fields	**Description**	**For More Information**
Add button (✚)	Add custom user properties.	”Adding a Custom User Property” on page 529
Reorder button (A-Z↓)	Change the order in which the custom properties appear on the Users or Membership User Properties screen.	”Setting the Custom User Properties Order” on page 541
Language Selection Dropdown List (English (U.S.) ▾)	Allows you to view custom user properties by language.	”Viewing Custom User Properties By Language” on page 545
Title Field	Displays the title of a custom user property. When viewing by language, the title changes to the title used in a specific language if it has been defined. Click a **Title** to edit the property. Note: The title and label are the same field. On some screens, **Title** is used; on others **Label** is used.	”Editing a Custom User Property” on page 539
Type Field	Shows the Type that was chosen for a custom user property.	”Type” on page 531
Required Field	Shows whether the field is required.	”Required” on page 531

Adding a Custom User Property

After you add a custom user property, it appears on all User and Membership User Information screens, under the **User Properties** header. When new users and membership users are added, custom user properties appear during the creation process.



This User currently belongs to these User Groups:

- Everyone

Task permissions

Create Task
Redirect Task

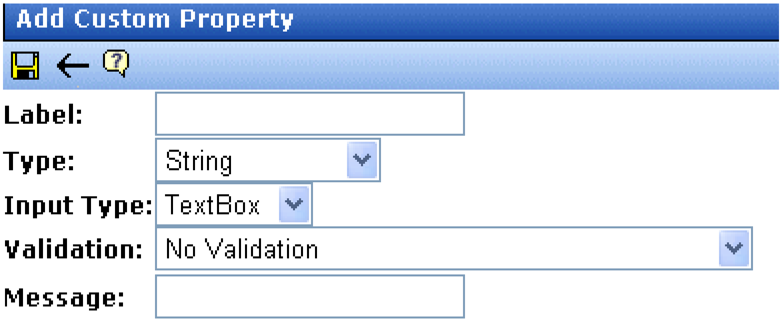
User Properties

Birthday	
Phone Number	
Street Address	
State Code	
Zip Code	
Credit Card Info	

Settings
Users
User Groups
Help
Configuration
Content
Forms
Library
Modules
Settings

Follow these steps to add a custom user property.

1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.
2. Choose the standard language used in your **Ektron CMS400.NET** Workarea.
3. Click the **Add Property** button (✚).
4. The Add Custom Property screen appears.



Add Custom Property

Label:

Type: String

Input Type: TextBox

Validation: No Validation

Message:

5. Complete the screen according to the table below.

The Custom User Properties Fields

The following table describes the custom user properties fields

Field	Description	More Information
Label	Title of the property you are adding. For example, Employee ID. Note: The Title and Label are the same field. On some screens the word Title is used, on others the word Label is used.	
Type	The property's data type. Once a type is selected and saved, you cannot change it. You must delete the custom property and re-enter it.	"The Type Field" on page 532
Required	Forces the user completing the screen to enter a value. If you make the property a requirement, a red asterisk appears next to its label. For example: *Employee ID	
Input Type	Choose how a user is able to enter a response to the property.	"The Input Type Field" on page 533
Validation	Ensures the right type of data is entered in a text box or text area.	"Validation" on page 534

Field	Description	More Information
Min Value	If desired, enter the minimum value you want to allow. The Min Value only appears when the following Validations are used: Numeric Only, Date Only and U.S. Zip Code. The following is an example of a Date Only Min Value: **01/01/1900**.	
Max Value	If desired, enter the maximum value you want to allow. The Max Value only appears when the following Validations are used: Numeric Only, Date Only and U.S. Zip Code. The following is an example of a Date Only Max Value: **01/01/1987**.	
Message	A message that appears when information entered in a user property violates the validation criteria. For example, if the validation is U.S. Zip Code, you might use the following message: **Please enter a valid zip code**	

6. Click the **Save** button (💾).
7. The new property appears on the View Custom Properties screen.

The Type Field

The following table describes the types available in the Type field.

Types	Description	Input Types Available	Validations Available
String	Accepts all alpha, numeric, and symbol characters	• Text Box • Text Area • Hidden	All validations *See Also:* ”Validation” on page 534
Boolean	Accepts a true or false response	• Check Box	None

Types	Description	Input Types Available	Validations Available
Numeric	Accepts numbers only	• Text Box	• No Validation • Cannot be blank • Numeric Only • U.S. Zip Code • Dollar Amount
Date	Only a date can be entered.	• Text Box	• No Validation • Cannot be blank • Date Only
SelectList	Select a response from a list of choices. *See Also:* ”SelectList Field” on page 536	NA	NA
Multi SelectList	Select any number of responses from a list of choices. *See Also:* ”MultiSelectList Field” on page 538	NA	NA
Category	A system-defined type that appears when the first subscription is created. One entry covers all subscriptions. *See Also:* ”Defining Subscriptions” on page 786.	NA	NA

The Input Type Field

The following table describes possible responses to the **Input Type** field.

Input Type	Description	An Option When Used With
Text Box	Creates a standard text box. Below is an example of a text box. 	• String • Numeric • Date

Input Type	Description	An Option When Used With
Text Area	Creates a multi-lined area for entering text. Typically used when more than one line of text needs to be added. Below is an example. 	• String
Hidden	Hides the input field. This can be used by an administrator to add additional values at postback time. This requires a developer to add client-side JavaScript.	• String
Check Box	Creates a checkbox. Used when the field requires a boolean (true / false) response. Below is an example of a check box. ☑ = True ☐ = False	• Boolean

Validation

The following table describes the validations available in the **Validation** field.

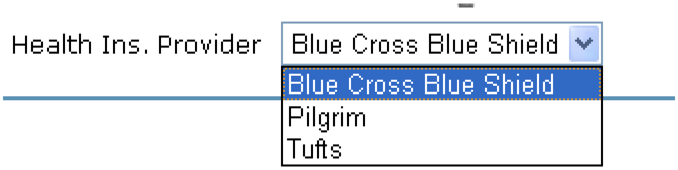
Validation	Description	An Option When Used With
No Validation	The entry is not checked.	• String • Numeric • Date
Cannot be blank	A response must be entered.	• String • Numeric • Date
Numeric Only	The response must be a number.	• String • Numeric
Text Only	The response must be characters.	• String

Validation	Description	An Option When Used With
Date Only	The response must be entered in the following format: mm/dd/yyyy.	- String - Date
Email Only	The response must be entered as an Email address. For example, username@domain.domainextention.	- String
Credit Card Only	The response must be entered as a credit card number. For example, nnnn nnnn nnnn nnnn	- String
Social Security Only	The response must consist of nine digits in this pattern: nnn-nn-nnnn.	- String
U.S. State Code	A two letter state code. For example: NH = New Hampshire.	- String.
U.S. Zip Code	The response must consist of 5 (nnnnn) or 9 digits separated by a dash after the fifth (nnnnn-nnnn). Note: If you use the Numeric Type, you cannot have a dash or space when using a nine digit Zip Code	- String - Numeric
Valid US Phone Number	The response must consist of a 10 digits in this pattern: nnn-nnn-nnnn.	- String
Canadian Postal Code	The response must consist of 6 (xnx nxn) alpha or numeric characters with a space after the first three characters.	- String
Time HH:MM or HH:MM:SS or HH:MM:SS.mm	Time is entered in one of the following three formats. **HH:MM** - Hours and Minutes 09:30 **HH:MM:SS** - Hours, Minutes and Seconds 09:30:45 **HH:MM:SS.mm** - Hours, Minutes, Seconds and milliseconds 09:30:45.002	- String
IP Address	The response must be in the form of an IP address.	- String

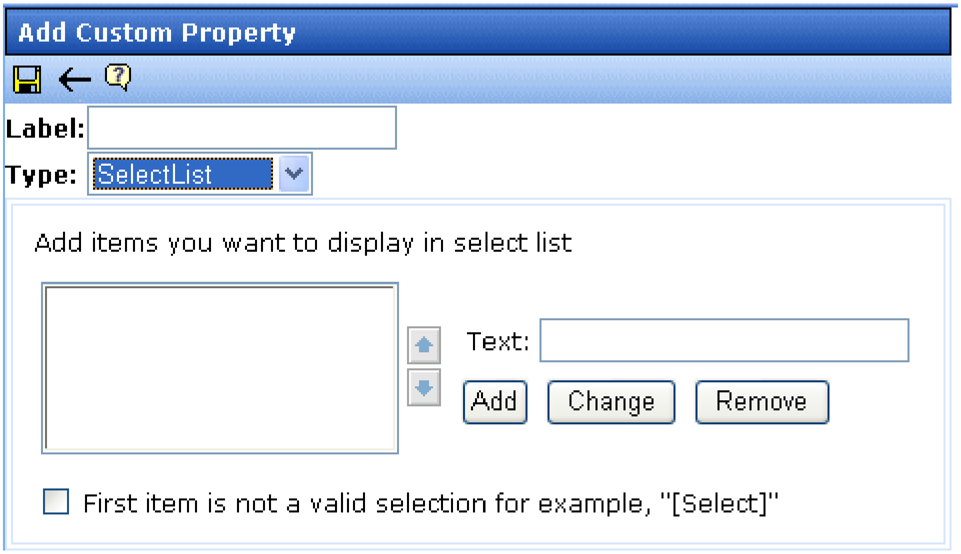
Validation	Description	An Option When Used With
Dollar Amount	This validation works differently depending on the Type used. If used with the *String* Type, you can have a dollar sign ($) along with the money amount in the text field. When used with the *Numeric* Type, you are not allowed to have a dollar sign ($) in the text field. The following are examples of each type with validation: **String** - $3.00 **Numeric** - 3.00	• String • Numeric
Canadian Social Insurance Number	The response must consist of nine digits in this pattern (nnn nnn nnn).	• String

SelectList Field

Use a **SelectList** field to present the user completing the User Information or Membership User Properties screen with a list of choices. See example below.



When you create a custom user property and specify its type to be **Select List**, the screen changes as shown below.


Add Custom Property
Label:
Type:
SelectList
Add items you want to display in select list
Text:
Add
Change
Remove
☐ First item is not a valid selection for example, "[Select]"

Completing a SelectList Field Entry

To add an item to the list, enter its text in the **Text** field, then click the **Add** button. Added items then appear in the larger box on the left.

You can then

- *remove* any item from the list by clicking it. It appears in the **Text** field. Click **Remove**.
- *change* the text of any list item by clicking it. It appears in the **Text** field. Make changes then click **Change**.
- *change the sequence* of list items by selecting an item then clicking the up or down arrow to move the item

Using the First List Item to Prompt a Response

You can use the first list item to prompt the user to make a selection instead of being a valid response. For example, the first list item may say **Select from a list of choices**. To do this, check the **First item is not a valid selection for example, “[Select]”** check box.

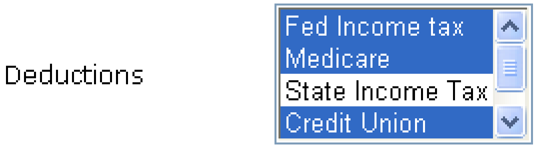
If you do, the field has an asterisk (*) next to it (indicating it is required) on the User Information and Membership User

Properties screens. The user completing the screen must choose any selection other than the first item. If he tries to file the screen without choosing a different item, the following error message appears:

Please fill in all required fields (*)

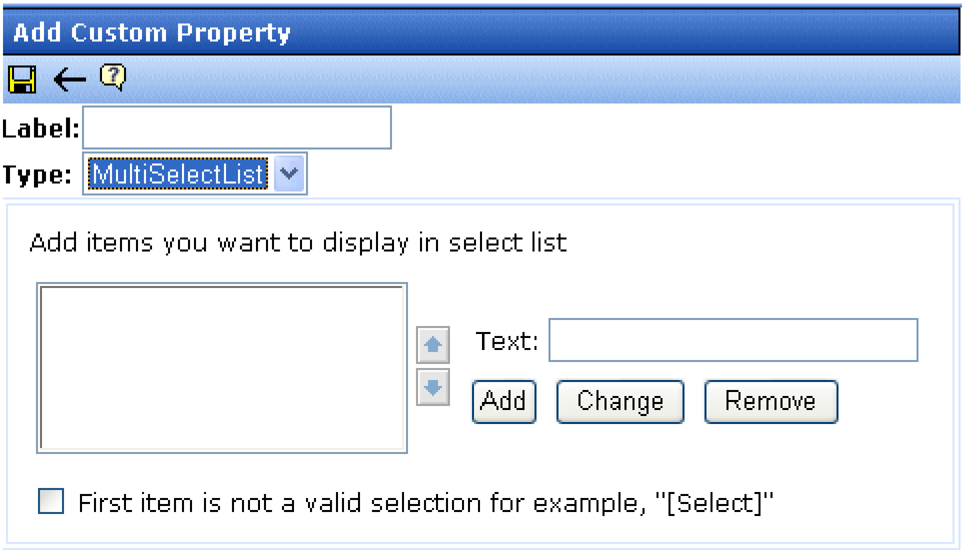
MultiSelectList Field

Use a **MultiSelectList** field to present the user completing the User Information or Membership User Properties screen with a list of choices. The user can choose as many responses as appropriate. See example below.


Deductions
Fed Income tax
Medicare
State Income Tax
Credit Union

Selected items are indicated by a blue background.

When you create a custom user property and specify its type to be **MultiSelect List**, the screen changes as shown below.


Add Custom Property
Label:
Add items you want to display in select list
Text:
Add
Change
Remove
☐ First item is not a valid selection for example, "[Select]"

Type: MultiSelectList

For information about completing the screen, see ”Completing a SelectList Field Entry” on page 537.

Editing a Custom User Property

When you click a custom user property’s title, you are brought to the Edit Custom Property Screen. From this screen, you can edit and delete a custom property or create a version of the custom property in a non-English language.

When you edit a custom user property, the changes are applied to all users and membership users. These changes are also applied to any other language versions of the custom properties that exist.

To learn how to:

- edit a custom user property. See ”Editing a Custom User Property” on page 539.
- delete a custom property. See ”Deleting a Custom User Property” on page 540.
- create a custom property for a non-English language. See ”Create a Custom User Property for a Non-English Language” on page 543.

Editing a Custom User Property

When editing a custom user property, the changes are available to users and membership users when the save button is clicked.

Follow these steps to edit a custom user property.

1. In the Workarea, click **Settings > Configuration > User Properties > User Properties.**
2. Click the **Title** of the Custom User Property you want to edit.
3. Choose the field you want to change. You can edit the following fields:

- Label
- Required

- Input Type
- Validation
- Min Value
- Max Value
- Message

  For descriptions of these fields, see ”The Custom User Properties Fields” on page 531

NOTE You cannot edit the **Type** field. If you need to change the type, you must delete the custom user property and create a new one.

WARNING! If you delete a custom user property, it is removed from all users and membership users. Any information that has been collected about users and membership users for that property will be lost. In addition, any language versions of the custom user property are deleted.

4. Click the **Save** button (💾).
5. When you click on a user or membership user, you see your changes.

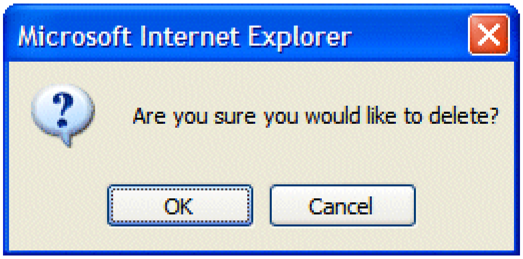
Deleting a Custom User Property

If you delete a custom user property, it is removed from all users and membership users. Any information that has been collected about users and membership users for that property will be lost. In addition, any language versions of the custom user property are deleted.

Follow these steps to delete a custom user property.

1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.
2. Click the **Title** of the custom user property you want to delete.
3. Click the **Delete** button (🗑).

A dialog box appears asking if you are sure you would like to delete the item.



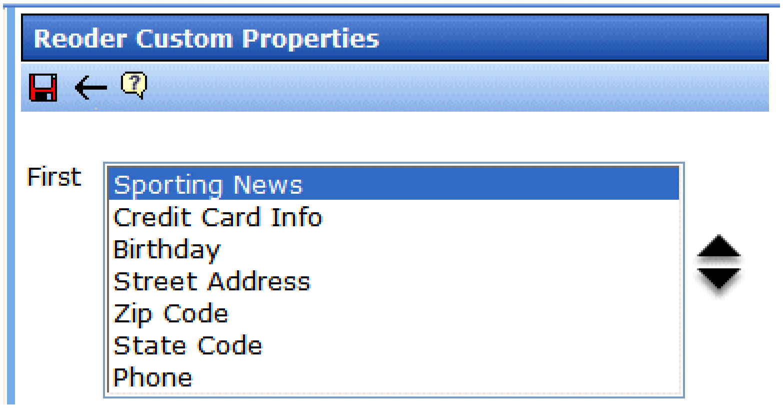
Are you sure you would like to delete?

4. Click **OK**.
5. The View Custom Properties screen appears, and the property is no longer available.

Setting the Custom User Properties Order

From the View Custom Properties screen, you can set the order in which the properties appear on the User and Membership Users Properties screen. To set the custom user properties order, complete these steps.

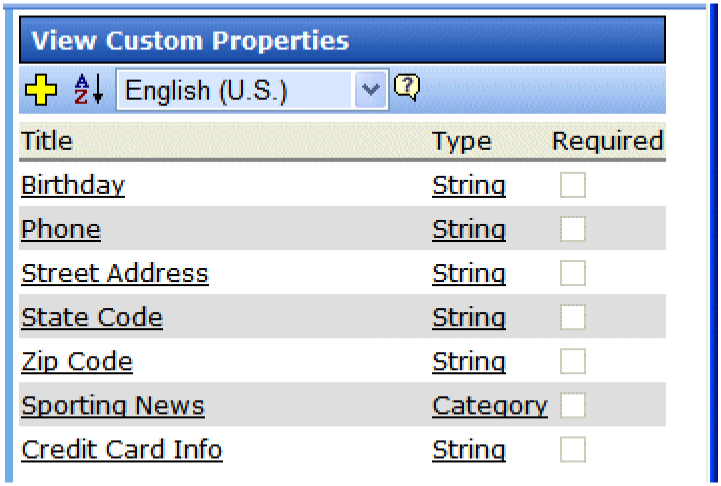
1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.
2. Click the **Reorder** button (A↓Z).
3. The Reorder Custom Properties screen appears.



Sporting News
Credit Card Info
Birthday
Street Address
Zip Code
State Code
Phone

4. Click on a property.

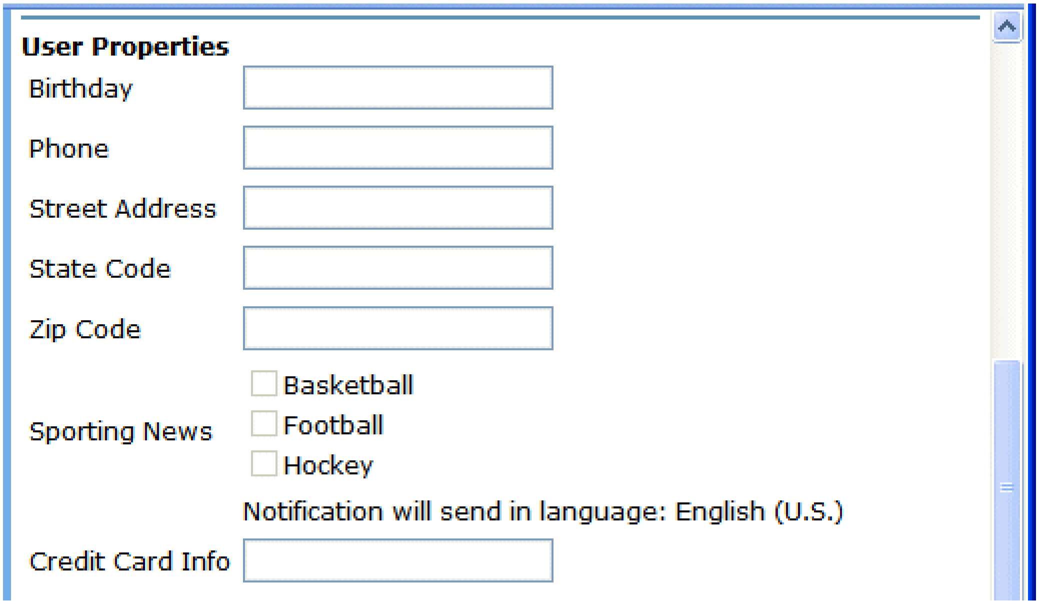
5. Click the **Up** or **Down** arrows (⬍) to move the property up or down the list.
6. Click the **Save** button (💾).
7. On the View Custom Properties screen, you now see the properties in the new order. If you go to the User or Membership User Properties screen, the order of the properties there now reflects the changes.



View Custom Properties

English (U.S.)

Title	Type	Required
Birthday	String	☐
Phone	String	☐
Street Address	String	☐
State Code	String	☐
Zip Code	String	☐
Sporting News	Category	☐
Credit Card Info	String	☐



User Properties

Birthday

Phone

Street Address

State Code

Zip Code

Sporting News
- ☐ Basketball
- ☐ Football
- ☐ Hockey

Notification will send in language: English (U.S.)

Credit Card Info

Using Custom User Properties for Non-English Languages

Like content, custom user properties have a language attribute. This is useful if you have users or membership users that only use a specific language. It can also be used if you want a custom user property to appear in the language in which the user is signed in.

Unless a language other than English is defined for a custom user property, the property defaults to the English version. For example, if you have two properties called Birthday and Phone Number in English and you can translate the French version of Birthday to Anniversaire, when you view the properties in French, you see the English version of Phone Number and the French version of Birthday.

Create a Custom User Property for a Non-English Language

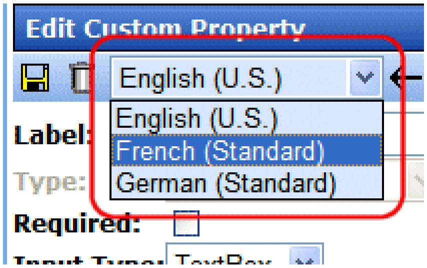
When creating a custom user property, it must be created in English then translated to the desired language. This is done by editing the property, changing languages, filling out the Translate Custom Property Label screen and saving the property.

IMPORTANT! All custom user properties in languages other than English are tied to the English version of the property. If you delete the English version of the property, all other language versions of the properties are deleted also. However, you can remove a non-English language version of the custom properties without deleting the English version. See ”Removing a Non-English Custom User Property Title” on page 544

The following steps illustrate how to translate the Title/Label of a property into French.

1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.
2. Choose a custom property to be defined in another language.

3. Choose a language from the language select dropdown box.

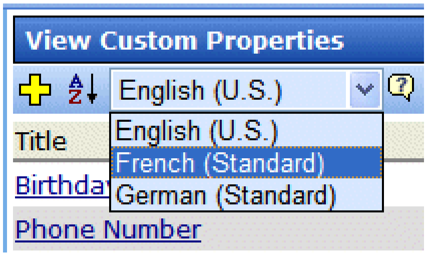

Edit Custom Property
English (U.S.)
English (U.S.)
French (Standard)
German (Standard)
Label:
Type:
Required:
Input Type:
TextBox

4. The Translate Custom Property Label screen appears.
5. Enter a **Label** for the property in the language you have chosen. For example, if you are creating a French version of a Birthday custom user property, you would enter Anniversaire in the label text field. For information on the Label property, see ”Label” on page 531
6. Click the **Save** button (💾).

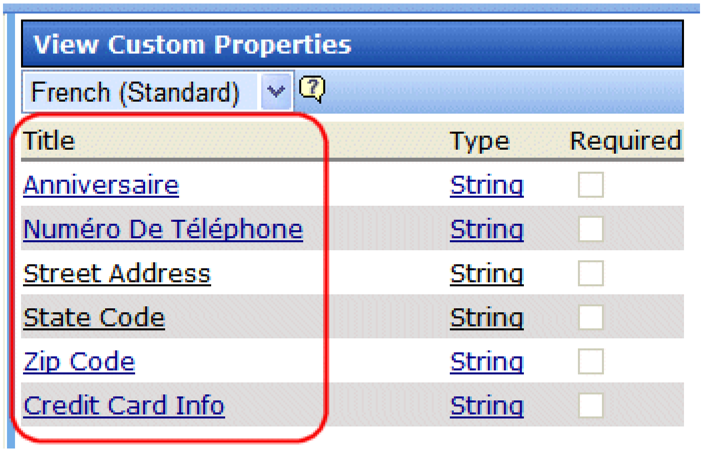
Removing a Non-English Custom User Property Title

Removing a non-English version of a custom user property title does not remove the english version of the property. When you remove the non-English version of a property, you are basically removing the label for that specific language in the custom property.

1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.
2. Choose the language in which the custom user property appears from the **Language Dropdown Box**.


View Custom Properties
English (U.S.)
English (U.S.)
French (Standard)
German (Standard)
Title
Birthda
Phone Number

3. Click on the **Title** you want to delete.



View Custom Properties

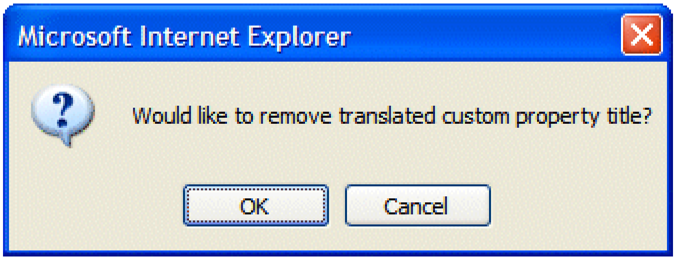
French (Standard)

Title	Type	Required
Anniversaire	String	☐
Numéro De Téléphone	String	☐
Street Address	String	☐
State Code	String	☐
Zip Code	String	☐
Credit Card Info	String	☐

4. The Translate Custom Property Label screen appears.

5. Click the **Delete** button (▭).

6. A dialog box appears asking if you would like to remove the translated custom property title.



Microsoft Internet Explorer

Would like to remove translated custom property title?

7. Click **OK**.

8. The English version of the Edit Custom Property screen appears.

9. Click the **Back** button (←).

WARNING! Do not click the delete button on the Edit Custom Property screen. This action deletes the English version of the custom user property. If you click the delete button, you lose all information collected by the property and all language versions of the property.

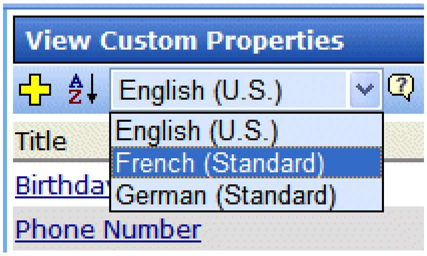
Viewing Custom User Properties By Language

From the View Custom Properties screen, you can view the custom users properties by languages. When viewing by languages, it is important to remember that if there is only an English version of the property, the English version appears in all the languages.

All custom user properties, in languages other than English, are tied to the English version of the property. If you delete the English version of the property, all other language versions of the properties are deleted.

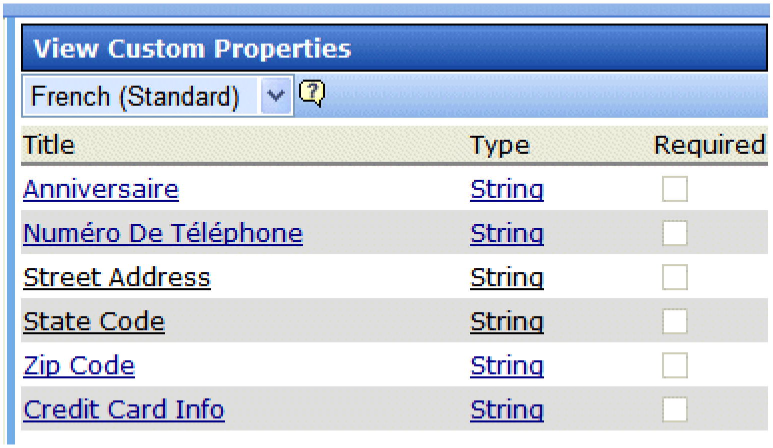
To view the custom user properties by language, follow these steps.

1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.
2. Choose the language in which to view the properties from the language dropdown box.


View Custom Properties
English (U.S.)
English (U.S.)
French (Standard)
German (Standard)
Title
Birthda
Phone Number

3. The View Custom Languages screen for that language appears.

NOTE In the example below, some properties have not been translated, so the English versions appear instead.


View Custom Properties
French (Standard)

Title	Type	Required
Anniversaire	String	☐
Numéro De Téléphone	String	☐
Street Address	String	☐
State Code	String	☐
Zip Code	String	☐
Credit Card Info	String	☐

Setting Permissions

Permissions determine which actions users and members of user groups can perform on content, library items, and content folders. For example, you allow your Webmaster to perform the most advanced actions, such as adding folders, editing folder properties, and deleting folders. At the same time, you could restrict content contributors to viewing, editing, and adding new content.

You can set permissions for a content folder or content item. If you assign permission to a content folder, it affects all of its subfolders unless you break inheritance for a subfolder.

Permissions are explained though the following topics:

- ”Who Is Authorized to Set Permissions” on page 547
- ”Setting Permissions through the Permissions Table” on page 547
- ”Inheritance” on page 548
- ”Standard & Advanced Permissions” on page 549
- ”Setting Permissions for a Content Folder” on page 551
- ”Setting Permissions for Content” on page 554

Who Is Authorized to Set Permissions

Only Ektron CMS400.NET administrators and users identified on the Manage Members for Role: Folder User Admin screen can set permissions. *See Also:* ”Using the Roles Screens” on page 564

Setting Permissions through the Permissions Table

IMPORTANT!

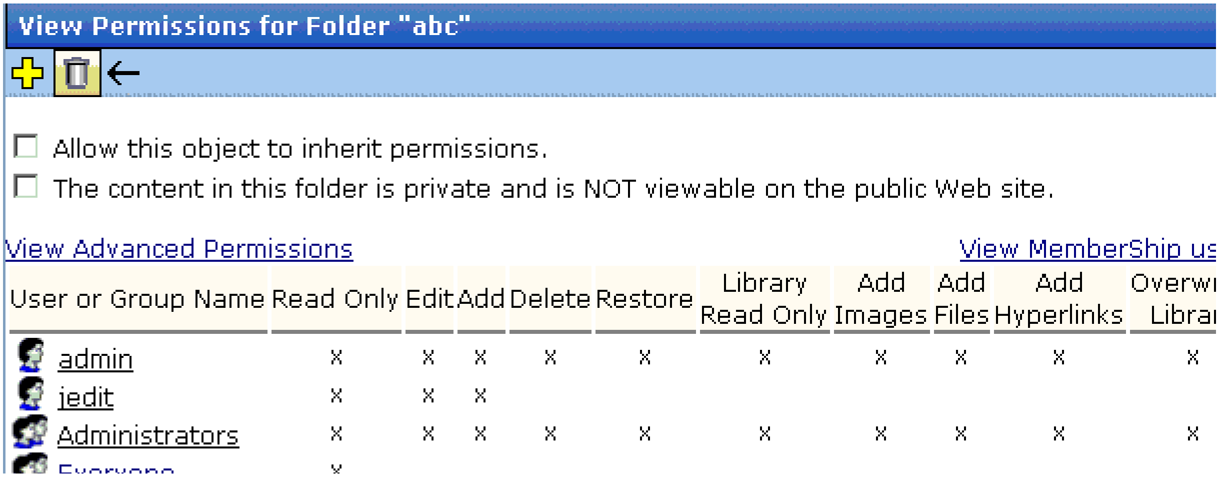
All members of the Administrators group are automatically granted all permissions to all Ektron CMS400.NET folders. Although these users do not appear when you view a folder’s permission settings, they have full permissions.

You manage the following permissions through the Permission Table (illustrated below).

- Content management: view, add, edit, delete, restore
- Library File Management: view, add images, add other types of files, add hyperlinks, overwrite files
- Folder management: add, edit, delete, traverse
- Work with Collections and Menus

NOTE You can use the Roles screens to assign additional permissions that are not defined in the Permission Table, such as the ability to create tasks. *See Also:* "Defining Roles" on page 564

The Permission Table appears when you click the Permission button (🔒) from a folder's or content item's Properties window.


View Permissions for Folder "abc"

☐ Allow this object to inherit permissions.

☐ The content in this folder is private and is NOT viewable on the public Web site.

View Advanced Permissions

View MemberShip us

User or Group Name	Read Only	Edit	Add	Delete	Restore	Library Read Only	Add Images	Add Files	Add Hyperlinks	Overw Libra
admin	x	x	x	x	x	x	x	x	x	x
jedit	x	x	x							
Administrators	x	x	x	x	x	x	x	x	x	x
Everyone	x									

Inheritance

By default, all content folders and items inherit permissions from their parent folder. You have two options for modifying permissions.

- Modify the permissions of the parent folder - see ”Setting Permissions for a Content Folder” on page 551
- Break inheritance and add permissions to a folder

Breaking Inheritance

To break inheritance from a parent folder, follow these steps.

1. Access the Permissions Table for a content folder or content in your Workarea, as described in ”Accessing the Permissions Table” on page 551.
2. Remove the check mark from the box that says **Allow this object to inherit permissions**.
3. A confirmation message appears.
4. Click **OK**.

Restoring Inheritance

To restore inheritance for a content folder or content, follow these steps.

1. Access the Permissions Table as described in ”Accessing the Permissions Table” on page 551.
2. Place a check in the box that says **Allow this object to inherit permissions**.
3. A confirmation message appears.
4. Click **OK**.

Standard & Advanced Permissions

There are two categories of permissions. You assign permissions in each category from a different screen.

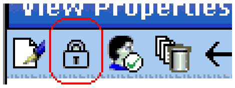
- Standard Permissions - basic functions
- Advanced Permissions - administrator level functions

The following table explains the permissions in Ektron CMS400.NET.

Category	Permission	Allows user/user group to perform this action on content in selected folder
Standard	Read Only	View content
	Edit	Edit content
	Add	Add content
	Delete	Delete content
	Restore	Restore old versions of content
	Library Read Only	View items in the corresponding library folder *See Also:* ”Managing Library Items” on page 152
	Add Images	Upload images to the corresponding library folder
	Add Files	Upload files to the corresponding library folder
	Add Hyperlinks	Add hyperlinks to the corresponding library folder
	Overwrite Library	Overwrite images and files to the corresponding library folder
Advanced	Collections	Manage collections *See Also:* ”Collections” on page 483
	Add Folders	Add sub folders *See Also:* ”Adding Subfolders” on page 59
	Edit Folders	Edit folder properties *See Also:* ”Folder Properties” on page 42
	Delete Folders	Delete the current folder or its subfolders
	Traverse Folders	View the subfolders under the main content folder. By default, the everyone user group has permission to view all subfolders.
	Modify Preapproval	Set or update a folder’s preapproval group. *See Also:* ”Automatic Creation of Tasks Associated with Content” on page 360

Setting Permissions for a Content Folder

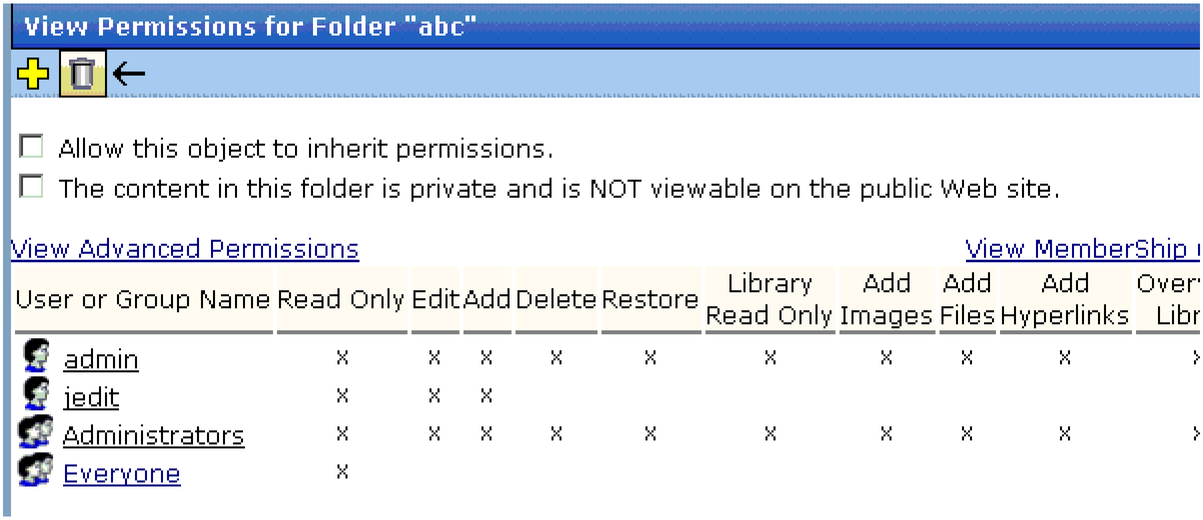
You can set permissions for any content folder and language from the Folder Properties screen. Here is the Permissions button on the Folder Properties screen.



Accessing the Permissions Table

To access the Permissions Table, follow these steps.

1. Select a folder from the left frame of the Workarea.
2. Select the language whose folder properties you want to update.
3. Click the Folder Properties button (📝).
4. The Folder Properties screen appears.
5. Click the Permissions button (🔒).
6. The Permissions Table appears.



☐ Allow this object to inherit permissions.

☐ The content in this folder is private and is NOT viewable on the public Web site.

View Advanced Permissions

View MemberShip

User or Group Name	Read Only	Edit	Add	Delete	Restore	Library Read Only	Add Images	Add Files	Add Hyperlinks	Over Libr
admin	x	x	x	x	x	x	x	x	x	x
jedit	x	x	x							
Administrators	x	x	x	x	x	x	x	x	x	x
Everyone	x									

The Permissions Table displays each user’s abilities to perform actions on content within the selected folder. Since all permissions cannot fit on one screen, you can click **View Advanced Permissions** to see the other group.

After viewing the permissions, you can change them. Below is a list of actions you can perform from this screen.

Actions You Can Perform from the Permissions Table

The following table summarizes actions you can perform from the Permission Table screen.

Action	**How to perform it**	**For more information, see**
View advanced permissions	Click **View Advanced Permissions**	"Standard & Advanced Permissions" on page 549
Add user or group to permission table	Click ✚	"Adding a User or User Group to the Permissions Table" on page 553
Remove user or group from permission table	Click 🗑	"Deleting Users or User Groups from the Permissions Table" on page 554
View membership users	Click **View MemberShip users**	"Private Content & Memberships" on page 439
Have this folder inherit permissions from parent folder	Check box next to **Allow this object to inherit permissions**	"Inheritance" on page 548
Make content in this folder private	Check box next to **The content in this folder is private and can only be viewed by authorized users and members** Note: If **Allow this object to inherit permissions** is checked, you cannot check this box. In that case, this folder is inheriting this setting from its parent folder.	"Private Content" on page 439

Adding a User or User Group to the Permissions Table

To add a user or user group to the Permissions Table, follow these steps.

NOTE Before adding users or groups, you must break inheritance. See ”Inheritance” on page 548.

NOTE If a user and the user group to which that user belongs are both given permission to a folder, the user has all permissions to which he/she is assigned as well as permissions assigned to the user group.

NOTE You can only assign Read Only permission to a Membership user or user group.
See Also: ”Membership Users and Groups” on page 510

1. Access the Permissions Table for the content folder or content, as described in ”Accessing the Permissions Table” on page 551.
2. Click the Add button (✚).
3. The Add Permissions screen appears. Only users and groups not assigned to the Permissions Table appear.
4. Click a user or group to add to the Permissions Table.
5. The Add Permissions screen appears.
6. Check the standard and advanced permissions for the user or group. Refer to ”Standard & Advanced Permissions” on page 549 for a description of permission options.

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

7. Click the Save button (💾).

Editing User or User Group Permissions

To add or remove permissions for a user or group, editing the user or group in the Permissions Table. To do so, follow these steps.

1. Access the Permissions Table for the content folder or content, as described in ”Accessing the Permissions Table” on page 551.

2. Click the user or group for which you want to edit permissions.
3. The Edit Permissions screen appears.
4. To assign any permission, check the box. To remove any permission, uncheck the box.

NOTE Remember to toggle between standard and advanced permissions.

5. Click the Update button (💾).

Deleting Users or User Groups from the Permissions Table

To remove permissions from a user or user group, use the Delete button on the View Permissions window. To do so, follow these steps.

1. Access the Permissions Table for the content folder or content, as described in "Accessing the Permissions Table" on page 551.
2. Click the Delete button (🗑).
3. The Remove Permissions screen appears.
4. Click the user or group to remove from the Permissions Table.
5. A confirmation message appears.
6. Click the **OK** button.

NOTE When you delete the permissions of a user or user group, that change is propagated to all subfolders and content. Also, if the user or group was part of an approval chain, they are removed from it.

Setting Permissions for Content

You can assign permissions to a single content item, overriding the default permissions inherited from the folder. To do so, follow these steps.

1. Access the content by navigating to its folder, selecting a language, and clicking on it.
2. Click the View Permissions button (🔒).

3. Uncheck the box next to **Allow this object to inherit permissions**.
4. A confirmation message appears. Press **OK**.
5. You can perform any action on the content that you can perform on a folder. These options are described in ”Actions You Can Perform from the Permissions Table” on page 552.

Setting Approval Chains

What is an Approval Chain?

An approval chain is a series of users or user groups who must approve content before it can be published on your Web site. When the last person in the chain approves content, it goes live.

Also, if a user deletes content, before it can be removed from **Ektron CMS400.NET**, everyone in the approval chain must approve the deletion.

An approval chain can include any number of users or user groups. However, to be eligible, a user or user group *must* have permissions to the content folder or content item.*See Also:* ”Setting Permissions” on page 547

NOTE If you assign a user group to an approval chain, only *one member* of the group needs to approve the content, not all members.

Also, if a user appears in an approval chain twice (both as a user and part of a user group), the approval chain skips the second approval because the user has already approved the content.

You can set up an approval chain for a content folder or a content item as well as a language. *See Also:* ”Multi-Language Approval Chains” on page 666

Finally, the Approval Method determines if content must be approved by all users in the chain, or only users higher up the chain than the one making the edits.

This chapter explains how to manage approval chains through the following subtopics.

- ”Examples of Approval Chains” on page 557
- ”Inheritance and the Approval Chain” on page 557
- ”Creating an Approval Chain for a Content Folder” on page 557
- ”Editing an Approval Chain For Content” on page 561

- ”The Approval Method” on page 562

NOTE Only Ektron CMS400.NET administrators and users identified on the Manage Members for Role: Folder User Admin screen can modify the approval chain.

Examples of Approval Chains

An approval chain lets you control how and when your Web site is updated. For example, if your Webmaster needs to approve every new content item or update of an existing item, he would be last user in every approval chain and exert total control over the site.

Alternatively, you could set up a less centralized organization, where each department head controls his section. To accommodate this, set up an approval chain for each department, and assign the department head as the last person in the chain.

On the opposite extreme, you can delete the approval chain for a content item or folder. In this case, every content item in that folder is published as soon as a user submits it for publication.

Inheritance and the Approval Chain

By default, every content folder and item inherits the approval chain from its parent folder. To modify an approval chain, either modify the parent’s approval chain or break inheritance. This procedure is described in ”Inheritance” on page 548.

Creating an Approval Chain for a Content Folder

Before you can edit an approval chain, you first have to view it.

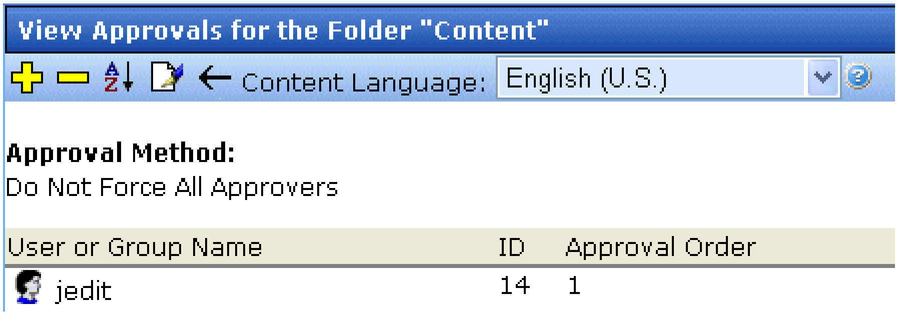
See Also:

- ”Viewing a Folder’s Approval Chain” on page 558
- ”Adding Approvers” on page 559
- ”Editing the Approval Order” on page 560
- ”Deleting Approvers” on page 561

Viewing a Folder’s Approval Chain

To view a folder’s approval chain, follow these steps.

1. Select a folder from the left frame of the Workarea.
2. Using the **View** field and languages drop-down list, select the language of the approval chain you want to view.
3. Click the Properties button ( ).
4. Click the Approvals button ( ).
5. The approval chain appears in the lower section of the screen.



View Approvals for the Folder "Content"

Content Language: English (U.S.)

Approval Method:
Do Not Force All Approvers

User or Group Name	ID	Approval Order
jedit	14	1

This screen shows the following information about the approval chain.

- its language
- every user and user group in the approval chain
- the approval order
- the approval method (*See also:* ”Changing the Approval Method” on page 563*)*
- toolbar buttons for modifying the approval chain and method

Actions You can Perform from the Approvals Screen

From this screen, you can perform these actions.

Action	Button	See this section for details
Add approvers	✚	”Adding Approvers” on page 559
Remove approvers	▬	”Deleting Approvers” on page 561
Change the order of users in the approval chain	A Z ↓	”Editing the Approval Order” on page 560
Change the approval method	✎	”Changing the Approval Method” on page 563
Change the language of the approval chain	**Content Language**	”Multi-Language Approval Chains” on page 666

Adding Approvers

To add a user or user group to the approval chain, follow these steps.

1. Access the approval table, as described in ”Viewing a Folder’s Approval Chain” on page 558.
2. Select the language of the approval chain. The chain only applies to content in this language.
3. Click the Add button (✚).
4. The Add Approvals screen appears.

NOTE Only users and user groups with permissions to the folder appear. See ”Adding a User or User Group to the Permissions Table” on page 553 for more information.

5. Click the user or user group to add to the approval chain.
6. A confirmation message appears.
7. Click **OK**.

NOTE If you assign a user group to an approval chain, only one member of the group needs to approve the content, not all members.

Editing the Approval Order

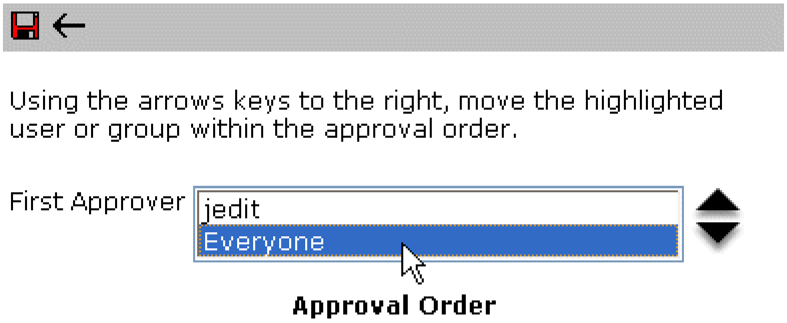
After you assign approvers to a folder, you may want to adjust the approval order. Place the user or group with final review at the end of the approval chain (that is, *the highest number*).

For example, if you have a content contributor whose edits must be approved by a department head, and the Webmaster has final review of all content, the approval order would look like this.

User or Group Name	Approval Order
Content contributor	1
Department Head	2
Webmaster	3

To edit the approval order, follow these steps.

1. Access the approval table as described in "Viewing a Folder's Approval Chain" on page 558.
2. Select the language.
3. Click the Reorder button ( ).
4. The Edit Approval Order screen appears.
5. Click the user or group whose approval order you want to change.



Using the arrows keys to the right, move the highlighted user or group within the approval order.

First Approver

jedit

Everyone

Approval Order

6. Click the Up (▲) or Down (▼) arrow to move the user or group to the desired order.
7. Click the Save button (💾).

Deleting Approvers

NOTE If a user in an approval chain is deleted from the permissions table, he or she is automatically deleted from the approval chain.

To delete a user or user group from an approval chain, follow these steps.

1. Access the approval table as described in ”Viewing a Folder’s Approval Chain” on page 558.
2. Select the language.
3. Click the Remove button (▬).
4. The Remove Approval screen appears.
5. Click the user or group that you want to remove from the approval chain.
6. A confirmation message appears.
7. Click **OK**.

Editing an Approval Chain For Content

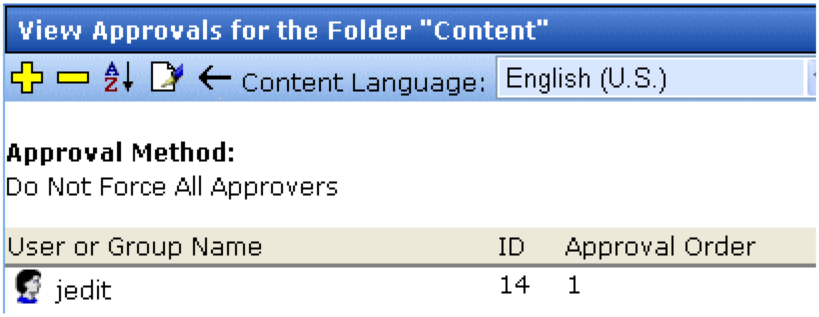
At times, you may need to change the approval chain for a specific content item. Use the Approvals button (👤) on the View Content screen to change a content item’s approval chain.

Viewing an Approval Chain for Content

To view the approval chain for content, follow these steps.

1. Select the content.
2. Click the View Permissions button (🔒).
3. Uncheck the checkbox next to **Allow this object to inherit permissions**.

4. Return to the View Content screen.
5. Click the Approvals button ( ).
6. The content's approvals table appears.



View Approvals for the Folder "Content"

Content Language: English (U.S.)

Approval Method:
Do Not Force All Approvers

User or Group Name	ID	Approval Order
jedit	14	1

After viewing the content's approval chain, you can perform the same actions on it as you can perform on a folder. This list of actions is available from "Actions You can Perform from the Approvals Screen" on page 558.

The Approval Method

The Approval Method determines if content must be approved by all users in the chain, or only users higher up in the chain than the user making the edits. The approval method only affects the approval process if the person submitting content for publishing is a member of the approval chain.

Two approval methods are available.

Approval Method	Description
Force All Approvers	*All* users in approval chain must approve the content, beginning with the first
Do Not Force All Approvers	Approvers *after the user submitting content* in the approval chain must approve the content

For example, assume the approval chain is set as below.

User or Group Name	Approval Order
Content contributor	1
Department Head	2
Webmaster	3

If the Approval Method is **Force All Approvers**, and the Department Head submits content, the content must be approved by the content contributor, then the department head, and the Webmaster before it is published.

If the Approval Method is **Do Not Force All Approvers**, and the Department Head submits content, the content must only be approved the Webmaster before it is published.

Changing the Approval Method

By default, the approval method is set to **Do Not Force All Approvers**. To change the approval method for a content folder or item, follow these steps.

1. Access the approval table, as described in ”Viewing a Folder’s Approval Chain” on page 558.
2. Click the Edit button (📝).
3. The Edit Approval Method screen appears.
4. Select an approval method by clicking the radio button.
5. Click the Save button (💾).

Defining Roles

Ektron CMS400.NET contains an Administrators User Group. Any user who is a member of that group automatically has full administrator privileges. *See Also:* ”Guidelines for Using The Folder-User Admin Role” on page 566

The Roles feature lets you assign *limited* or *specific* administrator privileges to users who should not have full administrator privileges. For example, you can let certain users create, redirect, or remove tasks but deny them other privileges normally granted to administrators.

Best Practice

When creating new user groups to use with roles, assign names as a mnemonic aid for the role, especially for folder-specific rules. For example, the **Marketing Folder Admins** user group could be used for all role members who can administer the marketing folder.

NOTE The Permissions Table lets you control which users can manage a folder’s properties, its content, library items, and create or edit collections. (*See Also:* ”Setting Permissions” on page 547) So, together, the Roles feature and the Permission Table give you the ability to assign administrative privileges to users who are not members of the Administrators group.

This section explains the use of Roles through the following topics.

- ”Using the Roles Screens” on page 564
- ”Guidelines for Using The Folder-User Admin Role” on page 566
- ”List of Administrator Privileges” on page 567

Using the Roles Screens

Use the Roles screens to assign limited administrator privileges. To access the Roles screens, go to the **Ektron CMS400.NET** Workarea and select **Settings** > **Roles**.

NOTE In the screens listed below, you can select users or groups. However, you can never select the Administrators group, because that group already has all permissions.

The following table describes the Roles screens.

Screen	Lets you give a user or user group the ability to	For more information, see
Alias-Edit	Assign a manual alias to content	”Permissions for Manual Aliasing” on page 460
Calendar- Admin	Create, edit and delete calendars	”Calendar Permissions” on page 429
Collection and Menu Admin	Create, edit and delete Collections and Menus via the **Modules** tab. Note: To manage permissions for creating collections and menus via the folder’s New > Collection or New> Menu option, use folder permissions. *See Also:* ”Setting Permissions” on page 547	”Collection Permissions” on page 484; ”Menu Feature” on page 491
Metadata-Admin	View, create and edit metadata definitions	”Metadata” on page 94
Business Rule Editor	Create or edit Business Rules and Rulesets	”Business Rules” on page 467
Smart Forms Admin	Create or edit Smart Forms	”Working with Smart Forms” on page 163
Task Create	Create tasks	”Task Permissions” on page 350
Task Delete	Delete tasks	”Task Permissions” on page 350
Task Redirect	Redirect tasks	”Task Permissions” on page 350
Template Configuration	View, create, update and delete system templates	”Creating/Updating Templates” on page 62
User-Admin	Create, view, edit, and delete users and user groups	”Managing Users & User Groups” on page 499

Screen	**Lets you give a user or user group the ability to**	**For more information, see**
XLIFF-Admin	Use the Language Xport feature, which copies content into XLIFF files that can be submitted to a translation agency.	”Using the Language Export Feature” on page 655
Personalization	Personalize a web page on your site	”Permissions that Affect Personalization” on page 488
Folder-User Admin	View and edit folder properties. These users can update properties, permissions, the approval chain, metadata, Web alerts, purge history, etc. For example, create a user group and give it permission to manage the top-level marketing folder. Members of the group can do everything to that folder and its subfolders, but lack authority over other folders. *See Also:* ”Guidelines for Using The Folder-User Admin Role” on page 566	”Folder Properties” on page 42
Custom Permissions	Would be used by a developer when extending **Ektron CMS400.NET**’s standard features.	

Guidelines for Using The Folder-User Admin Role

When setting up users and groups for administrative access over folders, keep these in mind.

- After being identified on the Manage Members for Role: Folder User Admin screen, users or groups must also be given at least Read-Only permission for individual folders on the **Folder Properties** > **View Permissions for Folder** screen. *See Also:* ”Setting Permissions” on page 547
- You *must* use the same identity on the Manage Members for Role: Folder User Admin and Folder properties screens. So, if a user group is listed for the role, use the same group when

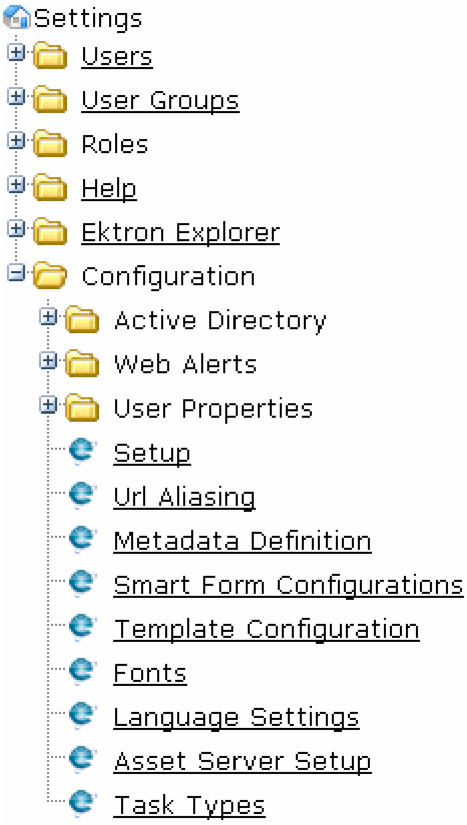
assigning folder permissions, not simply a group member. Conversely, if individual users are listed on the role screen, they must be specified in the folder permission.

- Ektron *strongly* recommends adding only user groups to the Folder User Admin role, not individual users.

  If you set up an individual user as a role member, he could accidentally receive administrative rights to other folders.

List of Administrator Privileges

Administrator privileges include access to most screens that appear when you select **Settings** > **Configuration** from the lower left panel of the Workarea (illustrated below).


Settings
Users
User Groups
Roles
Help
Ektron Explorer
Configuration
Active Directory
Web Alerts
User Properties
Setup
Url Aliasing
Metadata Definition
Smart Form Configurations
Template Configuration
Fonts
Language Settings
Asset Server Setup
Task Types

Administrators can also

- edit folder properties (including Web alerts, metadata, permissions, and the approval chain)
- manually alias content
- add, edit, or delete a calendar
- create, view, edit, and delete metadata definitions
- create, redirect, and delete tasks
- export content for translation to another language using XLIFF
- perform all personalization functions

Active Directory Feature

The Active Directory feature allows you to retrieve user and user group information from the Microsoft Windows Active Directory (AD) into Ektron CMS400.NET. As a result, you can administer user information from one place only, and users need to remember only one password/username combination to sign on to the network and Ektron CMS400.NET.

To learn more about Active Directory, see http://www.microsoft.com/windowsserver2003/technologies/directory/activedirectory/default.mspx.

The Active Directory feature has two implementation modes, described in the following table. Choose the mode that best meets your needs.

Mode	Information Shared between AD and CMS	How to Implement	For more information, see
user authentication only	• user logon name • domain • password	On the Active Directory Setup screen, check **Enable Active Directory authentication**.	"User Authentication Only Mode" on page 617
active directory integration	• user logon name • domain • password • user's first and last name • email address • user groups • user's group memberships	On the Active Directory Setup screen, check **Enable Active Directory authentication** and **Enable Active Directory integration**. You may also want to check **Enable automatic addition of user from AD** and **Enable automatic addition of user to groups**.	"Active Directory Integration" on page 571

WARNING!

To successfully operate Ektron CMS400.NET with Active Directory, the anonymous access user must be running as a domain user account. It cannot be run under a local user account. That domain account can be permission-limited if security is a concern, but the account must have access to the `c:\windows\temp` directory. If anonymous access user is not running as a domain user account, you receive an Automation Error when viewing the Active Directory Setup page.

After Active Directory is installed correctly, you can view the AD Setup page and click edit, but when you try to save the settings, you receive a User Properties Verification error. At that point, you must either set up IIS to run as a domain user or the user properties are invalid. The domain user must have query permission into Active Directory so he can retrieve that information.

After you change the user account under which IIS is running, run Net Stop IISAdmin and Net Start W3SVC from the DOS prompt before trying to save the settings again.

WARNING!

Ektron strongly recommends configuring a secure socket layer (SSL), especially if you are using Active Directory Integration. SSL encrypts passwords that are otherwise sent as clear text to the Ektron CMS400.NET server. See SSL Support in the **Ektron CMS400.NET** Setup Manual for more information.

Active Directory Integration

This chapter covers the following topics:

- ”How Information is Transferred from AD to Ektron CMS400.NET” on page 571
- ”Which Information is Transferred from AD to Ektron CMS400.NET” on page 572
- ”Logging into a System that Uses AD Integration” on page 574
- ”Single Sign On” on page 574
- ”Associating User Information in AD with Ektron CMS400.NET” on page 583
- ”User Groups” on page 586
- ”The Screens of the Active Directory Feature” on page 593
- ”Setup Guidelines” on page 612
- ”Disabling AD Integration” on page 614

How Information is Transferred from AD to Ektron CMS400.NET

Ektron CMS400.NET does not write to the AD – it only reads from it. This results in the following changes to how user information is handled within Ektron CMS400.NET.

- Once you enable AD integration, all changes to user and user group information must be made in the AD -- the Ektron CMS400.NET Edit User and User Group screens change to primarily view screens.
- When adding a new user or user group toEktron CMS400.NET, you can only select users and groups in the AD. If the user or user group does not exist in the AD, create them there first, and then import the user or group into Ektron CMS400.NET.

Which Information is Transferred from AD to Ektron CMS400.NET

Ektron CMS400.NET accesses the following AD user information.

- Authentication (password, user logon name, and domain) for signing in to Ektron CMS400.NET.

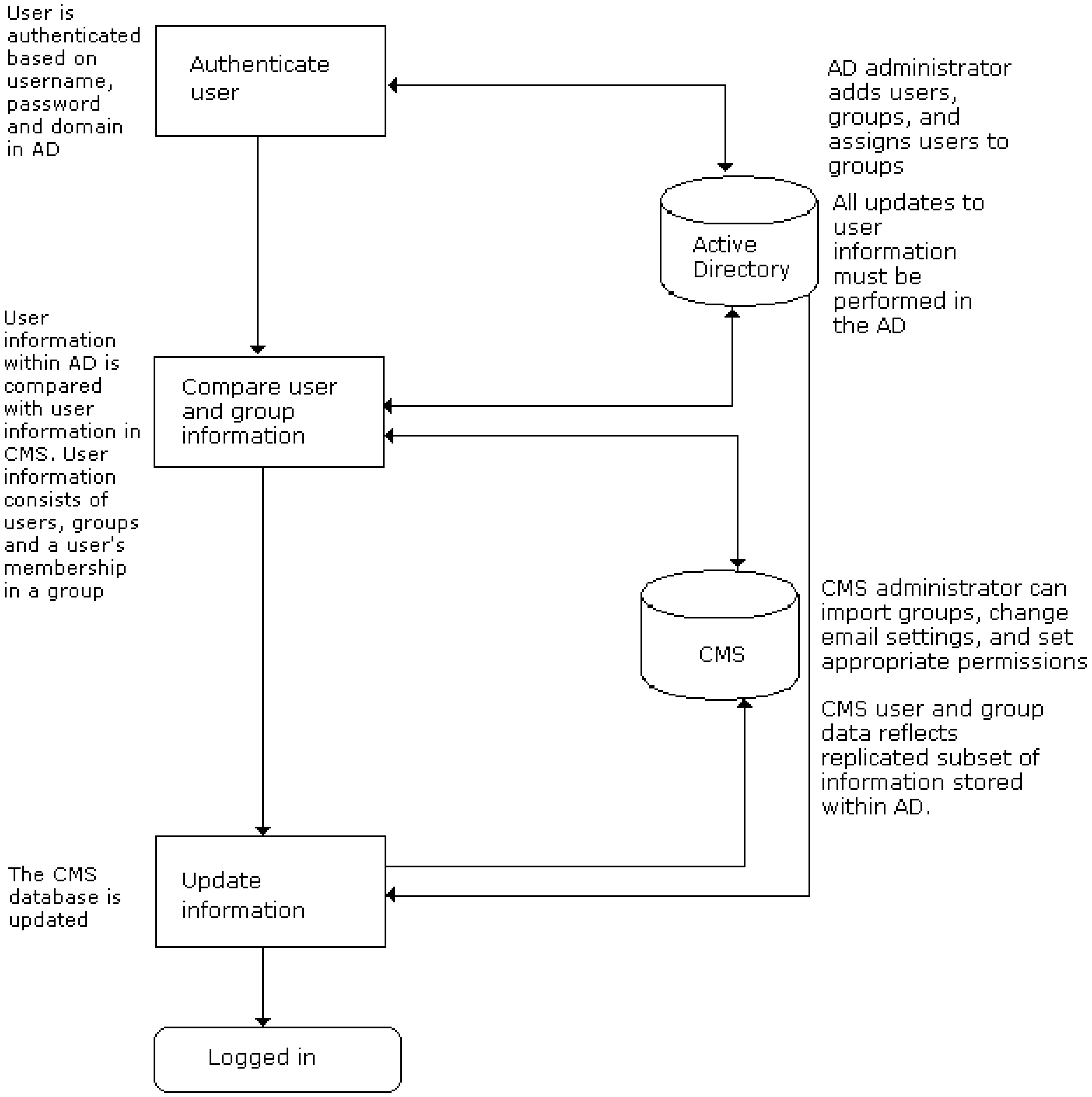
  The password is not stored in Ektron CMS400.NET – the application only refers to the password during sign in.
- User information, listed in the following table

Field in AD	**AD attribute**	**Corresponding field in Ektron CMS400.NET**
User logon name (pre-Windows 2000)	sAMAccountName	Domain and Username Note: Users can share a name in different domains. For example, juser/planets.com and juser/saturn.com. Otherwise, user names must be unique.
Last Name	sn	Lastname
First Name	givenName	Firstname
Email	mail	email Address

- user group information, listed in the following table.

Field in AD	**AD attribute**	**Corresponding field in Ektron CMS400.NET**
Group Name (pre-Windows 2000)	cn	Domain and User group name Note: User groups can share a name in different domains. For example, editors/planets.com and editors/saturn.com. Otherwise, user group names must be unique.

The following diagram illustrates the components of the Active Directory feature.


User is authenticated based on username, password and domain in AD
Authenticate user
AD administrator adds users, groups, and assigns users to groups
Active Directory
All updates to user information must be performed in the AD
User information within AD is compared with user information in CMS. User information consists of users, groups and a user's membership in a group
Compare user and group information
CMS
CMS administrator can import groups, change email settings, and set appropriate permissions
CMS user and group data reflects replicated subset of information stored within AD.
The CMS database is updated
Update information
Logged in

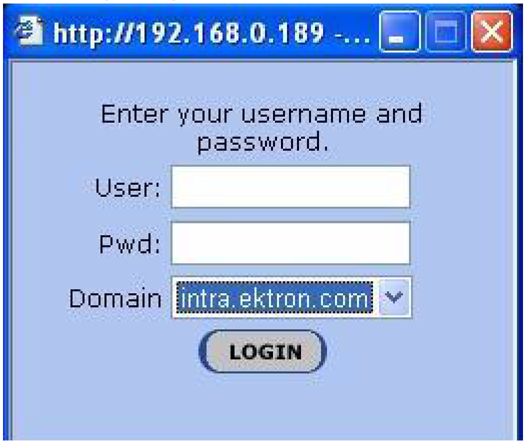
Overview of Active Directory Integration

A key component of this feature is keeping information in the AD consistent with Ektron CMS400.NET. The next sections explain

- ”Logging into a System that Uses AD Integration” on page 574
- ”Associating User Information in AD with Ektron CMS400.NET” on page 583
- ”User Groups” on page 586
- ”The Screens of the Active Directory Feature” on page 593

Logging into a System that Uses AD Integration

Because usernames and passwords are stored in the AD by domain, the AD sign on procedure requires you to select a domain name. So, if AD integration is enabled, the sign on screen includes a drop-down list that prompts the user to select a domain.



Domain intra.ektron.com

NOTE Your organization determines AD domain names.

For more information about logging in, see ”Logging Into an Ektron CMS400.NET Web Site” on page 6.

Single Sign On

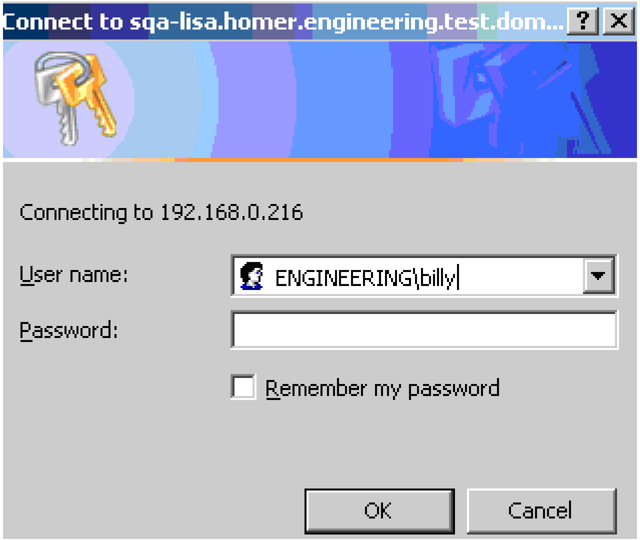
You can implement a Single Sign On feature that lets a user bypass the Login screen. The feature retrieves the user’s Windows login information from the server to authenticate access to **Ektron CMS400.NET**.

How Single Sign on Works

The feature uses a variable called `User.Identity.Name`. This holds the user's account/domain in Active Directory, and has the format `[domain]\[username]`. For example, `EKTRON1\skearney`. This variable is set when a user authenticates against a Windows server.

The user logs in to **Ektron CMS400.NET** by going to the site and clicking the login server control. If the variable is passed and Active Directory is enabled, the server control opens the autologin.aspx page. Next, the opening window refreshes just like a normal login, except the user is not prompted to enter a username, password, and domain.

However, if the user‘s computer is not on a domain, not on the same domain as **Ektron CMS400.NET**, or does not include the **Ektron CMS400.NET** server as a trusted site, the following login screen appears.


Connect to sqa-lisa.homer.engineering.test.dom...
?
Connecting to 192.168.0.216
User name:
Password:
☐ Remember my password
OK
Cancel

User name: ENGINEERING\billy

If Active Directory is not enabled, the normal login.aspx page appears.

Setting up Single Sign On

The Single Sign On login process uses two files: autologin.aspx (in the `workarea/SSO` directory) and login.aspx (in the `workarea` directory).

Once set up, user authentication is enabled from any domain that this server can reach. For example, if **Ektron CMS400.NET** is located in a third level domain, users from third, second, and first level domains can authenticate.

Setting up Single Sign On involves these procedures.

- ”Modifying Web.config for Single Sign On” on page 576
- ”Adjusting Security Settings for the Site Root Folder” on page 576
- ”Adjusting Security Settings for autologin.aspx” on page 578
- ”Adjusting Security Settings for login.aspx” on page 581
- ”Adjusting the Login Server Control” on page 582

After completing these procedures, enable Active Directory within **Ektron CMS400.NET** (if it isn’t already enabled). *See Also:* ”Setup Guidelines” on page 612

Ektron recommends turning on the auto add options (user and group).

Modifying Web.config for Single Sign On

1. Open the web.config file, located on your site’s root folder.
2. Find the `ek_AUTH_protocol` element.
3. Change its value to **GC**. It should look like this:

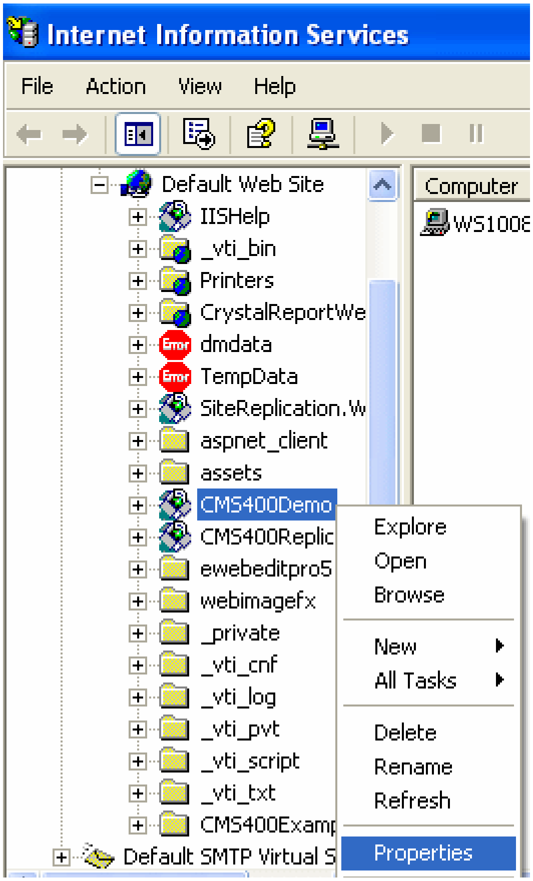
```
<add key="ek_AUTH_Protocol" value="GC" />
```

4. Find the `authentication` element.
5. Change the value of the `impersonate` attribute to **true**. It should look like this:

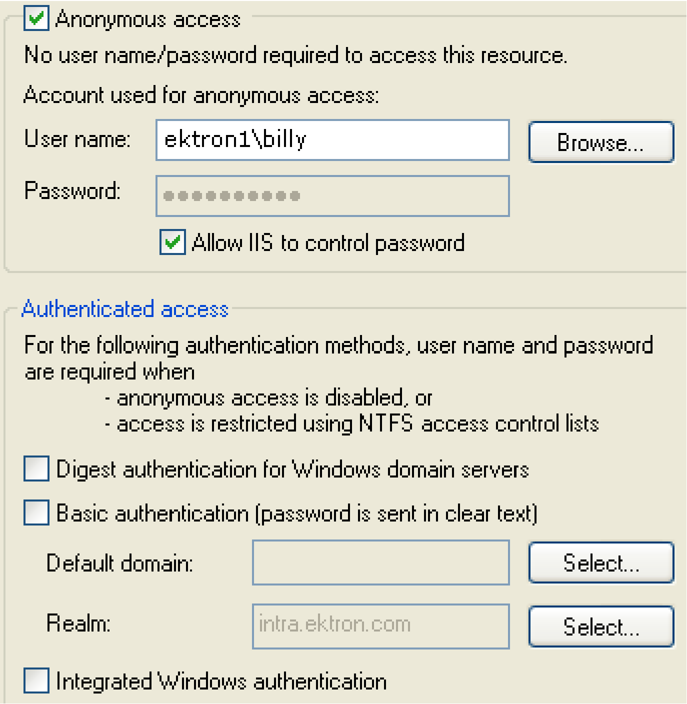
```
<authentication mode="Windows" />

    <identity impersonate="true" userName="" password=""/>
```

Adjusting Security Settings for the Site Root Folder

1. Go to **Windows Control Panel > Administrative Tools > Internet Information Services**.
2. Within IIS, go to **Web Sites > Default Web Site > CMS400 Demo**.
3. Right click the CMS400 Demo folder and select **Properties**.


Internet Information Services
File
Action
View
Help
Default Web Site
IISHelp
_vti_bin
Printers
CrystalReportWe
dmdata
TempData
SiteReplication.W
aspnet_client
assets
CMS400Demo
CMS400Replic
ewebeditpro5
webimagefx
_private
_vti_cnf
_vti_log
_vti_pvt
_vti_script
_vti_txt
CMS400Examp
Default SMTP Virtual S
Computer
WS1008
Explore
Open
Browse
New
All Tasks
Delete
Rename
Refresh
Properties

4. Click the **File security** tab then the **Edit** button.
5. Uncheck everything except **Anonymous Access**. The **Account used for anonymous access** should specify a domain account, preferably the root of the Active Directory tree.



☑ Anonymous access

No user name/password required to access this resource.

Account used for anonymous access:

User name: ektron1\billy

Password: ●●●●●●●●●●

☑ Allow IIS to control password

Authenticated access

For the following authentication methods, user name and password are required when
- anonymous access is disabled, or
- access is restricted using NTFS access control lists

☐ Digest authentication for Windows domain servers

☐ Basic authentication (password is sent in clear text)

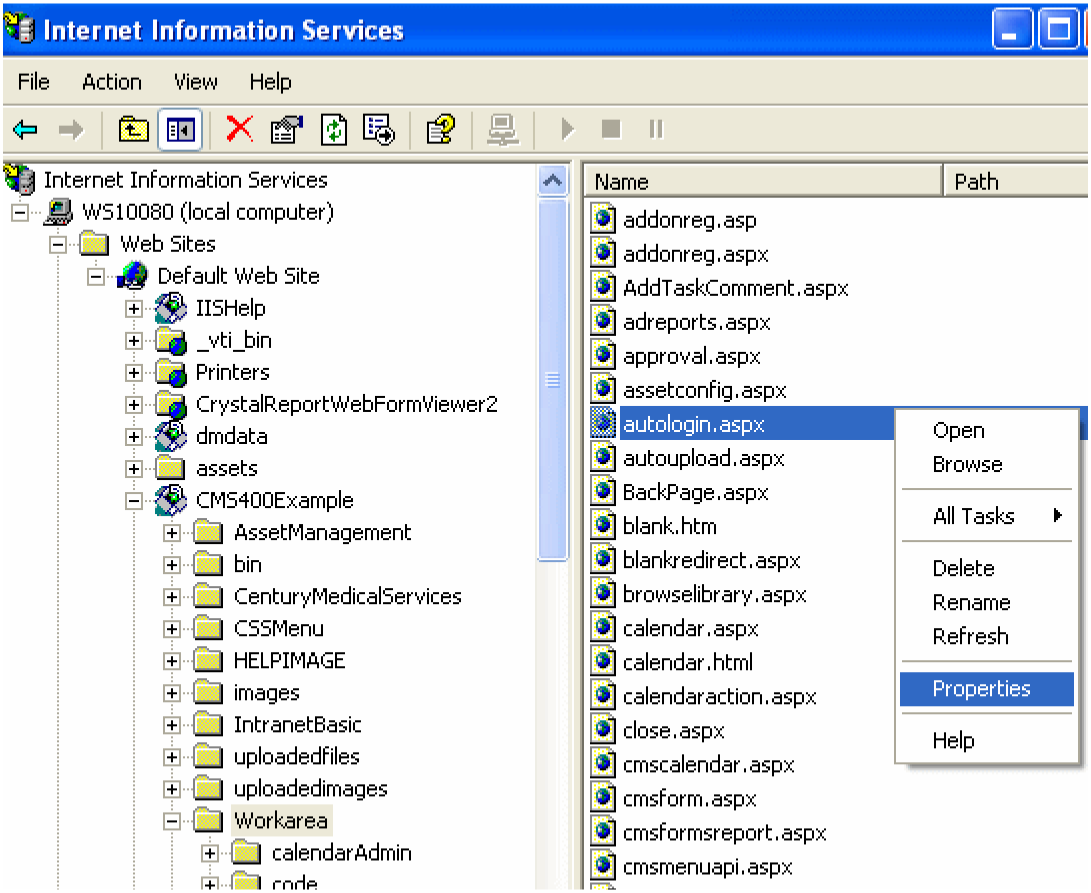
Default domain:

Realm: intra.ektron.com

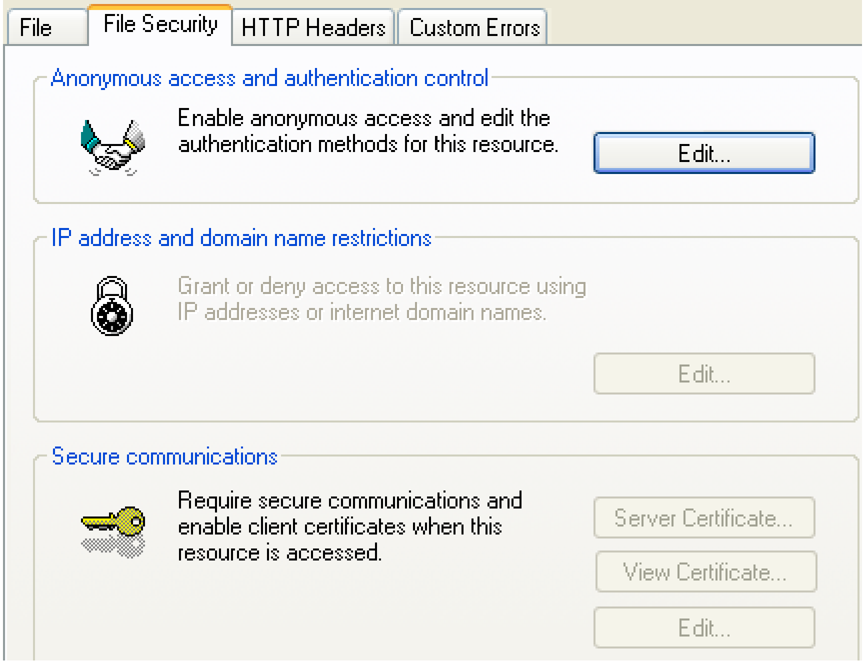
☐ Integrated Windows authentication

Adjusting Security Settings for autologin.aspx

1. Go to **Windows Control Panel > Administrative Tools > Internet Information Services**.
2. Within IIS, go to **Web Sites > Default Web Site > *your Web site's root folder* > Workarea > SSO > autologin.aspx**.
3. Right click autologin.aspx and select **Properties**.


Internet Information Services
File
Action
View
Help
Internet Information Services
WS10080 (local computer)
Web Sites
Default Web Site
IISHelp
_vti_bin
Printers
CrystalReportWebFormViewer2
dmdata
assets
CMS400Example
AssetManagement
bin
CenturyMedicalServices
CSSMenu
HELPIMAGE
images
IntranetBasic
uploadedfiles
uploadedimages
Workarea
calendarAdmin
code
Name
Path
addonreg.asp
addonreg.aspx
AddTaskComment.aspx
adreports.aspx
approval.aspx
assetconfig.aspx
autologin.aspx
autoupload.aspx
BackPage.aspx
blank.htm
blankredirect.aspx
browselibrary.aspx
calendar.aspx
calendar.html
calendaraction.aspx
close.aspx
cmscalendar.aspx
cmsform.aspx
cmsformsreport.aspx
cmsmenuapi.aspx
Open
Browse
All Tasks
Delete
Rename
Refresh
Properties
Help

4. Click the **File security** tab and the **Edit** button.

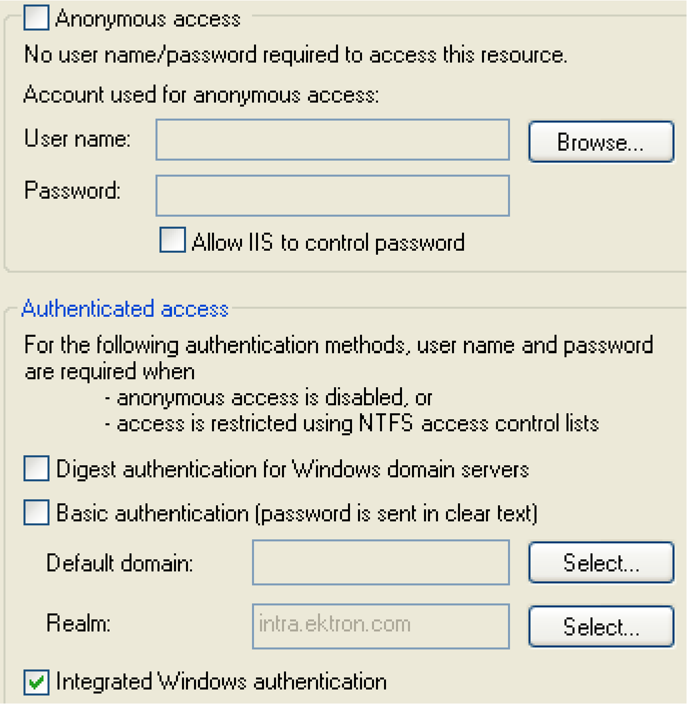

File
File Security
HTTP Headers
Custom Errors
Anonymous access and authentication control
Edit...
IP address and domain name restrictions
Edit...
Secure communications
Server Certificate...
View Certificate...
Edit...

Enable anonymous access and edit the authentication methods for this resource.

Grant or deny access to this resource using IP addresses or internet domain names.

Require secure communications and enable client certificates when this resource is accessed.

5. Under **Authenticated Access**, uncheck all except **Integrated Windows Authentication**.



☐ Anonymous access

No user name/password required to access this resource.

Account used for anonymous access:

User name:

Password:

☐ Allow IIS to control password

Authenticated access

For the following authentication methods, user name and password are required when
- anonymous access is disabled, or
- access is restricted using NTFS access control lists

☐ Digest authentication for Windows domain servers

☐ Basic authentication (password is sent in clear text)

Default domain:

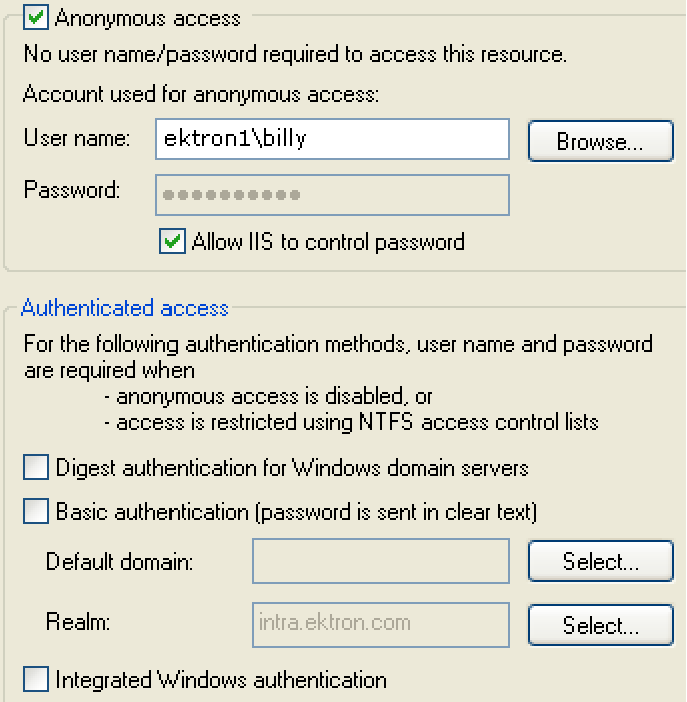
Realm: intra.ektron.com

☑ Integrated Windows authentication

As a result, autologin.aspx will pass credentials from the logged-in user's desktop.

Adjusting Security Settings for login.aspx

1. Within **IIS > Web Sites > Default Web Site >** ***your web site root*** **> Workarea**, right click login.aspx and select **Properties**.
2. Click the **File security** tab then the **Edit** button.
3. Uncheck everything except **Anonymous Access**. The **Account used for anonymous access** should specify a domain account, preferably the root of the Active Directory tree.



☑ Anonymous access

No user name/password required to access this resource.

Account used for anonymous access:

User name: ektron1\billy

Password: ●●●●●●●●●●●

☑ Allow IIS to control password

Authenticated access

For the following authentication methods, user name and password are required when
- anonymous access is disabled, or
- access is restricted using NTFS access control lists

☐ Digest authentication for Windows domain servers

☐ Basic authentication (password is sent in clear text)

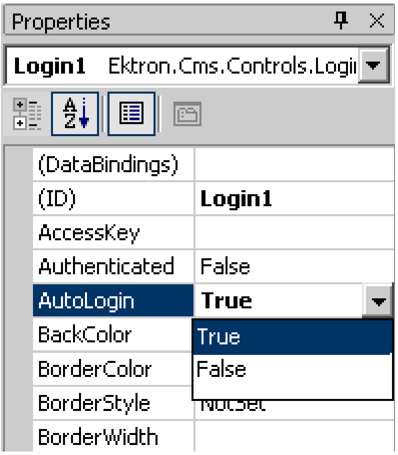
Default domain:

Realm: intra.ektron.com

☐ Integrated Windows authentication

Adjusting the Login Server Control

4. In Visual Studio.NET, open the Login server control and set the AutoLogin property to **True**. (Server Controls are explained in the **Ektron CMS400.NET** Developer’s Manual.)



Properties

Login1 Ektron.Cms.Controls.Logi

(DataBindings)	
(ID)	**Login1**
AccessKey	
Authenticated	False
AutoLogin	**True**
BackColor	
BorderColor	
BorderStyle	NotSet
BorderWidth	

Associating User Information in AD with Ektron CMS400.NET

A key component of the Active Directory Integration feature is to maintain consistent information between the AD and Ektron CMS400.NET. This section explains the transfer of user information between AD and Ektron CMS400.NET when integration is first enabled and on an ongoing basis.

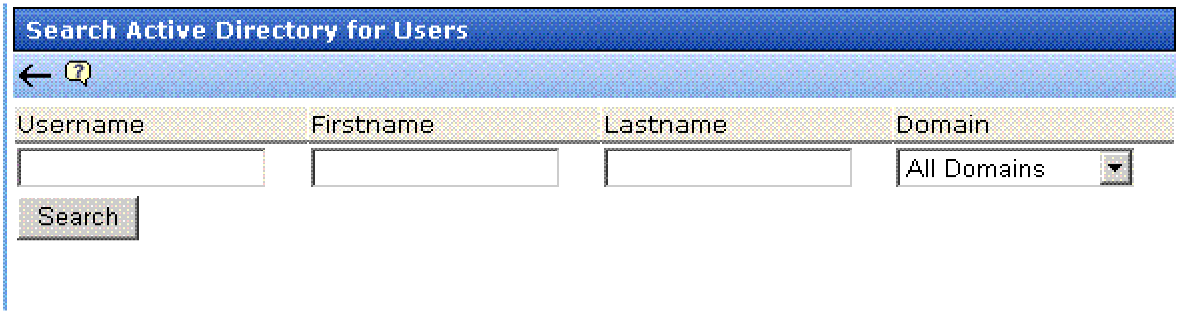
This section covers the following topics.

- ”Adding User Information from AD to Ektron CMS400.NET” on page 583
- ”When Integration is First Enabled” on page 584
- ”After Integration is Enabled” on page 585
- ”Editing User Information in Ektron CMS400.NET” on page 585
- ”Deleting Users” on page 586
- ”Replacing a User” on page 586

Adding User Information from AD to Ektron CMS400.NET

Before using the AD integration feature, add all AD users that will use your Web site to Ektron CMS400.NET. To copy an AD user into Ektron CMS400.NET, follow these steps.

1. From the left side of the Workarea, click **Users**.
2. Click the Add Users button ( ).
3. The Search Active Directory for Users screen appears.



4. From the **Domain** pull-down list, select the domain from which you want to add a user.

5. Enter as much information as you know into the other fields.
6. Click the **Search** button.
7. A new screen displays all users that satisfy the search criteria.
8. Click the check box under the **Add** column to add users to Ektron CMS400.NET.
9. Click the Save button (💾).

When Integration is First Enabled

Ektron CMS400.NET Database Already Implemented

If **Enable automatic addition of user from AD** is checked on the Active Directory Setup screen, user information is copied from the AD to Ektron CMS400.NET when that user logs in or is added to Ektron CMS400.NET.

See Also: ”The Active Directory Setup Screen” on page 597

The first time the user information is copied, the AD information overwrites all Ektron CMS400.NET information. To learn how information is updated from then on, see ”After Integration is Enabled” on page 585.

If two or more AD users have the same Ektron CMS400.NET user logon name but different domains (for example, JDoe in Eng.Acme.com and JDoe in Mkt.Acme.com) and that username (JDoe) also exists in Ektron CMS400.NET, the Active Directory Setup and Active Directory Status screens indicate this discrepancy by the following message:

CMS users need to be associated with Active Directory users.

Click the message to proceed to the Associate Ektron CMS400.NET Users to Active Directory Users screen and associate an AD user with the Ektron CMS400.NET user.

See Also: ”Associating Ektron CMS400.NET Users with Active Directory Users” on page 603

Ektron CMS400.NET is Being Installed, so No User Database Exists

Go to the Search Active Directory for Users Screen and select AD users that will use Ektron CMS400.NET. When you add a user, the user information is copied from the AD to Ektron CMS400.NET.

See Also: ”The Search Active Directory for Users Screen” on page 608

NOTE You can only select AD users that do not already exist in Ektron CMS400.NET. Also, the Active Directory Setup screen can restrict AD integration to one domain. If it does, you can only search for users within that domain.

After Integration is Enabled

User information is copied from the AD to Ektron CMS400.NET when either of these events occurs:

- the user logs in
- someone clicks the Refresh button (🔄) on the user’s View User Information screen

See Also: ”The View User Information Screen” on page 607

If a user’s last name, first name, email field, or group membership changed in the AD, those changes are copied to Ektron CMS400.NET. However, if a user’s *logon name* changed in the AD, that change is not copied to Ektron CMS400.NET because Ektron CMS400.NET uses that field to identify the user. Instead, that discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should proceed to the Associate Ektron CMS400.NET Users to Active Directory Users screen, where you can update the AD user associated with the Ektron CMS400.NET user.

See Also: ”Associating Ektron CMS400.NET Users with Active Directory Users” on page 603

Editing User Information in Ektron CMS400.NET

Because **Ektron CMS400.NET** does not write to the AD, you can only change the **User Language** and **Disable email Notifications** fields within the Ektron CMS400.NET Edit User screen. You must edit all other user fields from the AD.

Deleting Users

If a user is deleted in AD, Ektron CMS400.NET does not automatically delete the user. However, the user's login fails because he cannot be authenticated.

The user remains in Ektron CMS400.NET, and the discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should delete the user from Ektron CMS400.NET using the Delete User function.

See Also: "Deleting a User" on page 504

NOTE If you mistakenly delete all users with administrative privileges, you can still sign in using the builtin user's username and password. For more information, see "BuiltIn User" on page 32.

Replacing a User

If you associate the wrong AD user with a Ektron CMS400.NET user, you can replace the user. If you do, all Ektron CMS400.NET privileges and workflow responsibilities assigned to the old user transfer to the new one.

Follow these steps to associate a Ektron CMS400.NET user with a new AD user.

1. From the left side of the Workarea, click **Users**.
2. Click the user you want to replace.
3. Click the Associate CMS User with Different AD User button (🔍).
4. Select a user to replace the user you selected in Step 2.
5. Click the Save button (💾).

When you complete this procedure, the first user is deleted from Ektron CMS400.NET.

User Groups

This section explains how a user's group membership is copied from the AD to the Ektron CMS400.NET system when integration is first enabled, and then on an ongoing basis. Once assigned to a group, the user automatically receives all Ektron CMS400.NET privileges and workflow responsibilities associated with it.

NOTE The Active Directory has two kinds of user groups: security and distribution. Ektron CMS400.NET does not distinguish between them – as long as a user is a member of either kind of group, group information is imported to Ektron CMS400.NET.

This section explains the following topics.

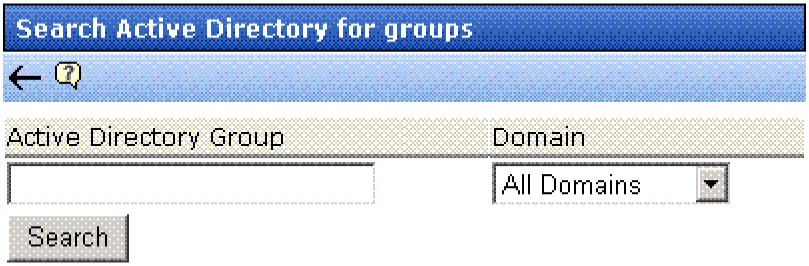
- ”Copying User Groups from AD to Ektron CMS400.NET” on page 587
- ”Associating a User’s AD Group Information with Ektron CMS400.NET” on page 588
- ”Mapping the Administrator Group” on page 589
- ”User Belongs to AD Group that Does Not Exist in Ektron CMS400.NET” on page 591
- ”User Belongs to Ektron CMS400.NET Group that Does Not Exist in AD” on page 591
- ”Removing Users from a Group” on page 591
- ”Adding User Groups” on page 592
- ”Adding a User to a Group” on page 592
- ”Replacing a User Group” on page 592
- ”Deleting a User Group” on page 592

Copying User Groups from AD to Ektron CMS400.NET

Before using the AD integration feature, copy all AD groups you will use in your Web site into Ektron CMS400.NET. To copy an AD group into Ektron CMS400.NET, follow these steps.

1. From the left side of the Workarea, click the **User Groups** folder.
2. Click the Add Groups button ().

The Search Active Directory for Groups screen appears.



3. From the **Domain** drop-down list, select the domain from which you want to add a user group.

NOTE The Active Directory Setup screen can restrict AD integration to one domain. If it does, you can only search within that domain.

4. Enter as much information as you know into the Active Directory Group field.
5. Click the **Search** button.
6. A new screen displays all groups that satisfy the search criteria.
7. Click the check box under the **Add** column to add users to Ektron CMS400.NET.
8. Click the Save button (💾).

Associating a User's AD Group Information with Ektron CMS400.NET

When Integration is First Enabled

Ektron CMS400.NET User Database Already Exists

If **Auto Add User To Group** is checked (on the Active Directory Setup screen), a user's group membership is first copied from the AD to Ektron CMS400.NET when a user logs in or is added. At this time, any AD group memberships overwrite Ektron CMS400.NET group memberships *except* the Everyone group, to which all users belong.

NOTE The Everyone group, unlike other Ektron CMS400.NET groups, is not associated with an AD group. It is an all-encompassing group with no special permissions.

If a user belongs to an AD user group that does not exist in Ektron CMS400.NET, nothing happens because the feature assumes that all AD groups are not meaningful in Ektron CMS400.NET.

If a user belongs to an Ektron CMS400.NET user group that does not exist in AD, the discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. From these screens, you can copy the AD group information into Ektron CMS400.NET.

See Also: ”Associating User Group Membership with Active Directory User Group Membership” on page 605 and ”Associating Groups with Active Directory Groups” on page 606

To learn how membership is updated from then on, see ”After Integration is Enabled” on page 589.

Ektron CMS400.NET is Being Installed, so No User Groups Exist

Follow the procedure described in ”Copying User Groups from AD to Ektron CMS400.NET” on page 587 to copy AD user groups to Ektron CMS400.NET. As users in those groups are added to Ektron CMS400.NET, their group membership is copied from AD to Ektron CMS400.NET.

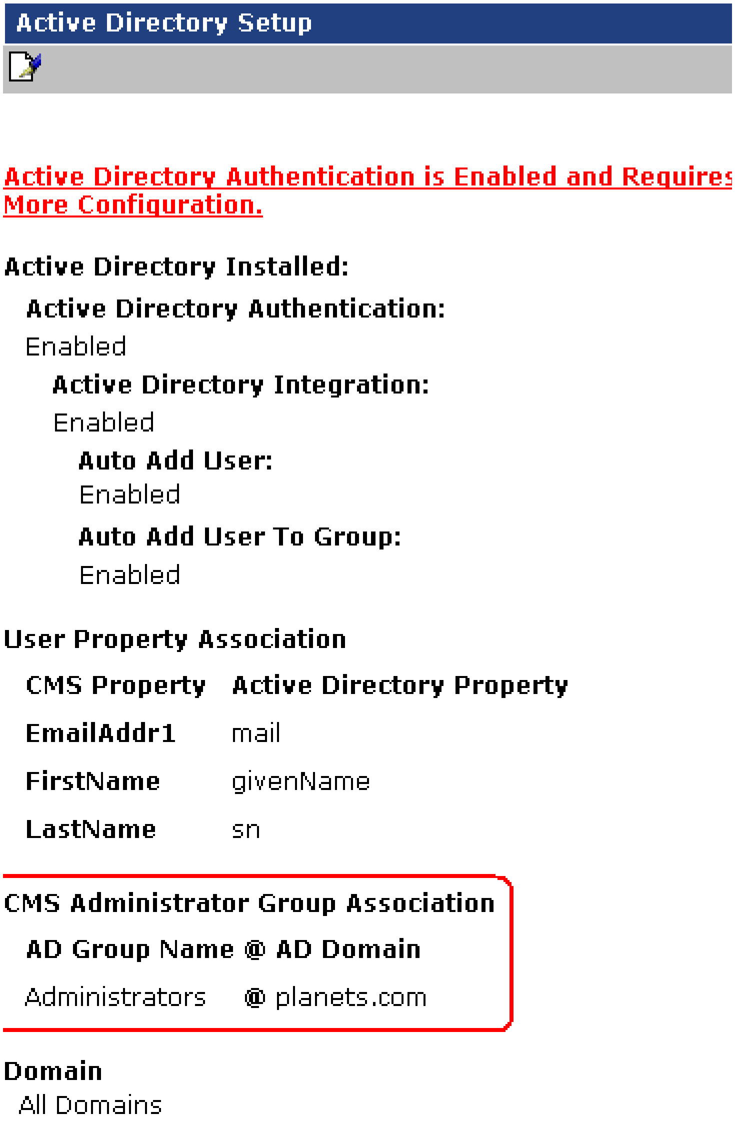
After Integration is Enabled

A user’s group membership is updated in Ektron CMS400.NET when all of the following are true:

- The **Enable automatic addition of user to groups** field is checked on the Active Directory Setup screen
- A user is added to Ektron CMS400.NET or his group membership changes in the Active Directory
- The user logs in or someone clicks on the Refresh button (⟳) on the user’s View User Information screen

Mapping the Administrator Group

On the Ektron CMS400.NET Active Directory Setup screen, you can identify an AD user group that maps to the Ektron CMS400.NET Administrator group.



Active Directory Setup

Active Directory Authentication is Enabled and Requires More Configuration.

Active Directory Installed:

Active Directory Authentication:
Enabled

Active Directory Integration:
Enabled

Auto Add User:
Enabled

Auto Add User To Group:
Enabled

User Property Association

CMS Property	Active Directory Property
EmailAddr1	mail
FirstName	givenName
LastName	sn

CMS Administrator Group Association

AD Group Name	@ AD Domain
Administrators	@ planets.com

Domain
All Domains

Administrators have access to all functions documented in this documentation. (Unlike other Ektron CMS400.NET user groups, whose names are copied from the AD, the Administrator and Everyone group names cannot be changed.)

For example, if the AD has a user group named CMSAdmin whose members should have the privileges of Ektron CMS400.NET administrators, assign that group to Administrators on the Active

Directory Setup screen. If such a group does not exist in AD yet, you should create it and then assign it on the Active Directory Setup screen.

Note that only one AD group can be mapped to the Ektron CMS400.NET Administrator group -- you cannot have an AD administrator group within each AD domain.

See Also: ”The Active Directory Setup Screen” on page 597

User Belongs to AD Group that Does Not Exist in Ektron CMS400.NET

If user is assigned to an AD user group that does not exist in Ektron CMS400.NET, nothing happens. The AD integration feature assumes that an Ektron CMS400.NET administrator only maintains user groups that are meaningful to Ektron CMS400.NET, and not all AD groups may be meaningful to Ektron CMS400.NET.

NOTE If a user belongs to a user group that is given Membership permissions, but also to a group that has CMS permissions, the user will only receive Membership permissions if logged into Ektron CMS400.NET.

User Belongs to Ektron CMS400.NET Group that Does Not Exist in AD

If a user was a member of a user group in Ektron CMS400.NET before integration was enabled, but does not belong to that group in the AD, this discrepancy is flagged on the Active Directory Setup and Active Directory Status screens.

If the user should belong to the AD group, add the group membership within the AD. Then, refresh the user on these screens to copy AD group information into Ektron CMS400.NET.

See Also: ”Associating Groups with Active Directory Groups” on page 606

Removing Users from a Group

If you delete a user from an AD group, the user is automatically removed from the associated Ektron CMS400.NET group the next time the user’s information is updated (as explained in ”After Integration is Enabled” on page 585).

Adding User Groups

Once AD integration is enabled, you can only add new user groups in the AD. In Ektron CMS400.NET, use the Search Active Directory for Groups screen to copy an AD user group to Ektron CMS400.NET. You can only add groups that do not already exist in Ektron CMS400.NET. This procedure is described in ”Copying User Groups from AD to Ektron CMS400.NET” on page 587.

Adding a User to a Group

You cannot add a user to a user group within Ektron CMS400.NET -- you must do so in the Active Directory.

Replacing a User Group

If you realize that you have associated the wrong AD user group with an Ektron CMS400.NET user group, you can replace the user group. Follow these steps to do so.

1. From the left side of the Workarea, click **User Groups**.
2. Click the user group that you want to replace.
3. Click the Associate Ektron CMS400.NET Group with Different AD Group button (🔍).
4. Select a group to replace the group you selected in Step 2.
5. Click the Save button (💾) to finalize the change.

Deleting a User Group

Deleting a User Group in AD

If you delete a user group in AD and users are assigned to the group within Ektron CMS400.NET, the group is not automatically deleted in Ektron CMS400.NET. However, any Ektron CMS400.NET users who were members of the group are no longer members the next time their Ektron CMS400.NET information is updated. The discrepancy is flagged on the Active Directory Setup and Active Directory Status screens.

Deleting a User Group in Ektron CMS400.NET

If you delete a user group in Ektron CMS400.NET and users are assigned to that group within AD, nothing happens. This is because the AD Integration Feature assumes that, in Ektron CMS400.NET, the administrator only sets up user groups that are meaningful to Ektron CMS400.NET, and some AD groups are not meaningful to Ektron CMS400.NET.

The Screens of the Active Directory Feature

The Active Directory feature uses the following screens:

- ”The Edit Domains Screen” on page 593
- ”The Active Directory Setup Screen” on page 597
- ”The Active Directory Status Screen” on page 602
- ”The View Users Screen” on page 606
- ”The View User Groups Screen” on page 609

This section explains how to use each screen.

The Edit Domains Screen

Use this screen to identify each network domain you will use with **Ektron CMS400.NET**’s Active Directory feature. You would use this when you want to define domains, as opposed to using auto discovery to find them.

This feature is described through the following subtopics.

- ”Enabling the Edit Domains Screen” on page 593
- ”Accessing the Edit Domains Screen” on page 594
- ”Fields of the Edit Domains Screen” on page 595
- ”How Domains are Used” on page 596

Enabling the Edit Domains Screen

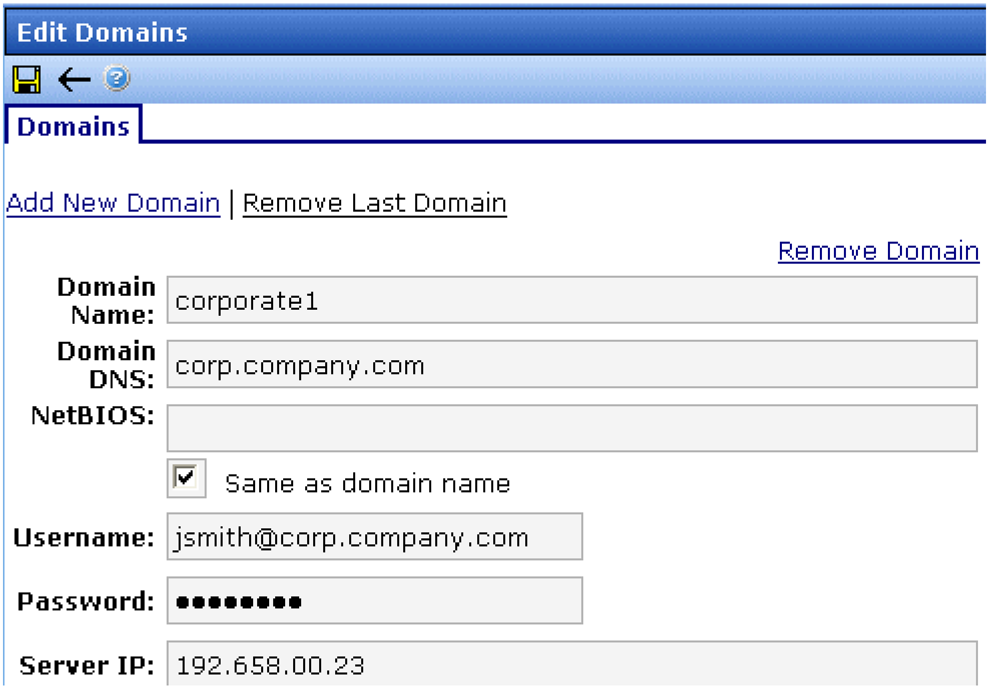
To have the Edit Domains screen appear, set the following web.config file values as shown below.

web.config value	Setting
ek_ADEnabled	True
ek_ADAdvancedConfig	True
ek_ADUsername	blank (username entered in Edit Domains screen)
ek_ADPassword	blank (username entered in Edit Domains screen)
ek_AUTH_Protocol	LDAP

Accessing the Edit Domains Screen

After you modify web.config as described above, access the Edit Domains screen by going to **Workarea > Settings > Configuration > Active Directory > Domains**.

Below is a sample of the screen.



Domain Name: corporate1

Domain DNS: corp.company.com

NetBIOS:

☑ Same as domain name

Username: jsmith@corp.company.com

Password: ●●●●●●●●●

Server IP: 192.658.00.23

The screen lets you add new domains, modify existing ones, or delete obsolete ones.

Fields of the Edit Domains Screen

When defining a domain, enter the following information.

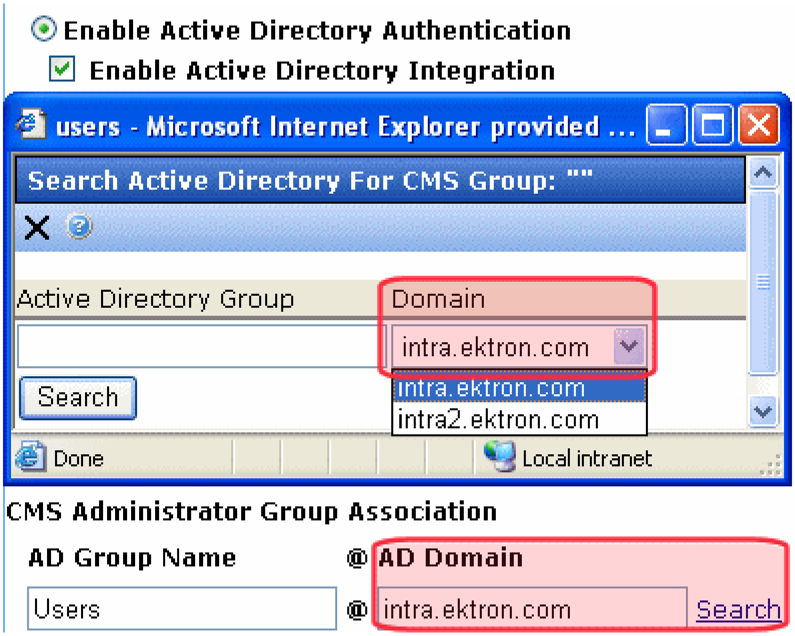
Field	Description
Name	Enter the name of the domain. Contact your server administrator for this information.
DNS	Enter the domain’s DNS. Contact your server administrator for this information. For example, **corp.company.com**.

Field	Description
NetBIOS	If your NetBios is the same as your domain name, leave the checkbox box checked. Otherwise, uncheck the box and enter your NetBIOS setting. Contact your server administrator for this information.
Username	Enter the name of the user with permission to sign on to the domain server. The name is in the format *username@domainDNS.* For example, **jsmith@corp.company.com**.
Password	Enter the password of the user identified above.
Server IP	Enter the IP address or DNS name of your domain controller. Note: If using Active Directory across a firewall, the IP address should be that of the firewall. On the firewall, traffic on port 389 (LDAP) should be allowed.

How Domains are Used

Domains defined on this screen are referenced when defining the user group that maps to the hard coded Ektron CMS400.NET administrator group. *See Also:* ”User Groups” on page 586

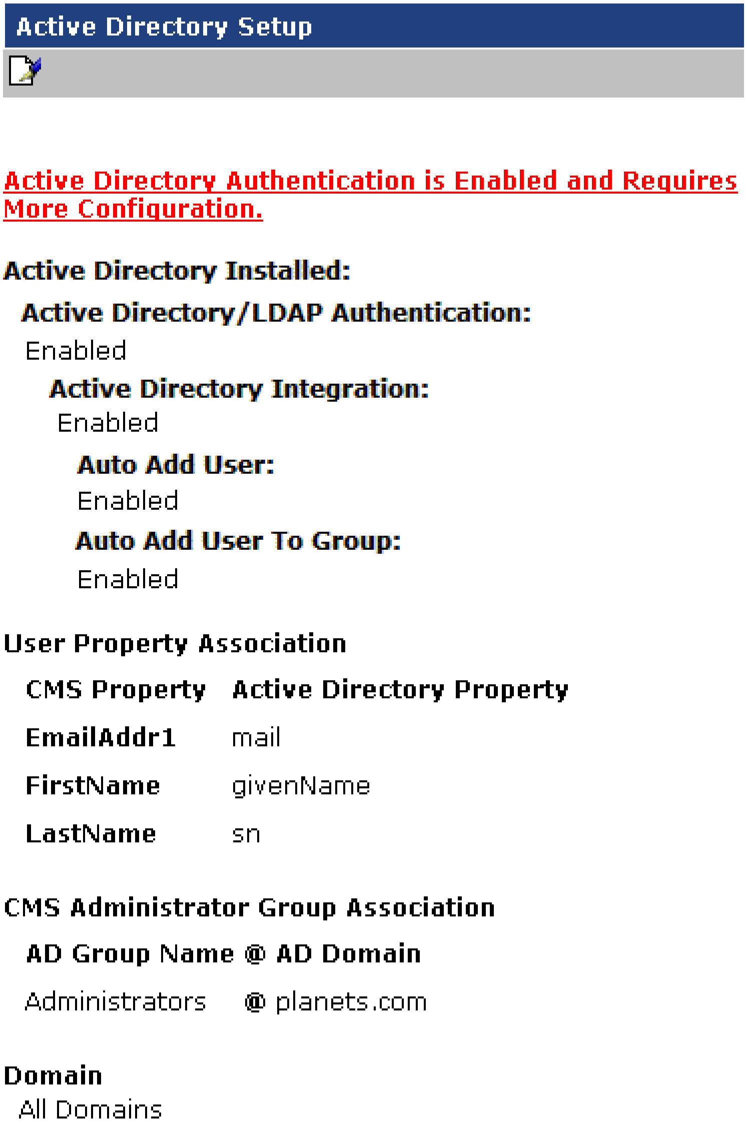
While defining the user group, first select a domain. **Ektron CMS400.NET** creates a selection list of Active Directory user groups in that domain. In this way, you must choose a user group within the selected domain.


Enable Active Directory Authentication
Enable Active Directory Integration
users - Microsoft Internet Explorer provided ...
Search Active Directory For CMS Group: ""
Active Directory Group
Domain
intra.ektron.com
intra.ektron.com
intra2.ektron.com
Search
Done
Local intranet
CMS Administrator Group Association
AD Group Name
@ AD Domain
Users
@ intra.ektron.com
Search

The Active Directory Setup Screen

The Active Directory Setup screen (illustrated below) lets you enable and disable the Active Directory feature, as well as determine other aspects of AD management, such as whether users and groups are automatically updated. To access the screen, click **Settings > Configuration > Active Directory > Setup** from the left panel of the Workarea.

.



Active Directory Setup

Active Directory Authentication is Enabled and Requires More Configuration.

Active Directory Installed:

Active Directory/LDAP Authentication:
Enabled

Active Directory Integration:
Enabled

Auto Add User:
Enabled

Auto Add User To Group:
Enabled

User Property Association

CMS Property	Active Directory Property
EmailAddr1	mail
FirstName	givenName
LastName	sn

CMS Administrator Group Association

AD Group Name @ AD Domain	
Administrators	@ planets.com

Domain
All Domains

The following table describes the fields on the screen.

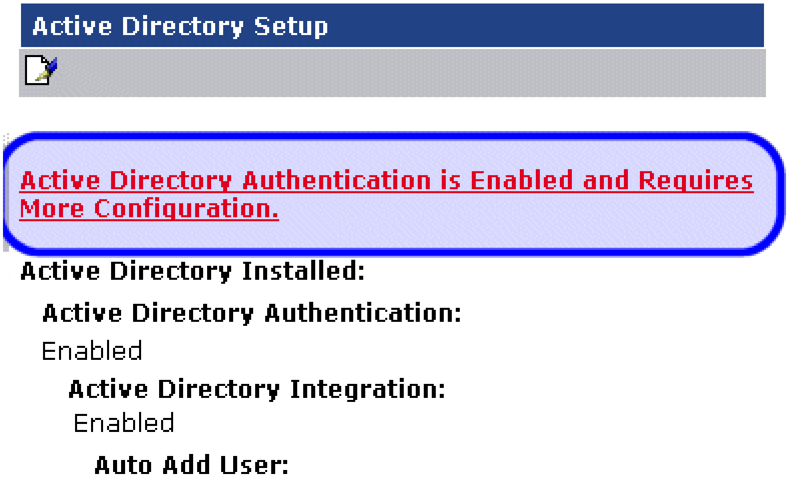
See Also: ”Messages Near the Top of the Active Directory Setup Screen” on page 601

Field	Description	For more information, see
Active Directory Installed		
Disable Active Directory and LDAP Authentication	Disables the use of Active Directory and LDAP Authentication.	”Disabling AD Integration” on page 614
Enable LDAP Authentication	If enabled, you need to fill out the following five fields. These fields are explained in the LDAP Authentication chapter.	”Enabling LDAP” on page 624
LDAP Server	Explained in LDAP Authentication chapter.	”Enabling LDAP” on page 624
Port	Explained in LDAP Authentication chapter.	”Enabling LDAP” on page 624
Organization	Explained in LDAP Authentication chapter.	”Enabling LDAP” on page 624
Domain	Explained in LDAP Authentication chapter.	”Enabling LDAP” on page 624
Organizational Unit	Explained in LDAP Authentication chapter.	”Enabling LDAP” on page 624
Active Directory Authentication	If enabled, user authentication is functional, and you can enable the following three fields.	”User Authentication Only Mode” on page 617 For information on LDAP, see ”LDAP Authentication” on page 622
Active Directory Integration	If enabled, the Active Directory feature is functional. Note: Can only be enabled if Active Directory Authentication is enabled.	”Active Directory Integration” on page 571
Auto Add User	If enabled, user information is copied from the AD to Ektron CMS400.NET when that user logs in or when the user is added to Ektron CMS400.NET. Note: Can only be enabled if Active Directory Integration is enabled.	”Associating User Information in AD with Ektron CMS400.NET” on page 583

Field	Description	For more information, see
Auto Add User To Group	If enabled, a user's group membership is first copied from the AD when a user logs in or is added. Note: Can only be enabled if Active Directory Integration is enabled.	"User Groups" on page 586
User Property Mapping		
FirstName	Enter the Active Directory Property that maps to the user's first name in Ektron CMS400.NET. By default, this is set to `givenName`, but you can change it to any AD property.	MSDN Library (http://msdn.microsoft.com/library/default.asp)> Active Directory, ADSI and Directory Services > Directory Services > Active Directory > Active Directory Reference > Active Directory User Interface Mappings.
LastName	Enter the Active Directory Property that maps to the user's last name in Ektron CMS400.NET. By default, this is set to `sn`, but you can change it to any AD property.	same reference as FirstName (above)
EmailAddr1	Enter the Active Directory Property that maps to the user's last name in Ektron CMS400.NET. By default, this is set to `mail`, but you can change it to any AD property.	same reference as FirstName (above)
Ektron CMS400.NET Administrator Group Mapping		
AD Group Name @ AD Domain	Enter the Active Directory user group and domain name that maps to the hard coded Ektron CMS400.NET administrator group. If you do not have an AD user group that includes all Ektron CMS400.NET administrators, you should create one and enter its name and domain here.	"Mapping the Administrator Group" on page 589

Field	Description	For more information, see
Domain	If you want to restrict the search of new users and groups to one AD domain, select that domain. If you do, the Search Active Directory for Users and Search Active Directory for Groups screens let you search in the selected domain only. Also, if any Ektron CMS400.NET user or group names include a domain (for example, admin@saturn.planets.com) that is excluded by your selection, those users/groups are flagged on the Active Directory Setup and Active Directory Status screens because the names now include an invalid domain.	

Messages Near the Top of the Active Directory Setup Screen


Active Directory Setup

Active Directory Authentication is Enabled and Requires More Configuration.

Active Directory Installed:

Active Directory Authentication:
Enabled

Active Directory Integration:
Enabled

Auto Add User:

Message	Explanation
Active Directory Authentication is Enabled and Requires More Configuration.	Some Ektron CMS400.NET users are not associated with AD users. Also, if you are using full active directory integration mode, user groups and/or user group relationships may not be associated.

Message	Explanation
Active Directory Authentication is disabled, but needs further configuration	Some Ektron CMS400.NET users and/or groups are no longer unique. This happens because, in the AD, users and groups can share a logon name as long as their domains are different. But, when AD authentication is disabled, two Ektron CMS400.NET users or groups can no longer share a name -- each must be unique.

If you see either message, click it. You proceed to the Active Directory Status screen, which helps you resolve the discrepancies.

See Also: ”The Active Directory Status Screen” on page 602

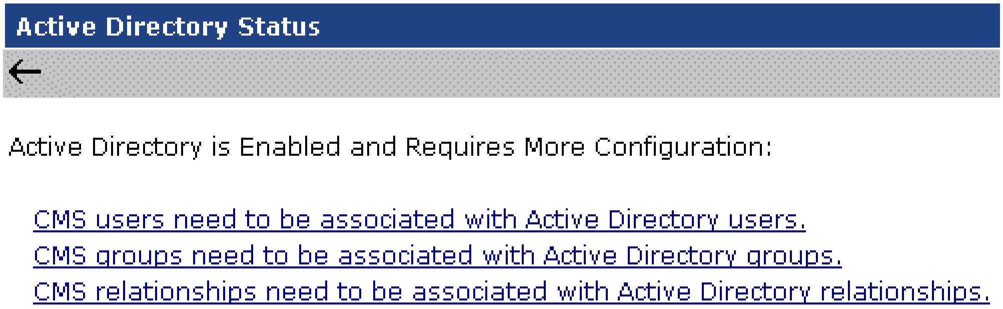
The Active Directory Status Screen

Use the Active Directory Status screen to resolve the following discrepancies between Ektron CMS400.NET and AD.

- an Ektron CMS400.NET user needs to be associated with an AD user
- an Ektron CMS400.NET user group needs to be associated with an AD user group
- an Ektron CMS400.NET user’s group membership need to be associated with the same AD user’s group membership

To access the screen, click **Configuration > Active Directory > Status** from the left panel of the Workarea.

.


Active Directory Status

Active Directory is Enabled and Requires More Configuration:

CMS users need to be associated with Active Directory users.
CMS groups need to be associated with Active Directory groups.
CMS relationships need to be associated with Active Directory relationships.

There are several reasons why such discrepancies may occur. To learn more about why

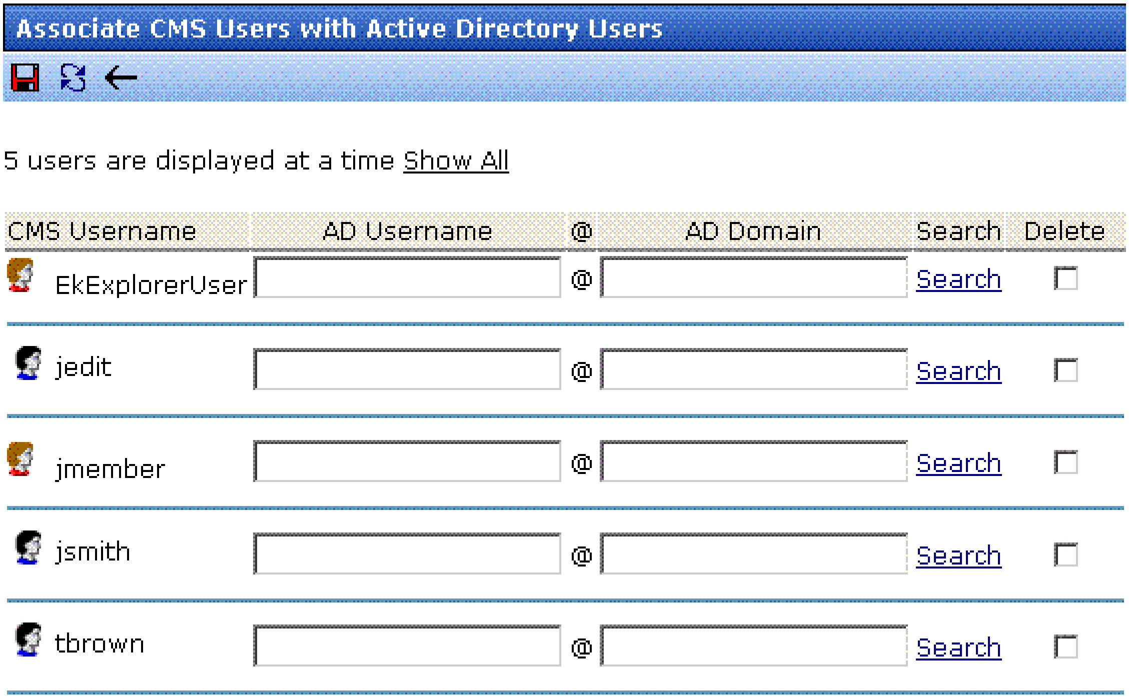
- an Ektron CMS400.NET user is not associated with an AD user, read ”Associating User Information in AD with Ektron CMS400.NET” on page 583.
- an Ektron CMS400.NET user’s group membership is not associated with the user’s AD group membership, read ”Associating a User’s AD Group Information with Ektron CMS400.NET” on page 588
- an Ektron CMS400.NET group is not associated with an AD group, read ”User Groups” on page 586

If you click any link on the Active Directory Status screen, a new screen appears that allows you to resolve the discrepancy. For information on how to use these screens, see the following topics.

- ”Associating Ektron CMS400.NET Users with Active Directory Users” on page 603
- ”Associating User Group Membership with Active Directory User Group Membership” on page 605
- ”Associating Groups with Active Directory Groups” on page 606

Associating Ektron CMS400.NET Users with Active Directory Users

If you click **CMS users need to be associated with Active Directory users** on the Active Directory Status screen, the Associate Ektron CMS400.NET Users with Active Directory Users screen appears (illustrated below). Use this screen to associate Ektron CMS400.NET users with AD users.



Associate CMS Users with Active Directory Users

5 users are displayed at a time Show All

CMS Username	AD Username	@	AD Domain	Search	Delete
EkExplorerUser		@		Search	☐
jedit		@		Search	☐
jmember		@		Search	☐
jsmith		@		Search	☐
tbrown		@		Search	☐

If a user with the same username exists in the AD, that name and domain appear by default in the **AD Username** and **AD Domain** fields. If the user exists in the more than one AD domain (as illustrated in the first example above), select a domain from the pull-down list.

If there is no default and you know the AD user name to associate with an Ektron CMS400.NET user, enter that in the **AD Username** and **AD Domain** fields. If you do not know the AD username, click **Search** to find the user in the AD.

If you decide to change the username in AD to match the Ektron CMS400.NET username, make the change in the AD. Then, click the Refresh button (⟳) to update Ektron CMS400.NET and resolve the discrepancy.

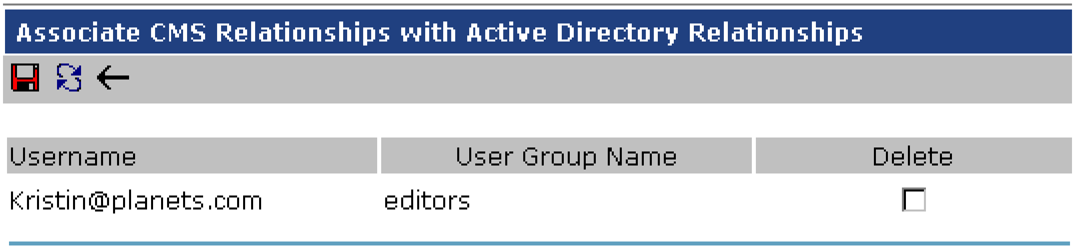
Finally, if a user should not exist in Ektron CMS400.NET, click the box under the **Delete** column to delete the user from Ektron CMS400.NET.

After you make all necessary changes, click the Save button ( ).

Associating User Group Membership with Active Directory User Group Membership

If you click **CMS relationships need to be associated with Active Directory relationships** on the Active Directory Status screen, the Associate Ektron CMS400.NET Relationships with Active Directory Relationships screen appears (illustrated below). Use this screen to coordinate Ektron CMS400.NET user group membership with AD user group membership.

The screen displays a user's group membership that exists in Ektron CMS400.NET, but does not exist in the AD.



Associate CMS Relationships with Active Directory Relationships

Username	User Group Name	Delete
Kristin@planets.com	editors	☐

See Also: "Associating a User's AD Group Information with Ektron CMS400.NET" on page 588

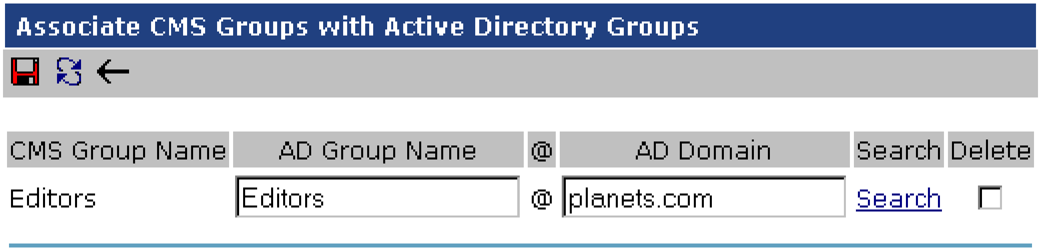
After viewing the discrepancy on the screen, you have two choices:

- To associate the user with the same user group in AD, go to the AD and assign the user to the group. Then, return to this screen and click the Refresh button ( ) to update the user group information in Ektron CMS400.NET.

- To remove the user's group membership in Ektron CMS400.NET, check the box under the **Delete** column and click the Save button ().

Associating Groups with Active Directory Groups

If you click **CMS groups need to be associated with Active Directory groups** on the Active Directory Status screen, the Associate Ektron CMS400.NET User Groups with Active Directory Groups screen appears (illustrated below). Use this screen to associate Ektron CMS400.NET groups with AD groups.



Associate CMS Groups with Active Directory Groups

CMS Group Name	AD Group Name	@	AD Domain	Search	Delete
Editors	Editors	@	planets.com	Search	☐

If a group with the same groupname exists in the AD, that name appears by default in the **AD Group Name** field. If the group exists in the more than one domain within the AD, select a domain from the pull-down list.

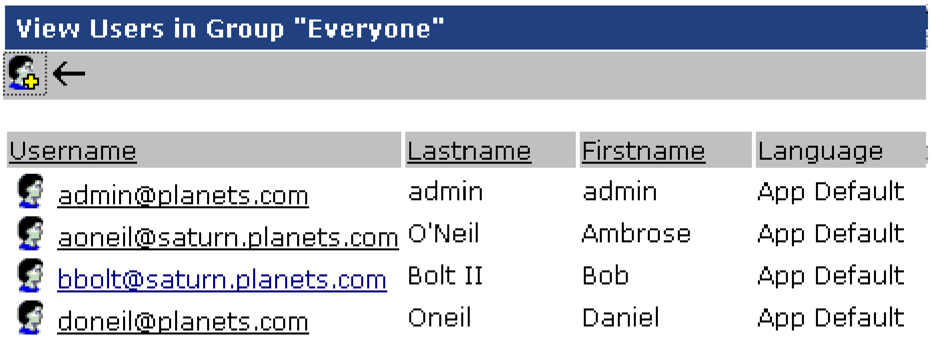
If there is no default and you know the AD group name to associate with an Ektron CMS400.NET group, enter that in the **AD Group Name** and **AD Domain** fields. If you do not know the AD groupname, click **Search** to find the group in the AD.

Finally, if this group should not exist in the Ektron CMS400.NET database, click the box under the **Delete** column to delete the group from Ektron CMS400.NET.

After you make all necessary changes, click the Save button () to save them.

The View Users Screen

The View Users screen (illustrated below) lists all users in the Ektron CMS400.NET database. To access the screen, click **Users** from the left panel of the Workarea. To view more information for a user, click that user to move to the View User Information screen.

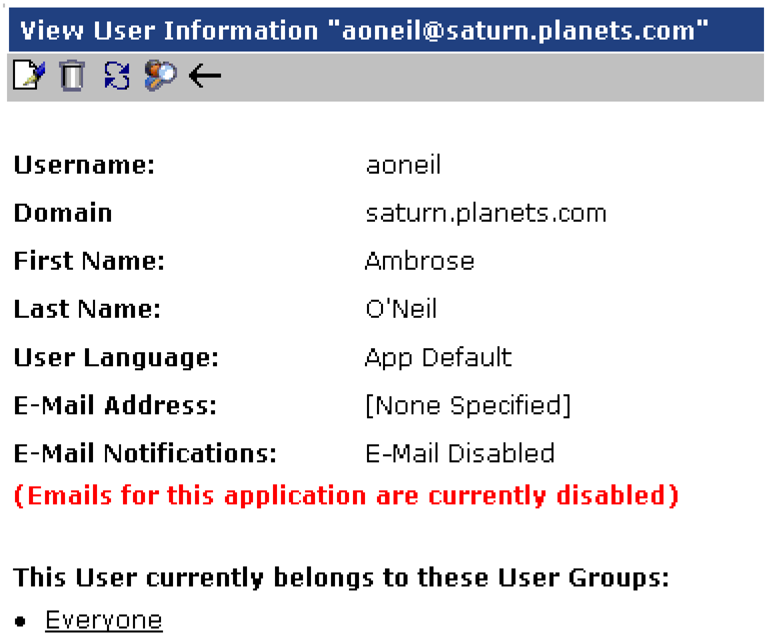


View Users in Group "Everyone"

Username	Lastname	Firstname	Language
admin@planets.com	admin	admin	App Default
aoneil@saturn.planets.com	O'Neil	Ambrose	App Default
bbolt@saturn.planets.com	Bolt II	Bob	App Default
doneil@planets.com	Oneil	Daniel	App Default

The View Users screen also provides a toolbar button () that lets you add AD users to the Ektron CMS400.NET database. When you click it, the Search Active Directory for Users Screen appears.

The View User Information Screen



View User Information "aoneil@saturn.planets.com"

Username:	aoneil
Domain	saturn.planets.com
First Name:	Ambrose
Last Name:	O'Neil
User Language:	App Default
E-Mail Address:	[None Specified]
E-Mail Notifications:	E-Mail Disabled

(Emails for this application are currently disabled)

This User currently belongs to these User Groups:

- Everyone

The View User Information Screen displays the user's

- username and domain
- first and last name
- language
- email address and whether the user receives email notifications
- user groups

If you are using *user authentication mode*, **username** and **domain** can only be edited in the AD. You can edit all other fields on this screen.

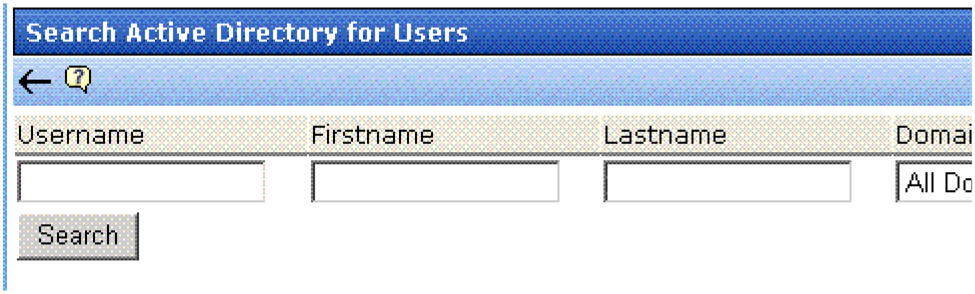
If you are using *full AD Integration mode*, you can only edit **language** and whether the user receives email notifications. You must edit the other fields in the AD.

The screen also displays the following buttons.

Button	Description
✎	Edit information on screen
🗑	Delete user *See Also:* ”Deleting Users” on page 586
⟳	Retrieve latest information from AD into Ektron CMS400.NET *See Also:* ”After Integration is Enabled” on page 585 Note: This toolbar button does not appear if you are using user authentication mode.
🔍	Replace user *See Also:* ”Replacing a User” on page 586
←	Return to previous screen

The Search Active Directory for Users Screen

Use this screen to add AD users to Ektron CMS400.NET. To access the screen, click **Users** from the left panel of the Workarea, then click the Add button ().



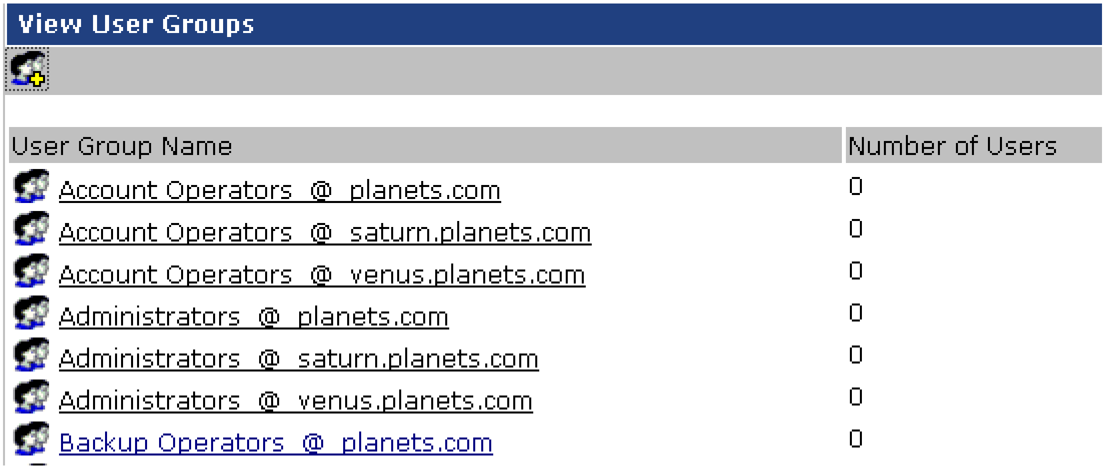
Enter as much search criteria as you know to reduce the number of users that the search yields. For example, if you know that the user’s last name is Jackson and the user is in the planets domain, enter those criteria and you will get fewer hits.

When the Active Directory Users screen appears, click the box next to users that you want to create in Ektron CMS400.NET. Then, click the Save button () to copy their information into Ektron CMS400.NET.

The View User Groups Screen

The View User Groups Screen displays all AD user groups that have been copied into Ektron CMS400.NET. (See ”Copying User Groups from AD to Ektron CMS400.NET” on page 587).

To access the screen, click **User Groups** from the left panel of the Workarea.



View User Groups

User Group Name	Number of Users
Account Operators @ planets.com	0
Account Operators @ saturn.planets.com	0
Account Operators @ venus.planets.com	0
Administrators @ planets.com	0
Administrators @ saturn.planets.com	0
Administrators @ venus.planets.com	0
Backup Operators @ planets.com	0

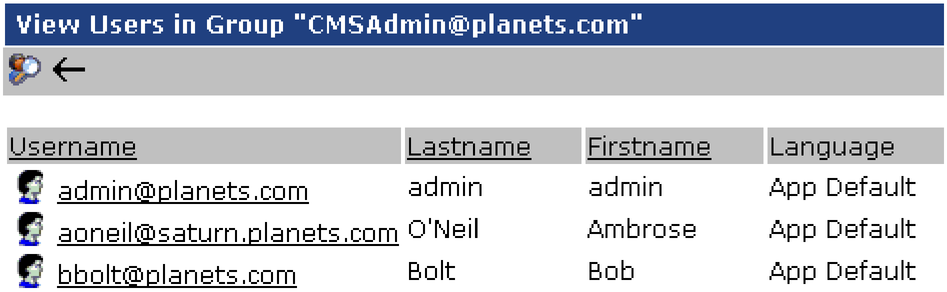
To view more information for a group, click that group to move to the View Users in Group screen.

The View User Groups screen also provides a toolbar button ( ) that lets you add AD groups to the Ektron CMS400.NET database. When you click it, the Search Active Directory for Groups screen appears.

View Users in Group Screen

The View Users in Group Screen displays, for each user in the group

- username and domain
- first and last name
- language



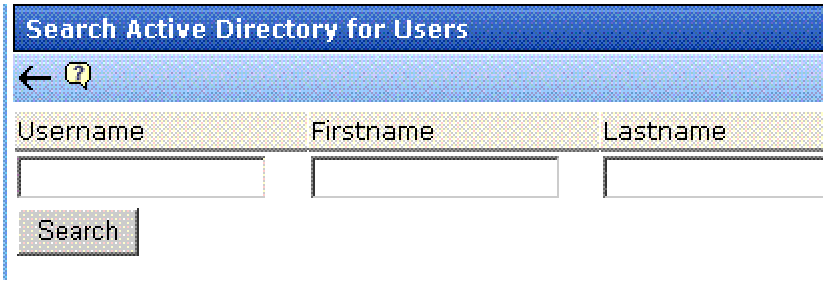
View Users in Group "CMSAdmin@planets.com"

Username	Lastname	Firstname	Language
admin@planets.com	admin	admin	App Default
aoneil@saturn.planets.com	O'Neil	Ambrose	App Default
bbolt@planets.com	Bolt	Bob	App Default

The screen also displays the following buttons.

Button	Description
🔍	Replace group *See Also:* "Replacing a User Group" on page 592
←	Return to previous screen

The Search Active Directory for Groups Screen



Search Active Directory for Users

Username	Firstname	Lastname

Use this screen to add AD groups to Ektron CMS400.NET. Enter as much search criteria as you know to reduce the number of groups that the search yields.

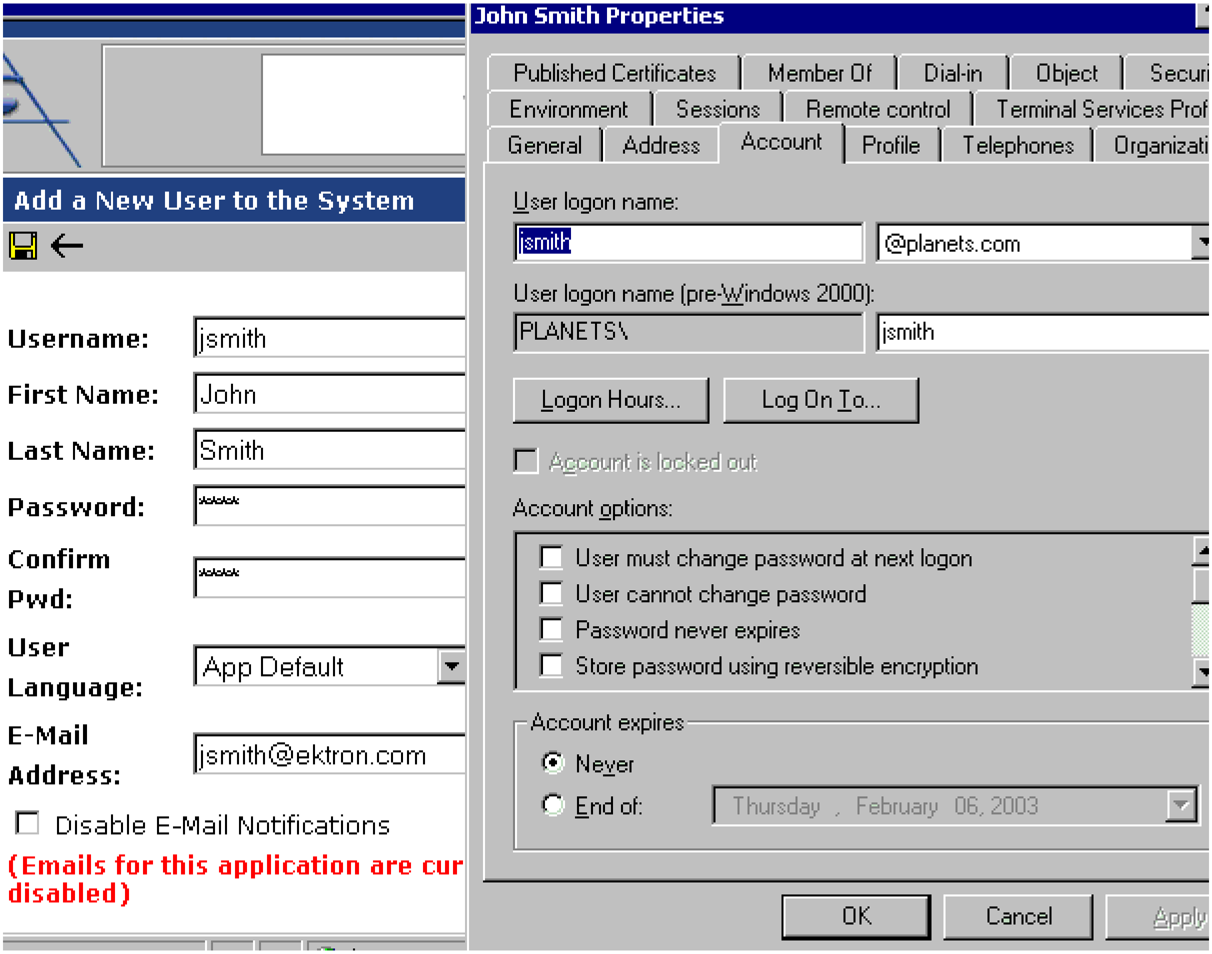
NOTE You can only select AD groups that do not already exist in Ektron CMS400.NET. Also, the Active Directory Setup screen can restrict AD integration to one domain. If it does, you can only search for groups within that domain.

For example, if you know that a group begins with S and is in the planets domain, enter those criteria and you will get fewer hits.

After you click Search, a new screen appears listing all AD groups that satisfy the search criteria. Click the box next to groups that you want to create in Ektron CMS400.NET. Then, click the Save button (💾) to copy their information.

Setup Guidelines

1. Make sure the users and user groups in Active Directory are defined correctly. Remember that, when you enable AD integration, first name, last name and email are copied from AD to Ektron CMS400.NET.
2. Determine which AD users and groups will be used in Ektron CMS400.NET.
3. Try to match up names. For example, if a user in Ektron CMS400.NET has the username of jsmith, but that user in AD has a username of john.smith, rename the user in Ektron CMS400.NET or in Active Directory so they match. This can be done during the actual integration, but doing it beforehand simplifies the process later.


Add a New User to the System
John Smith Properties
Published Certificates
Member Of
Dial-in
Object
Securi
Environment
Sessions
Remote control
Terminal Services Prof
General
Address
Account
Profile
Telephones
Organizati
Logon Hours...
Log On To...
OK
Cancel
Apply

Username: jsmith
First Name: John
Last Name: Smith
Password: *****
Confirm Pwd: *****
User Language: App Default
E-Mail Address: jsmith@ektron.com
☐ Disable E-Mail Notifications
(Emails for this application are cur
disabled)

User logon name: jsmith @planets.com
User logon name (pre-Windows 2000): PLANETS\ jsmith
☐ Account is locked out
Account options:
☐ User must change password at next logon
☐ User cannot change password
☐ Password never expires
☐ Store password using reversible encryption
Account expires
● Never
○ End of: Thursday , February 06, 2003

4. Determine which users should be in which groups, and make sure those relationships exist in both Ektron CMS400.NET and AD.
5. If your Active Directory Forest has multiple domains, decide if Ektron CMS400.NET should reference all domains or a specific one. (You will use this information when setting up domains.)
6. Determine if you want users to be added automatically upon log in or you want to manually add them yourself. (You will use this when completing the **Enable automatic addition of user from AD** field of the Active Directory Setup Screen.)

7. Determine if you want user groups to be associated upon log in or if you want to manually associate them. (You will use this when completing the **Enable automatic addition of user to groups** field of the Active Directory Setup Screen.)
8. Set the following elements in the Web.config.
    - For the `authentication` element, change the value of the `impersonate` attribute to **true**. It should look like this:

```
<identity impersonate="true" userName="" password=""/>
```

    - Set the `ek_ADEnabled` element to **true**. It should look like this:

```
<add key="ek_ADEnabled" value="true"/>
```

    - Set the `ek_AUTH_Protocol` element to **GC**. It should look like this:

```
<add key="ek_AUTH_Protocol" value="GC"/>
```

    - You can either set the anonymous access user for your application to a domain account, or declare the domain account to use through `ek_adusername` and `ek_adpassword`. It should look like this:

```
<add key="ek_ADUsername" value="[username]@domain" />

<add key="ek_ADPassword" value="YourPasswordHere" />
```

Disabling AD Integration

If you decide to disable AD authentication or integration, edit the Active Directory Setup screen and uncheck the box next to **Enable Active Directory Authentication** or **Enable Active Directory Integration**.

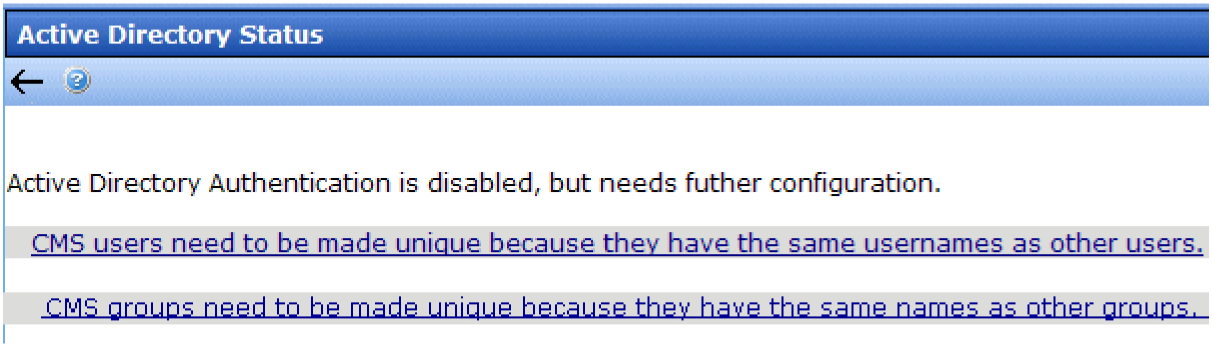
See Also: ”The Active Directory Setup Screen” on page 597

If you do this, and any users or groups share the same name within different domains, the following message appears on the screen.

Active Directory Authentication is disabled, but needs further configuration

For example, two users are named JJackson@saturn.com and JJackson@planets.com. When AD was enabled, the domain names made the two users unique. However, when you disable integration, the domain names are dropped, so the user names are now identical. You need to make the users unique.

If you click the message (above) on the Active Directory Setup screen, you move to the Active Directory Status screen. The following messages may appear.

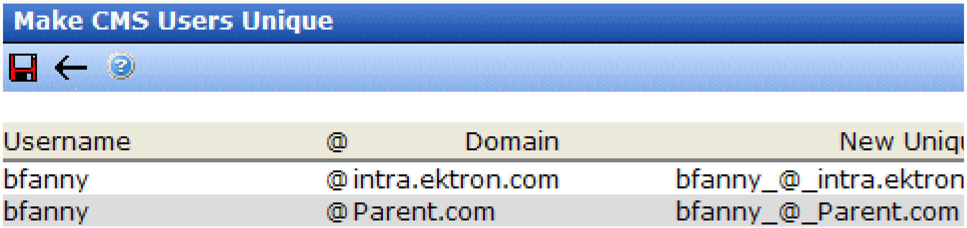


Active Directory Authentication is disabled, but needs futher configuration.

CMS users need to be made unique because they have the same usernames as other users.

CMS groups need to be made unique because they have the same names as other groups.

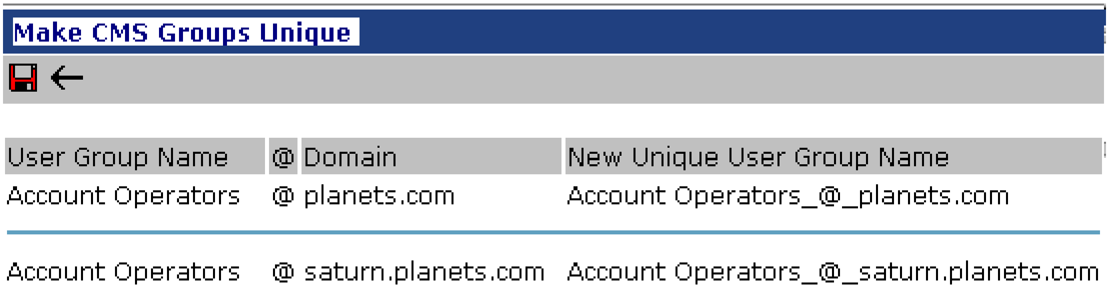
Click the message to proceed to the Make Ektron CMS400.NET Users Unique screen (illustrated below).



Username	@	Domain	New Uniq
bfanny	@	intra.ektron.com	bfanny_@_intra.ektron
bfanny	@	Parent.com	bfanny_@_Parent.com

This screen lists all users whose user names are not unique and suggests a new, unique Ektron CMS400.NET username. The new name consists of the user name, underscore, at sign (@), underscore, the domain name. So, for example, JJackson@saturn.com would appear as JJackson_@_saturn.com.

The same is true for user groups. For example, if you had two groups name Account Operators, one in the planets.com domain and another in the saturn.planets.com domain, the Make Ektron CMS400.NET Groups Unique screen would look like this.



Make CMS Groups Unique

User Group Name	@ Domain	New Unique User Group Name
Account Operators	@ planets.com	Account Operators_@_planets.com
Account Operators	@ saturn.planets.com	Account Operators_@_saturn.planets.com

Ektron recommends that you accept the suggested new names. Click the Save (💾) button to do so.

One advantage of using the new name format is that, if you later decide to re-enable AD integration, the software can automatically associate the AD and Ektron CMS400.NET users or groups.

User Authentication Only Mode

How Information is Transferred from Active Directory to Ektron CMS400.NET

Ektron CMS400.NET does not write to the AD – it only reads from it. This results in the following changes to how the username, domain, and password are handled within Ektron CMS400.NET.

- Changes to user logon name, domain and password must be made in the AD — you cannot update these fields in the Ektron CMS400.NET Edit User screens.
- When adding a new user to Ektron CMS400.NET, you can only select AD users. If the user does not exist in the AD, create the user there, and then import the user into Ektron CMS400.NET.

Which Information is Transferred from Active Directory to CMS400.NET

CMS refers to the following AD sign-in authentication information during sign-in: password, user logon name, and domain. Note that the password is not stored in CMS — CMS only refers to the password during sign-in.

Logging In

See ”Logging into a System that Uses AD Integration” on page 574

Adding User Information from AD to Ektron CMS400.NET

See ”Adding User Information from AD to Ektron CMS400.NET” on page 583

Changing the User Login Name in AD

If a user's *logon name* changes in the AD, it no longer matches the Ektron CMS400.NET logon name. This discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should proceed to the Associate Ektron CMS400.NET Users to Active Directory Users screen, where you can update the user information.

Alternatively, you could

1. Go to the View User Information screen.
2. Select the user whose AD name changed.
3. Click the Associate the Ektron CMS400.NET user with Different AD user toolbar button ().
4. Select the AD user and domain.

See Also: "Associating Ektron CMS400.NET Users with Active Directory Users" on page 603

Editing User Information in Ektron CMS400.NET

Ektron CMS400.NET does not write to the AD. This means that you can only change the **Username** and **Domain** fields from the AD.

You can change the **First Name**, **Last Name**, **email Address**, **User Language** and **Disable email Notifications** fields on the Ektron CMS400.NET Edit User screen.

Deleting Users

See "Deleting Users" on page 586

Replacing a User

See "Replacing a User" on page 586

IMPORTANT! If you replace a user in user authentication-only mode, the user's first name, last name, and email address are not overwritten with information in the active directory.

User Groups

User authentication mode has no effect on user groups. To learn more about user groups, see "Managing User Groups" on page 505.

The Screens of the Active Directory Feature in User Authentication Mode

Since the scope of user authentication mode is limited, only some fields on the AD screens are used. For example, on the Active Directory setup screen, the only relevant fields are authentication and domain.

See Also: "The Active Directory Setup Screen" on page 597

Also, on the Active Directory Status Screen, only one discrepancy message may appear:

CMS user needs to be associated with an AD user

See Also: "Associating Ektron CMS400.NET Users with Active Directory Users" on page 603

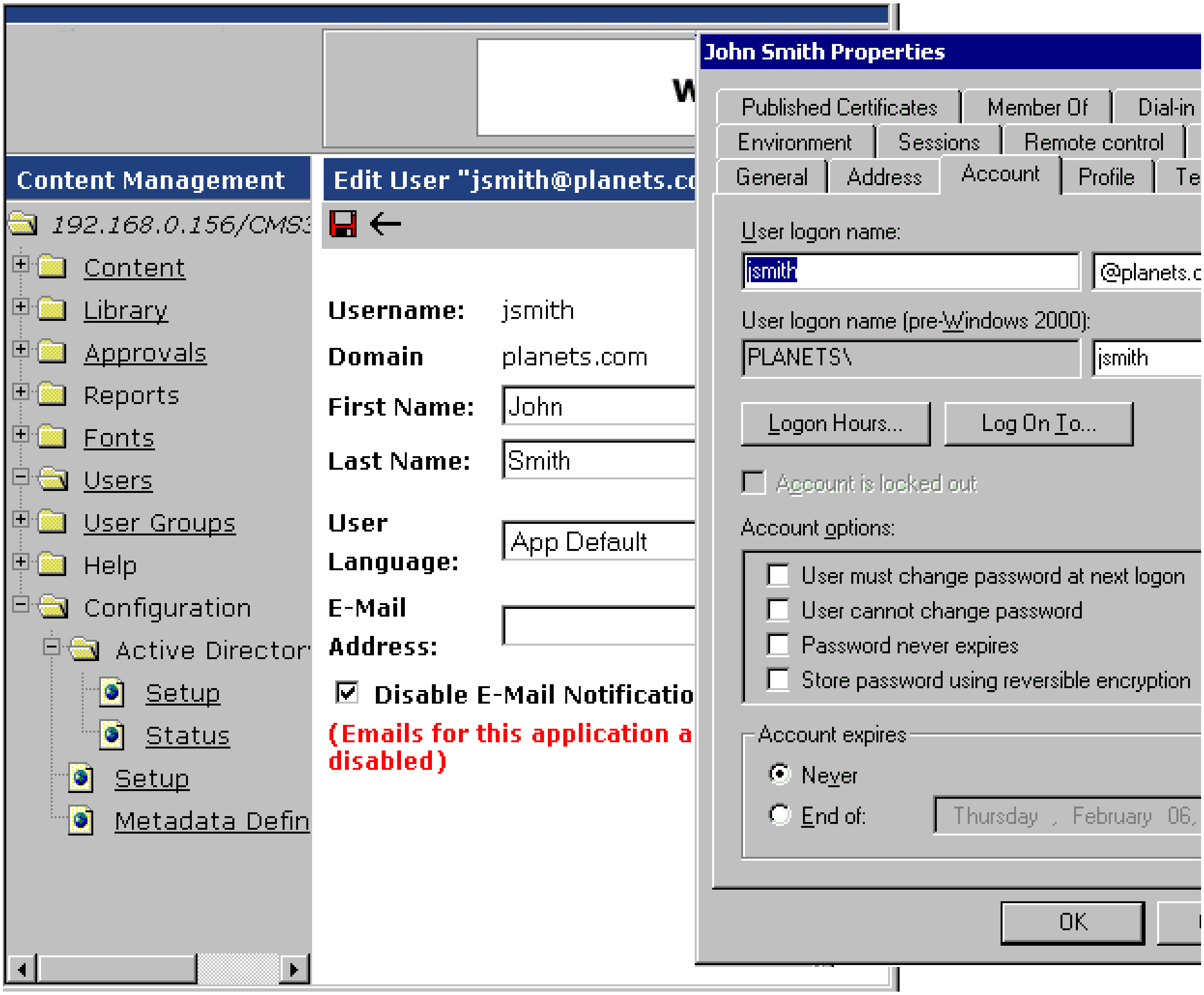
The View Users Screen works the same for both modes.

See Also: "The View User Information Screen" on page 607

Setup Guidelines

1. Make sure each AD user to be used in Ektron CMS400.NET is defined correctly in the Active Directory. Remember that, when you enable AD integration, logon name and domain are copied from AD to Ektron CMS400.NET.

2. Try to match up names. For example, if an Ektron CMS400.NET user's username is jsmith, but that user's AD username is john.smith, rename the user in Ektron CMS400.NET or Active Directory so they match. While you can match user names when authentication is enabled, doing it beforehand simplifies the process.


Content Management
192.168.0.156/CMS
Content
Library
Approvals
Reports
Fonts
Users
User Groups
Help
Configuration
Active Director
Setup
Status
Setup
Metadata Defin
John Smith Properties
Published Certificates
Member Of
Dial-in
Environment
Sessions
Remote control
General
Address
Account
Profile
Te
Logon Hours...
Log On To...
OK

Edit User "jsmith@planets.co

Username: jsmith

Domain planets.com

First Name: John

Last Name: Smith

User Language: App Default

E-Mail Address:

☑ **Disable E-Mail Notificatio**

(Emails for this application a disabled)

User logon name: jsmith @planets.c

User logon name (pre-Windows 2000): PLANETS\ jsmith

☐ Account is locked out

Account options:

☐ User must change password at next logon
☐ User cannot change password
☐ Password never expires
☐ Store password using reversible encryption

Account expires

● Never
○ End of: Thursday , February 06,

3. If you have multiple domains in your Active Directory Forest, decide if you want Ektron CMS400.NET to reference all domains or if you want to choose a specific one. (You will use this when completing the **Domain** field of the Active Directory Setup Screen.)
4. Set the following elements in the Web.config.
   - For the `authentication` element, change the value of the `impersonate` attribute to **true**. It should look like this:

```
<identity impersonate="true" userName="" password=""/>
```

   - Set the `ek_ADEnabled` element to **true**. It should look like this:

```
<add key="ek_ADEnabled" value="true"/>
```

   - Set the `ek_AUTH_Protocol` element to **GC**. It should look like this:

```
<add key="ek_AUTH_Protocol" value="GC"/>
```

   - You can either set the anonymous access user for your application to a domain account, or declare the domain account to use through `ek_adusername` and `ek_adpassword`. It should look like this:

```
<add key="ek_ADUsername" value="[username]@domain" />

<add key="ek_ADPassword" value="YourPasswordHere" />
```

Disabling AD Authentication

See ”Disabling AD Integration” on page 614

LDAP Authentication

LDAP is short for Lightweight Directory Access Protocol. It is a set of protocols that enable corporate directory entries to be arranged in a hierarchical structure which reflects geographic and organizational boundaries.

Ektron CMS400.NET's LDAP feature lets you retrieve user Login information from an LDAP server to Ektron CMS400.NET. As a result, you can administer user information from one place, and users only need to remember one password/username combination to sign on to the network and Ektron CMS400.NET.

The hierarchical structure of LDAP authentication can look a few different ways. For example, if you had the following LDAP structure, the domain would typically span multiple countries.

NOTE Here is a list of the abbreviations: CN = Common Name, OU = Organizational Unit, O = Organization, DN = Distinguished Name.

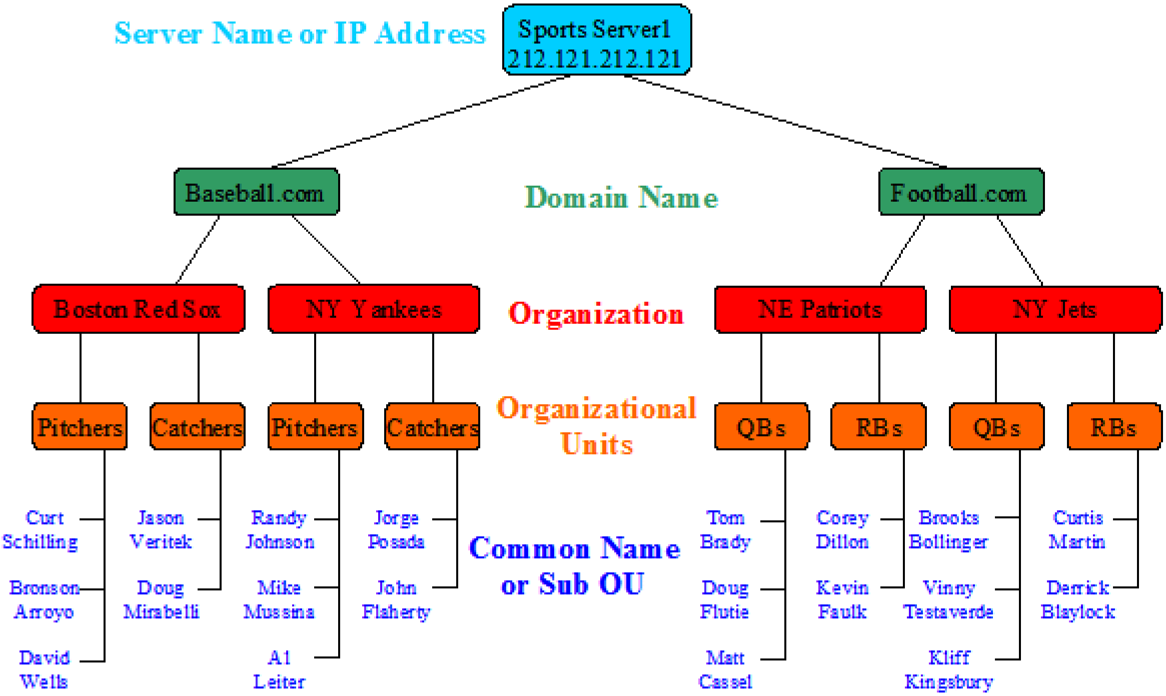
CN=Pitchers Name, OU=Pitchers, O=Baseball Team, C=US, DN=Baseball.com

By changing the order of C and DN, the hierarchy indicates that the domain Baseball.com is located in the US.

CN=Pitchers Name, OU=Pitchers, O=Baseball Team, DN=Baseball.com, C=US.

In some instances, it may be necessary to have an Organization appear below an Organizational Unit. This might happen if you have your Organization Unit has it own Organizations.

Below is a visual example of an LDAP hierarchical structure.


Server Name or IP Address
Sports Server1
212.121.212.121
Baseball.com
Domain Name
Football.com
Boston Red Sox
NY Yankees
Organization
NE Patriots
NY Jets
Pitchers
Catchers
Pitchers
Catchers
Organizational Units
QBs
RBs
QBs
RBs
Curt Schilling
Bronson Arroyo
David Wells
Jason Veritek
Doug Mirabelli
Randy Johnson
Mike Mussina
Al Leiter
Jorge Posada
John Flaherty
Common Name or Sub OU
Tom Brady
Doug Flutie
Matt Cassel
Corey Dillon
Kevin Faulk
Brooks Bollinger
Vinny Testaverde
Kliff Kingsbury
Curtis Martin
Derrick Blaylock

This chapter covers the following topics:

- ”Using LDAP with Ektron CMS400.NET” on page 623
- ”LDAP Screen Descriptions” on page 635
- ”Disabling LDAP Authentication” on page 639

Using LDAP with Ektron CMS400.NET

NOTE Active Directory and LDAP are not the same. While they can perform some similar functions, LDAP when used with Ektron CMS400.NET only verifies user login information and creates the user in the everyone group. Active Directory can can be used to verify user login information only or it can become completely integrated with Ektron CMS400.NET. To learn more about using Active Directory with Ektron CMS400.NET, see ”Active Directory Feature” on page 569

The following sections explain how to use LDAP with Ektron CMS400.NET.

- ”Enabling LDAP” on page 624
- ”Adding an Organizational Unit During Setup” on page 627
- ”Adding User Information from an LDAP Server to Ektron CMS400.NET” on page 628
- ”Editing User Information in Ektron CMS400.NET” on page 634
- ”Deleting Users” on page 635

Enabling LDAP

You enable LDAP through the Active Directory Setup screen. To enable the LDAP functionality in Ektron CMS400.NET, follow these steps.*See Also:* ”The Active Directory Setup Screen” on page 635

IMPORTANT! Before enabling LDAP in Ektron CMS400.NET, make sure your LDAP server is set up and ready for use. Be sure to include an Ektron CMS400.NET administrator account for yourself. Once you enable LDAP, the only account available to access Ektron CMS400.NET without LDAP authentication is the BuiltIn account. For more information on the BuiltIn account, see ”BuiltIn User” on page 32.

1. In the `webroot\CMS400Demo\web.config` file, change the following line:

   ```
   <add key="ek_AUTH_Protocol" value="None"/>
   ```

   becomes

   ```
   <add key="ek_AUTH_Protocol" value="GC"/>
   ```

2. Save and close the `Web.config` file.
3. In the Workarea, navigate to the **Settings > Configuration > Active Directory > Setup screen**.
4. Click the **Edit** button (📝).
5. On the Active Directory Setup screen, choose **Enable LDAP Authentication**.
6. Fill in the following fields.

Field	Description	For more information, see
Type	Choose the type of LDAP authentication you are using. Note: Depending on your choices, the fields below may be required or disallowed. The following choices are available: • Active Directory (LDAP) - Domain allowed, Organization is not. • Novell eDirectory/NDS - Organization allowed, Domain is not. • Sun Iplanet/JSDS - Domain allowed, Organization is not. • Other - Allows both Domain and Organization	”Using Active Directory for LDAP” on page 626
LDAP Server	The IP Address or name of the LDAP server	
Port	The LDAP server port that Ektron CMS400.NET communicates with. If you are unsure, consult the documentation provided with your Directory Service (such as, Novell, iPlanet, Microsoft, or Red Hat).	
Organization	The name of your company or organization. For example, Ektron, Inc. This field can be blank if you enter a domain in the **Domain** field.	
Domain	The name of the domain you are using. For example, www.ektron.com. This should be the same name you used when you received your license key. This field can be blank if you enter an organization in the **Organization** field.	
Path	The next levels below your Organization or Domain. These can include multiple levels of Organizational Units. For example, Content Editors, Marketing, East Coast.	

Field	Description	For more information, see
Add	Enter your the path you would like access to in the text field and click the **Add** link. When adding Organizational Units, the paths are comma separated and run from specific to general. For example, ou=Amherst,ou=New Hampshire,o=US Do not add individual Common Names here. Only add Organizational Units that contain the people who should have access to Ektron CMS400.NET. **Important**: You can have additional Organizations below your Organization Units as long as the path on your LDAP server is the same.	"Adding an Organizational Unit During Setup" on page 627 To add a single individual from a different Organizational Unit, see "Adding User Information from an LDAP Server to Ektron CMS400.NET" on page 628
Delete	Choose any Organizational Unit from the multi-selection box and click the **Delete** link.	

7. Click the Save button (💾).

Using Active Directory for LDAP

In the `webroot\CMS400Demo\Web.Config` file, add the Username and Password for `ek_ADUsername` and `ek_ADPassword`. For example:

```
<add key="ek_ADUsername" value="mwright@ektron.com" />

<add key="ek_ADPassword" value="mypasswordisthis" />
```

When using LDAP to connect to Active Directory, use the following settings in the Workarea.

NOTE LDAP using AD is NOT the same as AD integration. LDAP integration (independent of server type) does not support groups, only user authentication.

Field	Needed Information
Type	Active Directory (LDAP)
LDAP Server	[IP Address of the AD domain controller]

Field	Needed Information
Port	389
Organization	[leave this blank]
Domain	[dns name of the AD domain] For example: intra.ektron.com
Organizational Unit	[any OUs that you want to draw users from] For example: Support,Users,Ektron Corporate also Engineering,Users,Ektron Corporate

Adding an Organizational Unit During Setup

Things to consider when adding Organizational Units are:

- Should everyone in the OU have access to Ektron CMS400.NET?

  Once LDAP is enabled, users are added to the everyone group upon login. While everyone in the OU has access to Ektron CMS400.NET, every user does not necessarily have permission to edit content. To control permissions, set up user groups, adding each user to a group, and assigning permissions to the group. For more information on user groups, see ”Managing Users & User Groups” on page 499. For more information on assigning permissions, see ”Setting Permissions” on page 547.
- Do users in other Organizational Units need access?

  Sometimes, managers or editors are in a different OU. They need to be added manually, or you need to add their OU.

When adding an Organizational Unit, several entries might cover the same hierarchical path. For example, you might have:

- ou=Pitchers,ou=Players,o=Team
- ou=Players,o=Team
- o=Team

This allows you to authenticate users listed in Pitchers, Players, and Team.

Adding User Information from an LDAP Server to Ektron CMS400.NET

Users at each level are automatically available for adding to Ektron CMS400.NET. You do not have to be at the OU or CN level to add a user. If a user is at the DC or OU level, they are available.

There are three ways to add LDAP user information to Ektron CMS400.NET.

- Have the user log in after LDAP is enabled. As a result, the user appears in the Users list and is added to the Everyone group.

NOTE After a user logs in, some fields on the Add User screen can be filled in manually, such as first and last name. For a description of these fields, see ”Fill out the fields according to the table below.” on page 631.

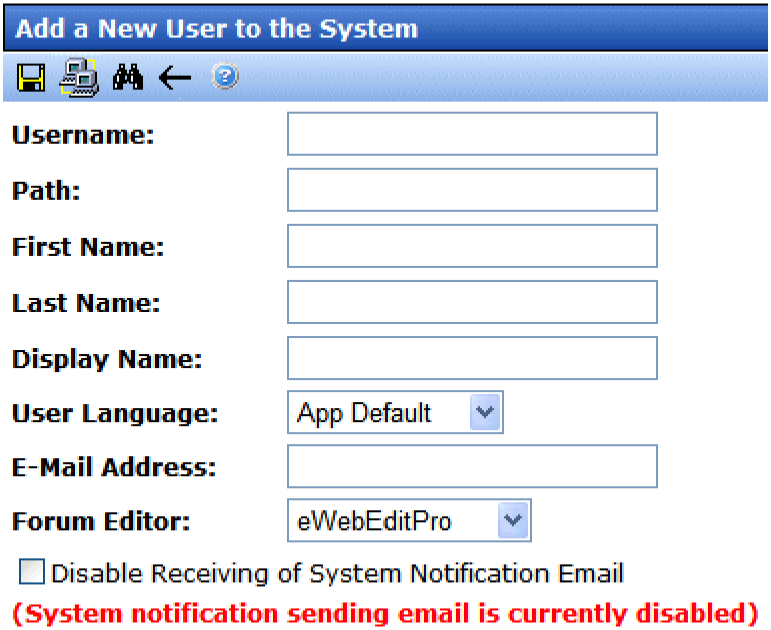
- Search an LDAP server for LDAP users using the LDAP Search feature. *See Also:* ”Searching an LDAP Server for Users.” on page 628
- Add the user’s LDAP information manually. *See Also:* ”Steps to Manually Add an LDAP User” on page 630.
- A combination of browsing for the user, then manually completing the remaining fields. *See Also:* ”Using the Browse Feature to Add an LDAP User” on page 632

Searching an LDAP Server for Users.

The following steps explain how to search for a user on an LDAP server an add them to the CMS400.NET.

1. Enable LDAP by following the instructions in ”Enabling LDAP” on page 624.
2. From the left side of the Workarea, click **Users**.
3. Click the Add Users button (👤).

4. The Add a New User to the System screen appears.



Add a New User to the System

Username:

Path:

First Name:

Last Name:

Display Name:

User Language: App Default

E-Mail Address:

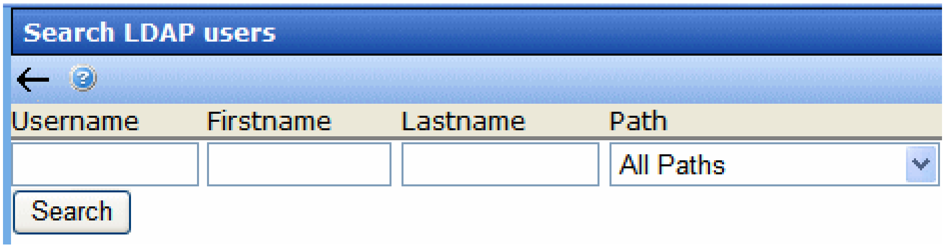
Forum Editor: eWebEditPro

☐ Disable Receiving of System Notification Email

(System notification sending email is currently disabled)

5. Click the Browse LDAP button (🔍).

6. The Search LDAP Users screen appears.



Search LDAP users

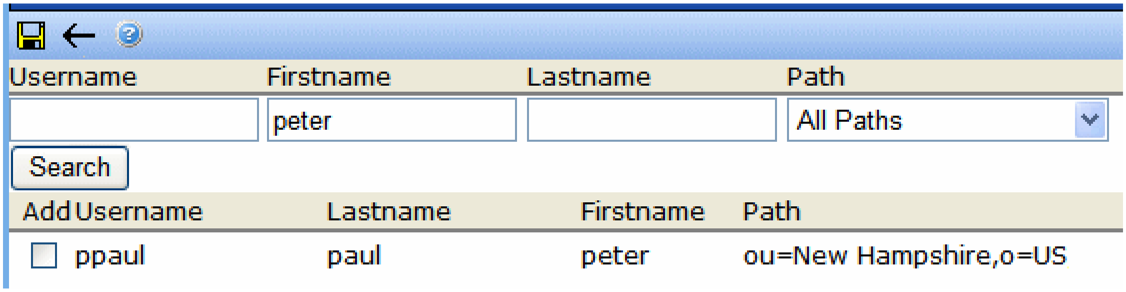
Username	Firstname	Lastname	Path
			All Paths

7. Enter search criterion for any of the categories to search.

- **Username** - the username of the user on the LDAP server.
- **Firstname** - the first name of the user on the LDAP server.
- **Lastname** - the last name of the user on the LDAP server
- **Path** - select a path from the drop down list. The paths that are available are the same paths that are enabled when configuring the CMS400.NET for use with your LDAP server. If you select a path and enter no other information, you get back all of the users in that path.

8. Click the **Search** button.

9. The search returns any users that match the criteria entered.

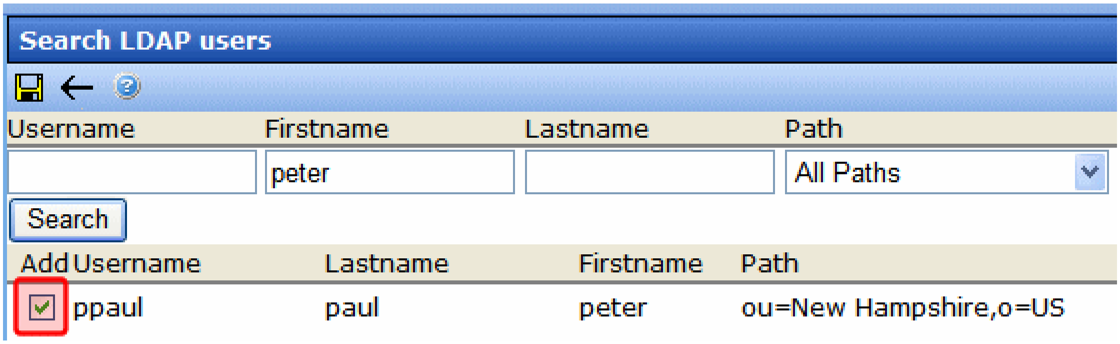


Username	Firstname	Lastname	Path
	peter		All Paths

Search

Add	Username	Lastname	Firstname	Path
☐	ppaul	paul	peter	ou=New Hampshire,o=US

10. Click the check box next to the user to be added.



Search LDAP users

Username	Firstname	Lastname	Path
	peter		All Paths

Search

Add	Username	Lastname	Firstname	Path
☑	ppaul	paul	peter	ou=New Hampshire,o=US

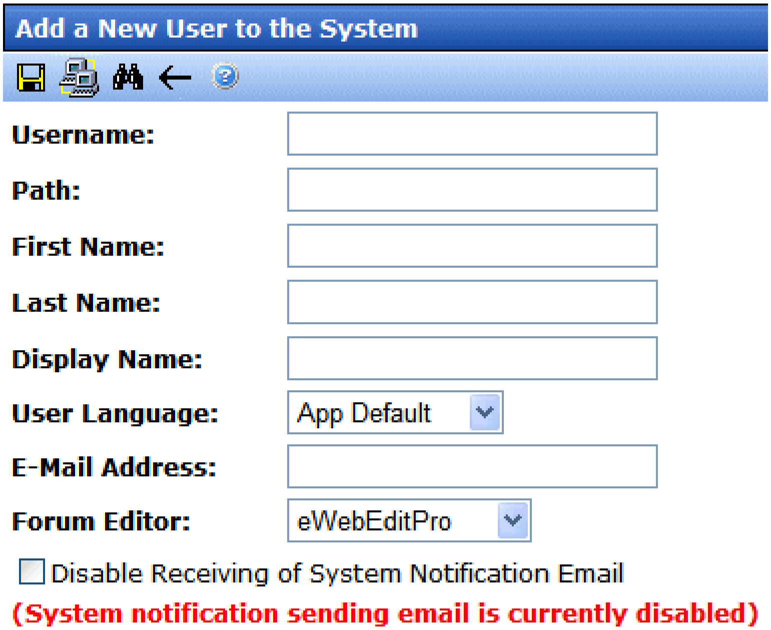
11. Click the Save button (💾)
12. The user is now added to Ektron CMS400.NET and added to the Everyone group. To learn about how to assign this user to a specific group, see "Assigning Users To User Groups" on page 506.

Steps to Manually Add an LDAP User

The following steps explain how to add an LDAP user manually.

1. Enable LDAP by following the instructions in "Enabling LDAP" on page 624.
2. From the left side of the Workarea, click **Users**.
3. Click the Add Users button (👤).

4. The Add a New User to the System screen appears.



Add a New User to the System

Username:

Path:

First Name:

Last Name:

Display Name:

User Language: App Default

E-Mail Address:

Forum Editor: eWebEditPro

☐ Disable Receiving of System Notification Email

(System notification sending email is currently disabled)

5. Fill out the fields according to the table below.

Field	Description
Username	The username of the person logging in, as found on the LDAP server.
Path	The path on the LDAP server to the user. For example: `ou=Amherst,ou=New Hampshire,o=US,dc=local`
First Name	The first name of the user.
Last Name	The last name of the user.
Display Name	The name of the user that is displayed in the Forums when using Threaded Discussions feature. For information on Threaded Discussions, see "Discussion Boards" on page 383

Field	Description
User Language	Select the language in which the user will view Ektron CMS400.NET screens and messages. The language also determines the default value whenever a drop-down list of languages appears within Ektron CMS400.NET. The dropdown list of choices at this field is derived from the Language Settings screen, available from the Settings > Configuration folder. Do not confuse the system language with the user's ability to create and edit foreign editions of content. This field does not prevent a user from working with multiple language content. *See Also:* "Multi-Language Support" on page 640 Note: If the selected language is not English, French or German, it is only supported after you download the Ektron CMS400.NET Language Support Program from Ektron and translate the Web site.
E-Mail Address	Enter the email address of the user.
Forum Editor	If you are using Threaded Discussions feature, specify which editor this user uses when editing in the Forums. Choose from eWebEditPro, eWebWP or a Javascript Editor. For information on Threaded Discussions, see "Discussion Boards" on page 383
Disable Email Notification	Select to disable email notifications for this user. If you do, the user will not receive the automatic email notification described in "Automatic eMail Notification" on page 828. However, this field has no effect on the user's ability to receive instant email.

6. Click **Save** (💾) to add LDAP users to Ektron CMS400.NET.
7. The View Users in Group Everyone screen appears, displaying the new user and the other Ektron CMS400.NET users. To learn about how to assign this user to a specific group, see "Assigning Users To User Groups" on page 506.

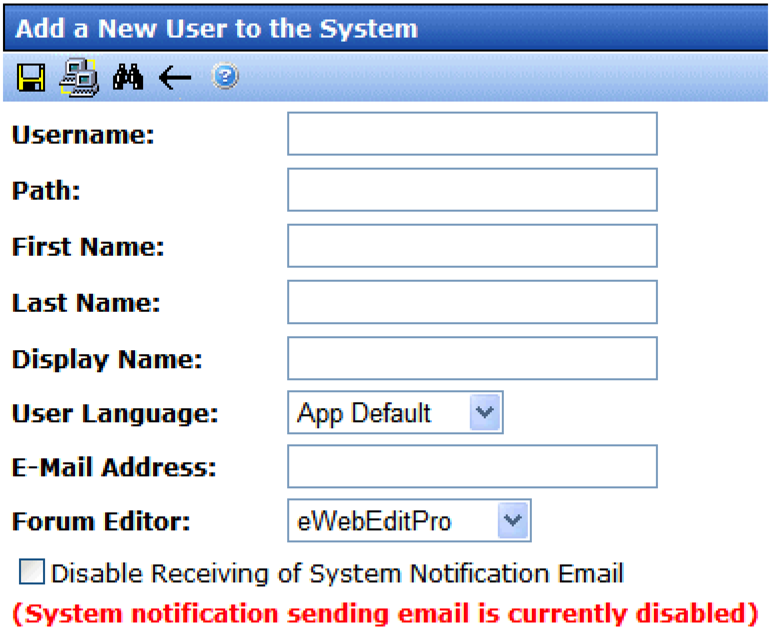
Using the Browse Feature to Add an LDAP User

The Browse LDAP feature provides a more friendly and intuitive way to find the username, domain/organization and organizational unit(s).

IMPORTANT The default server IP/DNS name and port are taken from the settings specified in the **Configuration > Setup** page. These settings must be specified before connecting to the LDAP server. *See Also*: "Enabling LDAP" on page 624

IMPORTANT An Organizational Unit that can see the user to be added must be specified in the **Configuration > Setup** page before using the browse feature. *See Also*: "Enabling LDAP" on page 624

1. Enable LDAP by following the instructions in "Enabling LDAP" on page 624.
2. From the left side of the Workarea, click **Users**.
3. Click the Add Users button ( ).
4. The Add a New User to the System screen appears.



Add a New User to the System

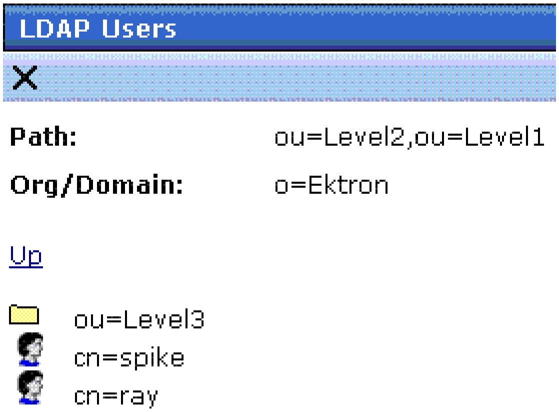
Username:	
Path:	
First Name:	
Last Name:	
Display Name:	
User Language:	App Default
E-Mail Address:	
Forum Editor:	eWebEditPro

☐ Disable Receiving of System Notification Email

(System notification sending email is currently disabled)

5. Click the Browse LDAP button ( ).

6. The LDAP Explorer appears.



Path: ou=Level2,ou=Level1

Org/Domain: o=Ektron

ou=Level3
cn=spike
cn=ray

7. Navigate the LDAP server's folders by clicking on the folder images. Each folder represents an Organizational Unit (OU). When you choose an OU level, its users appear.

NOTE In the LDAP Explorer, the Path and Org/Domain fields update dynamically as you navigate through the LDAP tree.

8. Select a user.
9. The user is now added to Ektron CMS400.NET and added to the Everyone group. To learn about how to assign this user to a specific group, see "Assigning Users To User Groups" on page 506.

Editing User Information in Ektron CMS400.NET

It is important to note that **Ektron CMS400.NET** does not write to the LDAP server. So, while you can change any fields when editing a user in Ektron CMS400.NET, you also need to make these changes in the LDAP server.

Steps to Edit an LDAP User's Information

The following steps explain how to edit an LDAP user's information.

1. In the Workarea, click **Settings** > **Users**.
2. In the Username column, click a user to edit.
3. The View User Information screen appears.
4. Click the Edit button (📝).

5. Change the information as needed. For more information on the fields you can edit, see ”Fill out the fields according to the table below.” on page 631.

6. Click Save (💾).

Deleting Users

If a user is deleted in an LDAP server, Ektron CMS400.NET does not automatically delete the user. However, the user’s login fails because he cannot be authenticated.

In this case, you should delete the user from Ektron CMS400.NET using the Delete User function. *See Also:* ”Deleting a User” on page 504

NOTE If you mistakenly delete all users with administrative privileges, you can still sign in using the builtin user’s username and password. For more information, see ”BuiltIn User” on page 32.

LDAP Screen Descriptions

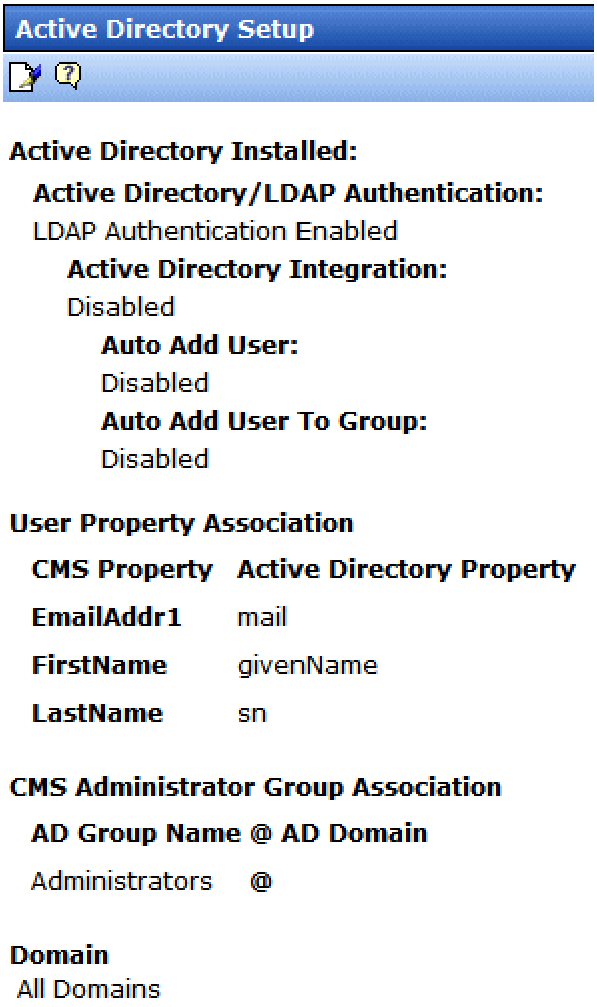
The LDAP feature uses the following screens:

- ”The Active Directory Setup Screen” on page 635
- ”The View Users Screen” on page 636

This section explains how to use each screen.

The Active Directory Setup Screen

The Active Directory Setup screen (illustrated below) lets you enable and disable the Active Directory or LDAP features, as well as determine other aspects of AD management, such as whether users and groups are automatically updated. To access the screen, click **Configuration -> Active Directory -> Setup** from the left panel of the Workarea.



Active Directory Setup

Active Directory Installed:

Active Directory/LDAP Authentication:

LDAP Authentication Enabled

Active Directory Integration:

Disabled

Auto Add User:

Disabled

Auto Add User To Group:

Disabled

User Property Association

CMS Property	Active Directory Property
EmailAddr1	mail
FirstName	givenName
LastName	sn

CMS Administrator Group Association

AD Group Name @ AD Domain

Administrators @

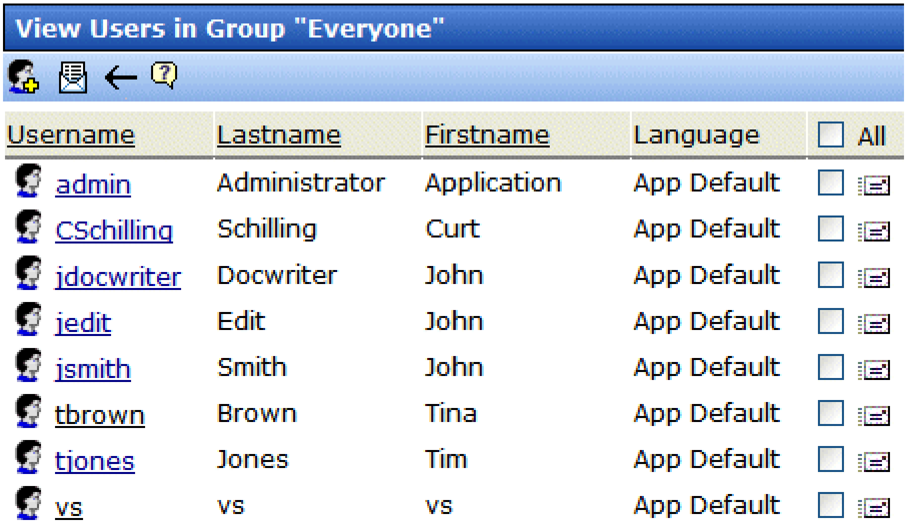
Domain

All Domains

For a description of the fields, see the Active Directory section ”The Active Directory Setup Screen” on page 597.

The View Users Screen

The View Users screen (illustrated below) lists all users in the Ektron CMS400.NET database. To access the screen, click **Users** from the left panel of the Workarea. To view more information for a user, click that user to move to the View User Information screen.

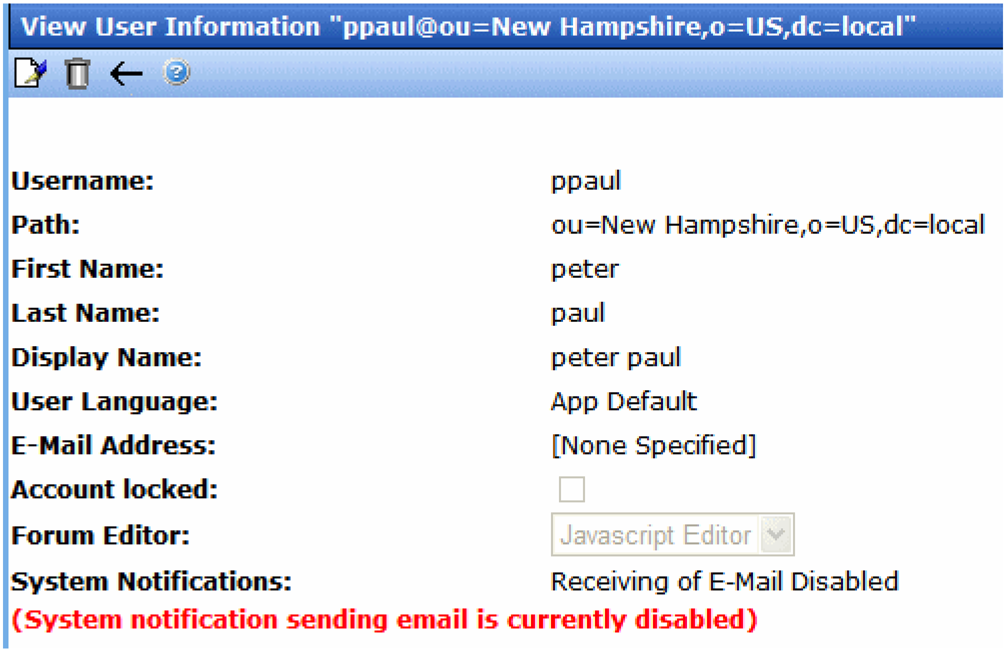


View Users in Group "Everyone"

Username	Lastname	Firstname	Language	☐ All
admin	Administrator	Application	App Default	☐
CSchilling	Schilling	Curt	App Default	☐
jdocwriter	Docwriter	John	App Default	☐
jedit	Edit	John	App Default	☐
jsmith	Smith	John	App Default	☐
tbrown	Brown	Tina	App Default	☐
tjones	Jones	Tim	App Default	☐
vs	vs	vs	App Default	☐

The View Users screen also provides a toolbar button () that lets you add LDAP users manually to the Ektron CMS400.NET database. This is useful if you want to add a single user from an Organization that is does not have the same Organizational Unit as the rest of your users, and you do not want to add any other users from that Organization.

The View User Information Screen



View User Information "ppaul@ou=New Hampshire,o=US,dc=local"

Username:	ppaul
Path:	ou=New Hampshire,o=US,dc=local
First Name:	peter
Last Name:	paul
Display Name:	peter paul
User Language:	App Default
E-Mail Address:	[None Specified]
Account locked:	☐
Forum Editor:	Javascript Editor
System Notifications:	Receiving of E-Mail Disabled

(System notification sending email is currently disabled)

The View User Information Screen displays the user’s

- username
- Path
- first and last name
- language
- email address and whether the user receives email notifications
- whether the account is locked
- which Forum Editor the user is using
- user groups
- user properties (if any)

The screen also displays the following buttons.

Button	**Description**
📝	Edit information on screen
🗑	Delete user *See Also:* ”Deleting Users” on page 635
←	Return to previous screen
?	Launches a help screen

Disabling LDAP Authentication

If you decide to disable LDAP authentication or integration, edit the Active Directory Setup screen and select **Disable Active Directory and LDAP Authentication**.

See Also: ”The Active Directory Setup Screen” on page 635

Multi-Language Support

There are several aspects to translating within **Ektron CMS400.NET**. They are listed below.

Type of Translation	Seen by	For more information, see
Content	Content contributors; visitors to your site	”Working with Multi-Language Content” on page 640
Spell check dictionary	Visitors to your site	”Set the Language of Spell Checking” on page 677
Special Character Encoding	Visitors to your site	”Character Encoding” on page 677
Workarea screen labels, alt text, system messages	Content contributors	”Translating the Workarea” on page 677

Working with Multi-Language Content

Ektron CMS400.NET supports the creation of content in any language supported by the Unicode standard. This section explains how to create and work with content in any language.

Overview

First, determine the languages in which your site’s content should appear (see ”Determining Which Languages are Available” on page 644). Then, for any content, you can provide editions in each supported language.

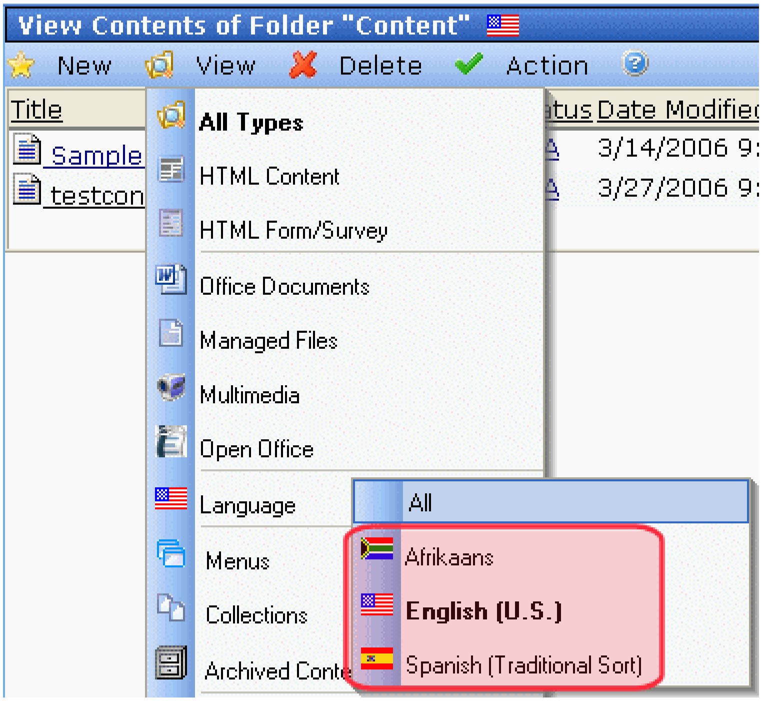
To provide multi-language content, you can either create new content or copy and edit existing content. For example, you can begin the creation of German content by copying English content into it, then translating that content into German and deleting the English content.

All editions of content have the same ID number but are differentiated by the language attribute. As a result, your Web page template can link to a single content item, but what is displayed is determined by the selected language. There are two ways that content's language can be selected:

- a language cookie, which is created when a visitor enters your site and selects a language
- the link to another page includes the language (`langType`) parameter. For example, `mytemplate.aspx?LangType=1033`.

NOTE For a list of the decimal values for each supported language, see "Appendix C: List of Supported Languages" on page 890.

The View Contents of Folder screen's **View** field lets you choose a language then view and create content in that language. You can also view *all* content in the folder, regardless of language. This field makes to easy to find and work on content editions in a selected language.


View Contents of Folder "Content"
New
View
Delete
Action
Title
Sample
testcon
tus
Date Modified
3/14/2006 9:
3/27/2006 9:
All Types
HTML Content
HTML Form/Survey
Office Documents
Managed Files
Multimedia
Open Office
Language
Menus
Collections
Archived Conte
All
Afrikaans
English (U.S.)
Spanish (Traditional Sort)

The View Contents of Folder screen also displays the language of each content item. This helps you distinguish them when viewing all content.

Finally, you can set up a separate approval chain for each edition of a content, and can assign collections and tasks in any supported language.

This section describes how to work with a multiple language Web site through the following topics.

- ”Enabling/Disabling Support for Multiple Language Content” on page 642
- ”Viewing Your Site in Another Language” on page 643
- ”Determining Which Languages are Available” on page 644
- ”The Default Language” on page 647
- ”Creating New Content” on page 648
- ”Translating Content” on page 649
- ”Additional Multi-Language Topics” on page 665
- ”Setting Up a Multilingual Web Site” on page 668
- ”Using a Language Other than American English as the Default” on page 672
- ”Resolving Conversion Issues” on page 672

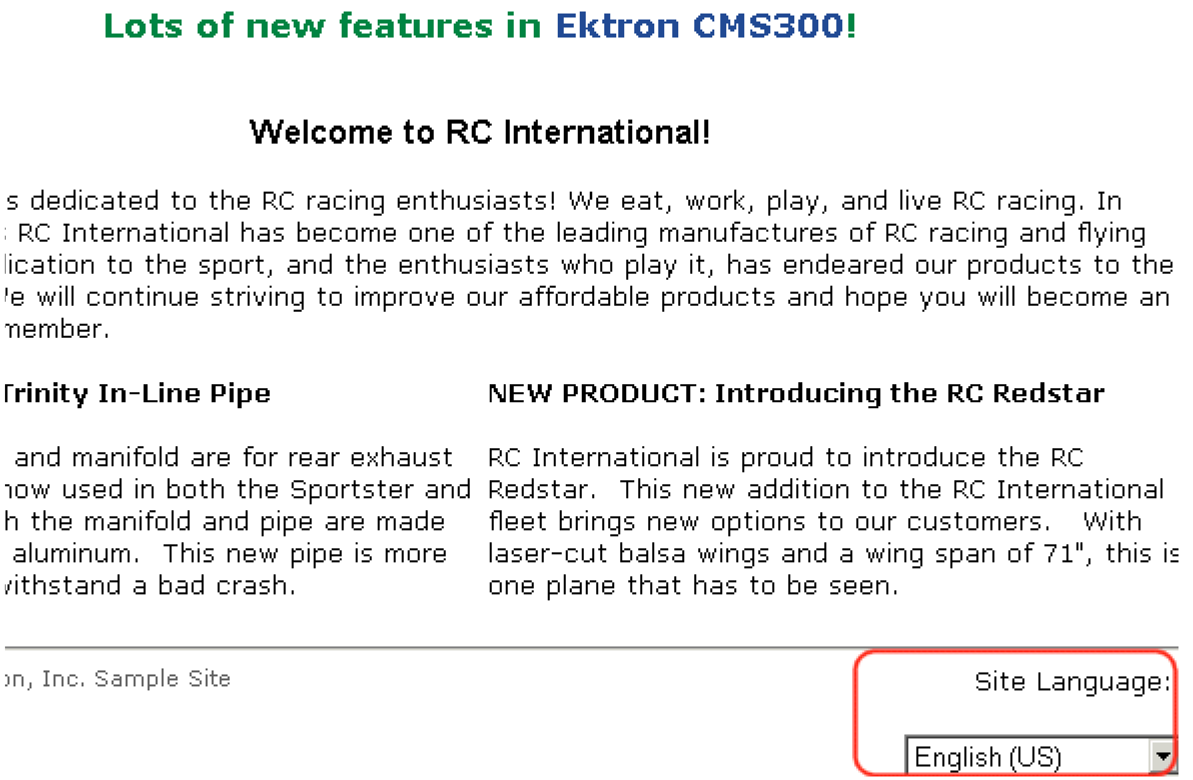
Enabling/Disabling Support for Multiple Language Content

Support for multi-language content is enabled in the web.config file. To enable or disable it, follow these steps.

1. Open the file `webroot\yourwebsite\web.config`.
2. To enable multi-language content, set the value of `ek_EnableMultilingual` to 1. To disable it, set it to zero (0).
3. Save and close web.config.

Viewing Your Site in Another Language

It’s easy for your site visitors to view your site in any enabled language. On any screen, your developer can display a language drop-down list (circled in red below).



Lots of new features in Ektron CMS300!

Welcome to RC International!

s dedicated to the RC racing enthusiasts! We eat, work, play, and live RC racing. In RC International has become one of the leading manufactures of RC racing and flying lication to the sport, and the enthusiasts who play it, has endeared our products to the e will continue striving to improve our affordable products and hope you will become an member.

Trinity In-Line Pipe

and manifold are for rear exhaust now used in both the Sportster and h the manifold and pipe are made aluminum. This new pipe is more withstand a bad crash.

NEW PRODUCT: Introducing the RC Redstar

RC International is proud to introduce the RC Redstar. This new addition to the RC International fleet brings new options to our customers. With laser-cut balsa wings and a wing span of 71", this is one plane that has to be seen.

on, Inc. Sample Site

Site Language: English (US)

(For more information about the LanguageSelect Server Control which displays this drop-down list, see the **Ektron CMS400.NET** Developer’s Manual.) On the sample site provided with **Ektron CMS400.NET**, this drop-down list appears in the lower left corner of the home page, but your developer can place it anywhere on any page.

Another way to indicate which language-edition of content to display is by adding the language parameter (`langType`) to the Quicklink. For example, `products.aspx?LangType=1033` displays the

English (US) edition of the products.aspx content. This syntax automatically sets the language cookie.

NOTE For a list of the decimal values for each supported language, see ”Appendix C: List of Supported Languages” on page 890.

See Also: ”What Happens if Chosen Language is Not Available” on page 644

What Happens if Chosen Language is Not Available

A visitor to your site uses one of the methods listed above to select a language. **Ektron CMS400.NET** uses the following criteria to determine which language edition to display for content.

1. If an edition of the content is available in the selected language, display that.
2. If option 1 is not available, display an edition of the content in the default language (defined in the ek_DefaultContentLanguage variable in web.config).

NOTE When **Ektron CMS400.NET** is installed, the default language is English.*See Also:* ”The Default Language” on page 647

3. If neither edition is available, display nothing.

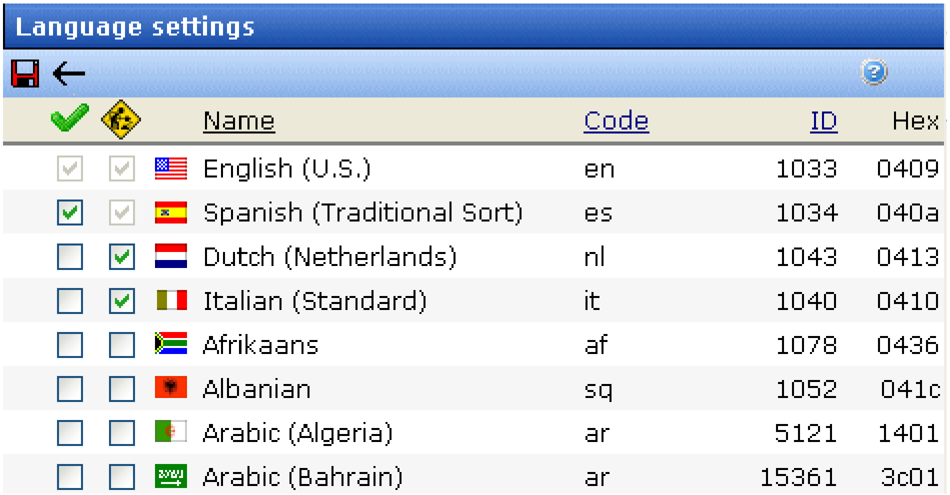
Determining Which Languages are Available

To determine which languages are available for creating content, go to the Workarea and click **Settings > Configuration > Language Settings**. The Language Settings screen lists all languages in which content can be created on your site.

NOTE Only members of the Administrator User Group can view, add, or edit language settings.

To change the list, follow these steps.

1. Click the Edit button (✎).
2. The Edit Language Setting screen appears.

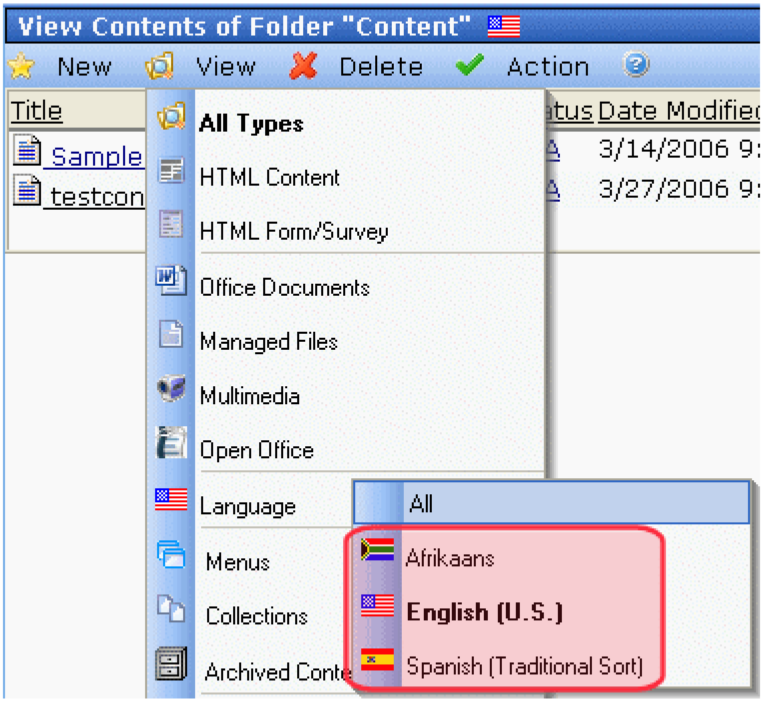


Language settings

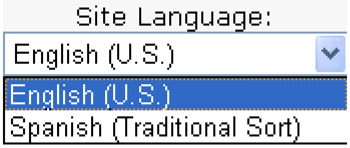
✓	◆		Name	Code	ID	Hex
☑	☑		English (U.S.)	en	1033	0409
☑	☑		Spanish (Traditional Sort)	es	1034	040a
☐	☑		Dutch (Netherlands)	nl	1043	0413
☐	☑		Italian (Standard)	it	1040	0410
☐	☐		Afrikaans	af	1078	0436
☐	☐		Albanian	sq	1052	041c
☐	☐		Arabic (Algeria)	ar	5121	1401
☐	☐		Arabic (Bahrain)	ar	15361	3c01

3. Each language has two check boxes. They are described below.

- To enable a language in the Workarea only, click (◆). If this column is checked, the language populates the language drop-down lists within **Ektron CMS400.NET**, as shown below.


View Contents of Folder "Content"
New
View
Delete
Action
Title
Sample
testcon
tus
Date Modified
3/14/2006 9:
3/27/2006 9:
All Types
HTML Content
HTML Form/Survey
Office Documents
Managed Files
Multimedia
Open Office
Language
Menus
Collections
Archived Conte
All
Afrikaans
English (U.S.)
Spanish (Traditional Sort)

- To enable a language in the Workarea *and* let site visitors select it when viewing the site, click (✓).


Site Language:
English (U.S.)
English (U.S.)
Spanish (Traditional Sort)

So, you can enable languages in the ◆ column when you are translating the site but are not ready to make those content items publicly available. When you complete the translation, check the ✓ column.

NOTE

If you select ✓, the check box in the ◆ column is checked automatically. This is because, if you let users view the language on the site, it must be enabled in the Workarea.

NOTE

The default content language on a dropdown list is determined in the `ek_DefaultContentLanguage` element of the web.config file.

If you choose only one language on the Language Settings screen, fields that prompt the user to select a language do not appear in **Ektron CMS400.NET**. Instead, all content is created in that language.

The Default Language

The default language determines which edition of content to display when a visitor to your site does not select a language.

It is also used if a visitor selects a language other than the default, then navigates to page for which content does not exist in the selected language. In that case, **Ektron CMS400.NET** displays that content in the default language (if available).

Within **Ektron CMS400.NET**, the default language determines the default value on the language drop-down lists that appear on every page on which a user can select a language.

When you install **Ektron CMS400.NET**, the default language is English.

Use the following procedure to change the default language for your multi-language Web site.

1. Open the folder `webroot\yourwebsite`.
2. Within that folder, open web.config.
3. Set the value of `ek_DefaultContentLanguage` to the locale id of the default language. For example, 1031 for German.

NOTE For a list of locale ids, see ”Appendix C: List of Supported Languages” on page 890.

4. Save and close web.config.

See Also: ”Using a Language Other than American English as the Default” on page 672

Disabling a Language

To disable any language, uncheck the accompanying checkbox on the Edit Language Setting screen. (For more information, see ”Determining Which Languages are Available” on page 644.)

If you want to disable the default language, you must first assign a new default language. *See Also:* "The Default Language" on page 647 explains what a default language is and how to assign one.

What Happens to Content When You Disable Its Language

If you disable a language for which content exists, that content remains in the database but no one can access it, either from within **Ektron CMS400.NET** or when visiting your site.

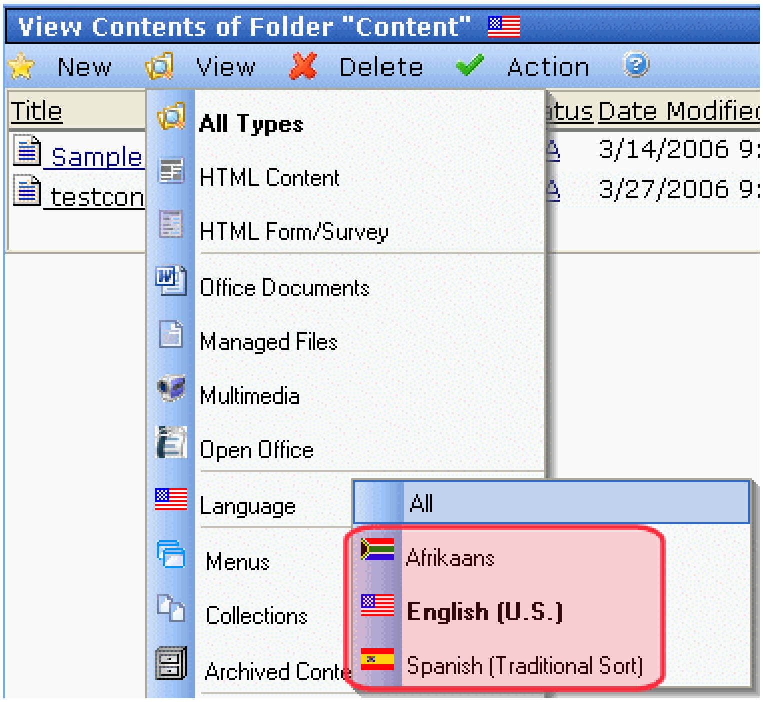
If you later enable that language, the content is once again available.

Creating New Content

To create content in a non-English language, follow these steps.

1. Navigate to the content folder in which you want to create the content. (You must have permission to add content to the folder.)
2. From the language drop-down list, select the language in which you want to create the content

.


View Contents of Folder "Content"
New
View
Delete
Action
Title
Sample
testcon
tus
Date Modified
3/14/2006 9:
3/27/2006 9:
All Types
HTML Content
HTML Form/Survey
Office Documents
Managed Files
Multimedia
Open Office
Language
Menus
Collections
Archived Conte
All
Afrikaans
English (U.S.)
Spanish (Traditional Sort)

If the desired language is not available, see ”Determining Which Languages are Available” on page 644.

3. Click the Add Content button () and create the content as you would any content.*See Also:* ”Adding Content” on page 72
4. In order to add metadata to a content, metadata specifications must have been created for the selected language.*See Also:* ”Metadata” on page 94

Translating Content

When translating content into a foreign language, you have three options.

Option	For more information, see
Copy original content into a new content item in a new language. Then, translate content manually.	”Translating Content Manually” on page 650

Option	For more information, see
Use the computer-based translation tool provided with **Ektron CMS400.NET**.	”Using Machine Translation” on page 652
Create an XLIFF or XHTML file from existing content. The files are sent to a translation agency and return translated in the new language(s). Then, you import the translated files into the CMS.	”Using the Language Export Feature” on page 655

Translating Content Manually

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

For example, an editor is translating content from French to German. The editor copies the French edition to new content whose language is German. As the editor translates the French edition into German, he deletes the French content. Any images in the content would usually remain, and all formatting (tables, bullets, etc.) is retained.

After signing in to **Ektron CMS400.NET**, you copy content into new content of a different language by either

- navigating the Web site, or
- accessing the Workarea and navigating the folder structure

After copying the original content, translate it into the new language then delete the original text. Both procedures are described below.

Accessing Content via the Web Site

1. Navigate to a page on which you can select the site language. *See Also:* ”Viewing Your Site in Another Language” on page 643
2. Select the language into which you want to translate the content.

3. Navigate to content that you want to translate. You must have privileges to add content to this folder. *See Also:* ”Setting Permissions” on page 547
4. Right click within the content’s border and a small menu appears.
5. Click the Add New Language option ( ).
6. The original language content appears. Translate into the new language then delete the original content.

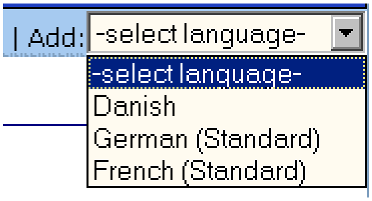
NOTE At this point, you can click the Translate Content button ( ) to have the software translate the content. You can then edit it as needed to perfect the translation.

7. In order to add metadata to content, metadata specifications must have been created for the selected language. *See Also:* ”Metadata” on page 94
8. When you save the content, it is saved as the edition of that content in the selected language.

Accessing Content via its Content Folder

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

1. Go to the View Content screen for the content you want to translate. Its status must allow editing (it cannot be submitted or pending).
2. From the View drop-down list, select a original language.
3. Click the content you want to translate.
4. It appears on the View Content screen.
5. Use the **Add** drop down list in the upper right corner to select the language into which you want to translate the content.



6. The original language content appears. Translate into the new language then delete the original content.
7. In order to add metadata to content, metadata specifications must have been created for the selected language.*See Also:* ”Metadata” on page 94
8. When you save the content, it is saved as the edition of that content in the selected language.

Using Machine Translation

Ektron CMS400.NET includes a machine translation feature, which can automatically translate content from/to the following languages.

- English
- Dutch
- French
- German
- Italian
- Portuguese (Brazil)
- Spanish

NOTE Currently, machine translation is not supported for all languages in the Language Settings screen.

Like most software-based translation, someone fluent in the new language should review the translated content to verify that the translation is appropriate within the context of the page.

The machine translation feature lets you choose a glossary (that is, a field, industry, or subject area). This helps the software find the best translation for a term or phrase with different meanings in different fields.

To use the machine translation feature, follow these steps.

Accessing Content via the Web Site

1. Navigate to a page on which you can select the site language. *See Also:* ”Viewing Your Site in Another Language” on page 643

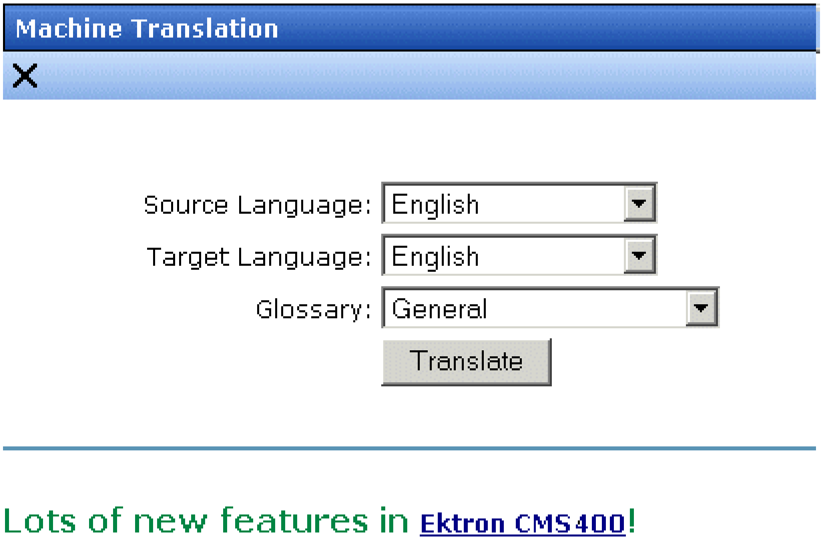
2. Select the language into which you want to translate.
3. Navigate to content you want to translate.

NOTE You must have privileges to add content to the folder.*See Also:* "Setting Permissions" on page 547

4. Right click within the content's border. A menu appears.
5. Click the Add Content button ().
6. The original language content appears.
7. If the screen uses a Smart Form, select the text that you want to translate.

NOTE You cannot use Machine Translation to translate field names in a Smart Form. XLIFF files are a good way to translate XML field names.*See Also:* "Using the Language Export Feature" on page 655

8. Click the Translate Content button ().
9. The Translation screen appears.



Machine Translation

Source Language: English

Target Language: English

Glossary: General

Lots of new features in Ektron CMS400!

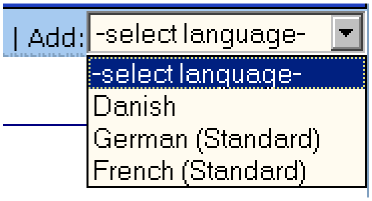
10. Select the source (old) and target (new) languages.
11. If the content should refer to a specific glossary, select one from the dropdown list.
12. Click the **Translate** button.
13. The translation appears. If it looks OK, press **Paste Content**.

14. The translated content replaces the original content in the editor. Modify as needed.
15. In order to add metadata to content, metadata specifications must have been created for the selected language.*See Also:* ”Metadata” on page 94
16. When you save the content, it is saved as the edition of that content in the selected language.

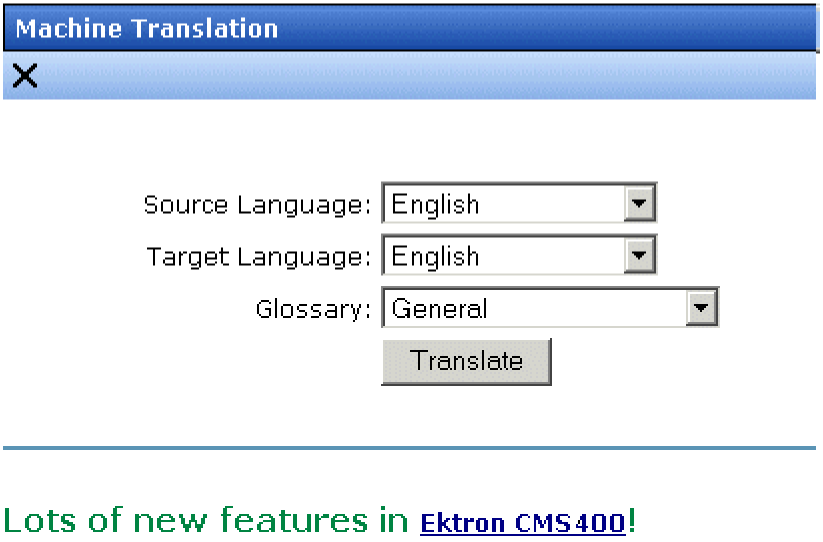
Accessing Content via its Content Folder

To machine translate content by identifying its content folder, follow these steps.

1. Log into the Workarea and go to the View Content screen for the content you want to translate. Its status must allow editing (that is, its status cannot be submitted or pending).
2. From the View drop-down list, select an original language (that is, the language from which it will be translated).
3. Click the content you want to translate.
4. It appears on the View Content screen.
5. Use the **Add** drop down list in the upper right corner to select the language into which you want to translate the content. It must be a language supported for machine translation (English, Dutch, French, German, Italian, Portuguese (Brazil), or Spanish).



6. The original language content appears. Edit the title if appropriate.
7. Click the Translate Content button ( ).
8. The Translation screen appears.


Machine Translation

Source Language: English

Target Language: English

Glossary: General

Lots of new features in Ektron CMS400!

9. Select the source (old) and target (new) languages.
10. If the content should refer to a specific glossary, select one from the dropdown list.
11. Click the **Translate** button.
12. The translation appears. If it looks OK, press **Paste Content**.
13. The translated content replaces the original content in the editor. Modify as needed.
14. In order to add metadata to content, metadata specifications must have been created for the selected language.*See Also:* ”Metadata” on page 94
15. When you save the content, it is saved as the edition of that content in the selected language.

Using the Language Export Feature

The Language Export feature lets you copy content into XLIFF files that can be submitted to a translation agency. The agency translates the files and returns them. In the final stage, you import the translated content back into **Ektron CMS400.NET**.

The Language Export feature lets you translate the following kinds of CMS information.

- content, including summary, comments, and meta data
- forms, including response message, comments, and meta data
- all menus (you cannot choose individual menus)
- file assets (files managed by the DMS, including Office documents, Open Office documents, managed files, etc.)

The Language Export Feature is explained through the following topics.

- ”What is XLIFF?” on page 656
- ”Overview of Exporting/Importing Translation Files” on page 657
- ”Creating the .zip File” on page 657
- ”Importing Translated Files into Ektron CMS400.NET” on page 662

What is XLIFF?

XLIFF (XML Localization Interchange File Format) is a format that's used to exchange localization data between participants in a translation project. This special format enables translators to concentrate on the text to be translated, without worrying about text layout. The XLIFF standard is supported by a large group of localization service providers and localization tools providers.

To learn more about XLIFF, visit these Web sites:

- http://www-106.ibm.com/developerworks/xml/library/x-localis/
- http://www-106.ibm.com/developerworks/xml/library/x-localis2/
- http://www.xliff.org/

Supported Versions of XLIFF

Ektron CMS400.NET supports the following versions of the XLIFF standard: 1.0, 1.1, and 1.2. You specify the version you are exporting in the web.config file, using the `ek_XliffVersion` element. Any version listed above can be imported.

Overview of Exporting/Importing Translation Files

1. You select content to translate. You can select:
    - a content item
    - a folder (all content in the selected folder is selected; all subfolders of the selected folder may be included)
    - all menus
2. **Ektron CMS400.NET** converts the selected content to XLIFF files. You can prepare the files for translation into several languages at once.

    A separate .xlf file is created for each item. Then, all .xlf files for a language are compressed into one .zip file. A separate .zip file is created for each language.
3. Transmit the.zip files to a translation agency, which converts them into the new language(s).
4. The translation agency returns the files.
5. Import them into **Ektron CMS400.NET**. If the editions of the content do not exist in the target language, they are created.

Creating the .zip File

To create one or more .zip files for translation, follow these steps.

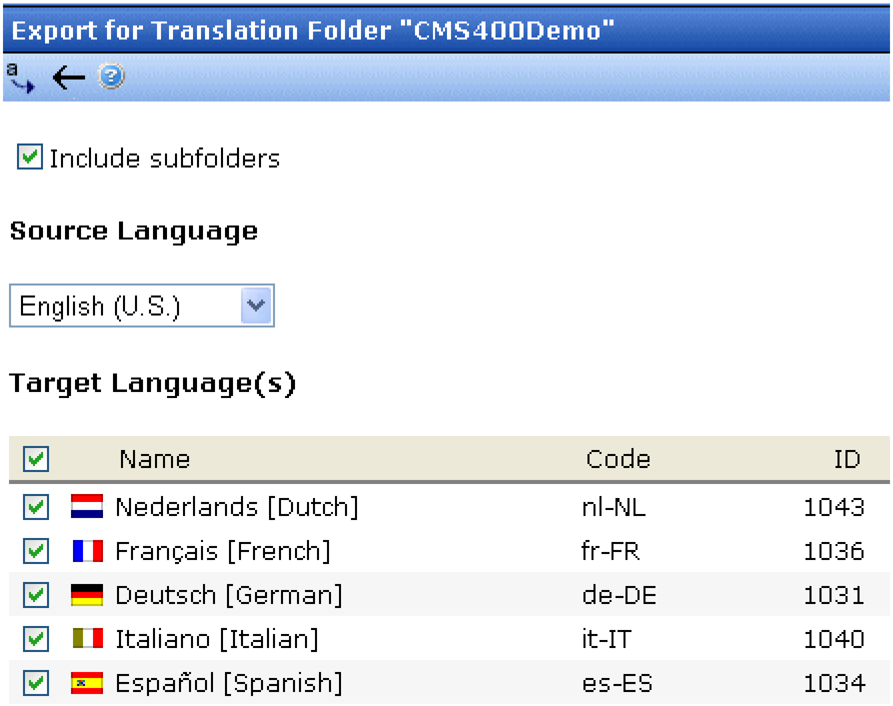
Note

Only members of the Administrator User Group and those defined in the Manage Members for Role: XLIFF-Admin screen can create or import XLIFF files. *See Also:* "Using the Roles Screens" on page 564.

1. To translate *one content item*, navigate to its View Content screen.

    To translate *all content in a folder* (and, if desired, all of its subfolders), navigate to its View Contents of Folder screen.

    To translate a menu, go to **Modules > Menus**.
2. Click the Export for Translation button (aα). (On the View Contents of Folder Screen, click **Action > Export for Translation**.)
3. The Export for Translation screen appears.



Export for Translation Folder "CMS400Demo"

☑ Include subfolders

Source Language

English (U.S.)

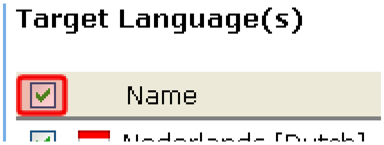
Target Language(s)

☑	Name	Code	ID
☑	Nederlands [Dutch]	nl-NL	1043
☑	Français [French]	fr-FR	1036
☑	Deutsch [German]	de-DE	1031
☑	Italiano [Italian]	it-IT	1040
☑	Español [Spanish]	es-ES	1034

The **Include Subfolders** field only appears if you click the Export for Translation button from the View Contents of Folder screen.

4. If you want to include content in all of the selected folder’s subfolders, check **Include Subfolders**. To translate just the selected folder, uncheck it.
5. The language of items being translated appears in the **Source Language** pull-down. If this is not the correct source language, click the down arrow and select the correct one.
6. All languages enabled in the Language Settings screen are selected under **Target Language(s)**. (*See Also:* ”Determining Which Languages are Available” on page 644).
7. To translate the content into *all* languages, proceed to the next step.

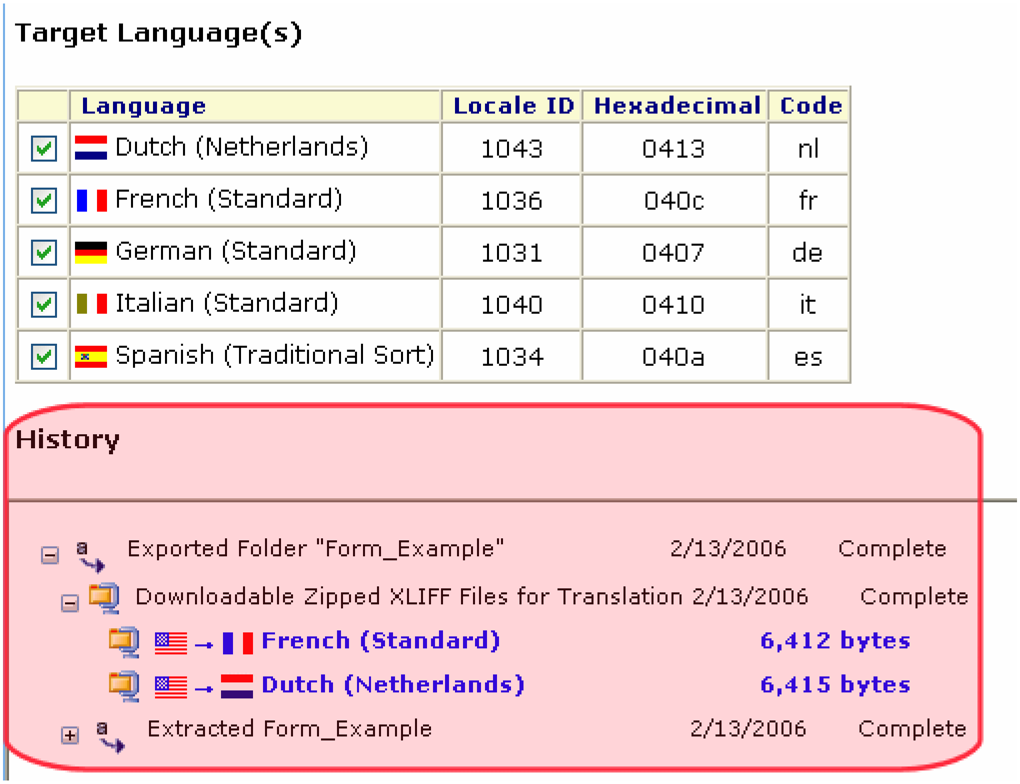
   To translate the content into *some* languages, uncheck the languages that you do not want. You can uncheck the box in the header row (illustrated below) to uncheck all, then only check the ones you want.



8. Click the box in the left column for each language into which you want to translate the content.
9. Click the Create XLIFF Files for Translation button ( ).
10. **Ektron CMS400.NET** creates one .zip file for each language. The .zip file includes an XLIFF file for each selected content item.

NOTE If any selected folder contains content in a target language whose edit date is more recent than the source language edition, that content is excluded from the .zip file. Ektron CMS400.NET assumes that, since a more recent target-language edition exists, you do not want to translate the corresponding source language edition.

The **History** section of the Export for Translation screen displays the translated files.



Target Language(s)

	Language	Locale ID	Hexadecimal	Code
☑	Dutch (Netherlands)	1043	0413	nl
☑	French (Standard)	1036	040c	fr
☑	German (Standard)	1031	0407	de
☑	Italian (Standard)	1040	0410	it
☑	Spanish (Traditional Sort)	1034	040a	es

History

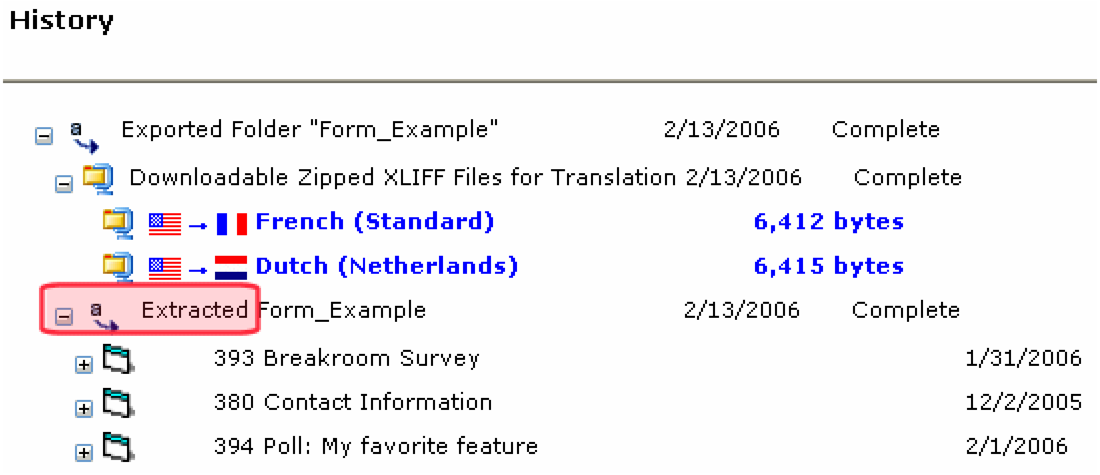
- ⊟ Exported Folder "Form_Example" 2/13/2006 Complete
  - ⊟ Downloadable Zipped XLIFF Files for Translation 2/13/2006 Complete
    - → **French (Standard)** **6,412 bytes**
    - → **Dutch (Netherlands)** **6,415 bytes**
- ⊞ Extracted Form_Example 2/13/2006 Complete

The history lists the .zip file created for each language. (.zip files are indicated by the WinZip icon ( ).) To the right of the icon are

- the flag of the source language
- an arrow indicating the direction of the translation
- the flag and name of the destination language
- the size of the zip file

NOTE The top of the history window display the most recently exported/imported files.

11. If you want to review the items in a zip file, click the plus button next to **Extracted**. When you do, each content item’s ID number, title, and last edit date appear.



History

Exported Folder "Form_Example" 2/13/2006 Complete

Downloadable Zipped XLIFF Files for Translation 2/13/2006 Complete

French (Standard) 6,412 bytes

Dutch (Netherlands) 6,415 bytes

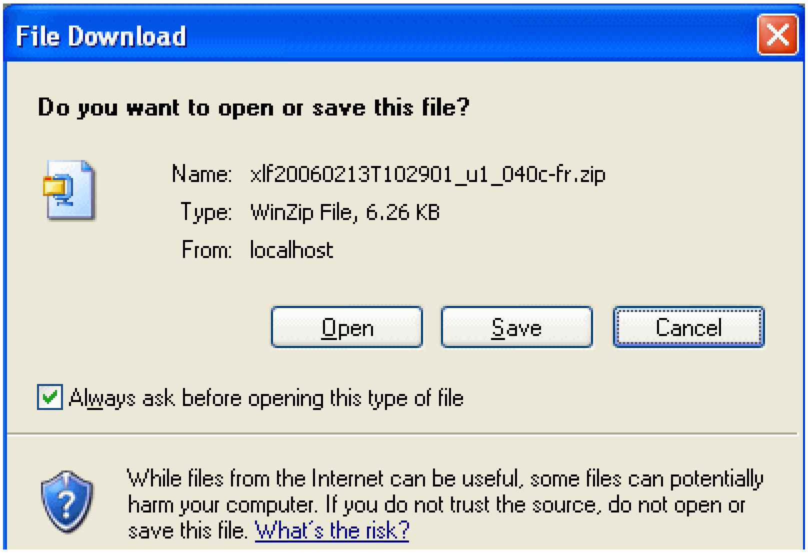
Extracted Form_Example 2/13/2006 Complete

393 Breakroom Survey 1/31/2006

380 Contact Information 12/2/2005

394 Poll: My favorite feature 2/1/2006

12. Click the blue text of a .zip file. The File Download window appears.



File Download

Do you want to open or save this file?

Name: xlf20060213T102901_u1_040c-fr.zip

Type: WinZip File, 6.26 KB

From: localhost

☑ Always ask before opening this type of file

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

NOTE If you want to review the XLIFF files within the .zip file, click **Open**.

13. Click the **Save** button. The Save As window appears. Navigate to the folder where you want to place the zip file and click **Save**.

14. Transmit the files to the translation agency.

NOTE When XLIFF files are returned by the translation agency, their extension must be .xlf. Other than that, the file name is not important.

File Naming Patterns

File Type	Pattern
XLIFF	*item identifier*[*item ID*]_[*new language hexadecimal code*][*two letter new language code*].xlf • *item identifier* options: - content: **cont** - form: **form** - menu: **s** - menu item: **s** • *item ID* varies, depending on whether the item is content, a form, a menu, or a menu item - content: content ID number - form: form ID number - Menu: menu ID number - Menu item: menu ID number
Zip	xlf[*timestamp in format yyyymmddThhmmss*]_u[*user ID*] _ [*new language hexadecimal code*]-[*two letter language code*].zip The user ID indicates which user performed the export or import.

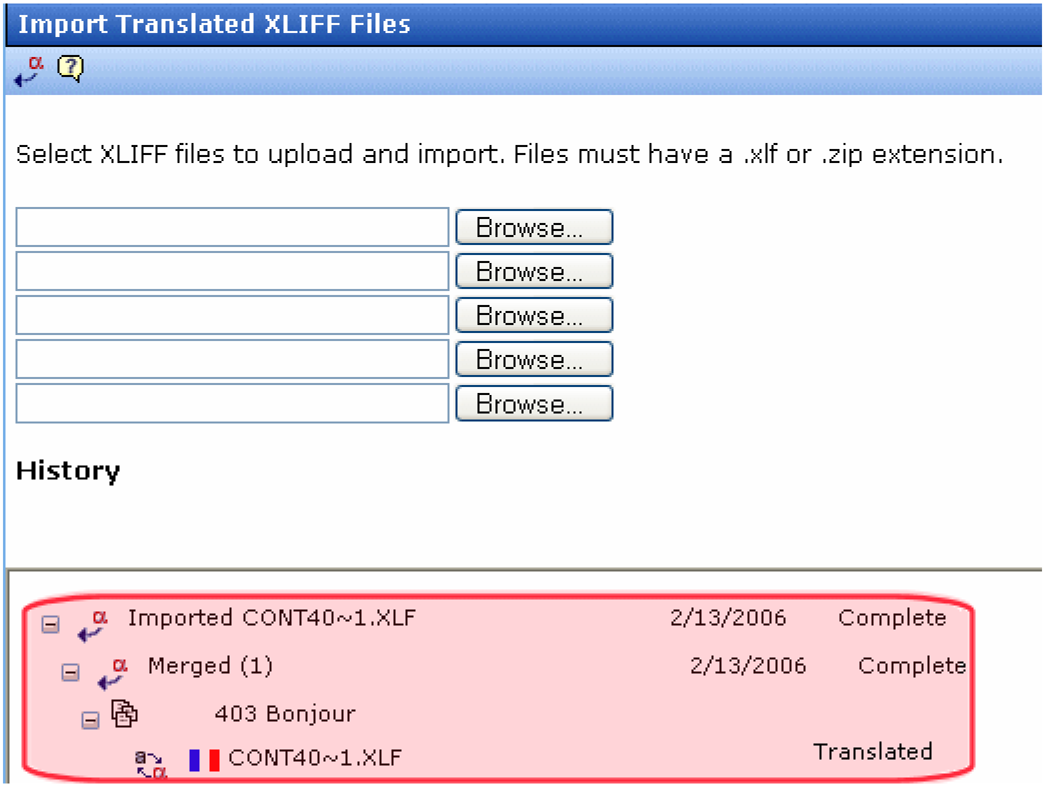
Importing Translated Files into Ektron CMS400.NET

To import the translated files into **Ektron CMS400.NET**, follow these steps.

Note Only members of the Administrator User Group and those defined in the Manage Members for Role: XLIFF-Admin screen can create or import XLIFF files. *See Also:* "Using the Roles Screens" on page 564.

1. Go to **Workarea > Modules > Import XLIFF Files**.
2. Click the **Browse** button and navigate to the folder that contains the translated files.
3. Select the files to import.

4. Click the Upload and Import button ( ).
5. **Ektron CMS400.NET** creates new or updates existing foreign-language editions of the imported content.
6. Information about the imported file appears in the history area of the Import XLIFF Files screen. You can click plus signs (+) to reveal increasing levels of information about the imported content.



Select XLIFF files to upload and import. Files must have a .xlf or .zip extension.

Imported CONT40~1.XLF	2/13/2006	Complete
Merged (1)	2/13/2006	Complete
403 Bonjour		
CONT40~1.XLF		Translated

When you import the file, the comment **Translated** appears next to it.

For each new edition:

- If the content title is the same as the source edition, the next available number is appended to the title to distinguish it from the source. For example: **Henry Williams(1)**.

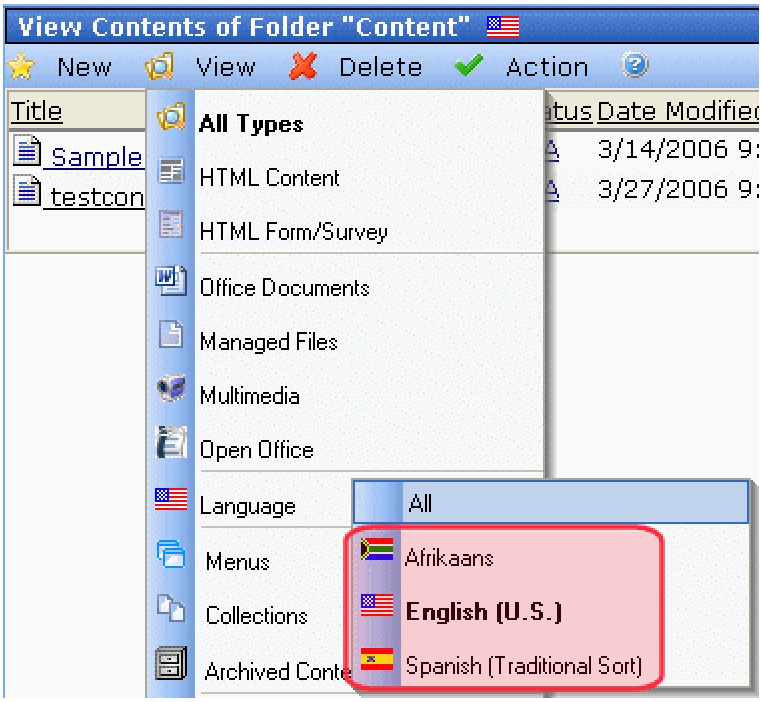
- its status matches the status of the source content. Typically, its status is checked out. When imported, it can enter the approval process just like other content.
- its history indicates it was checked in at the time the report was run
- for content, the following properties are inherited from the original content:
    - status
    - Smart Form
    - content searchable
    - approval method
- date created and last edit date are captured from when the content is imported
- the last user to edit is captured by user who imported the file

After you import the translation files, **Ektron CMS400.NET** removes them from the file system.

NOTE If an error exists in any of the files, the erroneous files are moved into a subdirectory. The directory is created using a timestamp. For example: `uploadedFiles\localization\merged\xlf20060208T141841_u1\error\.`

Viewing Foreign Language Content

1. Navigate to the folder that contains the content.
2. Click **View > Language** and select the desired language.


View Contents of Folder "Content"
New
View
Delete
Action
Title
Sample
testcon
tus
Date Modified
3/14/2006 9:
3/27/2006 9:
All Types
HTML Content
HTML Form/Survey
Office Documents
Managed Files
Multimedia
Open Office
Language
Menus
Collections
Archived Conte
All
Afrikaans
English (U.S.)
Spanish (Traditional Sort)

3. Only content in that folder and the selected language appears.

You can perform the same activities with this content as any other content.

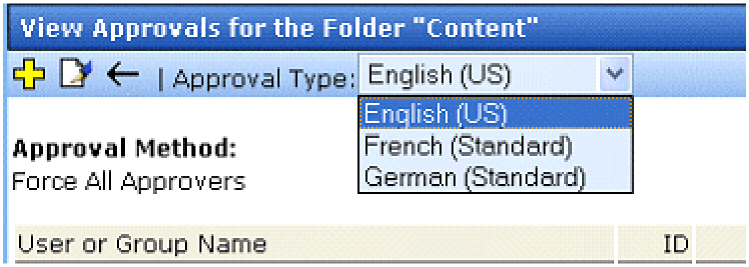
Additional Multi-Language Topics

- ”Multi-Language Approval Chains” on page 666
- ”Working with Tasks in a Multi-Language System” on page 666
- ”Working with Collections in a Multi-Language System” on page 666
- ”Working with Calendars in a Multi-Language System” on page 667
- ”Working with Menus in a Multi-Language System” on page 667
- ”Creating an External Link to a Page of Foreign Content” on page 667

Multi-Language Approval Chains

Just as you can create separate editions of content for each enabled language, you can set up a language-specific approval chain and method. When determining a folder's approval chain, first select a language then select users and groups with authority to approve content in that folder and that language.

The screen below shows the language selection drop-down list on the View Approvals screen.



Approval Method: Force All Approvers

Only users in the language-specific approval chain for a folder can approve content in that language.

You can also set a language-specific approval method. *See Also:* "The Approval Method" on page 562

Working with Tasks in a Multi-Language System

If you create content then add a task to it, the task can be in any enabled language. This would be helpful if, for example, you review English content then want to assign the task of translating it into another language in that language.

If you create a task then try to assign content to it, you can only choose from content in the language of the task.

Working with Collections in a Multi-Language System

In a multi-language **Ektron CMS400.NET** system, you can create a language-specific edition of each collection. For information about doing this, see the **Ektron CMS400.NET** User Manual section "Working with Collections."

Working with Calendars in a Multi-Language System

Calendars can be created in any supported language. Once you enter the calendar and event information in the foreign language, the calendar display (that is, day and month names) automatically appears in that language. Also, regional conventions for first-last days of the week, and date and time formats are maintained.

For more information, see "Creating a Foreign Language Calendar" on page 439.

Working with Menus in a Multi-Language System

NOTE If you are not familiar with the Ektron CMS400.NET's menus feature, please read "Menu Feature" on page 491 and the Ektron CMS400.NET User Manual section "Working with Menus."

You can create an edition of any menu in every supported language. When a site visitor selects a language, navigates to a page that has a menu and clicks the menu link, **Ektron CMS400.NET** displays the menu in the selected language if it is available. If a menu in that language is not available, nothing appears.

Before creating or translating a menu, it's a good idea to create or translate all content that will be on the menu. In this way, you can link these content items to the new menu. However, after creating a menu, you can always add new items to it.

For details about translating menus, see the **Ektron CMS400.NET** User Manual section "Working with Menus", "Managing Menus", "Working with Menus in a Multi-Language System."

Creating an External Link to a Page of Foreign Content

If another Web site links to a multilingual page on your site, the URL must include the language ID parameter. For example:

```
www.ektron.com/web-content-management-solutions.aspx?LangType=1036
```

Setting Up a Multilingual Web Site

Ektron CMS400.NET supports content in several languages. This section lists the steps to follow when setting up such a site.

See Also: "Creating Web Pages that Support Several Languages" on page 669

Step	For details, see
1. In web.config, make sure multilingual support is enabled.	"Enabling/Disabling Support for Multiple Language Content" on page 642
2. Set a default content language to be the one used by the majority of your site's content. If you had a previous version of **Ektron CMS400.NET** and selected a default language on the Database Upgrade Utility, be sure that default language matches the one in web.config.	"The Default Language" on page 647
3. Enable languages your site will support.	"Determining Which Languages are Available" on page 644
4. Add language selection function to templates.	"Viewing Your Site in Another Language" on page 643
5. Create a metadata definition for each supported language.	"Adding a Metadata Definition" on page 106
6. Create or translate content.	• "Creating New Content" on page 648 • "Translating Content" on page 649
7. Change the language of content not in the default language. Note: Only needed if Web site previously had content in more than one language.	"Resolving Conversion Issues" on page 672

Step	For details, see
8. Set up approval chains for new content.	”Multi-Language Approval Chains” on page 666
9. Set up multilingual collections.	”Working with Collections in a Multi-Language System” on page 666
10. Set up multilingual menus.	”Working with Menus in a Multi-Language System” on page 667
11. Modify text on templates.	”Modifying Page Content Based on Language Selection” on page 670
12. Translate graphics.	”Modifying Images Based on Language Selection” on page 671

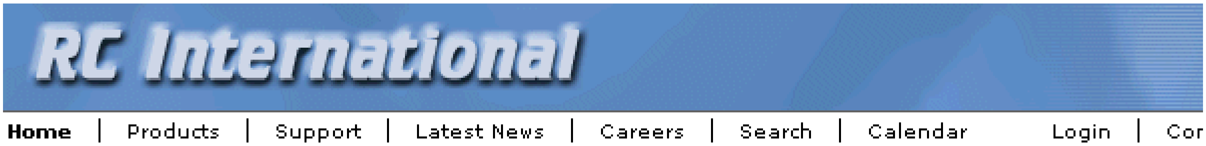
Creating Web Pages that Support Several Languages

When thinking about setting up your Web site to support content in multiple languages, consider these three actions.

Action	For more information, see
Create language-specific content, menus, collections	• ”Translating Content” on page 649 • ”Working with Collections in a Multi-Language System” on page 666 • ”Working with Menus in a Multi-Language System” on page 667 After you create these items, have the page invoke that item dynamically using an appropriate function (such as `ecmContentBlock`). When **Ektron CMS400.NET** receives a request to display an item that includes a language and item id number, it returns the language-specific edition. To learn about letting the user select a language from a Web page, see ”Viewing Your Site in Another Language” on page 643.
Adjust template content to user language	”Modifying Page Content Based on Language Selection” on page 670
Translate text in images	”Modifying Images Based on Language Selection” on page 671

Modifying Page Content Based on Language Selection

If a template's text should change according to a user's language selection, use a case statement to provide the language-specific content. A good example of this is the template used on the RC international sample site (Illustrated below).



Assume you want to create editions of the menu that runs across the header (**Home**, **Products**, etc.) in three languages:

- English
- French
- German

To do so, follow these steps.

Note — This procedure uses the header.asp file delivered with the RC international sample site as an example.

1. In the template file, declare each menu option a variable. For example:

```
Dim t_search, t_products, t_support, t_news, t_careers, t_calendar, t_home, t_login,
t_site_lang, t_contact, t_copyright, calendar_id
```

2. Enter case statements that provide the value of each variable in each language. (1031 is the decimal code for German, 1036 for French.) The following illustrates how to do this for the search menu option.

```
Select Case ContentLanguage

    Case "1031"

        t_search = "Suche"

    Case "1036"

        t_search = “Recherche"

    Case else

        t_search = "Search"

End Select
```

Now, when a user visits a page controlled by this template and selects French or German as the site language, the page is refreshed and the translated values appear on the template.

Modifying Images Based on Language Selection

Many Web page templates also include images that require translation. You can set up templates to invoke images in the user-selected language by following these steps.

1. Add to the library each image that should change when the language changes. For example, if your company’s tag line is translated into three languages, upload the three images into the library.

   It‘s a good idea to include the language in the title of the image. For example, tagline_English, tagline_French.
2. Create a separate content block for each language-specific image. Each content block must have a unique ID number.
3. Insert the appropriate image into a content block for each language. For example, insert the tagline_English image into the English content block.
4. Insert the content blocks into the appropriate templates. For example, insert the English content block into the English template.

Using a Language Other than American English as the Default

Use this procedure if your site supports one language only, and it is not American English (1033).

To set your site's default language to something other than American English, follow these steps.

1. Install a new site. Do not log in at this point.
2. Open your site's web.config file (located in your site root folder.) Set `ek_EnableMultilingual` to zero (0). Set `ek_DefaultContentLanguage` to the four digit locale id for the desired language. See "Appendix C: List of Supported Languages" on page 890
3. Log in to **Ektron CMS400.NET**.
4. Go to **Settings > Configuration > Language Settings**.
5. Enable the desired language, and disable all other languages.
6. Go to **Settings > Configuration > Setup**.
7. Make sure the desired language is the **Default Application Language**.
8. Go to **Settings > Users > Edit User Information**. Set the **User Language** to the desired language. Do *not* leave **App Default** as the value.
9. Repeat Step 7 for every **Ektron CMS400.NET** user.

Resolving Conversion Issues

IMPORTANT! This section is only relevant to Web sites that upgrade to **Ektron CMS400.NET** Release 4.7 or higher and which, prior to the upgrade, had content in more than one language. If your site does not meet both criteria, you can ignore this section.

When you upgrade to 4.7 or higher, the Database Upgrade utility prompts you to select a language. All content in your site is then assigned that language. (Prior to Release 4.7, content did not have a language attribute.) If all content is not in the selected language, you must resolve that discrepancy.

For example, assume for the sake of simplicity that your pre-4.7 Web site had four content items: three English and one French. During the database upgrade, you select English. Three content items are assigned the correct language, but the fourth content item, which should be assigned French, is also assigned English. You cannot simply change the content's language assignment. When resolving the discrepancy, there are two possible scenarios.

Scenario 1

Prior to 4.7, your site had unique content in French (id number 4). To resolve this, copy the content to a new French edition with the same id number. Then, delete the English edition.

Before Upgrade

Content id	Language attribute	Actual language
1	not available	English
2	not available	English
3	not available	English
4	not available	French

After Upgrade

Content id	Language attribute	Actual language
1	English	English
2	English	English
3	English	English
4	**English**	**French**

After Following Procedure Listed Below

Content id	**Language attribute**	**Actual language**
1	English	English
2	English	English
3	English	English
4 (deleted)	**~~English~~**	**~~English~~**
4	**French**	**French**

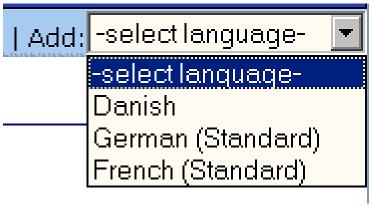
Procedure for Scenario 1

To change a content item’s language, follow these steps.

NOTE Before beginning this procedure, make sure

- the correct language for the content is enabled. See ”Determining Which Languages are Available” on page 644.
- metadata has been defined for the new language. See ”Adding a Metadata Definition” on page 106

1. Within **Ektron CMS400.NET**, navigate to the View Content screen on content item 4.
2. From the Add drop-down list, select French.



3. **Ektron CMS400.NET** creates a French edition of the content.
4. Check in that edition of the content.
5. Delete the English edition of the content.

Scenario 2

Prior to 4.7, your site had English and French content (id numbers 3 and 4) that presented the same content in each language. You want to leave the English content alone, create a French edition of that content with the same id number, then delete the French content.

The advantage of this solution is that both editions of the content have a single id number. So, when a site visitor selects a language and navigates to that page, **Ektron CMS400.NET** displays the edition of the content for the selected language.

To resolve this, create a French edition of the English content, copy the French content, then delete the French content.

Before Upgrade

Content id	Language attribute	Actual language
1	not available	English
2	not available	English
3	not available	English
4	not available	French

After Upgrade

Content id	Language attribute	Actual language
1	English	English
2	English	English
3	English	English

4	**English**	**French**

After Following Procedure Listed Below

Content id	Language attribute	Actual language
1	English	English
2	English	English
3	English	English
3	**French**	**French**
~~4~~(deleted)	**~~na~~**	**~~na~~**

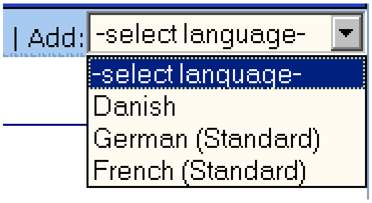
Procedure for Scenario 2

To solve the language conversion issue explained in scenario 2, follow these steps.

NOTE Before beginning this procedure, make sure

- the correct language for the content is enabled. See "Determining Which Languages are Available" on page 644.
- metadata was defined for the new language. See "Adding a Metadata Definition" on page 106

1. Within **Ektron CMS400.NET**, navigate to the View Content screen of content id 3.
2. From the Add drop-down list, select French.



3. **Ektron CMS400.NET** creates a French edition of content id 3.

4. Translate the title into French.
5. Delete the English elements of content id 3 (content, summary, metadata, schedule, and comments).
6. Check in the French edition of content id 3.
7. Copy and paste all relevant elements of the French content (id 4) into the French edition of content id 3 (content, summary, metadata, schedule, and comments).
8. Delete content id 4. *See Also:* "Deleting Content" on page 80

Set the Language of Spell Checking

To specify which dictionary to reference when checking spelling, specify a language in Microsoft Word, version 2000 or later. To do this, open Word and select **Tools > Language > Set Language**.

Character Encoding

The following Ektron Knowledge Base articles describe issues surrounding the display of special characters within **Ektron CMS400.NET**. Note that these articles refer to eWebEditPro, Ektron's WYSIWYG editor embedded within **Ektron CMS400.NET**.

Wherever these articles contain references to eWebEditPro's configuration data or file (config.xml), you should instead update the web.config file, located in your site's root folder.

- HOWTO: produce UTF-8 (www.ektron.com/developers/ewebeditpro_tutorials.cfm?id=403)
- INFO: Character Encoding (www.ektron.com/developers/ewebeditprokb.cfm?id=1807)
- INFO: Encoding special characters (www.ektron.com/developers/ewebeditprokb.cfm?id=384)

Translating the Workarea

You can translate **Ektron CMS400.NET**'s Workarea into French or German by changing the **Default Application** field in the Setup screen. (See "Default Application Language" on page 26.)

If you want to translate the Workarea strings into another language, read this section.

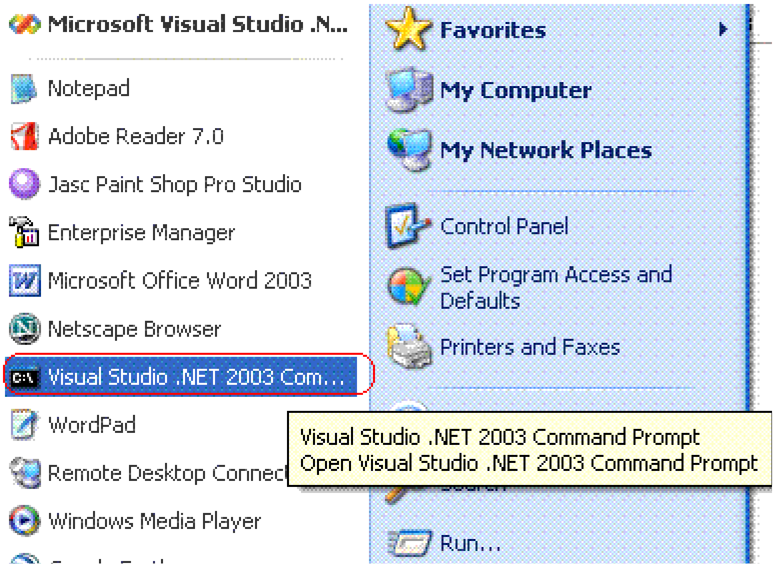
NOTE Ektron provides the American English strings in a text file. You must translate them to the new language.

Prerequisites

- The alphabetical, four-character identifier of the country/ language into which you are translating.
- The server that hosts **Ektron CMS400.NET** must have Visual Studio.NET

Procedure for Translating Workarea Strings

1. Click the Windows **Start** button.
2. Click the Visual Studio.NET command prompt (illustrated below) to open a command window.


Microsoft Visual Studio .N...
Notepad
Adobe Reader 7.0
Jasc Paint Shop Pro Studio
Enterprise Manager
Microsoft Office Word 2003
Netscape Browser
Visual Studio .NET 2003 Com...
WordPad
Remote Desktop Connect
Windows Media Player
Favorites
My Computer
My Network Places
Control Panel
Set Program Access and Defaults
Printers and Faxes
Run...
Visual Studio .NET 2003 Command Prompt
Open Visual Studio .NET 2003 Command Prompt

3. Within the command window, change the directory to this folder: `your web site\Workarea\resources`.
4. Insert the following text: `resgen EKResource.resources anyfilename.txt`.

NOTE You can assign whatever name you wish to the .txt file.

5. The .txt file is created in the `\resources` directory.
6. Use Visual Studio.NET to open the .txt file.
7. Replace every backslash (\) with a double backslash (\\).
8. Translate the text following every equal sign (=) to the end of the line. Be careful not to change any occurrences of n surrounded by double backslashes (`\\n\\`).
9. Save and close the .txt file.
10. Within the command window, insert the following: `resgen anyfilename.txt EKResource.two-character country code-two-character language code.resources`

    For example, to indicate that the workarea is being translated into the Spanish/Spain, enter `resgen span_translation.txt EKResource.es-ES.resources`

    This command translates all strings in the Workarea to the values you set in Step 8. **Writing Resource File ...Done** appears within the command window when the replacement is completed.
11. A new resource file is created in the `\resources` directory. You determined its name in Step 10.
12. Enable the new language in the Language Settings screen. See ”Determining Which Languages are Available” on page 644
13. Make the new language the default language in the Configuration Setup screen. See ”Default Application Language” on page 26.

Managing Your CMS400 System

Site Replication

WARNING! If you upgrade a staging server from version 5.2 to 6.0 but don't choose to upgrade the production server, you need to complete some steps to make the two systems compatible.This procedure is explained in "Upgrading Ektron CMS400.NET" > "Updating a Site Replication Production Machine after Upgrading from 5.2 to 6.0" in the **Ektron CMS400.NET** Setup Manual.

NOTE **Ektron CMS400.NET**'s Site Replication software is an extra cost option. Please contact your Ektron Sales representative for details on purchasing it.

Site Replication is an automated, one-way site synchronization between a staging or test server and a production server. It lets you perfect the changes on a staging server, then effortlessly copy them to the production server. In this way, your production server can easily be kept up-to-date, while at the same time be spared simple errors that typically accompany last-minute changes.

(Synchronization differs from copying in that it only copies files that are new or have changed. Since many files on both servers are typically the same, synchronization is faster than copying.)

Whether you've been testing a new site template or an upgraded version of CMS400.NET, Site Replication pushes the latest information to the production server. Site Replication is especially useful when your site contains sensitive information (for example, pricing) that needs to be carefully reviewed for quality assurance before it goes live.

Before the latest data is copied to the production server, it is backed up. So, you can restore the production server to an earlier version if you ever need to.

Site Replication is explained through the following subtopics.

- ”Site Replication vs. the Move Site Procedure” on page 681
- ”Site Replication Overview” on page 682
- ”What Information is Synchronized” on page 682
- ”What Information is Not Synchronized” on page 683
- ”Possible Site Replication Configurations” on page 684
- ”Prerequisites” on page 684
- ”Installing the Site Replication Utility” on page 686
- ”Configuring the Site Replication Utility” on page 703
- ”Setting up a Staging Server” on page 715
- ”Previewing the Site Replication Process” on page 717
- ”Performing Site Replication” on page 717
- ”Viewing and Restoring a Backup of the Production Server” on page 719
- ”Testing Site Replication Software” on page 725
- ”Quick Deploy” on page 730
- ”Troubleshooting Problems with Site Replication” on page 736

Site Replication vs. the Move Site Procedure

The **Ektron CMS400.NET** Setup Manual section “Installing Ektron CMS400.NET” > “Moving a Site to Another Directory or Server” describes a procedure for moving an **eWebEditPro+XML** Web site to a new folder or even a different server. You would use that procedure under the following circumstances:

- The initial move of a site up to a shared server (or any other server on which you cannot run the .exe installer). Subsequently, you would use the Site Replication feature.
- Moving a site to a new server. For example, you purchase a new server to replace your existing one.

- Moving a site between two servers that are not connected by a network.

Site Replication Overview

First, install Site Replication software onto both servers. Next, supply configuration information for each server, such as the site directory and when replication begins.

After you install and configure the Site Replication software, begin using it to synchronize the test server with the production server. Before initiating the synchronization, a **Preview** button displays the changes that will occur. Once you are ready, begin the synchronization. During the procedure, a screen displays its real-time progress.

When synchronization is complete, you can view a log of changes made. If you decide the update should not have occurred, you can restore the receiving server.

NOTE You should verify that adequate space is available for the Site Replication. The data directories are backed up before the Site Replication begins. The previous version remains, creating a sitereplication.backup/.dirbackup *date time* file. A new copy of the data directories is placed in the same folder and is named dirupdates *date time*.

What Information is Synchronized

Synchronized information includes:

- CMS400.NET code (the CMS400Scripts directory)
- CMS400.NET database schema changes
- CMS400.NET database content
- Document Management Functionality code (the AssetManagement directory)
- templates (ASPX, ASP, PHP, JSP)
- library content (uploadedfiles and uploadedimages folders)
- CMS400.NET web.config file

- user list - However, when the user list is copied to the production server, non-administrative users' permission to add content is removed.

NOTE If users edit content on a production server, the same changes must be made to the staging server. Alternatively, users can edit on the staging server, and you can perform another replication.

What Information is Not Synchronized

Because they contain site-specific information, the following files are not synchronized during Site Replication:

- Membership users (*See Also:* ”Updating Membership Users” on page 701)
- license key and URL aliasing settings
- content ratings data
- content tracking statistics
- forum and blog posts
- CMS400.NET form data tables - used to hold form submissions from a Web site. Also, any tasks that track form data.
- Web.config (needs to be updated manually only when upgrading)
- AssetManagement.config (needs to be updated manually only when upgrading if receiving server has Document Management Functionality)
- AssetManagementData.config (needs to be updated manually only when upgrading if receiving server has Document Management Functionality)
- The most recent searches table, use to generate the Search Phrase Report
- Optionally, a list of tables on the production machine (*See Also:* ”Preserving Database Tables” on page 702)

NOTE SIte Replication does not install Windows services. To do that, you must upgrade Ektron CMS400.NET software on the production server.

Possible Site Replication Configurations

The following configurations are supported during Site Replication:

- CMS400.NET site and database on same server
- CMS400.NET site and database on separate servers

The rest of this chapter explains the Site Replication utility through the following topics.

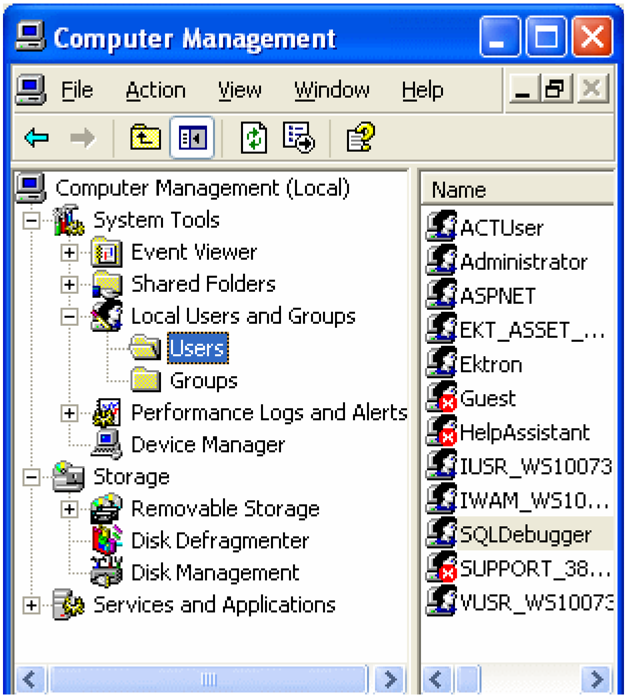
- ”Installing the Site Replication Utility” on page 686
- ”Configuring the Site Replication Utility” on page 703
- ”Previewing the Site Replication Process” on page 717
- ”Performing Site Replication” on page 717
- ”Viewing and Restoring a Backup of the Production Server” on page 719

Prerequisites

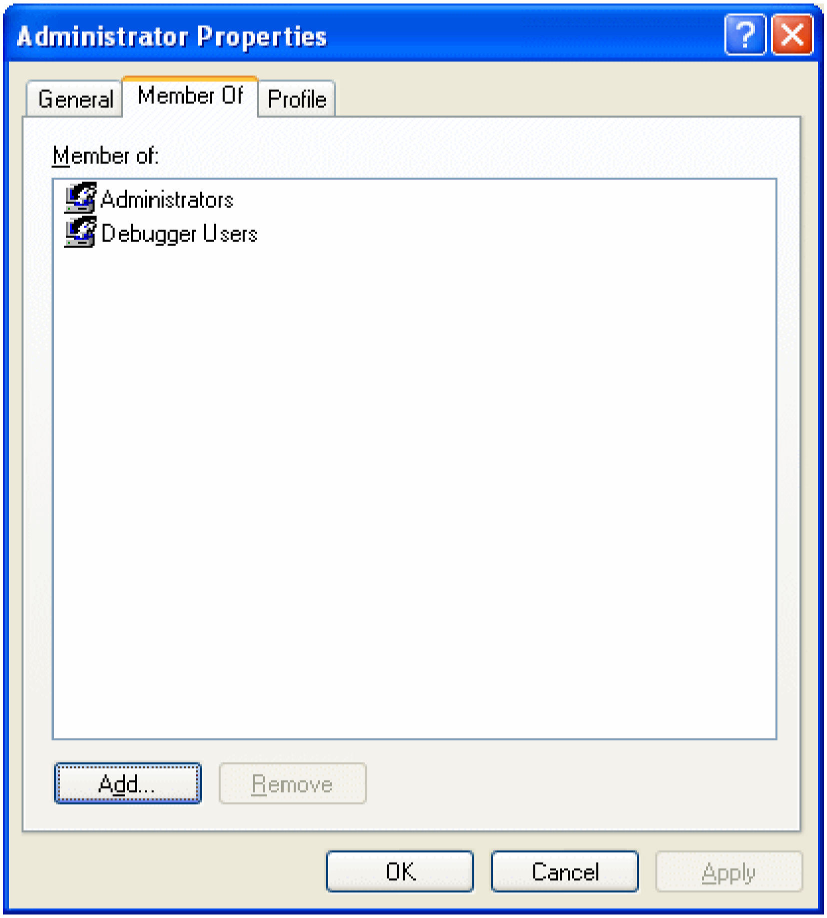
Every user who will use Site Replication must be a member of the Administrators group within Windows’ Microsoft Management Console.

To apply this setting to a user, follow these steps.

1. Click **Start > Control Panel > Administrative Tools > Computer Management**.
2. Click **Local Users and Groups** then the **Users** folder.


Computer Management
File Action View Window Help
Computer Management (Local)
System Tools
Event Viewer
Shared Folders
Local Users and Groups
Users
Groups
Performance Logs and Alerts
Device Manager
Storage
Removable Storage
Disk Defragmenter
Disk Management
Services and Applications
Name
ACTUser
Administrator
ASPNET
EKT_ASSET_...
Ektron
Guest
HelpAssistant
IUSR_WS10073
IWAM_WS10...
SQLDebugger
SUPPORT_38...
VUSR_WS10073

3. If the user does not appear in the right frame, right click the mouse and select **New User...**. Then complete the dialog.
4. Right mouse click on the user and select **Properties**.
5. Click the **Member of** tab.

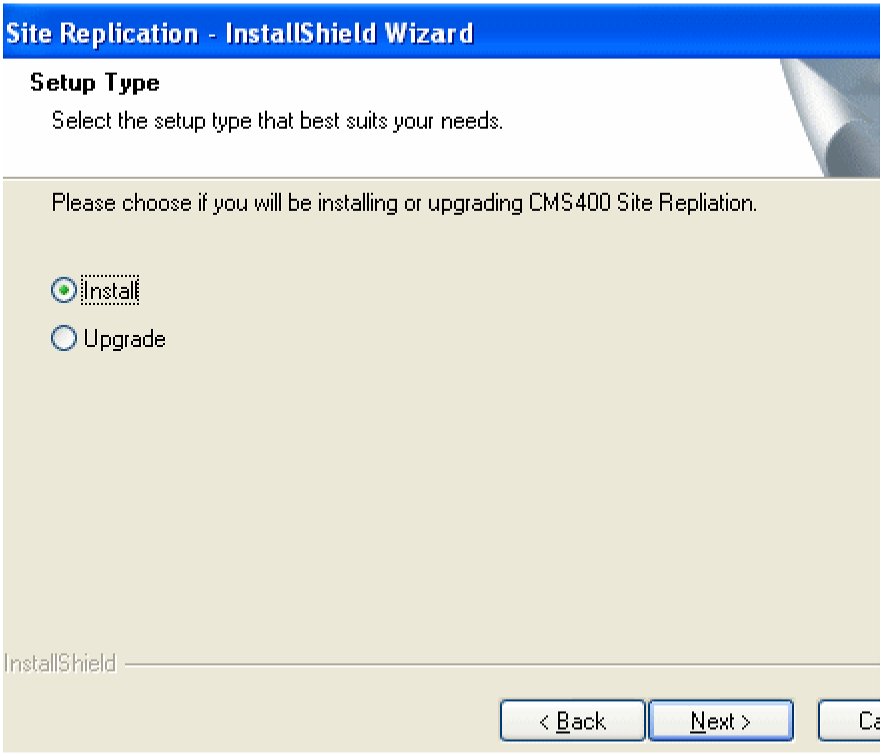

Administrator Properties
General
Member Of
Profile
Member of:
Administrators
Debugger Users
Add...
Remove
OK
Cancel
Apply

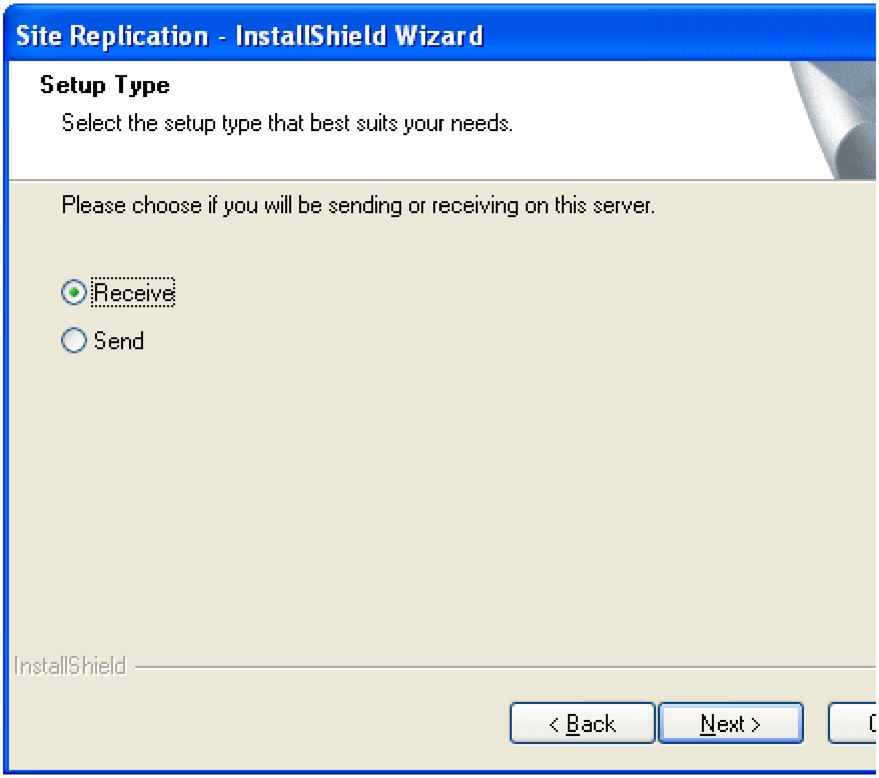
6. If you do not see **Administrators** in the **Member of** window, click the **Add** button.
7. In the **Enter the object names to select** field, enter **Administrators**.
8. Click **OK** twice.

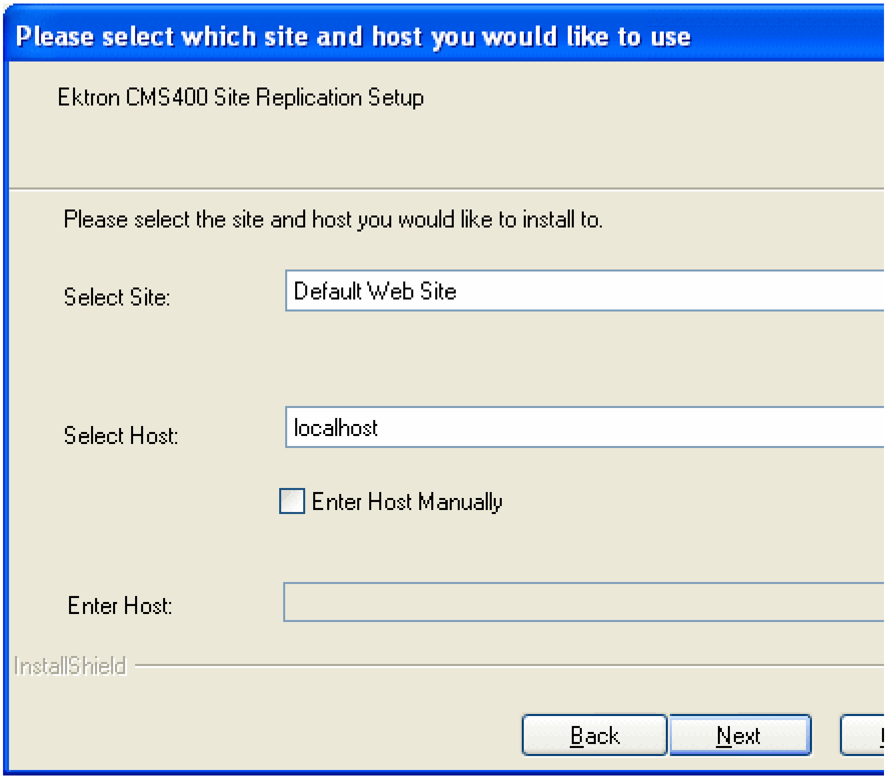
Installing the Site Replication Utility

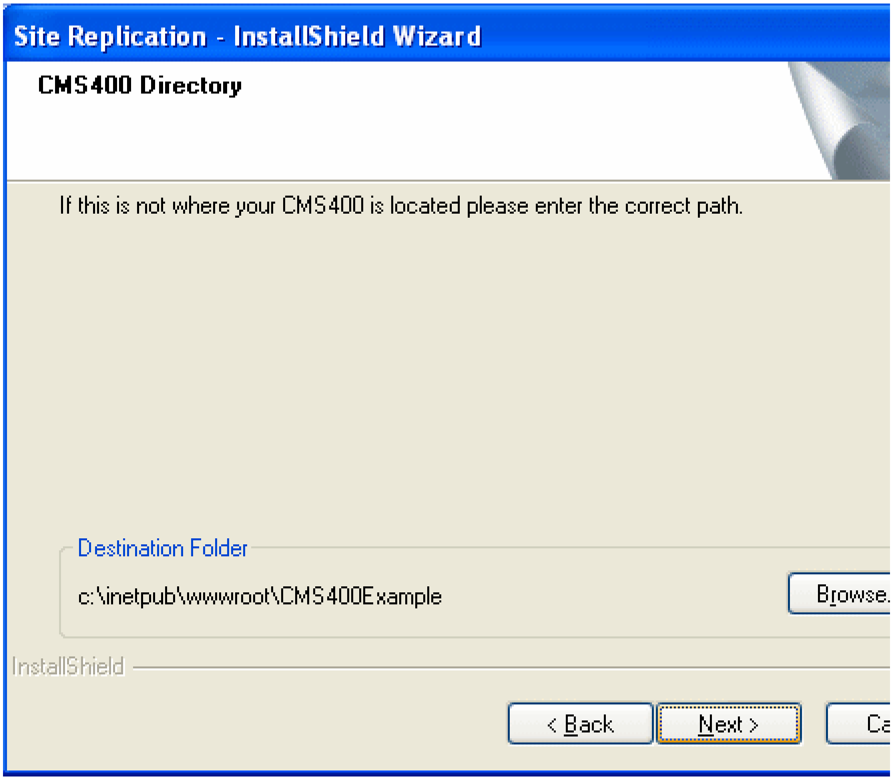
You must install the Site Replication utility on the staging server and all production servers. After installing on a server, you should configure it. *See Also:* ”Configuring the Site Replication Utility” on page 703

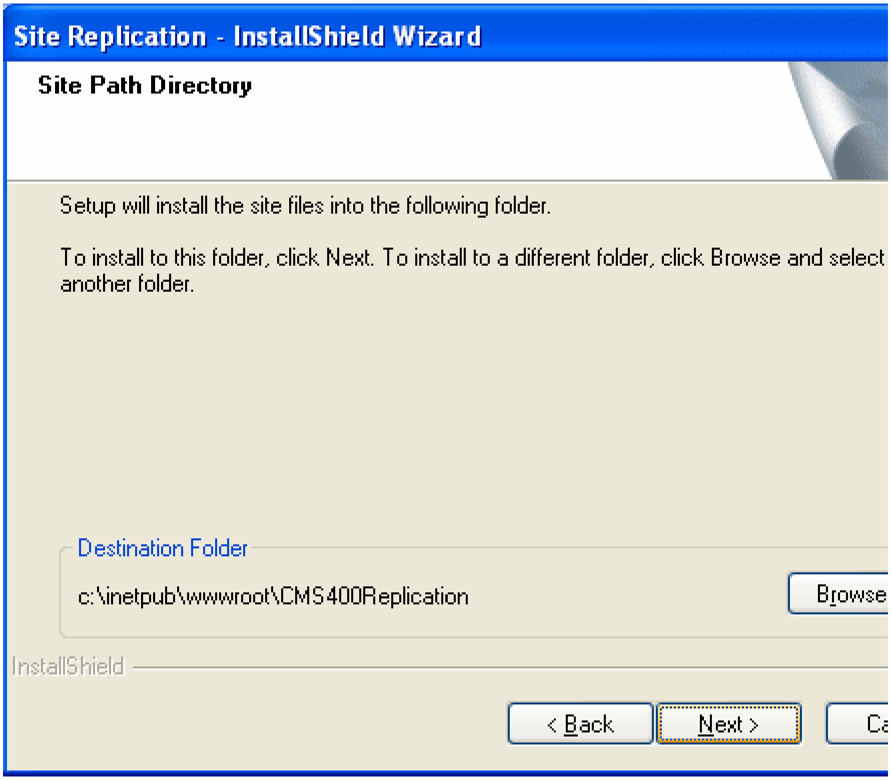
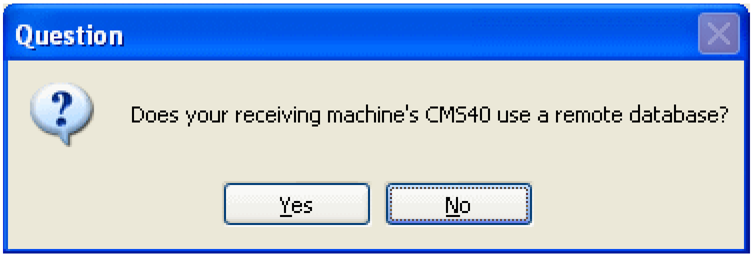
1. Download the Site Replication.exe file from Ektron’s Web site.
2. Double click the downloaded file.
3. Follow the screen directions as they appear.

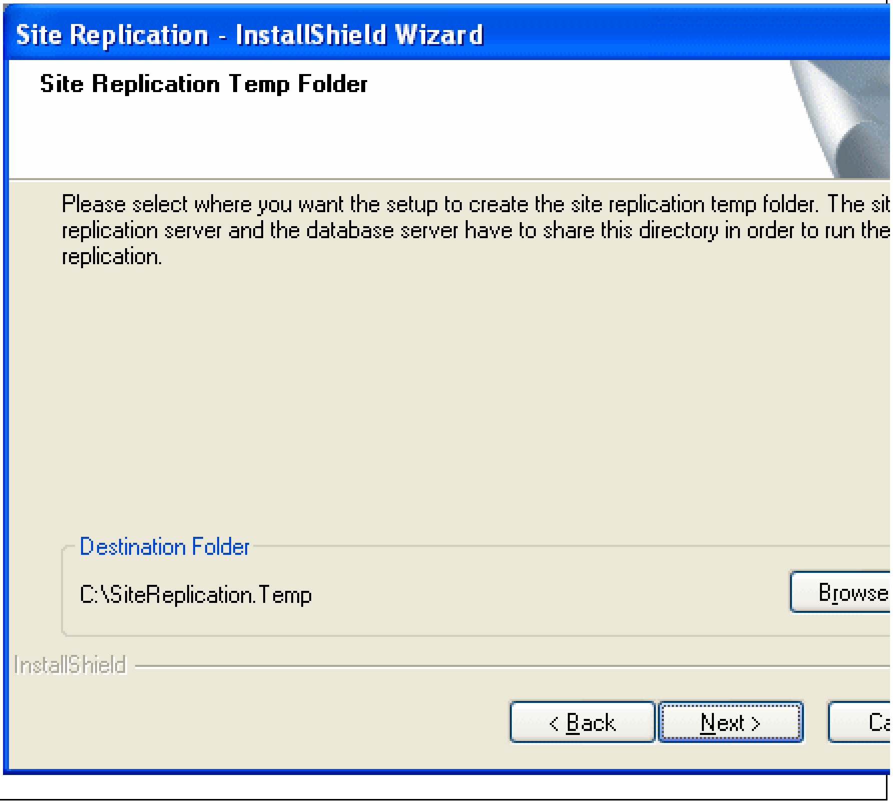
Directions	**Screen**
1. Indicate if this is a new installation or an upgrade. If doing an upgrade, only perform steps 3 and 6 below.	 Site Replication - InstallShield Wizard **Setup Type** Select the setup type that best suits your needs. Please choose if you will be installing or upgrading CMS400 Site Repliation. ● Install ○ Upgrade

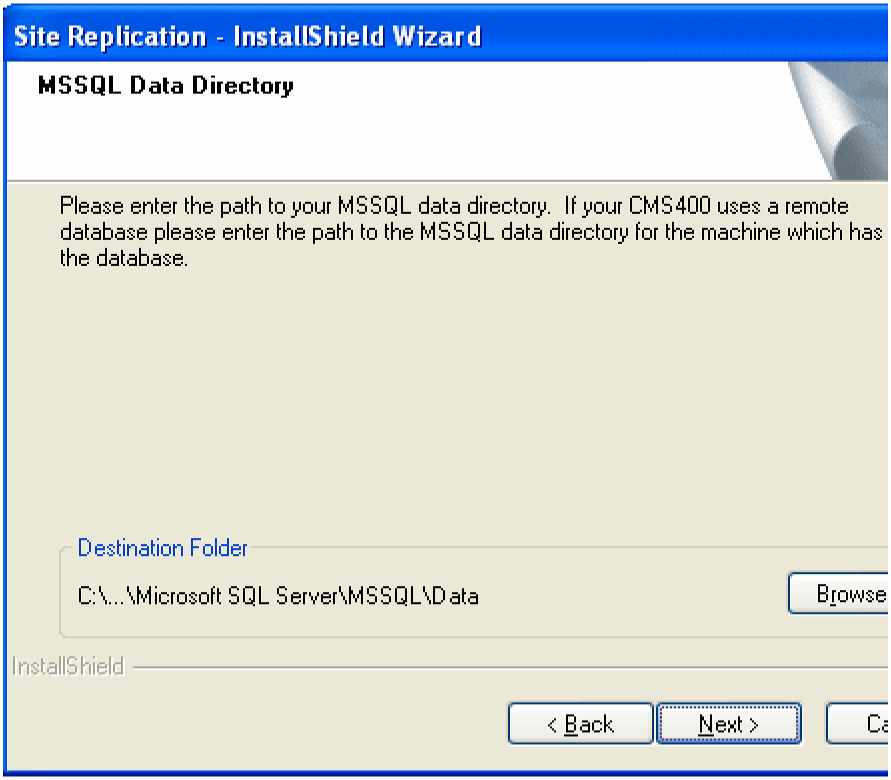
Directions	Screen
2. Indicate whether the server on which you are installing will be used to *send* or *receive* information. A staging server would send, while a production server would receive.	 **Site Replication - InstallShield Wizard** **Setup Type** Select the setup type that best suits your needs. Please choose if you will be sending or receiving on this server. ● Receive ○ Send

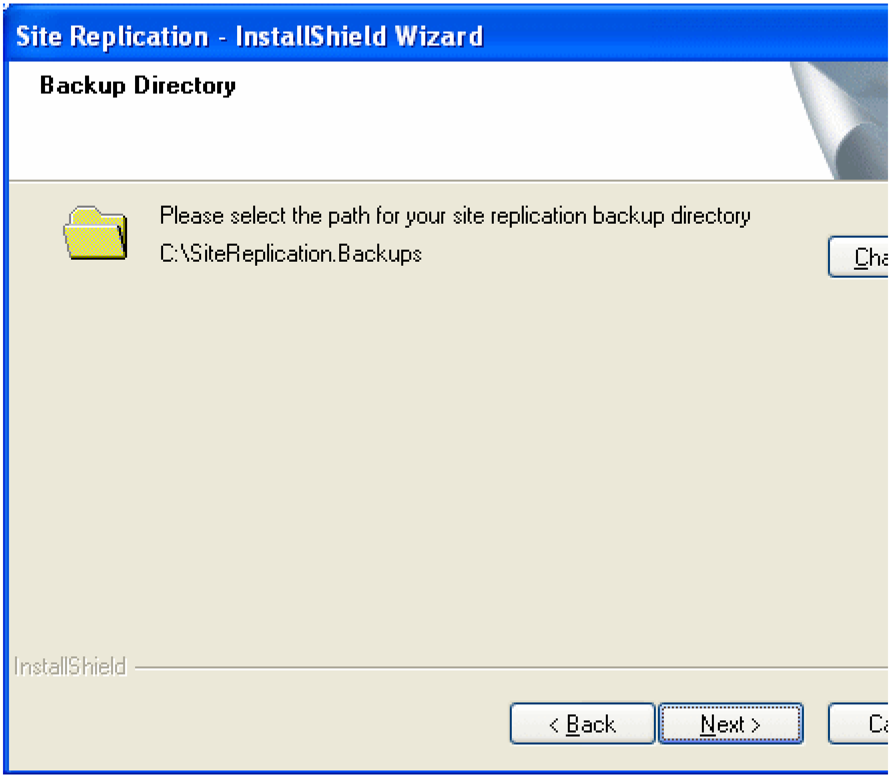
Directions	**Screen**
3. Identify the Web site for which you are installing the Site Replication utility. If you are unsure, accept the default. 4. Select the site host from the dropdown list. Or, you can check the **Enter Host Manually** box and enter the path to your site host.	Please select which site and host you would like to use Ektron CMS400 Site Replication Setup Please select the site and host you would like to install to. Select Site: Default Web Site Select Host: localhost ☐ Enter Host Manually Enter Host:

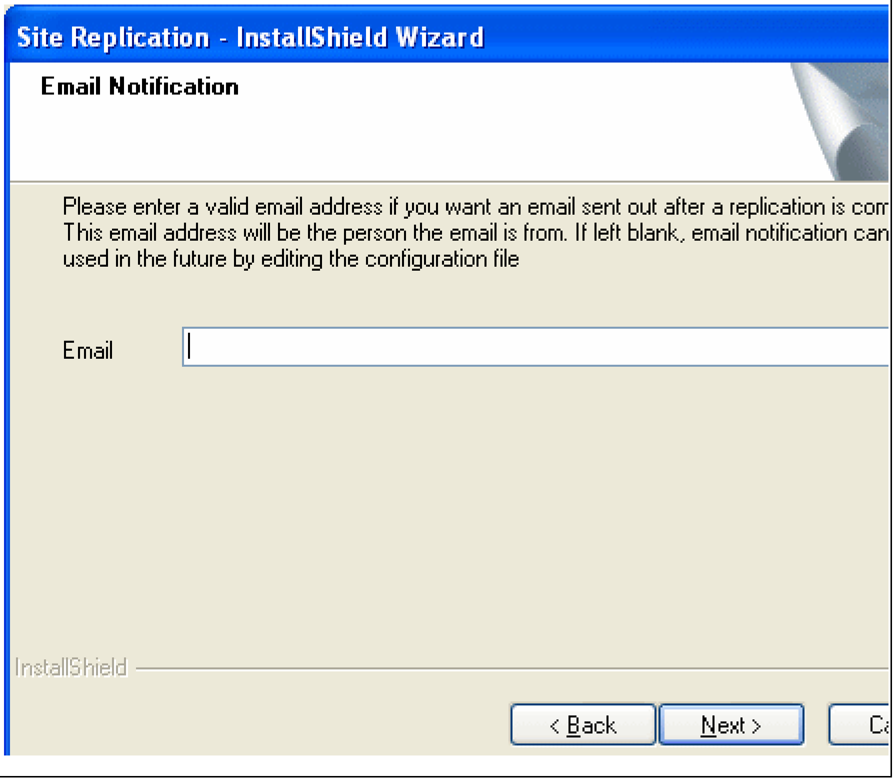
Directions	Screen
5. Enter the directory in which **Ektron CMS400.NET** resides. Important! The staging and production servers must use the same directory name (for example, `http://`*`staging server/`*`MySite` and `http://`*`production server/`*`MySite`). If not, the content may incorrectly reference images in the `uploadedfiles` directory of the staging server. As a result, the production server displays broken images.	 If this is not where your CMS400 is located please enter the correct path. Destination Folder: c:\inetpub\wwwroot\CMS400Example Site Replication - InstallShield Wizard CMS400 Directory Browse. InstallShield < Back Next > Ca

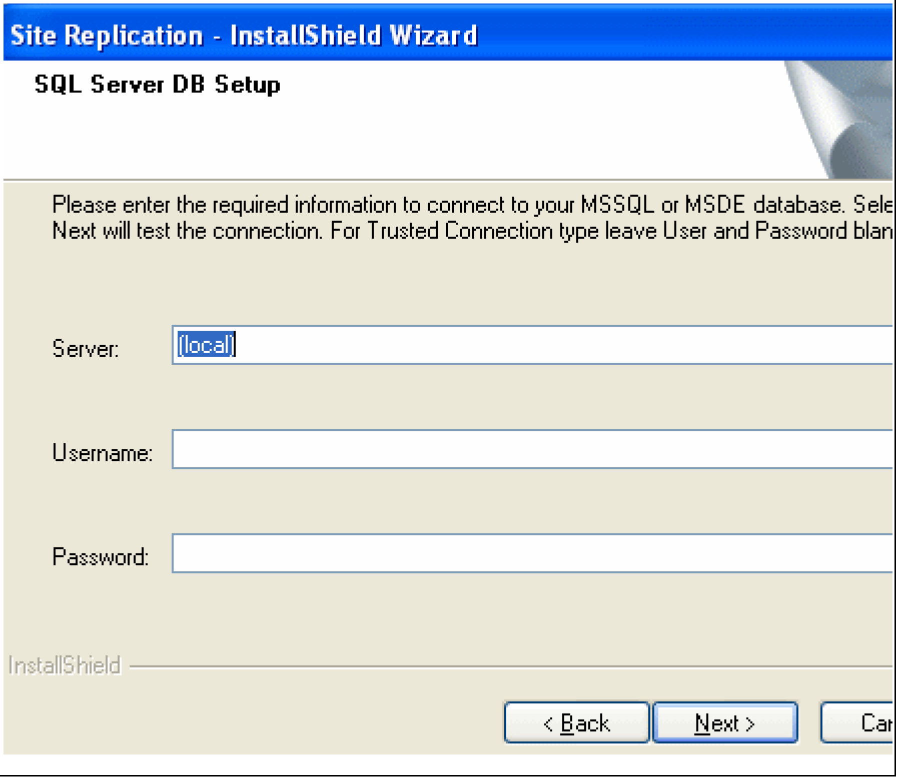
Directions	Screen
6. Enter the folder to which the Site Replication files will be installed. If you are unsure, accept the default.	 Site Replication - InstallShield Wizard Site Path Directory Setup will install the site files into the following folder. To install to this folder, click Next. To install to a different folder, click Browse and select another folder. Destination Folder c:\inetpub\wwwroot\CMS400Replication
7. Click **Yes** or **No** to indicate if the server uses a remote database. That is, a database stored on a separate server.	 Question Does your receiving machine's CMS40 use a remote database?

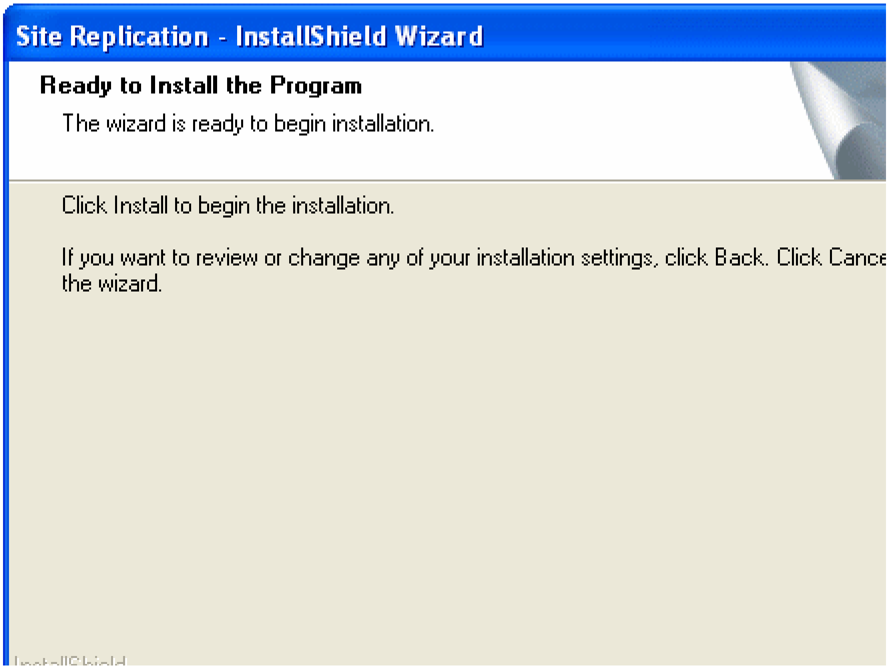
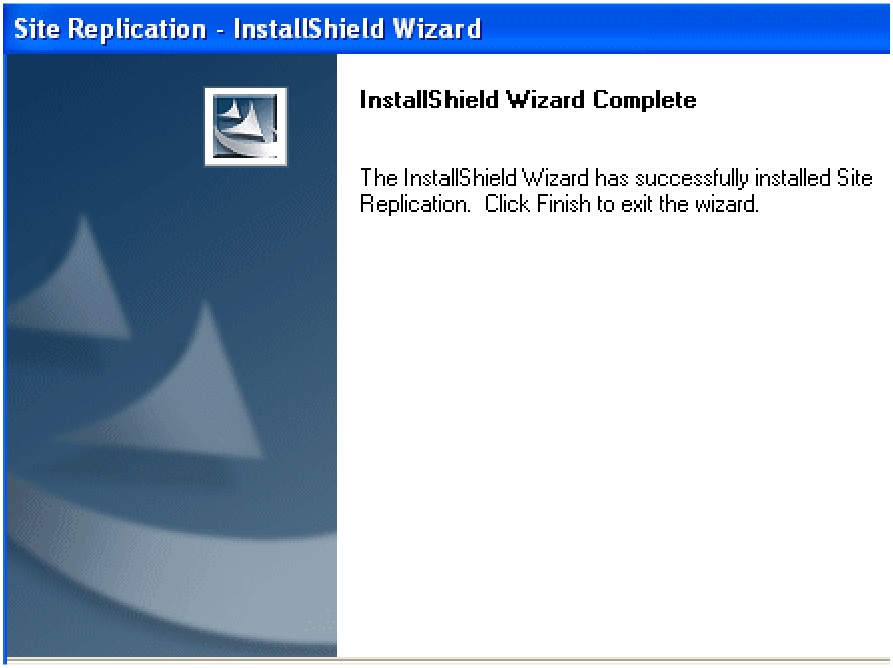
Directions	Screen
8. If your receiving server uses a remote database server, the Site Replication feature uses a temporary folder to store the database prior to replication. A default folder to be used for this purpose appears. You can accept the default or navigate to a different folder on the receiving server.	 Site Replication - InstallShield Wizard Site Replication Temp Folder Please select where you want the setup to create the site replication temp folder. The sit replication server and the database server have to share this directory in order to run the replication. Destination Folder C:\SiteReplication.Temp

Directions	Screen
9. On the receiving server, enter the path to your installation of the MS SQL Server Data directory.	 Site Replication - InstallShield Wizard MSSQL Data Directory Please enter the path to your MSSQL data directory. If your CMS400 uses a remote database please enter the path to the MSSQL data directory for the machine which has the database. Destination Folder C:\...\Microsoft SQL Server\MSSQL\Data

Directions	Screen
10. If you are configuring a receiving server, enter the path to your backups directory. Before new information is pushed from the staging server, production server files are backed up to this directory. *See Also:* "Viewing and Restoring a Backup of the Production Server" on page 719	 Site Replication - InstallShield Wizard Backup Directory Please select the path for your site replication backup directory C:\SiteReplication.Backups

Directions	Screen
11. If you are configuring a sending server, you are prompted to enter a “from” email address. When site replication finishes, the notification uses this as the “from” email address. Note: You can enter a “to” email address on the configuration screen.	 **Email Notification** Please enter a valid email address if you want an email sent out after a replication is com This email address will be the person the email is from. If left blank, email notification can used in the future by editing the configuration file Email Site Replication - InstallShield Wizard InstallShield < Back Next > Ca

Directions	Screen
Server Field Enter the path to the server that hosts the database. If using a remote database, enter the path to the database server, *not* the receiving server. **Username and Password Fields** If using a trusted connection, leave the username and password blank. Otherwise, enter a username and password specific to the database for the receiving and sending server.	 Site Replication - InstallShield Wizard SQL Server DB Setup Please enter the required information to connect to your MSSQL or MSDE database. Sele Next will test the connection. For Trusted Connection type leave User and Password blan Server: (local) Username: Password:

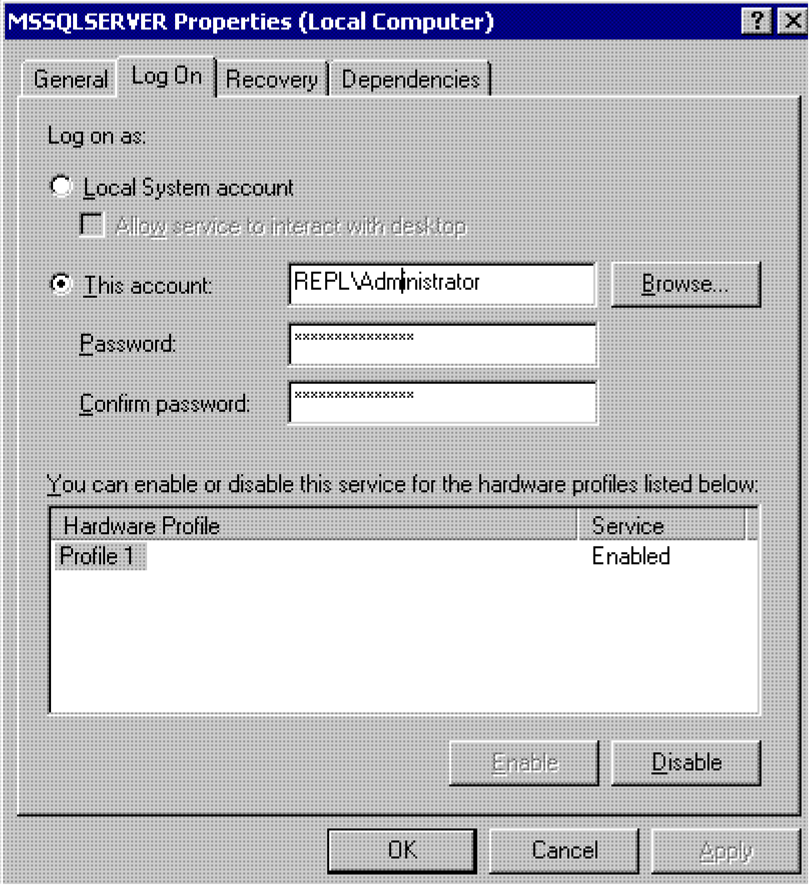
Directions	Screen
12. Click the **Install** button to begin the installation.	 Site Replication - InstallShield Wizard **Ready to Install the Program** The wizard is ready to begin installation. Click Install to begin the installation. If you want to review or change any of your installation settings, click Back. Click Cance the wizard. InstallShield
13. The installation begins. When it is done, the screen on the right appears.	 Site Replication - InstallShield Wizard **InstallShield Wizard Complete** The InstallShield Wizard has successfully installed Site Replication. Click Finish to exit the wizard.

Additional Steps Prior to Configuring the Site Replication Utility

- If you are *not* using a trusted connection, the login user defined in the **Ektron CMS400.NET** web.config file needs sysadmin privileges.

  If you *are* using a trusted connection, the user running the replication needs sysadmin privileges.

- If you are using a remote database, configure the MSSQL Windows Service on the remote server to run as a Domain user. To do this, follow these steps.
  - Go to Control Panel.
  - Select **Administrative Tools**.
  - Select **Services**.
  - Right click **MSSQL Server**.
  - Select **Properties**.
  - Click the **Log On** tab.
  - Select **This account**.
  - Click the **Browse** button and find a domain user who exists on both the **Ektron CMS400.NET** and the database server.


MSSQLSERVER Properties (Local Computer)
General
Log On
Recovery
Dependencies
Browse...
Enable
Disable
OK
Cancel
Apply

Log on as:

○ Local System account

☐ Allow service to interact with desktop

● This account: REPL\Administrator

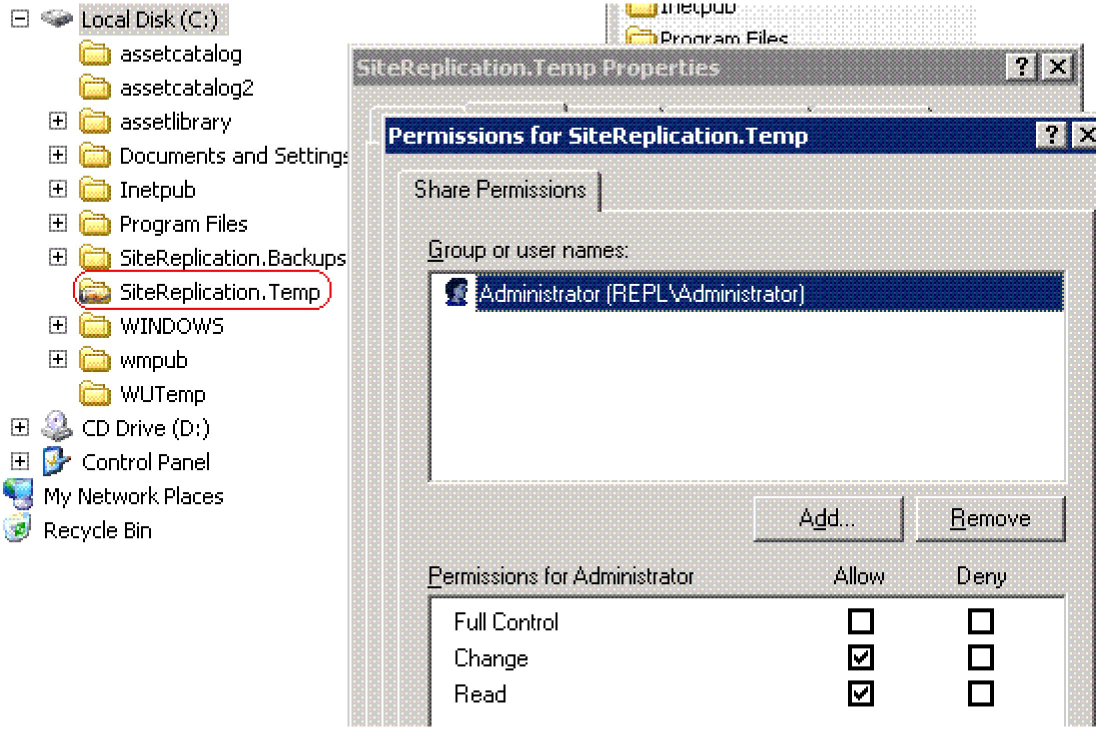
Password: ***************

Confirm password: ***************

You can enable or disable this service for the hardware profiles listed below:

Hardware Profile	Service
Profile 1	Enabled

- Give the user selected above permission to read/write to the SiteReplication.Temp directory. To do so, follow these steps.
  - Open Windows Explorer.
  - Right mouse click the `c:/sitereplication.temp` folder.
  - Select **Properties**.
  - Click **Sharing** then **Permissions**.
  - Assign to the user selected above permission to read and write to this directory.


Local Disk (C:)
assetcatalog
assetcatalog2
assetlibrary
Documents and Settings
Inetpub
Program Files
SiteReplication.Backups
SiteReplication.Temp
WINDOWS
wmpub
WUTemp
CD Drive (D:)
Control Panel
My Network Places
Recycle Bin
SiteReplication.Temp Properties
Permissions for SiteReplication.Temp
Share Permissions
Group or user names:
Administrator (REPL\Administrator)
Add...
Remove
Permissions for Administrator
Allow
Deny

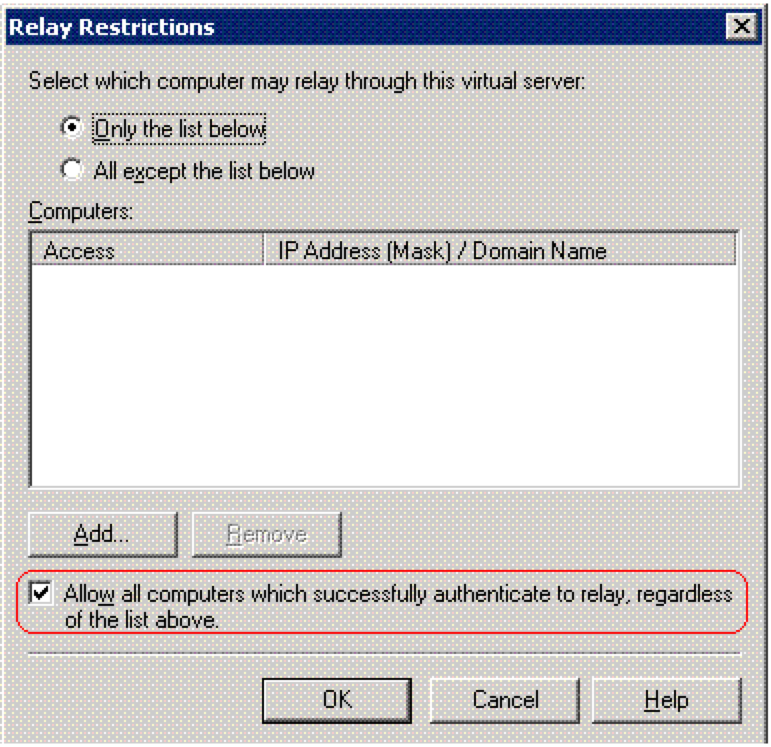
Permissions for Administrator	Allow	Deny
Full Control	☐	☐
Change	☑	☐
Read	☑	☐

- If you will use email to communicate the completion of the replication, SMTP must be running on the sending (staging) server’s IIS.

  Also, the CDO objects must be installed. Mail will be sent from `CMS400 Site Replication`.

  Finally, verify that your SMTP server allows relaying from the sending machine. You may need to set the Send\EmailFrom tag in the siterepl.config file to a valid internet email address. You can use the SendEmail web services API test in replication.asmx to test the configuration.

- Go to **IIS > Default SMTP Virtual Server > Properties > Access tab > Relay** button. Make sure the following field is checked: **Allow all computers which successfully authenticate to relay, regardless of the list above**.



Select which computer may relay through this virtual server:

● Only the list below

○ All except the list below

Computers:

Access	IP Address (Mask) / Domain Name

☑ Allow all computers which successfully authenticate to relay, regardless of the list above.

See Also:

- "Updating Membership Users" on page 701
- "Preserving Database Tables" on page 702

Updating Membership Users

Typically, membership users are site visitors who register themselves via Web pages that reside on a production server. So, you would not want membership information on the staging server to overwrite that information.

However, if your staging server contains membership users that you want to move to the production server, follow these steps. You might do this on a one-time basis if, for example before your production server goes live.

1. On the production server, navigate to the folder *`CMS400 server/`* `Documents and settings/all users/application data`.

2. Open the `sitereplCMS400Replication.config` file with a simple word processor, such as Notepad.
3. Set the value of `PreserveMembershipUsers` to **False**.

```
<entry name="PreserveMembershipUsers">False</entry>
```

4. Save and close the file.

The next time you run Site Replication, all membership user information on the staging server will be sent to the production server.

After running the replication, you would typically change the value of `PreserveMembershipUsers` to **True**, so that subsequent replications do not affect membership users on the production server.

Preserving Database Tables

Some customers have a custom set of tables in the production database for tracking unique information. If your site has custom tables that you want to preserve during replication, follow these steps to instruct the site replication to do that.

1. On the production server, navigate to the folder *`CMS400 server/`* `Documents and settings/all users/application data`.
2. Open the `sitereplCMS400Replication.config` file with a simple word processor, such as Notepad.
3. Within the PreserveTables entry, list the tables to be preserved during replication.

```
<entry name="PreserveTables">my_custom_table_tbl</entry>
```

NOTE If you enter more than one table, separate each with a comma.

Since the tables may have foreign key relationships, list the primary key tables first. When the tables are deleted, they are deleted in reverse order, so there are no foreign key errors.

When the tables are copied, it is done in forward order so the primary keys are restored before the foreign keys reference them.

4. Save and close the file.

Configuring the Site Replication Utility

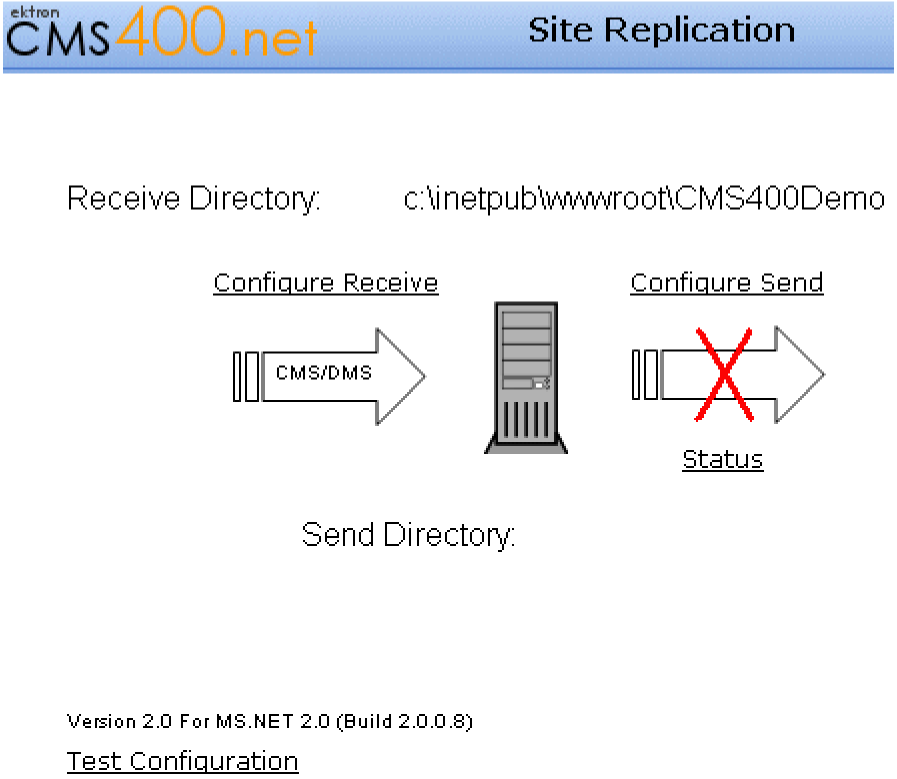
To configure the Site Replication utility, enter the following into your Web browser's address field:

```
http://localhost/cms400replication/ConfigReplication.aspx
```

Alternatively, follow this path from the Start menu.

Start > All Programs > Ektron > Site Replication > CMS400 Site Replication

The following screen appears if you chose to set up a receiving machine.

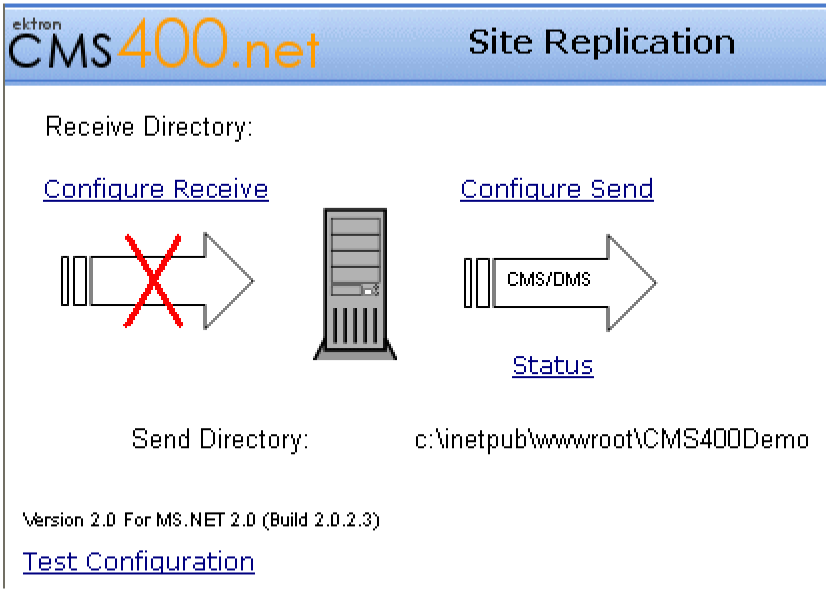

ektron CMS400.net
Site Replication
Configure Receive
CMS/DMS
Configure Send
Status
Test Configuration

Receive Directory: c:\inetpub\wwwroot\CMS400Demo

Send Directory:

Version 2.0 For MS.NET 2.0 (Build 2.0.0.8)

The following screen appears if you chose to set up a sending machine.


ektron CMS400.net
Site Replication
Configure Receive
Configure Send
CMS/DMS
Status
Test Configuration

Receive Directory:

Send Directory: c:\inetpub\wwwroot\CMS400Demo

Version 2.0 For MS.NET 2.0 (Build 2.0.2.3)

This screen displays the following Site Replication information:

- current status
- the receiving directory
- the sending directory
- test configuration

This screen also links to other screens that let you configure, run, and get a detailed status of the replication process. Click **Configure Send** to configure your staging server, and **Configure Receive** to configure a production server.

NOTE Only configure the send page on the staging server, and the receive page on the production server.

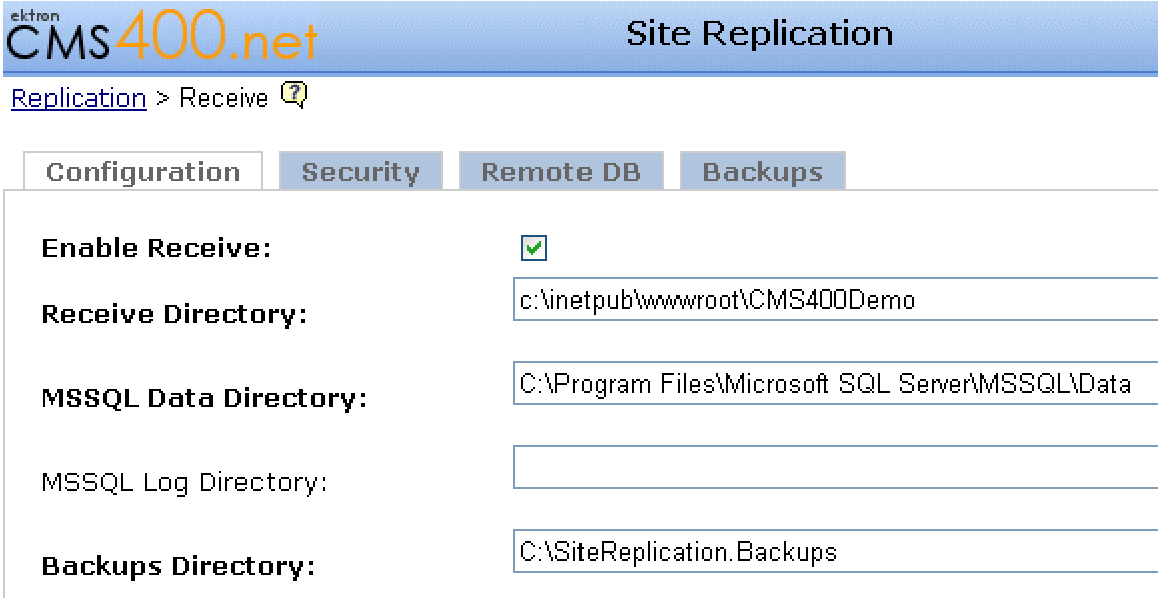
See Also:

- ”Configuring the Receiving Server” on page 705
- ”Configuring the Sending Server” on page 709
- ”The Site Replication Status Page” on page 714
- ”Testing Site Replication Software” on page 725

Configuring the Receiving Server

Use the configuration receive page to set up information about a receiving server.

NOTE To return to the home screen, click **Replication** in the top left corner.



ektron CMS400.net
Site Replication
Replication > Receive
Configuration
Security
Remote DB
Backups

Enable Receive: ☑

Receive Directory: c:\inetpub\wwwroot\CMS400Demo

MSSQL Data Directory: C:\Program Files\Microsoft SQL Server\MSSQL\Data

MSSQL Log Directory:

Backups Directory: C:\SiteReplication.Backups

This screen has four secondary screens, listed across the top:

- ”Configuration Screen” on page 705
- ”Security” on page 706
- ”Remote DB” on page 707
- ”Backups” on page 708

The following table explains the initial screen’s fields.

Configuration Screen

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Field	**Description**
Enable Receive	Determines whether the server you are signed into can receive Site Replication information. ☑ Checked = Receive ☐ Not checked = Do not receive
Receive Directory	The site directory on the receiving (production) server that is updated when Site Replication occurs. For example: `c:\inetpub\wwwroot\cms400demo` Note: If you just installed the Site Replication utility, the receiving directory you specified during installation appears.
MSSQL Data Directory	The location of the MSSQL database directory. The default is: `c:\Program Files\Microsoft SQL Server\MSSQL\Data`
MSSQL Log Directory	Enter the location of the MSSQL Log directory, which stores your MSSQL .ldf files.
Backups Directory	The location of the Site Replication backup files. For example: `c:\SiteReplication.Backups` The backup directory may require a large amount of space, depending on the size of your site and if you are using the Document Management Functionality. *See Also:* ”Viewing and Restoring a Backup of the Production Server” on page 719
Save Button Save	Saves the receiving (production) server information.

Security

.

Field	Description
Valid Username	Username used for authentication on receiving (production) server. If you are setting up a receiving server that uses a trusted connection, this user needs sysadmin access for MSSQL. Also, this value must match the **Username** on the Configuration Sending Server screen. Ektron recommends entering the name in this format: `domain name\username`. Note: You do not need to complete this field. If you do, this information provides additional security for which user can send data to this server.
Valid Sender IP	The IP address of the sending (staging) server, which will be synchronized with the production server you are configuring. It must be a static IP address. Note: You do not need to complete this field. If you do, this information provides additional security for which server can send data to this server.
Save Button	Save the receiving (production) server information.

Remote DB

.

Field	Description
DB Server’s Temp Dir	Most databases can only back up and restore to a local drive. So if your database server is on a different machine than your CMS, both machines must share a domain/group and a user/password for directory access. Ektron recommends setting up a separate directory named SiteReplication.Temp and sharing it on the staging or production server (whichever uses the remote database server). The database server can connect to this network share via a UNC path. Note: The MSSQL service must run as a domain user to be able to access a UNC share.
Receive DB Temp Dir	If the receiving server uses a remote database server, enter the UNC path to the shared directory on that server. *See Also:* ”DB Server’s Temp Dir” on page 708
Save Button [Save]	Save the receiving (production) server information.

Backups

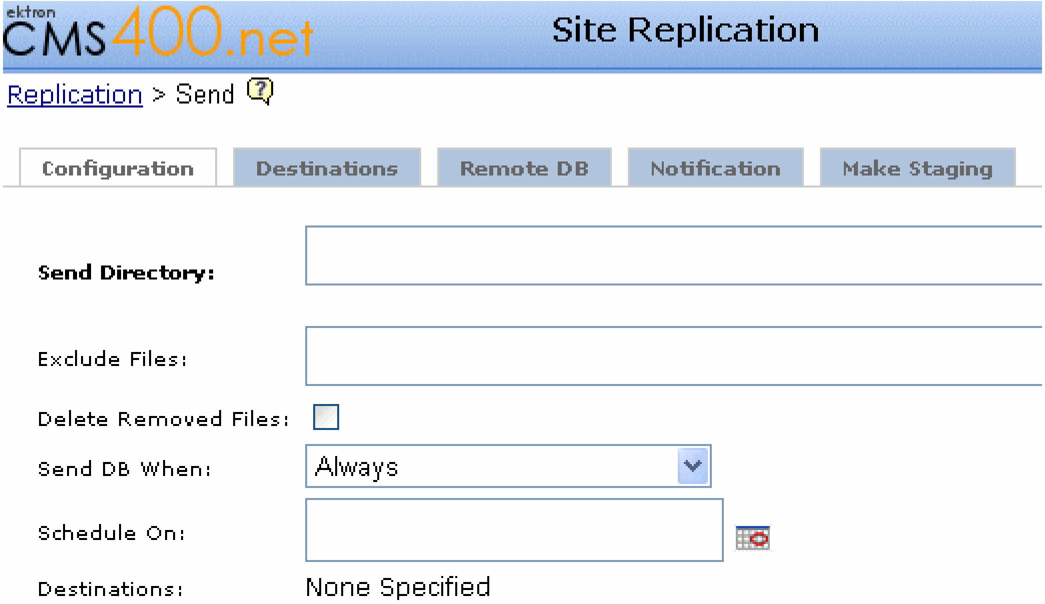
.

Field	Description
Replication Backups	Displays the number of Site Replication backups stored in the backups directory. Up to 10 backups are kept. The selection box directly below this label lists the most recent 10 backups. *See Also:* ”Viewing and Restoring a Backup of the Production Server” on page 719
Button [Restore]	Choose a backup from the replication backups selection box. Click **Restore** to replace the site on the receiving server with the selected backup. *See Also:* ”Viewing and Restoring a Backup of the Production Server” on page 719

Configuring the Sending Server

The first time you configure the sending (staging) server, follow the procedure described in ”Setting up a Staging Server” on page 715. Later, you can use the **Configure Send** page modify that information.

NOTE To return to the home screen, click **Replication** in the top left corner.



ektron CMS400.net
Site Replication
Replication > Send
Configuration
Destinations
Remote DB
Notification
Make Staging

Send Directory:

Exclude Files:

Delete Removed Files: ☐

Send DB When: Always

Schedule On:

Destinations: None Specified

This screen has these secondary screens, listed across the top:

- ”Configuration Screen” on page 709
- ”Destinations Screen” on page 711
- ”Remote DB Screen” on page 712
- ”Notification Screen” on page 712
- ”Setting up a Staging Server” on page 715

The following tables explain the screens.

Configuration Screen

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Field	**Description**
Send Directory	The location of site directory on the sending server whose content will be synchronized with the production server. For example: `c:\inetpub\wwwroot\cms400demo`
Exclude Files	If you want to exclude certain file types from the replication, enter them here. For example, you may want to exclude all PDF files. For each file type, enter an asterisk (), period(.), then the file extension. For example `*.pdf`. Separate each extension with a comma.
Delete Removed Files	During Site Replication, files that were deleted on the staging server are now labeled “deleted” on the production server. Check this box if you want to remove these files from the production server.
Send DB When	Indicate if you want to copy the **Ektron CMS400.NET** database to the named destination servers. Your choices are: • **Always** • **1st Destination only** (only copy the database to the first destination server listed above) • **Never**
Schedule On	To begin the replication as soon as you press the **Send** button, leave this field blank. To schedule the replication for a future date and time, click the calendar button.

Destinations	The path to the replication.asmx file on every *production* server that will be updated by this staging server. For example:
	`http://productionserver1/CMS400replication/replication.asmx`
	or
	`http://198.0.25.214/CMS400replication/replication.asmx`
	You must enter the username and password needed to access that folder before pressing the **Add** button to add a destination folder.

Field	Description
Windows Username	Username used for authentication on receiving (production) server. If you are setting up a receiving server that uses a trusted connection, this user needs sysadmin access for MSSQL. Enter the `domainname\username`. It must match the WS Username on the production server's Configuration Receiving Server screen.
Password	Password for the above user.
Send Button Send	Begin the Site Replication process. If you scheduled a date/time, the process is delayed until then.

Destinations Screen

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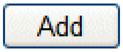
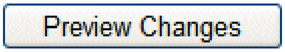
Field	Description
Destinations	A Display-only field that lists the path to the replication.asmx file on every production server that will be updated by this staging server.

Destination to add	Enter the path to the replication.asmx file on every *production* server that will be updated by this staging server. For example:
	`http://productionserver1/CMS400replication/replication.asmx`
	or
	`http://198.0.25.214/CMS400replication/replication.asmx`
	You must enter the username and password needed to access that folder before pressing the **Add** button to add a destination folder.

Windows Username	Username used for authentication on receiving (production) server. If you are setting up a receiving server that uses a trusted connection, this user needs sysadmin access for MSSQL. Enter the `domainname\username`. It must match the WS Username on the production server's Configuration Receiving Server screen.
Password	Password for the above user.

Field	Description
Add Button 	Add a new **Destination**. *See Also:* ”Destinations” on page 710 Before pressing this button, make sure that a valid destination appears in the **Destinations** field, and the username and password needed to access that folder appear in their respective fields.
Preview Changes Button 	Preview a list of changes to take place when the Site Replication occurs. Use this feature to examine which changes are scheduled before replication begins. Before pressing this button, make sure a valid destination appears in the **Destinations** field, and the username and password needed to access that folder appear in their respective fields. Then, select a production server from the **Destinations** field. *See Also:* ”Previewing the Site Replication Process” on page 717

Remote DB Screen

.

Field	Description
DB Server’s Temp Dir	Most databases can only back up and restore to a local drive. So, if your database server is on a different machine than your CMS, both machines must share a domain/group and a user/password for directory access. Ektron recommends setting up a separate directory named SiteReplication.Temp and sharing it on the site replication server. The database server can connect to this network share via a UNC path. So, if the sending server uses a remote database server, enter the site replication server’s shared directory.
Send DB Temp Dir	If the sending server uses a remote database server, enter the UNC path to the shared directory on that server.

Notification Screen

.

Field	Description
email Notification to	Use this field to notify someone when the site replication is finished. Enter the email address of the person you want to notify. Note: email notification only works if the sending server's SMTP mail service is enabled. *See Also:* "If you will use email to communicate the completion of the replication, SMTP must be running on the sending (staging) server's IIS." on page 700 Here is an example of the email resulting from a successful replication. `Completed At 10/7/2005 9:50:26 AM`
From Address	Enter the name that will appear in the email's *from* line.

Make Staging Screen

This screen helps you to set up a staging server when only a production server is currently available. The screen facilitates the setup of the staging server by

- copying Web site and database information from the production server to the staging server
- initializing the staging server with content from the production server

For more information, see "Setting up a Staging Server" on page 715.

.

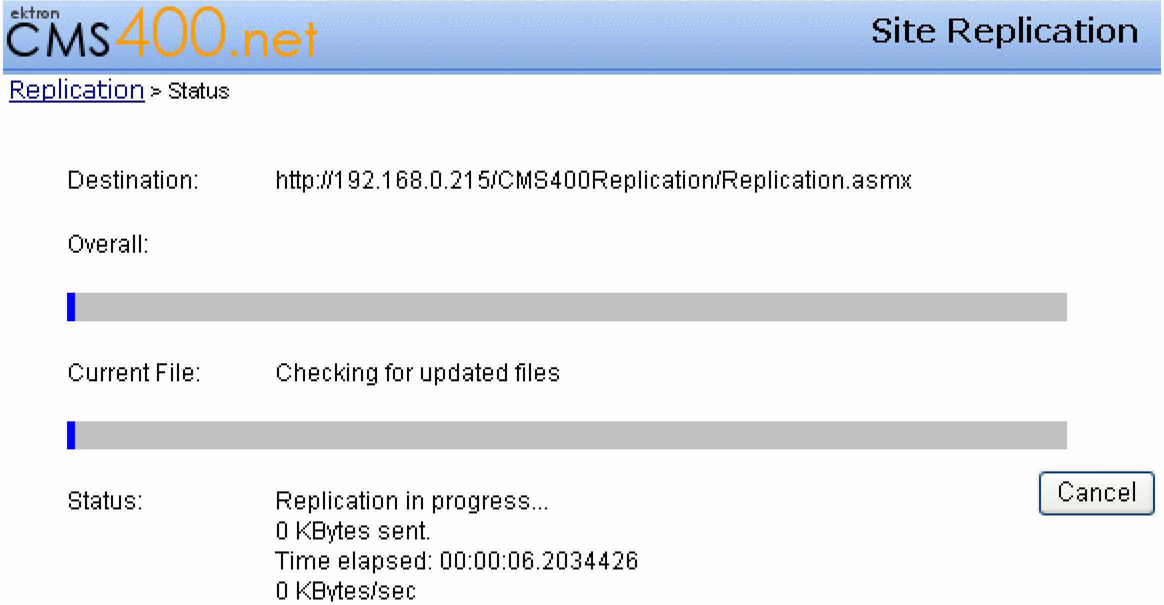
Field	Description
New Connection String	Enter a connection string pointing to the new database.
MSSQL Data Directory	Enter the location of the staging server's MSSQL database directory. The default is: `c:\Program Files\Microsoft SQL Server\MSSQL\Data`
MSSQL Log Directory	Enter the location of the staging server's MSSQL Log directory, which stores your MSSQL .ldf files.

Field	**Description**
Temp Directory	
Windows Username	Enter the Username used for authentication on receiving (production) server. If you are setting up a receiving server that uses a trusted connection, this user needs sysadmin access for MSSQL. Enter the `domainname\username`. It must match the WS Username on the production server's Configuration Receiving Server screen.
Password	Enter the password for the above user.
Create Staging	Click this button when you are ready to create the staging server based on the information entered on the screen. Before pressing this button, make sure you completed "Setting up a Staging Server" on page 715. When you click the **Create Staging** button, Site Replication copies the CMS400Demo directory, the assetlibrary directory, and the CMS400 database form the production server to the staging server.

The Site Replication Status Page

The status page keeps you informed of the Site Replication process. Specifically, it lists the current status of the Site Replication. Also, If a replication is currently in progress, the page displays

- the percentage of completion
- the file currently being replicated
- the destination server's URL



Destination: http://192.168.0.215/CMS400Replication/Replication.asmx

Overall:

Current File: Checking for updated files

Status: Replication in progress...
0 KBytes sent.
Time elapsed: 00:00:06.2034426
0 KBytes/sec

Setting up a Staging Server

Follow these directions if you are migrating from a single-server model to a two-server model, that is, a staging and production server. Your current server becomes a production server, and the new server will be a staging server.

After purchasing the appropriate licensing and downloading the Site Replication software, follow these steps.

WARNING! Only follow these steps to set up a sending server. After that, you can perform Site Replication by following "Performing Site Replication" on page 717.

1. Install **Ektron CMS400.NET** on the staging server. Set it up exactly like the production server (for example, all directories must have the same name).

NOTE This procedure is described in the **Ektron CMS400.NET** Setup Manual.

During installation, when you are asked to specify **Setup Type**, choose **Minimal**.

2. Install Site Replication software on both servers. See ”Installing the Site Replication Utility” on page 686.
3. Follow the steps described in ”Additional Steps Prior to Configuring the Site Replication Utility” on page 698.
4. Configure Site Replication software on the production server according to instructions in ”Configuring the Receiving Server” on page 705.
5. On the sending server, enter the following into the browser address bar: `http://localhost/ConfigReplSend.aspx`
6. Click the **Destinations** tab.
7. In the **Destinations to Add** field, enter the path to the replication.asmx file on the production server. For example:

`http://productionserver1/CMS400replication/replication.asmx`

or

`http://198.0.25.214/CMS400replication/replication.asmx`

Enter only one destination.

8. Enter the username and password needed to access that folder.
9. Press the **Add** button.
10. Click the **Configuration** tab.
11. In the **Send Directory** field, enter the send server’s site root directory.
12. Click the **Make Staging** tab. This screen facilitates the setup of the staging server by

- copying Web site and database information from the production server to the staging server
- initializing the staging server with content from the production server

13. In the **New Connection String** field, enter a connection string pointing to the new database. You can copy this from the web.config file. For example

```
server=(local);database=remotedb;Integrated Security=true;user=sams;pwd=sam123;
```

14. In the **MSSQL Data Directory** and **MSSQL Log Directory** fields, specify the location of the MSSQL data and log directories.
15. Enter the username and password needed to access the production server.

16. Click **Create Staging**.
17. The Site Replication software initializes the staging server with content from the production server.

Previewing the Site Replication Process

After you configure the Site Replication utility, you can preview which files the replication will transfer before beginning the replication.

If the list looks correct, proceed with the replication. If the list looks wrong or incomplete, review the contents of the sending (staging) server to make sure all content was updated properly. Then, run the preview again to make sure the list of files to be moved is correct before beginning the replication.

To use the preview feature, follow these steps.

1. To access the Site Replication utility, enter the following into your Web browser's address field:

`http://localhost/cms400replication/ConfigReplication.aspx`

2. Click **Configure Send**.
3. In the **Destination** field, select the production server with which you will synchronize.
4. Enter the password required to access that production server.
5. Click the **Preview Changes** button.
6. A list of files to be transferred to the production server appears.

Performing Site Replication

For background information about Site Replication, see "Site Replication" on page 680.

You must configure the Site Replication utility before beginning the actual replication.

IMPORTANT! Make sure that the system clock on both servers is set to the same time. The Site Replication software uses the clock to determine which files to replicate.

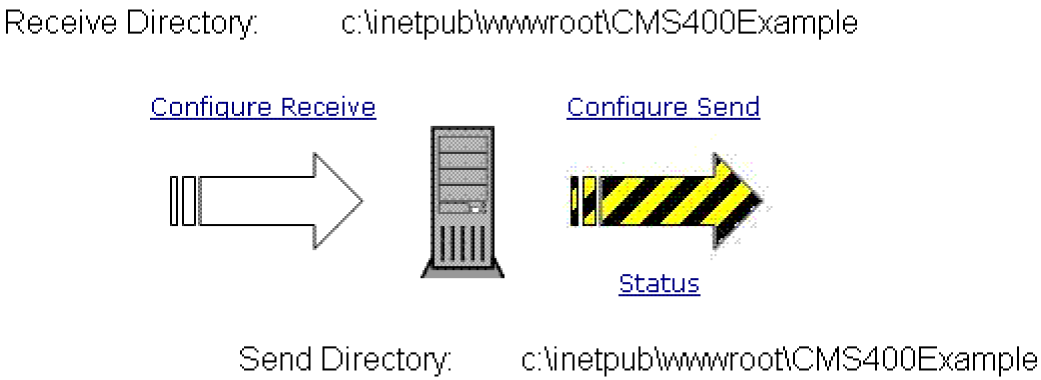
Before beginning the site replication, check free space on the receiving (production) server to make sure it can accommodate your site directory on the sending (staging) server. Also, Ektron recommends using the Preview feature to identify which files will be moved by the replication prior to beginning. *See Also:* ”Previewing the Site Replication Process” on page 717

To use the Site Replication, follow these steps.

1. To access the Site Replication utility, enter the following into your Web browser’s address field:

`http://localhost/cms400replication/ConfigReplication.aspx`

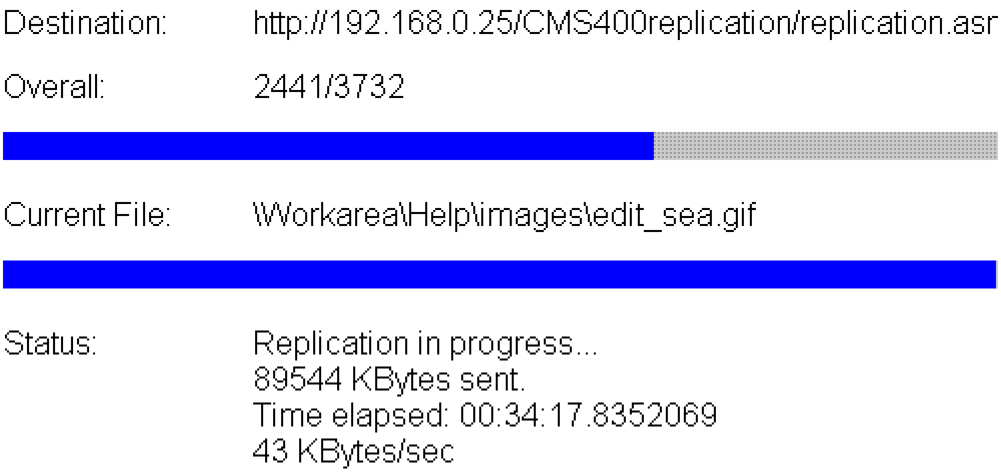
2. Click **Configure Send**.
3. In the **Destination** field, select the production server with which you will synchronize.
4. Enter the Username and password required to access that production server.
5. If you want to begin the replication in the future, use the **Schedule on** field. *See Also:* ”Schedule On” on page 710. Otherwise, proceed to the next step.
6. Click the **Send** button.
7. The replication begins.
8. The main screen of the sending server changes to the following, indicating you cannot edit its configuration information while replication is taking place.



Receive Directory: c:\inetpub\wwwroot\CMS400Example

Send Directory: c:\inetpub\wwwroot\CMS400Example

9. To view the progress of the replication, click **Status**. A screen like the following displays.



Destination: http://192.168.0.25/CMS400replication/replication.asr

Overall: 2441/3732

Current File: \Workarea\Help\images\edit_sea.gif

Status: Replication in progress...
89544 KBytes sent.
Time elapsed: 00:34:17.8352069
43 KBytes/sec

The screen displays the following information:

- **Destination** - the receiving server
- **Overall** - the number of files already transferred/the total number of files to be transferred
- **Current File** - the file currently being transferred
- **Status** - Information about the replication (number of kilobytes sent so far, time elapsed, speed of transfer)

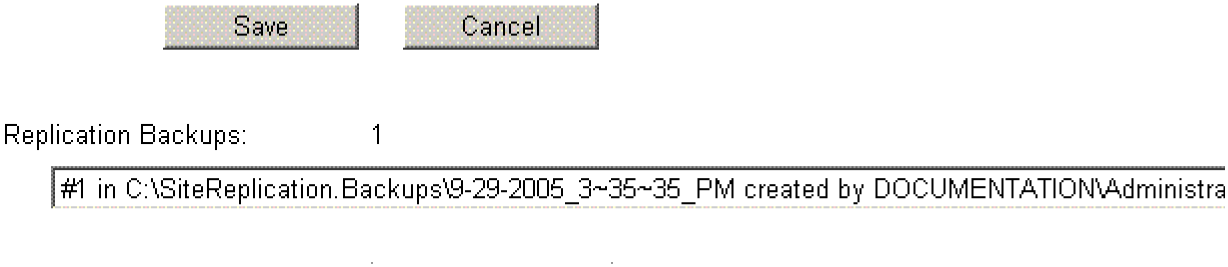
10. A list of files transferred to the production server appears.

After completing the replication, it’s a good idea to spot check the content on the production server to verify that the replication was successful.

Viewing and Restoring a Backup of the Production Server

When you run a Site Replication, a backup is made of the receiving (production) server before any new or updated files are copied from the sending (staging) server. Only files with the same name but a earlier edit date/time are backed up. A backup directory is specified during installation. After installation, the directory can be changed via the receiving server's **Configuration** screen. *See Also:* "Configuring the Receiving Server" on page 705

On that screen, you can see how many backups are available. Below that, a drop-down box displays information about each backup, such as creation date, time and user.



Replication Backups: 1

#1 in C:\SiteReplication.Backups\9-29-2005_3~35~35_PM created by DOCUMENTATION\Administra

You can also view a log of the selected backup, which lists every file copied from the sending to the receiving server. To see the log, click the **Show Log** button.

See Also:

- "How Backup Files Are Maintained and Numbered" on page 720
- "Restoring a Backup" on page 720

How Backup Files Are Maintained and Numbered

The Site Replication utility only keeps the 10 most recent backups. So, if 10 are already available and you initiate a new replication, the oldest backup is removed, and the current files about to be replaced are saved as the number one backup. All remaining backups are renumbered one higher.

Restoring a Backup

When you restore a backup, only files that were overwritten and the web.config, assetmanagement.config, assetmanagementdata.config files are restored. Any new files copied to the production server are not deleted.

To restore a backup of files on the receiving (production) server, follow these steps.

1. To access the Site Replication utility, enter the following into your Web browser's address field:

```
http://localhost/cms400replication/ConfigReplication.aspx
```

2. Click **Configure Receive**.
3. In the bottom section of the screen, display the drop-down selection box under **Replication backups**.
4. Select the backup that you want to restore.
5. Click **Restore**.

Using Site Replication with Multiple Sites

If you are using **Ektron CMS400.NET**'s Site Replication feature to copy content from your staging to production server, you *must* replicate all files at one time. You cannot replicate only one site, since all sites share library files.

While configuring the Replication Send screen, use the **Add** button to identify all destination directories. *See Also:* "Configuring the Site Replication Utility" on page 703

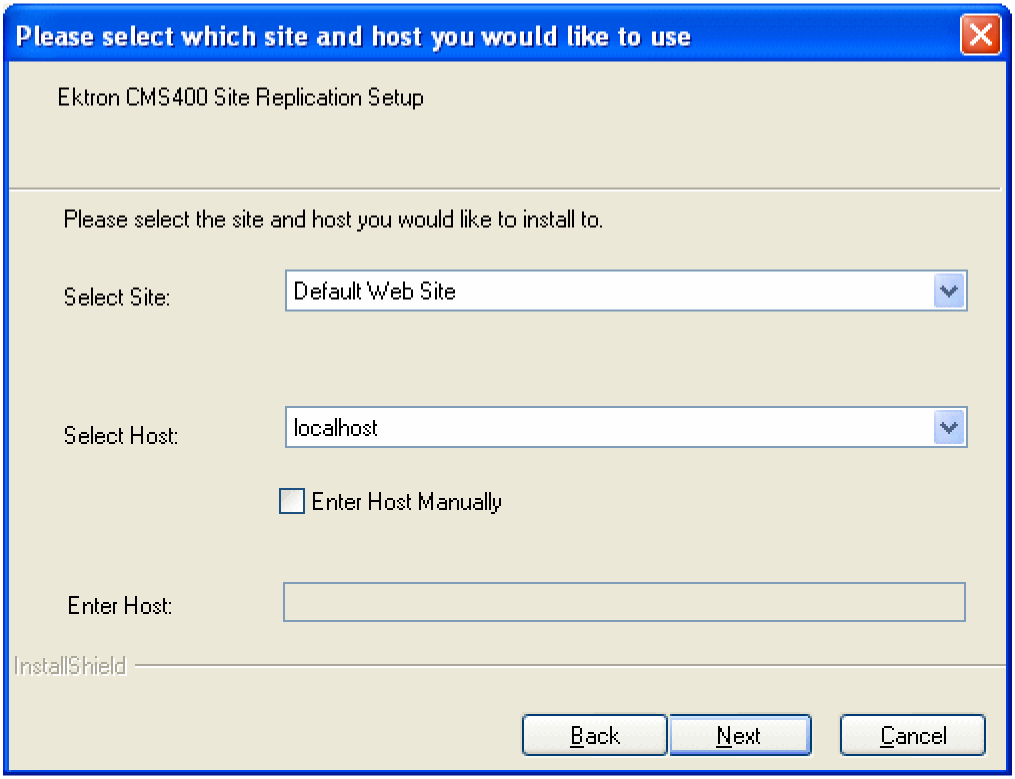
When setting up Site Replication for receiving site, in the **Destination** field, select the appropriate destination directory. *See Also:* "Performing Site Replication" on page 717

See Also: "Installation Guidelines" on page 721

Installation Guidelines

To set up multiple sites on a staging server, follow these guidelines.

1. Install the Site Replication feature separately for each site. On the following installation screen, be sure the site is unique.



Please select which site and host you would like to use
Back
Next
Cancel
InstallShield

Ektron CMS400 Site Replication Setup

Please select the site and host you would like to install to.

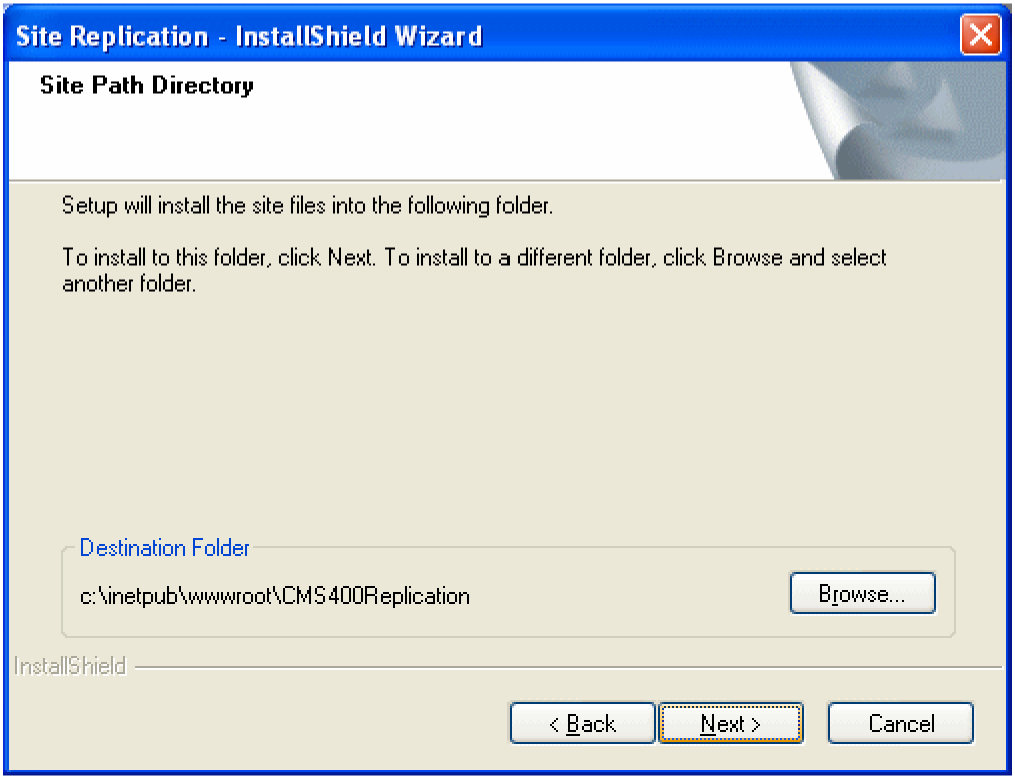
Select Site: Default Web Site

Select Host: localhost

☐ Enter Host Manually

Enter Host:

2. When asked to identify the site path directory, be sure the directory name is unique for each site.


Site Replication - InstallShield Wizard
Site Path Directory

Setup will install the site files into the following folder.

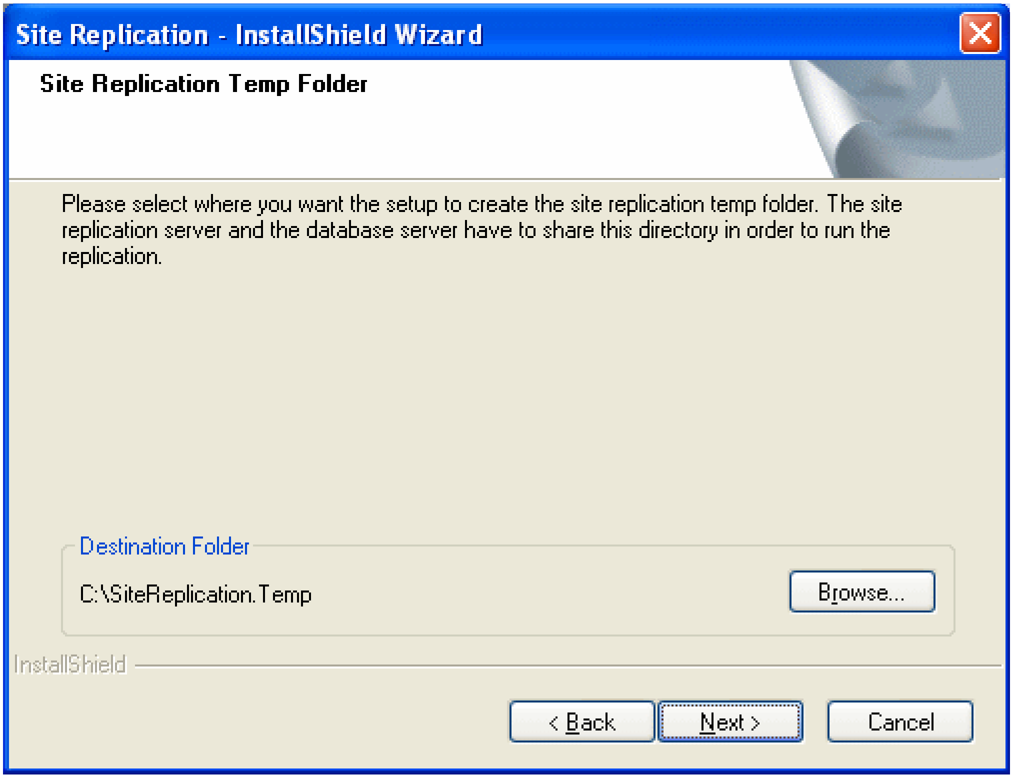
To install to this folder, click Next. To install to a different folder, click Browse and select another folder.

Destination Folder

c:\inetpub\wwwroot\CMS400Replication

Browse...
InstallShield
< Back
Next >
Cancel

3. If your receiving server uses a remote database server, it is good practice for each site to use a unique temporary folder to store the database prior to replication.



Site Replication - InstallShield Wizard
Site Replication Temp Folder

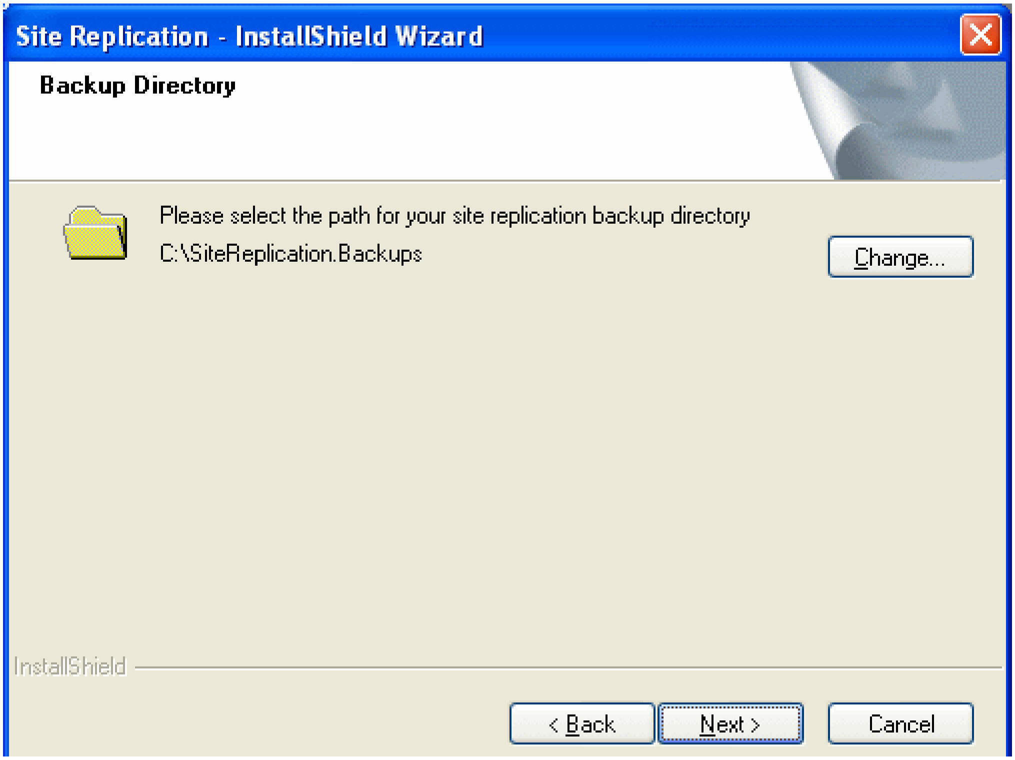
Please select where you want the setup to create the site replication temp folder. The site replication server and the database server have to share this directory in order to run the replication.

Destination Folder

C:\SiteReplication.Temp

Browse...
InstallShield
< Back
Next >
Cancel

4. Specify a unique backup directory for each site.



Site Replication - InstallShield Wizard

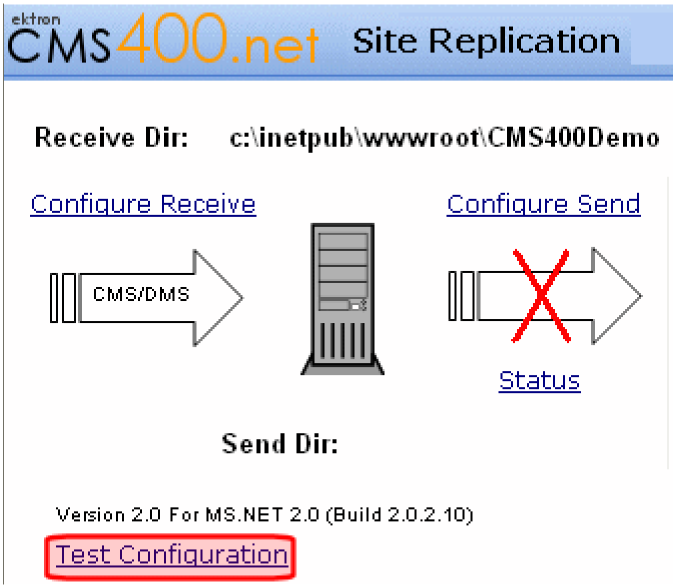
Backup Directory

Please select the path for your site replication backup directory

C:\SiteReplication.Backups

Testing Site Replication Software

On the main Site Replication Screen, a **Test Configuration** option lets you verify that your Site Replication software is working properly. You can also use this screen to diagnose problems.



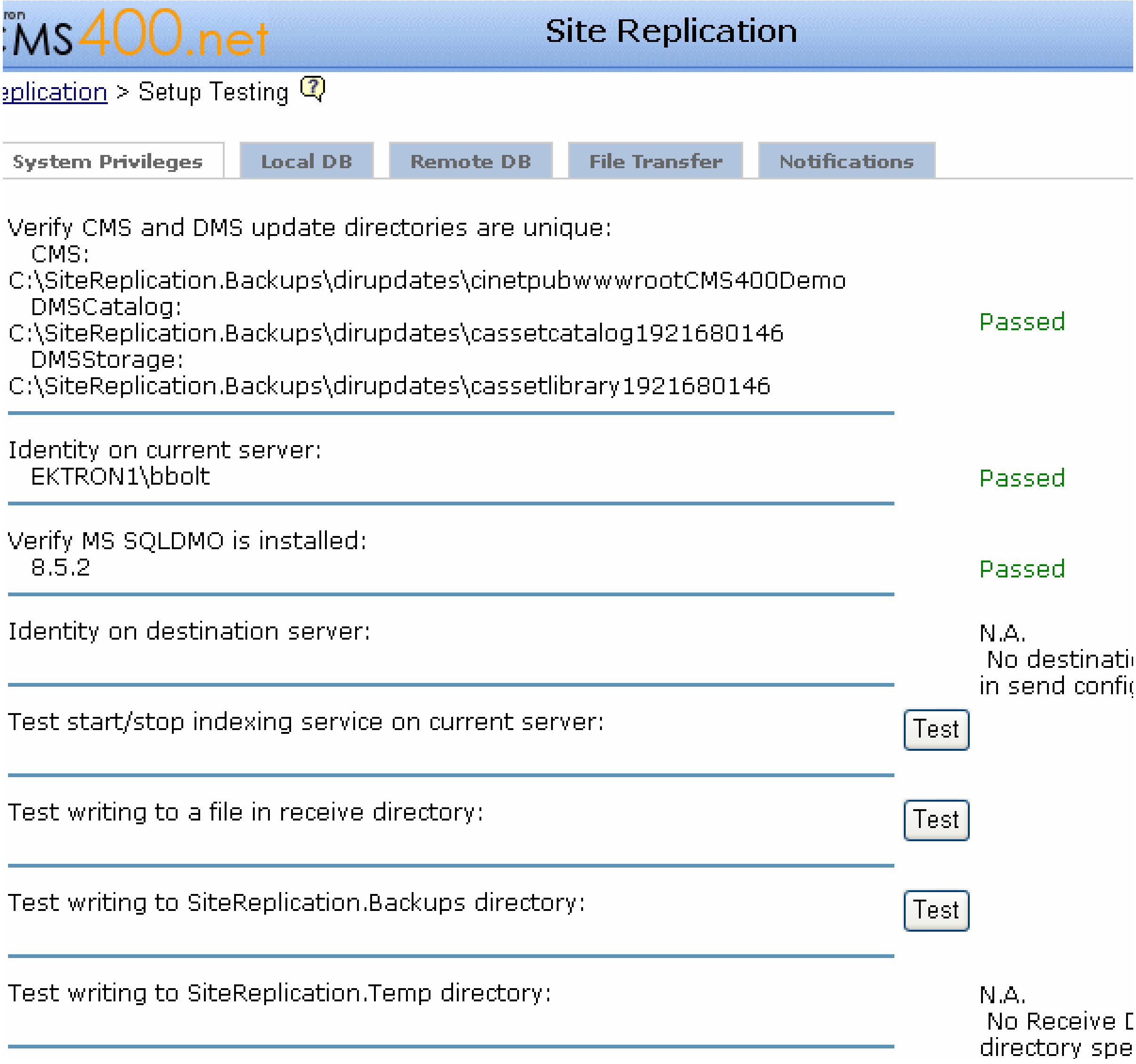
ektron CMS400.net Site Replication
Configure Receive
Configure Send
CMS/DMS
Status
Test Configuration

Receive Dir: c:\inetpub\wwwroot\CMS400Demo

Send Dir:

Version 2.0 For MS.NET 2.0 (Build 2.0.2.10)

When you click **Test Configuration**, the following screen appears.


CMS400.net
Site Replication
eplication > Setup Testing
System Privileges
Local DB
Remote DB
File Transfer
Notifications
Test
Test
Test

Verify CMS and DMS update directories are unique:
CMS:
C:\SiteReplication.Backups\dirupdates\cinetpubwwwrootCMS400Demo
DMSCatalog:
C:\SiteReplication.Backups\dirupdates\cassetcatalog1921680146
DMSStorage:
C:\SiteReplication.Backups\dirupdates\cassetlibrary1921680146
Passed

Identity on current server:
EKTRON1\bbolt
Passed

Verify MS SQLDMO is installed:
8.5.2
Passed

Identity on destination server:
N.A.
No destinati
in send confi

Test start/stop indexing service on current server:

Test writing to a file in receive directory:

Test writing to SiteReplication.Backups directory:

Test writing to SiteReplication.Temp directory:
N.A.
No Receive D
directory spe

This screen lets you verify that Site Replication is configured properly. If all tests pass on your sending, receiving, and remote machines, Site Replication should function properly.

Tests are grouped by tabs into the following areas.

Group	These tests verify	For more information, see
System Privileges	Users have been assigned privileges to write files, restart services, etc. These activities occur during Site Replication.	• ”Prerequisites” on page 684 • ”If you are not using a trusted connection, the login user defined in the Ektron CMS400.NET web.config file needs sysadmin privileges.” on page 698
Local DB	If **Ektron CMS400.NET** runs on the same machine as the **Ektron CMS400.NET** database server, you can back up and restore the **Ektron CMS400.NET** database.	”Viewing and Restoring a Backup of the Production Server” on page 719
Remote DB	If you installed a database on a separate server, you can back up and restore it.	
File Transfer	The transfer of files and databases between sending and receiving servers.	”What Information is Synchronized” on page 682
Notifications	Notification email can be sent.	”If you will use email to communicate the completion of the replication, SMTP must be running on the sending (staging) server’s IIS.” on page 700

Listing of Tests Per Server

Tab/Function	Use on sending server	Use on receiving server	Use on remote database server
System Privileges			
Verify CMS and DMS update directories are unique		✓	
Identity on current server:	✓	✓	

Tab/Function	**Use on sending server**	**Use on receiving server**	**Use on remote database server**
Verify MS SQLDMO is installed	✓	✓	
Identity on destination server	✓		
Test start/stop indexing service on current server	✓	✓	
Test writing to a file in receive directory		✓	
Test writing to SiteReplication.Backups directory		✓	
Test writing to SiteReplication.Temp directory			✓
Local DB			
Test backup CMS DB using Send settings:	✓		
Test restore DB using Receive settings:		✓	
Remote DB			
Test backing up DB using SiteReplication.Temp:			✓
Test restoring DB using SiteReplication.Temp			✓
File Transfer			
Transfer file to destination using WebDAV	✓		
Check SQL Server Compatibility	✓		

Tab/Function	**Use on sending server**	**Use on receiving server**	**Use on remote database server**
Check Site Replication Compatibility	✓		
Notifications			
Sent Email to:	✓		

Quick Deploy

The Quick Deploy feature is explained through the following topics.

- ”Introduction” on page 730
- ”Information Copied During Quick Deploy” on page 731
- ”Quick Deploy Prerequisites” on page 732
- ”Using Quick Deploy” on page 733

Introduction

Quick Deploy is a simpler form of Site Replication that quickly moves updated content from a staging to production server. It also moves data collected on the production server back to the staging server, such as Content Analytics and Poll/Survey results.

When to Use Quick Deploy

Use Quick Deploy when content authors are updating specific content items (for example, press releases), new blog entries, and new blog comments but do not need to replicate an entire site.

You also use Quick Deploy to copy to the staging server information collected on the production server from site visitors, such as content rating data, content hits, and poll/survey results.

When Not to Use Quick Deploy

You cannot use Quick Deploy when making the following changes. In these cases, use Site Replication.

- Moving new folders from staging to production server
- Moving content items that can be edited on the production server. Quick Deploy moves read-only content.

Information Copied During Quick Deploy

From Staging to Production Server

During Quick Deploy, the following information is copied from the staging to production server.

- Content that is *published* (whether new or updated) or *deleted* (if its folder is enabled for Quick Deploy)
- New Blog and Discussion Forum comments that have been entered through the Workarea (only Blogs and Discussion Forums whose **Quick Deploy** property is checked. See ”Quick Deploy Prerequisites” on page 732)
- New or updated files in the uploadedfiles, uploadimages, and assets and assetlibrary directories
- aspx templates (See ”Moving non-Content Files with Quick Deploy” on page 734)
- Any files selected as described in ”Moving non-Content Files with Quick Deploy” on page 734

From Production to Staging Server

The following information is copied from the production to the staging server. If the information already exists on the staging server, it is overwritten by the production server information.

- New Blog and Discussion Forum comments entered through the Web site
- New form submissions and submission tasks. (When forms are submitted, new tasks direct users to handle the forms, and notification email is sent to the users.)
- Poll/survey results
- Site Analytic information

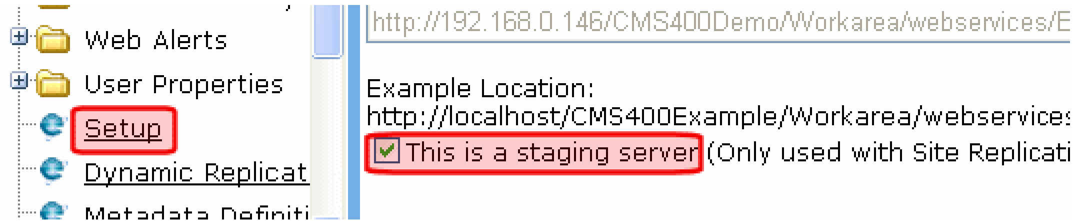
- Content rating data
- Search phrases

Quick Deploy Prerequisites

- Your license key supports Quick Deploy.

NOTE **Ektron CMS400.NET**'s Site Replication software is an extra cost option. Please contact your Ektron Sales representative for details on purchasing it.

- Identify the staging server. To do this, edit the **Settings > Configuration > Setup** screen and check the **This is a staging server** checkbox (see illustration below).



http://192.168.0.146/CMS400Demo/Workarea/webservices/E

Example Location:
http://localhost/CMS400Example/Workarea/webservice:

☑ This is a staging server (Only used with Site Replicati

- Both servers have the same version of **Ektron CMS400.NET** (minimum build 6.0.2)
- On both servers, enable Quick Deploy in the web.config. To do this, open `siteroot/web.config`. Then, change the value of the `<add key="ek_EnableReplication"` element to `true`.
- In the staging server's web.config, specify the Quick Deploy Web service URL. To do this, open `siteroot/web.config` and find the line that specifies the URL.

```
<add key="ek_ReplicationWS" value="http://localhost/CMS400Demo/WorkArea/WebServices/
ReplicationService.asmx"/>
```

Within that line, replace `localhost` with the production server. For example:

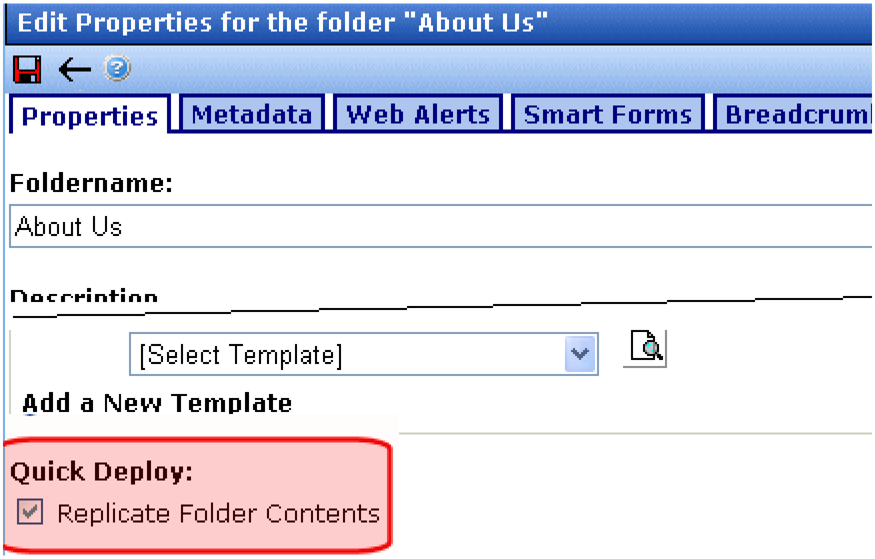
```
<add key="ek_ReplicationWS" value="http://555.555.555.55/CMS400Demo/WorkArea/WebServices/
ReplicationService.asmx"/>
```

- WIthin **Ektron CMS400.NET**, check the **Quick Deploy** property for folders, Blogs and Discussion Forums that contain content to be replicated dynamically.

NOTE You can only set these folder properties after the above settings are made.

To do this, access the folder then click **View > Folder Properties**. Near the bottom of the screen is **Quick Deploy** followed by **Yes** or **No**.

To change the **Quick Deploy** setting, click the Edit button ( ) then change the value of the **Replicate Folder Contents** check box (illustrated below).


Edit Properties for the folder "About Us"
Properties
Metadata
Web Alerts
Smart Forms
Breadcrum
Description
[Select Template]
Add a New Template

Foldername: About Us

Quick Deploy:
☑ Replicate Folder Contents

Unlike some other folder properties, there is no inheritance of this value -- you must individually set each folder to be replicated.

Enabling Multiple Production Destinations

If you want to have Quick Deploy update more than one production server, identify each one in the staging server's web.config file at the `ek_ReplicationWS` element. Separate each URL with a comma(,).

The **Ektron CMS400.NET** database is only synchronized to the first server in the list. Other servers only receive static file updates, that is, files in the uploadedfiles, uploadedimages, assets, and assetlibrary directories

Using Quick Deploy

Moving Content with Quick Deploy

Before running Quick Deploy for the first time, both servers must have the same folder structure and content. You can accomplish this either by copying the database from staging to production server, or running a Site Replication. *See Also:* ”Performing Site Replication” on page 717

To use Quick Deploy to move content from staging to production server, publish the content. As content is published, the Ektron Windows Service automatically moves it to the production server. *See Also:* ”Ektron Windows Service” on page 802

Whenever content is published, all information ready to be moved between the two servers is also moved. An example of this information are Blog and Discussion Forum comments. For a complete list see, ”Information Copied During Quick Deploy” on page 731.

However, if you want to move files selected on the Quick Deploy screen’s **Select CMS Files** tab, you must use the procedure described in ”Moving non-Content Files with Quick Deploy” on page 734.

Moving non-Content Files with Quick Deploy

As mentioned in ”Moving Content with Quick Deploy” on page 733, whenever eligible content is published, all information ready to be moved between the servers is sent. For a complete list, see ”Information Copied During Quick Deploy” on page 731

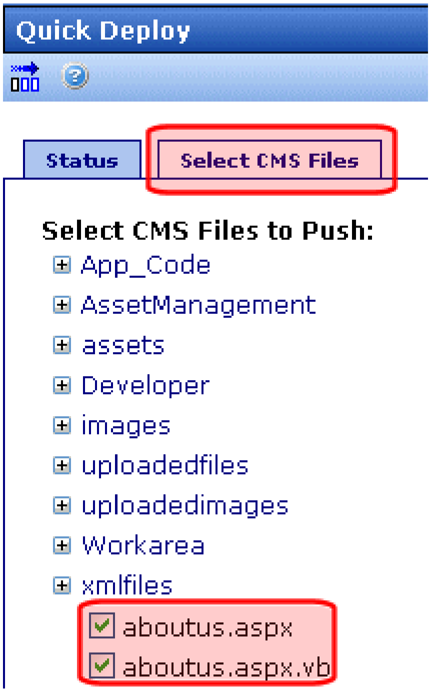
You can also move non-content files whenever you want, whether or not content is being updated. In addition to those files, you can select any number of other CMS files (such as .aspx templates) and move them at the same time. You can only move files within the **Ektron CMS400.NET** root directory.

To move non-content files between the servers, follow these steps.

1. Complete all prerequisites listed in ”Quick Deploy Prerequisites” on page 732.
2. Click **Settings** > **Configuration > Quick Deploy**.

3. To move CMS files other than those mentioned in "Information Copied During Quick Deploy" on page 731 (for example .aspx templates), click the **Select CMS Files** tab. Check each file to move to the production server.

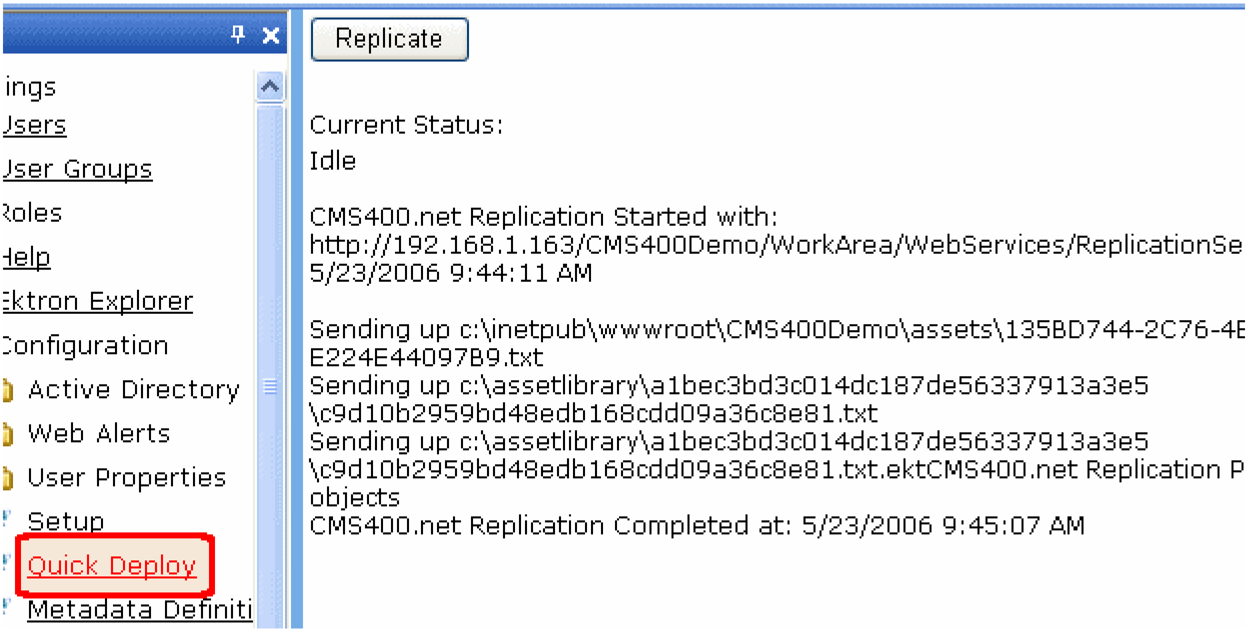
NOTE You cannot select files within the web.config and the bin directories.


Quick Deploy
Status
Select CMS Files
Select CMS Files to Push:
⊞ App_Code
⊞ AssetManagement
⊞ assets
⊞ Developer
⊞ images
⊞ uploadedfiles
⊞ uploadedimages
⊞ Workarea
⊞ xmlfiles
☑ aboutus.aspx
☑ aboutus.aspx.vb

4. Click the **Replicate** button ( ).
5. **Starting Replication...** appears.
6. Once the connection is established, the screen displays the status of the replication. For example:

```
CMS400.net Replication Started with: http://192.168.0.nnn/CMS400Demo/WorkArea/WebServices/
ReplicationService.asmx at 5/4/2006 11:31:41 AM
```

7. When Quick Deploy completes, the screen lists the moved files and completion date and time.


ings
Jsers
Jser Groups
Roles
Help
Ektron Explorer
Configuration
Active Directory
Web Alerts
User Properties
Setup
Quick Deploy
Metadata Definiti
Replicate

```
Current Status:
Idle

CMS400.net Replication Started with:
http://192.168.1.163/CMS400Demo/WorkArea/WebServices/ReplicationSe
5/23/2006 9:44:11 AM

Sending up c:\inetpub\wwwroot\CMS400Demo\assets\135BD744-2C76-4E
E224E44097B9.txt
Sending up c:\assetlibrary\a1bec3bd3c014dc187de56337913a3e5
\c9d10b2959bd48edb168cdd09a36c8e81.txt
Sending up c:\assetlibrary\a1bec3bd3c014dc187de56337913a3e5
\c9d10b2959bd48edb168cdd09a36c8e81.txt.ektCMS400.net Replication P
objects
CMS400.net Replication Completed at: 5/23/2006 9:45:07 AM
```

TECHNICAL NOTE Replication log information is also captured in the Windows Event log. If you set web.config's ek_LogLevel to 1, every database row that was changed is logged.

Troubleshooting Problems with Site Replication

Use the following table to troubleshoot error messages that may appear while you are using the Site Replication feature. Note that message text varies depending on your server name, date, database name, etc.

Error	**Solution**
Error using WebDAV to send file to http://192.168.0.202/SiteReplication.WebDAV/7-14-2006_8~54~47_PMRecvStageDB.tmp - The remote server returned an error: (401) Unauthorized.	A file cannot be added to the WebDAV directory because the username/password you entered are not authorized to copy files to it. This error occurs if: • there's an invalid username/password on destination machine • the WebDAV directory has invalid sharing security settings • WebDav is not enabled If you check all causes above and still get the error, go to the staging server and turn off WebDAV in the `C:\Documents and Settings\All Users\Application Data\sitereplCMS400Replication.config` file. If you do, Site Replication uses Web Services instead of WebDAV.
((The error below appears after you run the Transfer File to Destination using WebDAV test diagnostic.) Failed! Error: Error using WebDAV to send file to http://192.168.0.202/SiteReplication.WebDAV/EktProbeDB101.mssqlbackup0 - The remote server returned an error: (401) Unauthorized.	Same as above
The request failed with HTTP status 401: Unauthorized	You typed an incorrect username or password. Typically occurs when Site Replication begins.
Server was unable to process request. ---> Can't restore DB. CMS400Demo~~7-14-2006_9~15~53_PM already exists on DB server!	This error appears when your configuration consists of two or more production servers that share a database and the **Send DB When** field is set to **Always**. In this case, Site Replication tries to copy to the same database on the same machine. To resolve this error: 1. Go to the sending server. 2. Access the Site Replication software. 3. Click the **Configuration** tab. 4. Verify that **Send DB When** is set to **1st Destination Only**.

Error	Solution
Server was unable to process request. ---> Access to the path 'C:\Documents and Settings\All Users\Application Data\sitereplCMS400Replication.config' is denied.	Anonymous Access is enabled for your **Ektron CMS400.NET** Site Replication directory. To fix it for the staging and production servers, open IIS and disable Anonymous Access on your Site Replication directory. To do that, follow these steps. 1. Open IIS. 2. Navigate to the CMS400Replication directory. 3. Open **Properties**. 4. On the **Directory Security** tab, under **Anonymous Access and Authentication Control**, click the **Edit** button. 5. Ensure that Anonymous Access is unchecked.
(The error below appears in the Identity on Destination Server test diagnostic.) Failed! This web application should not allow Anonymous access!	See above
Server was unable to process request. ---> Access to the path '\\ZEUS\SiteReplication.Temp\7-14-2006_9~34~30_PMRecvStageDB.tmp.uncompressed' is denied.	Your production server is using a remote database, and the specified user does not have permission to update it. To resolve the error, follow these steps. 1. Go to SiteReplication.Temp directory. 2. Right click and choose **Properties**. 3. Click the **Sharing** Tab. 4. Click the **Permissions** button. 5. Add a user that exists on the production and database server. (That is, a user in the domain these servers share). 6. Give the user **Read** and **Change** permissions.
(The error below appears in the Test writing to SiteReplication.Temp directory in the test diagnostics.) Failed! Error: Access to the path '\\ZEUS\SiteReplication.Temp\tmp.ekreplprobe' is denied	See above

Error	**Solution**
Server was unable to process request. ---> Could not restore database '\\ZEUS\SiteReplication.Temp\7-14-2006_11~21~00_PMRecvStageDB.tmp.uncompressed' on receiver. Error was: [Microsoft][ODBC SQL Server Driver][SQL Server]Device activation error. The physical file name 'C:\Program Files\Microsoft SQL Server\MSSQL\Data33\CMS400Demo~~7-14-2006_11~21~00_PM.mdf' may be incorrect. [Microsoft][ODBC SQL Server Driver][SQL Server]File 'CMS400Demo' cannot be restored to 'C:\Program Files\Microsoft SQL Server\MSSQL\Data33\CMS400Demo~~7-14-2006_11~21~00_PM.mdf'. Use WITH MOVE to identify a valid location for the file. [Microsoft][ODBC SQL Server Driver][SQL Server]Device activation error. The physical file name 'C:\Program Files\Microsoft SQL Server\MSSQL\Data33\CMS400Demo~~7-14-2006_11~21~00_PM_log.ldf' may be incorrect. [Microsoft][ODBC SQL Server Driver][SQL Server]File 'CMS400Demo_log' cannot be restored to 'C:\Program Files\Microsoft SQL Server\MSSQL\Data33\CMS400Demo~~7-14-2006_11~21~00_PM_log.ldf'. Use WITH MOVE to identify a valid location for the file. [Microsoft][ODBC SQL Server Driver][SQL Server]RESTORE DATABASE is terminating abnormally.	The path to the MSSQL Data Directory is incorrect. To resolve it, follow these steps. 1. Sign on to the production server. 2. Access the Site Replication software. 3. Open the **Configuration Receive** screen. 4. On the **Configuration** tab, enter the correct path to the **MSSQL Data Directory**. If you are using a remote database, enter the path to database server's MSSQL Data Directory.
Server was unable to process request. ---> Invalid Site Replication Sender Connection IP Address!	On the production server's Configure Receive screen > **Security** tab, you entered **Valid Sender IP address**. Then, you tried to run Site Replication from a different server. To resolve the error, run Site Replication from server specified at **Valid Sender IP address**.
Server was unable to process request. ---> Invalid Site Replication Sender Username or Password!	On the production server's Configure Receive screen > **Security** tab, you entered a **Valid Username**. Then, you signed in as a different user and tried to run Site Replication. To resolve the error, sign in as the specified user then run Site Replication.

Error	Solution
Server was unable to process request. ---> [Microsoft][ODBC SQL Server Driver][SQL Server]Cannot open user default database. Login failed.	The Site Replication user lacks permission to back up and add a new database. To resolve the error, make sure the user has SysAdmin permissions for the SQL server database. This user is specified in the `<connectionstrings>` element of the **Ektron CMS400.NET** web.config file. If you do not want to enter the user information into the **Ektron CMS400.NET** web.config file, enter it into the `C:\Documents and Settings\All Users\Application Data\sitereplCMS400Replication.config` file. Settings in that file override those in the web.config file. Within `sitereplCMS400Replication.config`, use these fields. • **Send\DBUser** – username for accessing the sending server’s database • **Send\DBPassword** – password for accessing the sending server’s database. Be sure to encrypt it using **Ektron CMS400.NET**’s EncryptEmailPassword.exe (located in `C:\Program Files\Ektron\CMS400v`*`releasenumber`*`\Utilities`) • **Receive\DBUser** – username for accessing the receiving server’s database • **Receive\DBPassword** – password for accessing the receiving server’s database. Be sure to encrypt it as described above
Failed! The server rejected one or more recipient addresses. The server response was: 550 5.7.1 Unable to relay for test@ektron.com.	This is an email notification error. To fix it, follow these steps. 1. Open IIS. 2. Right click **Default SMTP Virtual Server**. 3. Choose **Properties**. 4. Click the **Access** tab. 5. Click the **Relay** button. 6. Under **Select which computer may relay through this virtual server**, change the setting from **Only the list below** to **All except the list below**. 7. Make sure the **Allow all computers which successfully authenticate to relay** box is checked.

Error	Solution
Status: Last replication failed! Client found response content type of 'text/html; -8', but expected 'text/xml'. The request failed with the error message: -- Server Error in '/' Application. ____ Runtime Error . .	Occurs at the beginning of a Site Replication. Indicates that the Site Replication directory is not set as an application. To make the Site Replication directory an application, follow these steps. 1. Go to IIS. 2. Select the CMS400replication folder. 3. Select **Properties**. 4. On the **Directory** tab, under **Application Settings > Application Name**, make sure **CMS400Replication** appears. If it does not, click the **Create** button and enter it. Do this for both the staging and production site replication folders

Content Analytics Feature

The Content Analytics feature lets you track statistics about visits to your Web site. You can use it to determine the following kinds of information:

- how often your content was viewed
- how many site visitors viewed for first time, and how many returned
- the most popular *referral pages* (that is, the Web page from which visitors clicked to arrive on your site)

Several options for selecting a date range let you compare activity across different weeks, months, and years.

This section explains the Content Analytics feature through the following subtopics.

- ”Enabling the Content Analytics Feature” on page 742
- ”Determining Which Templates are Tracked” on page 743
- ”Specifying the Frequency of Writing to the Database” on page 744
- ”The Statistical Data” on page 745
- ”Writing to the IIS Log” on page 746
- ”Content Analytics Reporting” on page 747
- ”Changing the Date Range of the Statistical Data” on page 753

Enabling the Content Analytics Feature

By default, the Content Analytics feature is enabled in the web.config file, under the `<analyticsSettings>` tag. To disable it, set the value of the `enableAnalytics` property to `false`.

```
<analyticsSettings>
```

```
<!-- globally enables or disabled all visitor tracking -->

<add key="enableAnalytics" value="true" />
```

If this property is set to `true`, and you later change it to `false`, statistical data remains within **Ektron CMS400.NET**, but no additional data is collected.

Determining Which Templates are Tracked

Analytic data is tracked for every template that has a Content Analytics server control.

NOTE Ektron CMS400.NET can only track template views if the viewer's browser's cookies are enabled.

Inserting a Content Analytics Server Control

For details about dropping this server control onto a template, see the **Ektron CMS400.NET** Developer Manual section "Content Analytics Server Control."

Best Practice

Drop the control onto an area that does not disrupt the template layout, such as the bottom.

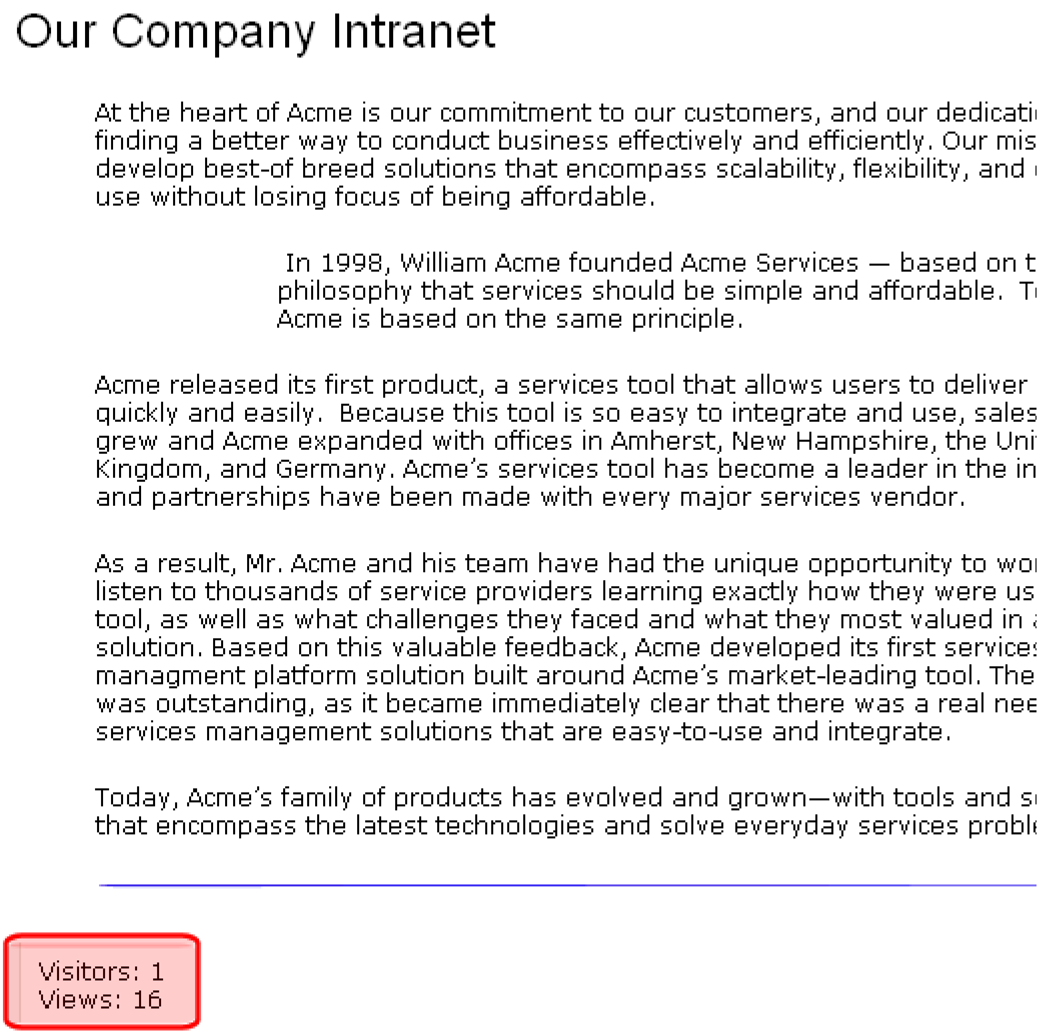
Tracking Templates vs. Individual Content Items

To track visitor activity to a template (for example, customerservice.aspx), drop the server control onto it. To track activity for a content item within that template, set the **DefaultContentID** property to the ID of that content.

NOTE You can only track one content item per template.

Display of Analytic Data on Template

If a user is logged in, each template that has a server control displays statistics for that template. So, you can immediately see how many times a template has been viewed, and by how many visitors (as illustrated below).



Our Company Intranet

At the heart of Acme is our commitment to our customers, and our dedicati
finding a better way to conduct business effectively and efficiently. Our mis
develop best-of breed solutions that encompass scalability, flexibility, and
use without losing focus of being affordable.

In 1998, William Acme founded Acme Services — based on t
philosophy that services should be simple and affordable. T
Acme is based on the same principle.

Acme released its first product, a services tool that allows users to deliver
quickly and easily. Because this tool is so easy to integrate and use, sales
grew and Acme expanded with offices in Amherst, New Hampshire, the Uni
Kingdom, and Germany. Acme's services tool has become a leader in the in
and partnerships have been made with every major services vendor.

As a result, Mr. Acme and his team have had the unique opportunity to wo
listen to thousands of service providers learning exactly how they were us
tool, as well as what challenges they faced and what they most valued in
solution. Based on this valuable feedback, Acme developed its first service
managment platform solution built around Acme's market-leading tool. The
was outstanding, as it became immediately clear that there was a real nee
services management solutions that are easy-to-use and integrate.

Today, Acme's family of products has evolved and grown—with tools and s
that encompass the latest technologies and solve everyday services probl

Visitors: 1
Views: 16

You can get a more detailed breakdown of activity for a template by viewing the Top Templates statistics. *See Also:* "Top Templates" on page 752

Specifying the Frequency of Writing to the Database

NOTE The following feature only works with a SQL database. It does not work with Oracle.

Once you set up the Content Analytics feature, your database is subject to a continuous barrage of write activity, generated by visits to your site.

To mitigate the effect of this activity on your database's performance, you can hold visit activity in application server memory until a predetermined amount of data is collected. When that amount is collected, it is moved in one packet to the database. So, the database is "hit" much less frequently.

You can specify the amount of data saved in memory prior to being written to the database using these web.config file elements.

- `recordsBeforeWrite` - the number of unique template visits
- `timeBeforeWrite` - the number of seconds since the last time a database write occurred

When either element reaches the value set in web.config, all records stored in application server memory are written to the database. That event also resets the value of both elements to zero (0).

The Statistical Data

For every template view, the following statistical information is captured:

- **url** - the visited page
- **content_id** - the ID of the visited content. Only captured if a content block ID was entered in the server control's **DefaultContentID** property. *See Also:* "Tracking Templates vs. Individual Content Items" on page 743
- **visitor_id** - a unique GUID that identifies a visitor
- **hit_date** - date and time when a page view occurred
- **referring_url** - the URL a user was viewing before jumping to the visited page
- **visit_type** - zero (0) indicates new visitor, 1 indicates returning visitor, 2 indicates all other views. *See Also:* "Tracking Site Visitors" on page 746

In a session, the first page hit tracks the visit as zero (0) (if the user is new) or 1 (if the user previously visited the page). From then on, 2 is logged.

Tracking Site Visitors

The Content Analytics feature provides information about visits made by *new* versus *returning* visitors. To capture this data, the feature asks this question whenever a page is visited: is the user logged in as either a membership or regular user?

- If *yes*, capture the user ID with the statistical data
- If *no*, place a cookie on the visitor’s computer

So, the first time a user visits a page, either user information is captured or a cookie is created.

The next time the user visits that page, the feature checks the visit history for the user ID, or for a cookie. If either is found, the visit is considered a return.

New Visitor Statistical Tracking

The same user visit may be considered new on one view but not on another. For example, someone visits on January 30 (Monday) then again February 2 (Thursday). On the monthly statistics, that visitor is new, but on the weekly statistics, the February 2 hit would be a return visit (his second this week).

Now consider a second visitor, who browses to your site on the first and 20th of the month. These visits would appear on weekly statistics as two new visits, but on the monthly statistics, only the first visit would show up on that month's tally of new visitors. The second visit would add to the return visitor statistics.

Writing to the IIS Log

In addition to writing Site Analytic data to the database, you can write it to the IIS log. To do this, enable the `appendToIISLog` element in the web.config file.

Note that if you set `appendToIISLog` to `true`, Site Analytic data is written to the IIS log, but does not appear in the Workarea. Only data written to the database appears in the Workarea.

Content Analytics Reporting

The Content Analytics feature has extensive reporting features which are based on drilling down from a top-level view of the entire site, to individual templates, all the way down to individual content items (if specified).

To access Content Analytics Reports, follow these steps.

Either

1. Browse to a content item for which analytic data is being captured.
2. Right click the mouse.
3. Click **View Template Activity** to see analytic data for the current content item (to learn more about data captured for one content item, see ”Top Content” on page 751).
4. Click **View Site Analytics** to view analytic data for the entire Web site.

   or

1. Go to **Modules** > **Site Analytics** to view analytic data for the entire Web site.

Five levels of reporting are available.

- ”Site Statistics” on page 748
- ”Site Activity” on page 749
- ”Top Content” on page 751
- ”Top Templates” on page 752
- ”Top Referrers” on page 753

Summary of Statistical Data Available

The following table lists the kinds of analytic statistics that can be viewed at each level of the site.

Type of Statistical Information	Site-wide	Template-Level	Content-Level
Views of Any Template	X	X	X
Visitors: New and Return	X	X	X
Pie Chart of New vs. Return Visitors	X	X	X
Pie Chart of Views/Visitors Ratio	X	X	X
Bar Graph of Views/Visitors Ratio	X	X	X
Visited Pages	X		
Visited Content Blocks	X	X	
URLs from which Site Visitors Accessed **Ektron CMS400.NET**	X		

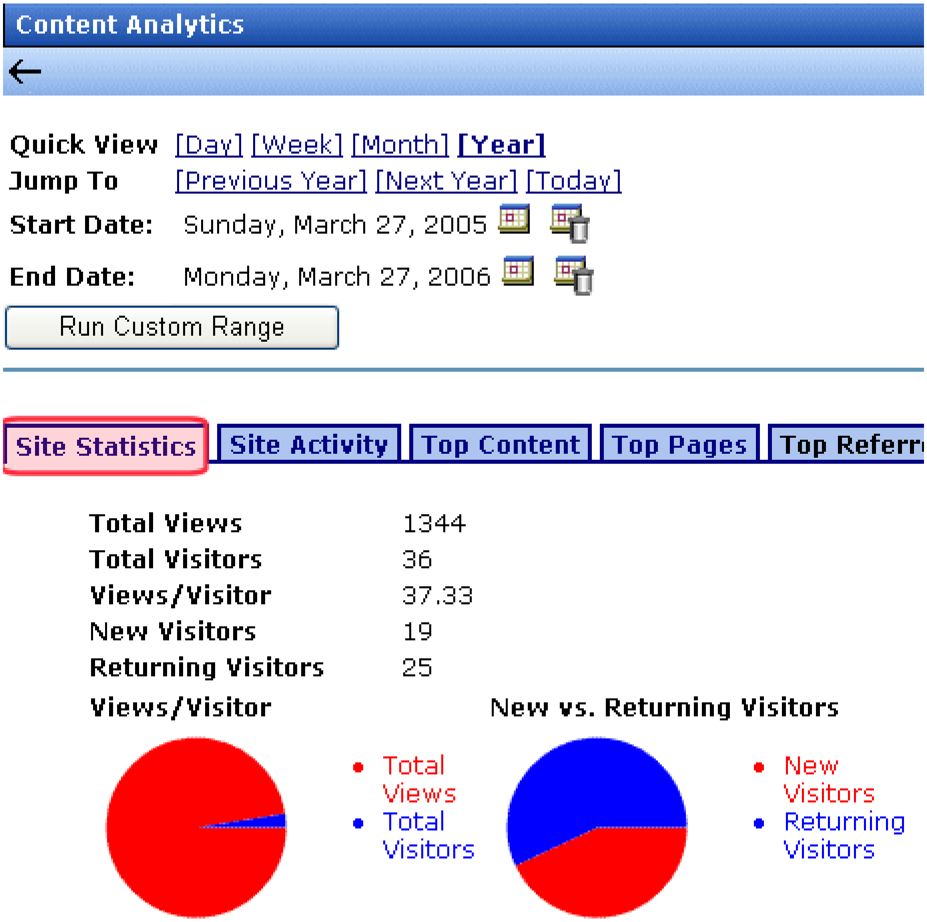
Site Statistics

The Site Statistics screen offers an overview of all tracked activity within the selected date range. You see actual data for the

- number of views
- number of visitors
- ratio of visitors per view
- number of new and returning visitors
- ratio of new to return visitors

Below this data are pie charts of the ratio of views to visitors and new vs. return visitors.

NOTE To understand how new and returning visitors are tracked, see ”Tracking Site Visitors” on page 746.



Content Analytics

Quick View [Day] [Week] [Month] **[Year]**

Jump To [Previous Year] [Next Year] [Today]

Start Date: Sunday, March 27, 2005

End Date: Monday, March 27, 2006

Run Custom Range

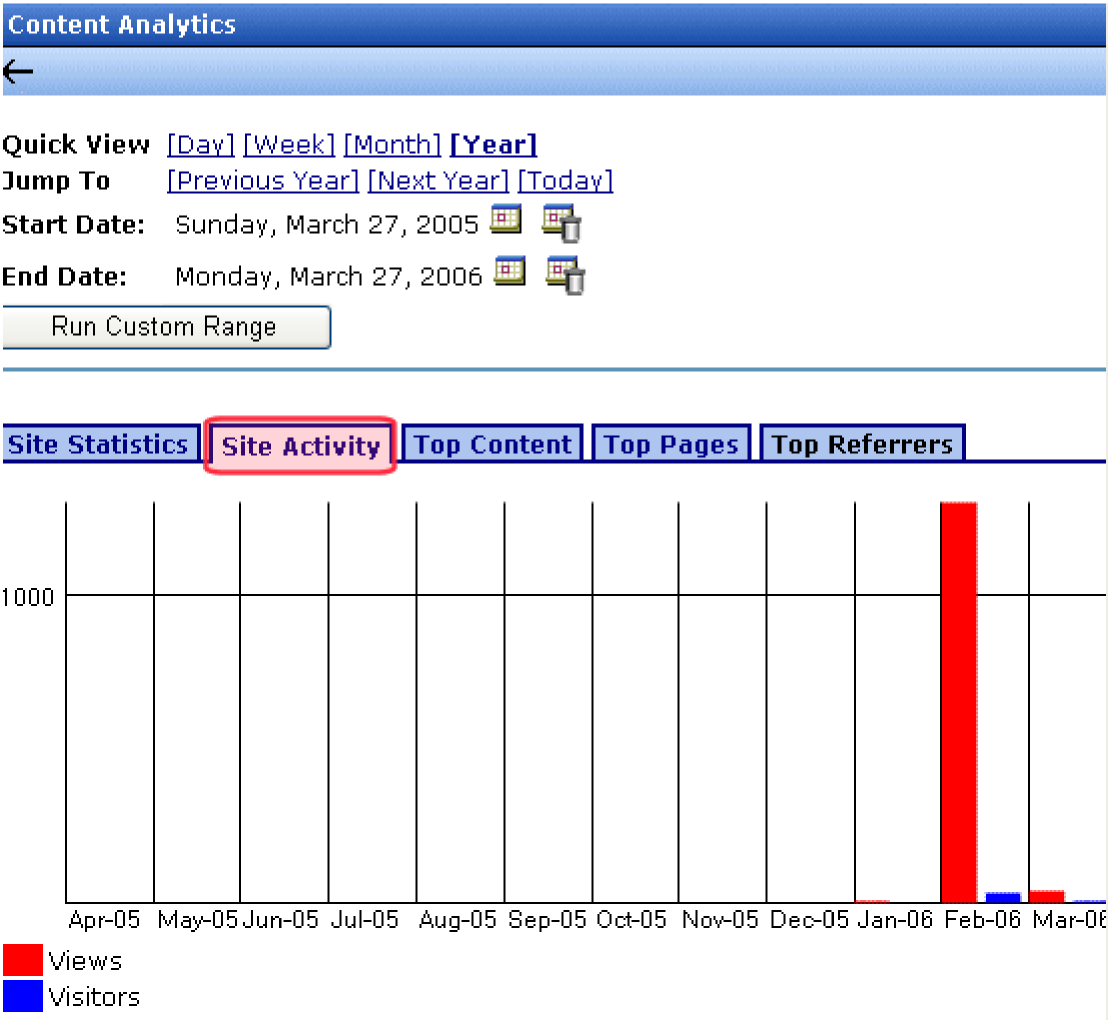
Site Statistics
Site Activity
Top Content
Top Pages
Top Referr

Total Views	1344
Total Visitors	36
Views/Visitor	37.33
New Visitors	19
Returning Visitors	25

Views/Visitor
● Total Views
● Total Visitors
New vs. Returning Visitors
● New Visitors
● Returning Visitors

Site Activity

The Site Activity view shows relative activity during the selected time period. The red bar indicates views, and the blue bar indicates visitors.



Start Date: Sunday, March 27, 2005

End Date: Monday, March 27, 2006

Content Analytics
Quick View [Day] [Week] [Month] [Year]
Jump To [Previous Year] [Next Year] [Today]
Run Custom Range
Site Statistics
Site Activity
Top Content
Top Pages
Top Referrers
1000
Apr-05
May-05
Jun-05
Jul-05
Aug-05
Sep-05
Oct-05
Nov-05
Dec-05
Jan-06
Feb-06
Mar-06
Views
Visitors

Site Activity Time Increments

The graph's time increments are one level below the **Quick View** selection. For example, in the screen above, **Quick View** is set to **Day**. So, the statistics are broken down by *hours* of the day.

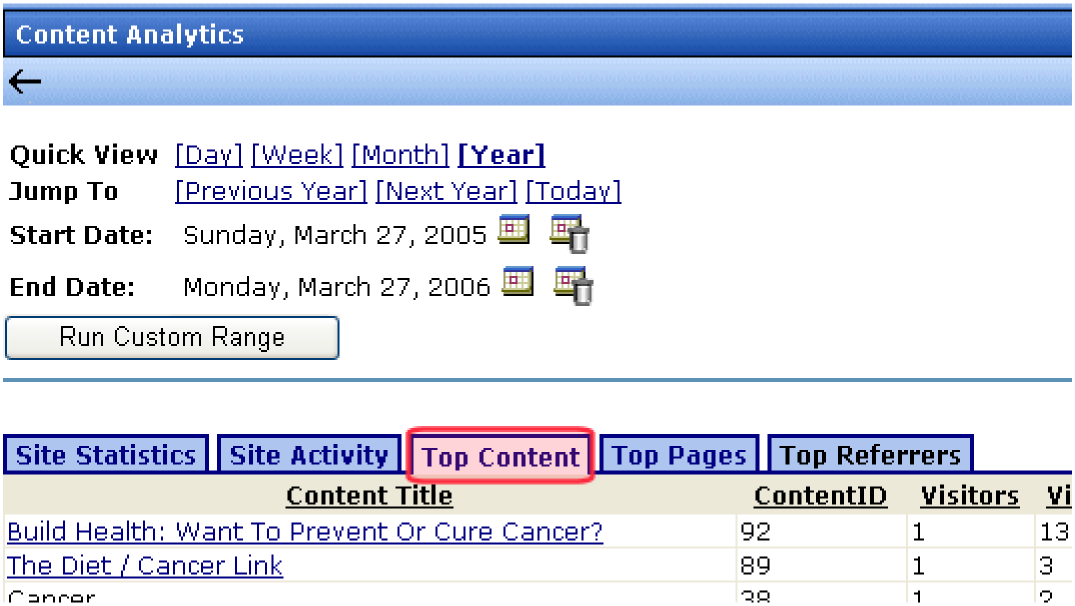
The following table lists the Site Activity time increments for each Quick View selection.

Quick view time increment	Site Activity Graph display broken down by these units
day	hourly
week	daily
month	weekly
year	monthly

Top Content

The Top Content View shows the most frequently-accessed content items on your Web site.

See Also: "Tracking Templates vs. Individual Content Items" on page 743;


Content Analytics

Quick View [Day] [Week] [Month] **[Year]**
Jump To [Previous Year] [Next Year] [Today]
Start Date: Sunday, March 27, 2005
End Date: Monday, March 27, 2006

Run Custom Range
Site Statistics
Site Activity
Top Content
Top Pages
Top Referrers

Content Title	ContentID	Visitors	Vi
Build Health: Want To Prevent Or Cure Cancer?	92	1	13
The Diet / Cancer Link	89	1	3
Cancer	38	1	2

You can click on any content item to view

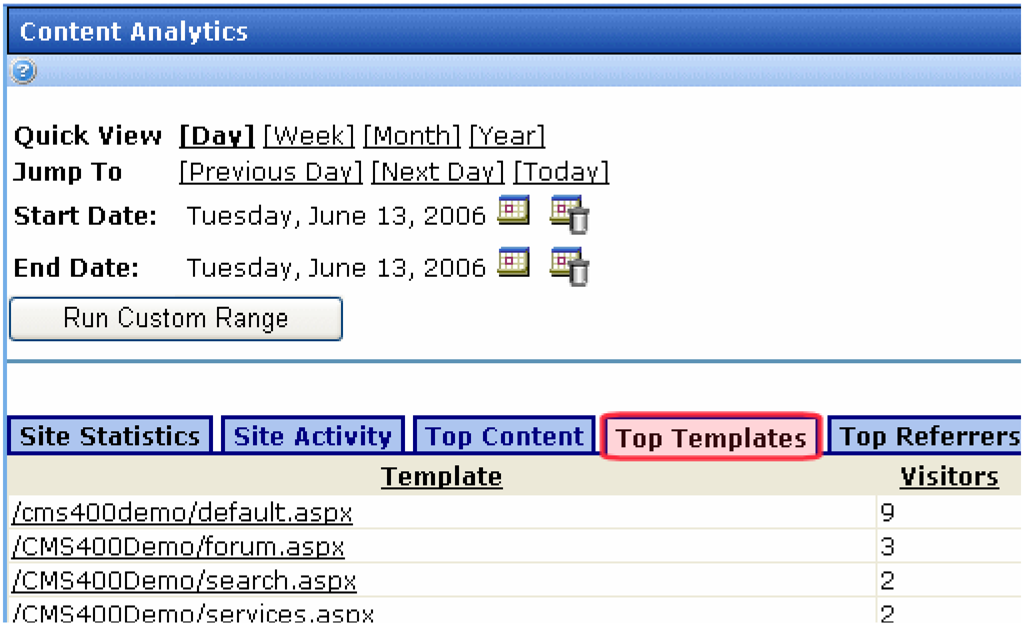
- **Content Statistics** - statistics for that content item only (*See Also:* ”Site Statistics” on page 748)
- **Content Activity** - relative activity for that content item only (*See Also:* ”Site Activity” on page 749)
- **Audit Content** - all users who viewed the selected content item; to the right of each user are the date and time when the content was viewed

NOTE Only users who viewed the content after logging in appear on the list. Visitors to your site who do not log in affect statistics but are not tracked on this report.

Top Templates

The Top Templates View shows all viewed templates on your Web site, with the most frequently-accessed templates on top.

By default, the templates at the top of the list are those with the highest number of unique visitors. You can change the sort by clicking on any column header. For example, to sort the templates by the number of views, click **Views**.


Content Analytics
Quick View [Day] [Week] [Month] [Year]
Jump To [Previous Day] [Next Day] [Today]
Run Custom Range
Site Statistics
Site Activity
Top Content
Top Templates
Top Referrers

Start Date: Tuesday, June 13, 2006

End Date: Tuesday, June 13, 2006

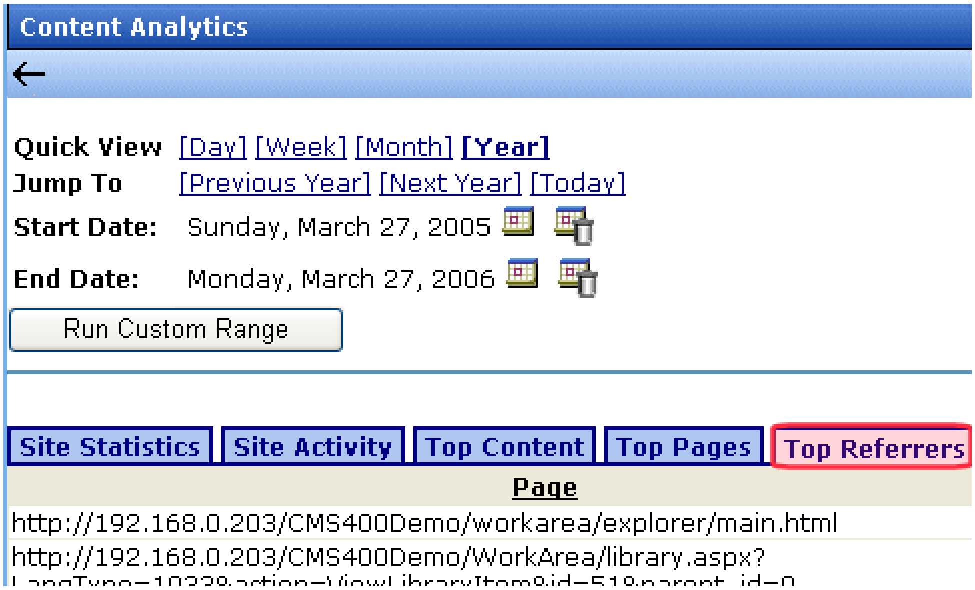
Template	Visitors
/cms400demo/default.aspx	9
/CMS400Demo/forum.aspx	3
/CMS400Demo/search.aspx	2
/CMS400Demo/services.aspx	2

You can click on any template to view

- **Template Statistics** - statistics for that template only (*See Also:* ”Site Statistics” on page 748)
- **Template Activity** - relative activity for that template only (*See Also:* ”Site Activity” on page 749)
- **Content in Template** - if a content items was specified for the template in the Content Analytic server control, this view show statistics for the template. You can click the template to view Template Level activity. (*See Also:* ”Top Templates” on page 752)

Top Referrers

The Top Referrers View shows the Web pages from which your site was most frequently accessed.


Content Analytics
Quick View [Day] [Week] [Month] [Year]
Jump To [Previous Year] [Next Year] [Today]
Run Custom Range
Site Statistics
Site Activity
Top Content
Top Pages
Top Referrers

Start Date: Sunday, March 27, 2005

End Date: Monday, March 27, 2006

Page
http://192.168.0.203/CMS400Demo/workarea/explorer/main.html
http://192.168.0.203/CMS400Demo/WorkArea/library.aspx?

Changing the Date Range of the Statistical Data

When you first view statistical data, the default date range is today (one day).

If you view statistics for different date ranges, when you return to the screen, the last selected date range is the default selection. You can change it if needed.

Using Quick View Options

Use **Quick View** options to view analytic statistics for any of the following time periods.

- one day
- one week
- one month
- one year

When you click **Quick View [week]**, **[month]** or **[year]**, the current end date is used as the *last* day of the range. Here are some examples.

Quick View Option	**If end date is today, begin date is**
Week	one week earlier than today
Month	one month earlier than today
Year	one year earlier than today

Using Jump To Options

Use **Jump To** options to view analytic statistics for a time period before and after the current date range. The time period is determined by the Quick View increment. For example, if the Quick View option is Day, you can *jump to* the previous day, the following day, or today.

Regardless of the Quick View increment, you can always view statistics for today.

Quick View Option	**“Jump to” options**
Day	• previous day • next day • today
Week	• previous week • next week • today
Month	• previous month • next month • today
Year	• previous year • next year • today

Support for Multiple Sites

Ektron CMS400.NET's Multi-site Support feature lets you set up and manage several Web sites under one CMS. For example:

- `www.ektron.com`
- `support.ektron.com`
- `forums.ektron.com`

All sites share a single database. The Multi-site Support feature does not support multiple databases.

Multisite support is explained through the following topics.

- ”Advantages of Multiple Sites” on page 756
- ”Prerequisites” on page 757
- ”Using Multiple Sites” on page 757
- ”Installing the Multi-site Support Feature” on page 758
- ”Using Site Replication in a Multisite Environment” on page 764

Advantages of Multiple Sites

- The URL can communicate to site visitors the nature of the site.
- All sites can share
    - common content, but appear within their own site and templates
    - the library of images and files. These files can be stored once, yet authors can insert them into content from any site.

Prerequisites

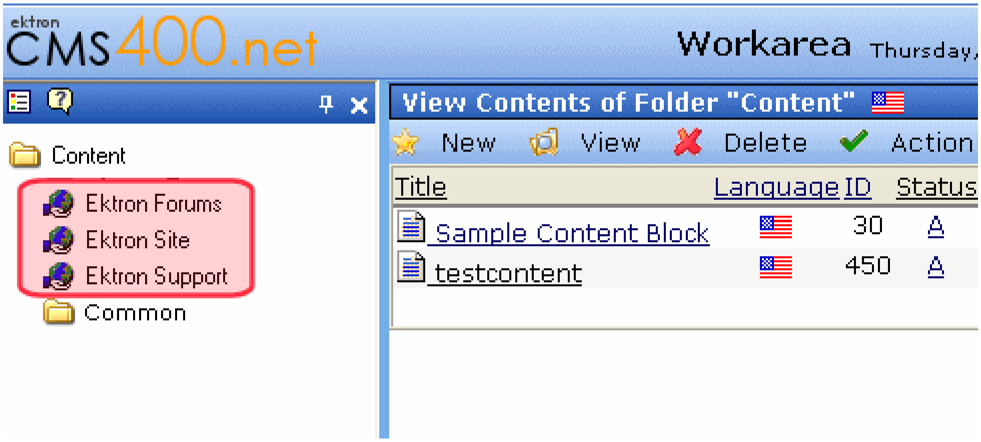
- The server must run Windows Server 2003 or 2005

NOTE Windows XP supports only one Web site.

- All sites must reside on the same server

Using Multiple Sites

Within the Workarea, sites appear under **Ektron CMS400.NET**'s folder structure but the icon is a globe (see illustration below). So, an author can create and edit content in the additional site the same way he creates/edits content in the root site.


ektron CMS400.net
Workarea Thursday,
Content
Ektron Forums
Ektron Site
Ektron Support
Common
View Contents of Folder "Content"
New
View
Delete
Action
Title
Language
ID
Status
Sample Content Block
30
A
testcontent
450
A

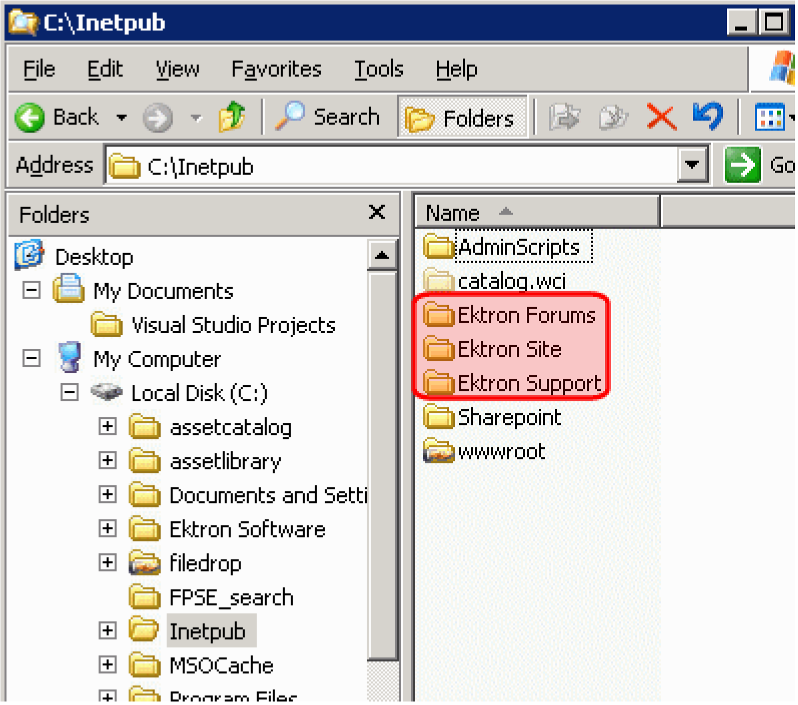
Authors log into a root site then begin editing content in the additional site. Regardless of which site he is using, an author can use the library to insert hyperlinks, images, files, and quicklinks.

When a folder has a production domain assigned to it, it is a *domain folder*. Links to content in a domain folder are activated via linkit.aspx, which redirects to the appropriate domain name and uses the appropriate template for the folder or content.

WARNING! You cannot create a hyperlink within content, a collection, menu, etc. to a form that resides in another site.

Installing the Multi-site Support Feature

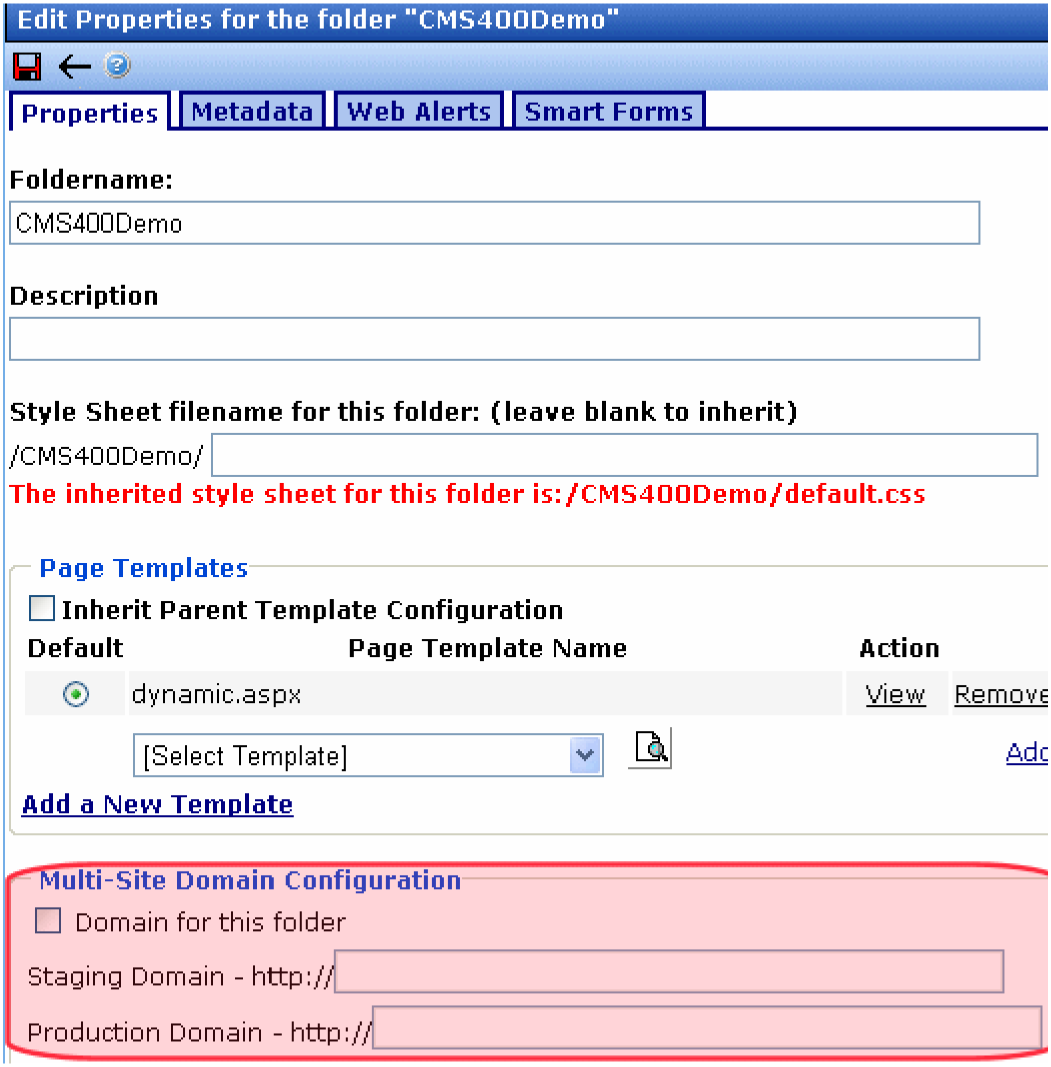
1. Install **Ektron CMS400.NET**.
2. Using Windows Explorer, create a Windows folder for each new site at the same level as the `wwwroot` folder.


C:\Inetpub
File Edit View Favorites Tools Help
Back
Search
Folders
Address C:\Inetpub
Go
Folders
Desktop
My Documents
Visual Studio Projects
My Computer
Local Disk (C:)
assetcatalog
assetlibrary
Documents and Setti
Ektron Software
filedrop
FPSE_search
Inetpub
MSOCache
Program Files
Name
AdminScripts
catalog.wci
Ektron Forums
Ektron Site
Ektron Support
Sharepoint
wwwroot

3. In IIS, create a new IP address for each additional site.
4. If the server is used as a staging server with the Site Replication Feature, go to the **Ektron CMS400.NET** Workarea then **Settings** > **Configuration** > **Setup**. Edit the setup screen and make sure the **This is a staging server** checkbox is checked. *See Also:* "Site Replication" on page 680
5. In the **Ektron CMS400.NET** Workarea, create a new top-level folder for each site.

WARNING! The folder must reside directly under the root folder.

6. Assign multi-site capabilities to each folder created in Step 5. To do this, select the folder then click **View > Folder Properties** and access the Folder Properties screen. The Multi-Site Configuration fields appear on that screen.


Edit Properties for the folder "CMS400Demo"
Properties
Metadata
Web Alerts
Smart Forms
Page Templates
Default
Page Template Name
Action
View
Remove
[Select Template]
Adc
Add a New Template
Multi-Site Domain Configuration

Foldername: CMS400Demo

Description

Style Sheet filename for this folder: (leave blank to inherit)

/CMS400Demo/

The inherited style sheet for this folder is:/CMS400Demo/default.css

☐ Inherit Parent Template Configuration

● dynamic.aspx

☐ Domain for this folder

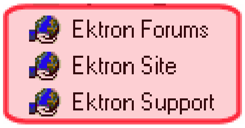
Staging Domain - http://

Production Domain - http://

7. In the **Staging Domain** and **Production Domain** fields, insert the domains you created in Step 3. Then save the screen.

NOTE **Staging Domain** appears only if **This is a staging server** is checked on the Configuration >Setup screen.

Within **Ektron CMS400.NET**, the new domains are indicated by a globe icon.



Ektron Forums
Ektron Site
Ektron Support

8. Copy the following CMS files and folders from the site root folder to each new site folder.

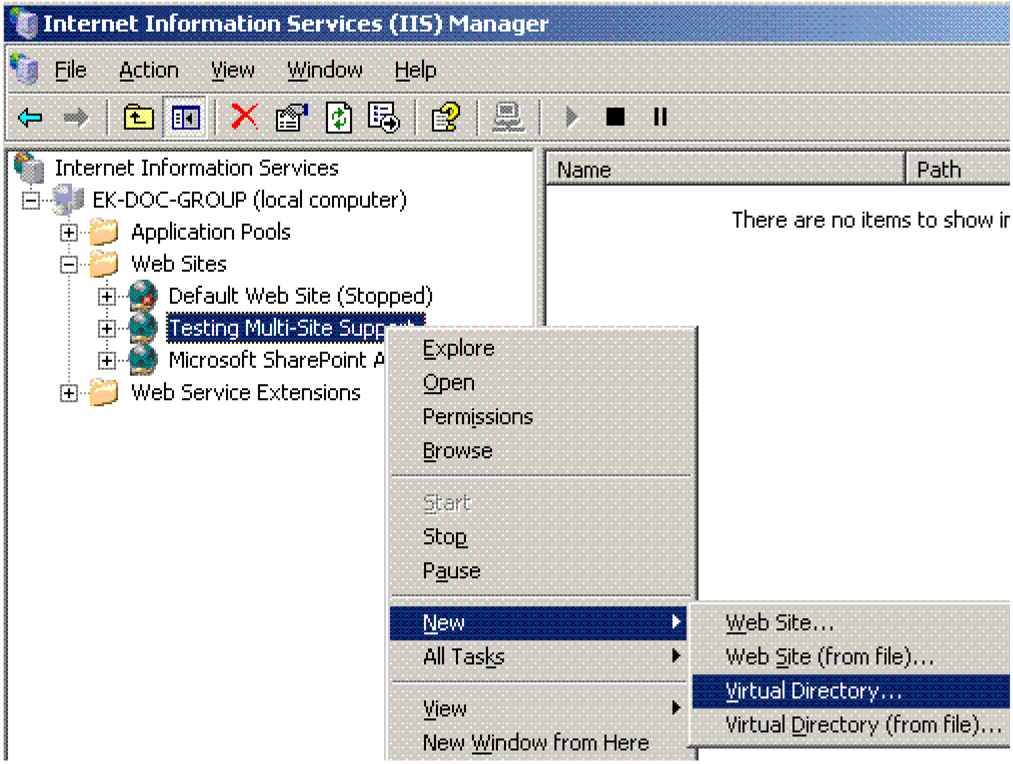
- all individual files (not subdirectories)
- these subdirectories:
    - bin
    - WorkArea
    - App_Code

9. Within each new folder, open the web.config file and update the value of `ek_sitePath` to **"/"**.

10. In IIS, for each new Web site, create new virtual folders for the following shared folders:

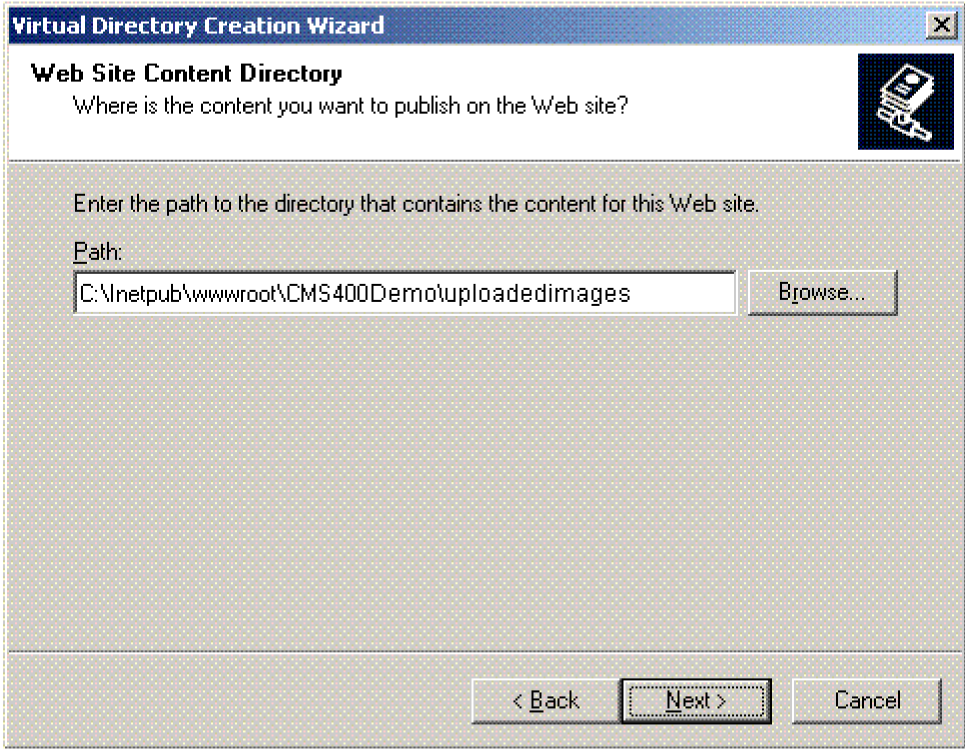
- assets
- uploadedfiles
- uploadedimages

These folders were created when you installed **Ektron CMS400.NET**. If you did a normal installation, they reside under the site directory. For example,
`C:\Inetpub\wwwroot\CMS400Demo\uploadedimages`.


Internet Information Services (IIS) Manager
File
Action
View
Window
Help
Internet Information Services
EK-DOC-GROUP (local computer)
Application Pools
Web Sites
Default Web Site (Stopped)
Testing Multi-Site Support
Microsoft SharePoint A
Web Service Extensions
Name
Path
Explore
Open
Permissions
Browse
Start
Stop
Pause
New
All Tasks
View
New Window from Here
Web Site…
Web Site (from file)…
Virtual Directory…
Virtual Directory (from file)…

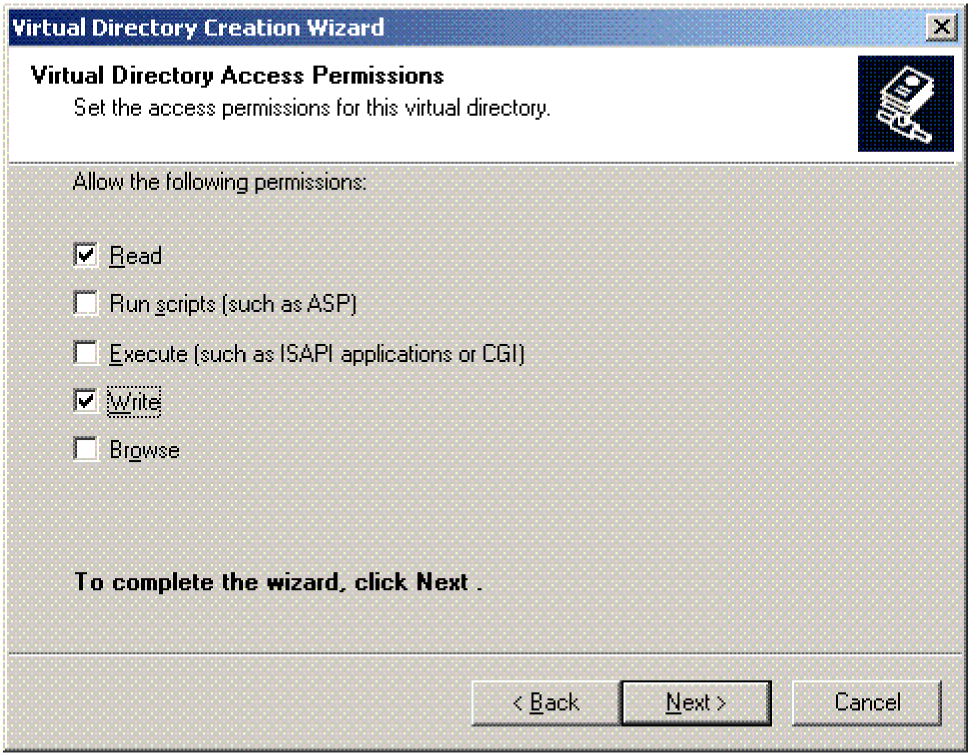
There are no items to show ir

- Link the new folders to corresponding subfolders in the root folder.


Virtual Directory Creation Wizard
Web Site Content Directory
Where is the content you want to publish on the Web site?
Enter the path to the directory that contains the content for this Web site.
Path:
Browse...
< Back
Next >
Cancel

C:\Inetpub\wwwroot\CMS400Demo\uploadedimages

- The `images` subfolder needs read-only permission
- These subfolders need read and write permissions: `uploadedfiles, uploadedimages, assets, assetlibrary`


Virtual Directory Creation Wizard
Virtual Directory Access Permissions
< Back
Next >
Cancel

Set the access permissions for this virtual directory.

Allow the following permissions:

☑ Read

☐ Run scripts (such as ASP)

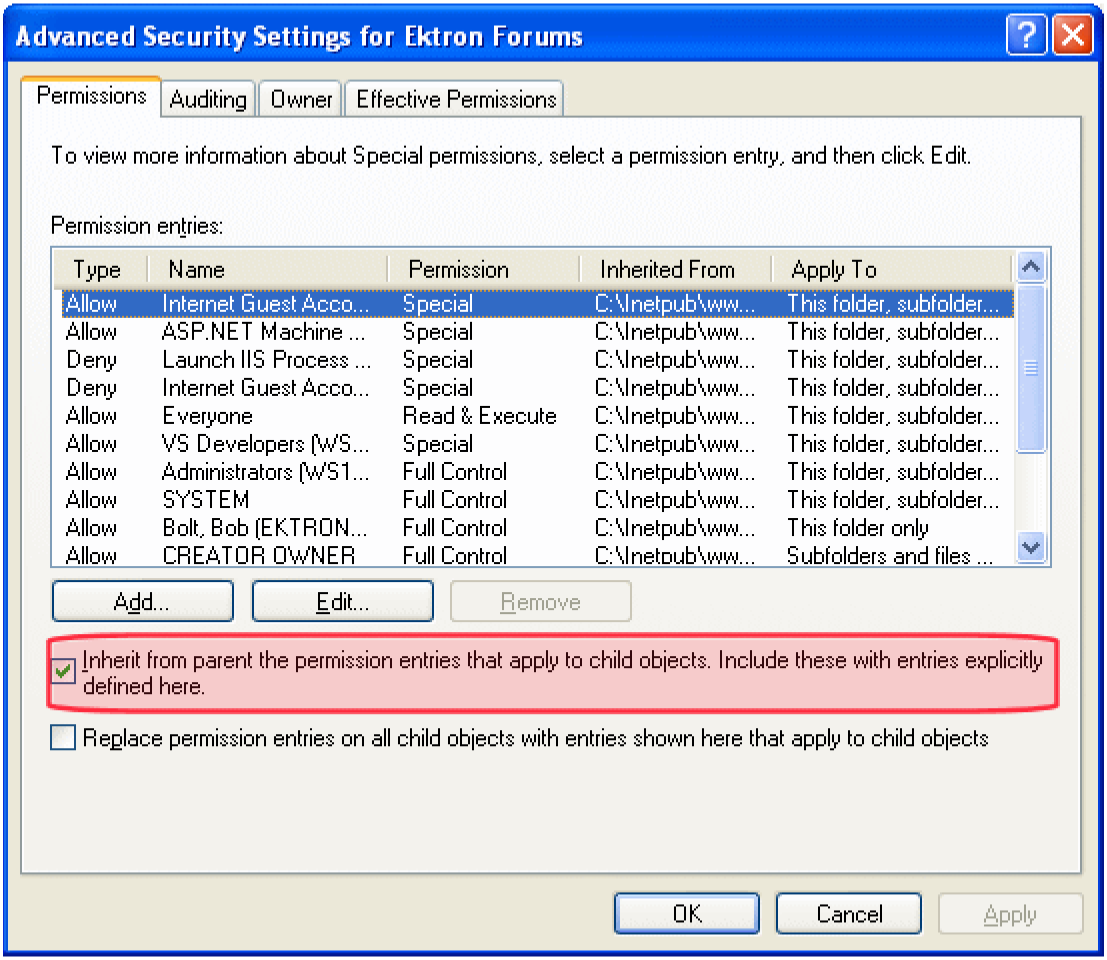
☐ Execute (such as ISAPI applications or CGI)

☑ Write

☐ Browse

To complete the wizard, click Next .

11. Set permissions on the new folders. To do this, follow these steps:
    - Using Windows Explorer, navigate to the new folder(s) you created in Step 7.
    - Right click the folder and click Sharing and Security.
    - Click the Security tab.
    - Click the Advanced button.
    - Click the check box next to **Inherit from the parent the permission entries that apply**…



To view more information about Special permissions, select a permission entry, and then click Edit.

Permission entries:

Type	Name	Permission	Inherited From	Apply To
Allow	Internet Guest Acco...	Special	C:\Inetpub\ww...	This folder, subfolder...
Allow	ASP.NET Machine ...	Special	C:\Inetpub\ww...	This folder, subfolder...
Deny	Launch IIS Process ...	Special	C:\Inetpub\ww...	This folder, subfolder...
Deny	Internet Guest Acco...	Special	C:\Inetpub\ww...	This folder, subfolder...
Allow	Everyone	Read & Execute	C:\Inetpub\ww...	This folder, subfolder...
Allow	VS Developers (WS...	Special	C:\Inetpub\ww...	This folder, subfolder...
Allow	Administrators (WS1...	Full Control	C:\Inetpub\ww...	This folder, subfolder...
Allow	SYSTEM	Full Control	C:\Inetpub\ww...	This folder, subfolder...
Allow	Bolt, Bob (EKTRON...	Full Control	C:\Inetpub\ww...	This folder only
Allow	CREATOR OWNER	Full Control	C:\Inetpub\ww...	Subfolders and files ...

☑ Inherit from parent the permission entries that apply to child objects. Include these with entries explicitly defined here.

☐ Replace permission entries on all child objects with entries shown here that apply to child objects

Using Site Replication in a Multisite Environment

See "Using Site Replication with Multiple Sites" on page 721

Web Alert Feature

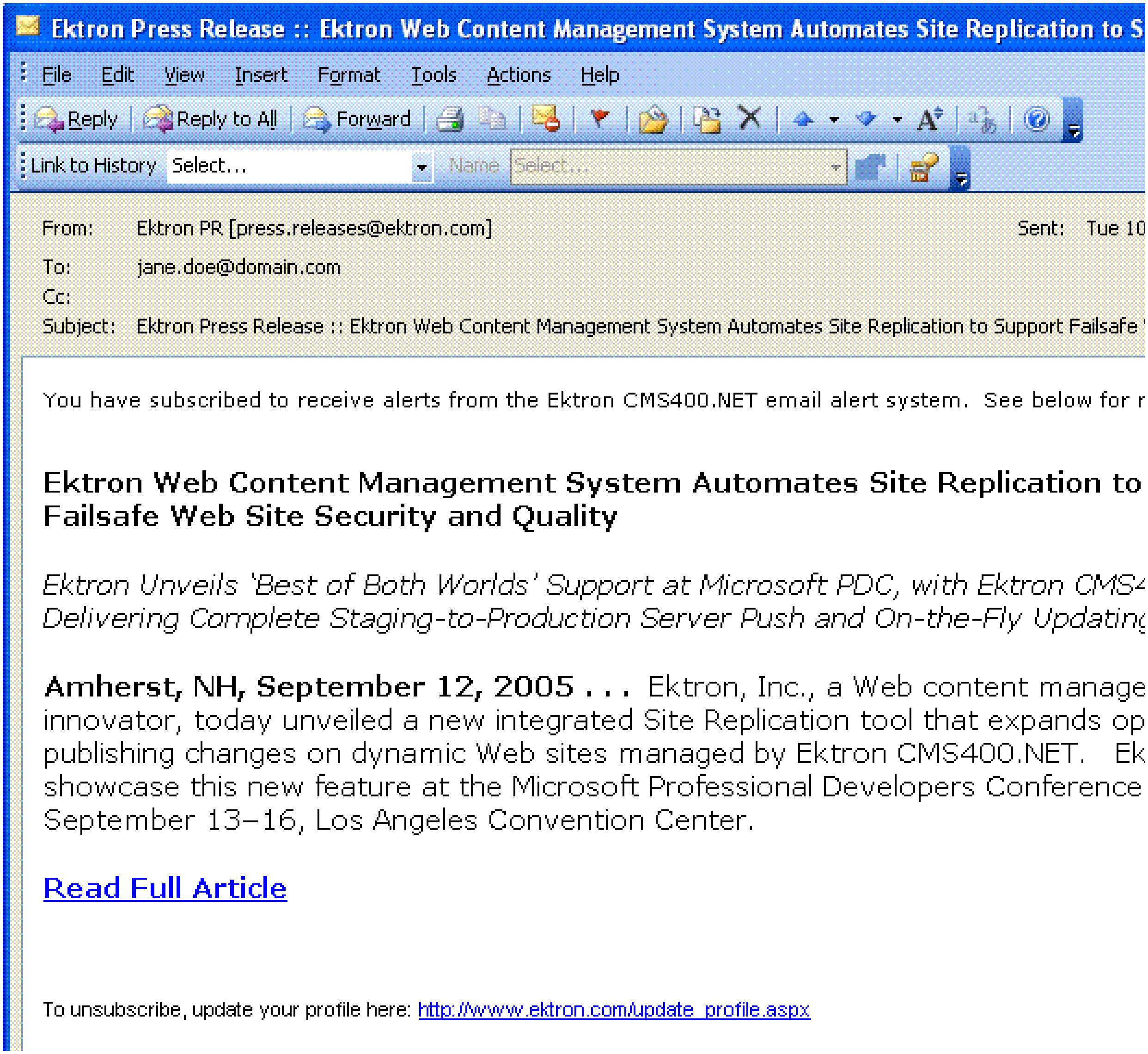
The Web Alert feature enables **Ektron CMS400.NET** to generate email for a list of registered users whenever new content appears on your site, or existing content is updated.

For example, anyone may register to be notified whenever new information about your product is published. As soon as the page is published on your site, registered users receive an email announcement with a link to the new/updated page. The recipient clicks the link and immediately accesses the page.

As a result, a self-selected group of users can be instantly notified of changes on your Web site relating to their interests. Once the system is set up, you don't need to do anything -- everything happens in the background.

NOTE Only members of the Administrator User Group and users identified on the Manage Members for Role: Folder User Admin screen can work with Web Alerts.

Sample Web Alert email


Ektron Press Release :: Ektron Web Content Management System Automates Site Replication to S
File
Edit
View
Insert
Format
Tools
Actions
Help
Reply
Reply to All
Forward
Link to History
Select...
Name
Select...

From: Ektron PR [press.releases@ektron.com]
Sent: Tue 10
To: jane.doe@domain.com
Cc:
Subject: Ektron Press Release :: Ektron Web Content Management System Automates Site Replication to Support Failsafe

You have subscribed to receive alerts from the Ektron CMS400.NET email alert system. See below for r

Ektron Web Content Management System Automates Site Replication to Failsafe Web Site Security and Quality

Ektron Unveils 'Best of Both Worlds' Support at Microsoft PDC, with Ektron CMS4 Delivering Complete Staging-to-Production Server Push and On-the-Fly Updatin

Amherst, NH, September 12, 2005 . . . Ektron, Inc., a Web content manage innovator, today unveiled a new integrated Site Replication tool that expands op publishing changes on dynamic Web sites managed by Ektron CMS400.NET. Ek showcase this new feature at the Microsoft Professional Developers Conference September 13–16, Los Angeles Convention Center.

Read Full Article

To unsubscribe, update your profile here: http://www.ektron.com/update_profile.aspx

This chapter explains the Web Alerts feature through the following topics.

- ”How Web Alert Works” on page 767
- ”Server Configuration” on page 768

- ”Enabling the Web Alert Feature” on page 770
- ”Setting Up the Message Queue and Asynchronous Processor” on page 771
- ”Creating the email Message” on page 780
- ”Defining Subscriptions” on page 786
- ”Assigning Web Alert Information to Folders and Content” on page 789
- ”How Users Sign up for Subscriptions” on page 796

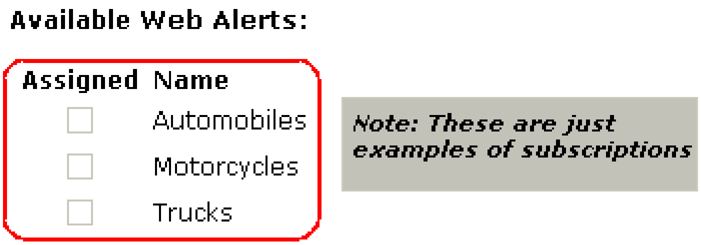
How Web Alert Works

The following explains how Web Alert email works.

1. Content is published.
2. **Ektron CMS400.NET** checks the **This is a staging server** checkbox on the Configuration > Application Setup screen. If it is unchecked, proceed to the next step. If the box is checked, no Web alerts will be issued for this server.
3. **Ektron CMS400.NET** checks to see if any subscriptions are assigned to the folder or content. (Subscriptions can be assigned at the folder or content level.)

   If no subscriptions are assigned, the **Web Alerts** tab does not appear when editing content.
4. If any subscription is assigned, **Ektron CMS400.NET** checks to see if an email should be created for this content. The settings appear under **Web Alerts** tab.

   For example, some content only triggers an email when it is first published, while other items always generate an email.
5. If an email should be generated, **Ektron CMS400.NET** builds the email content by retrieving information from fields on the Folder Properties screen. These are identified under the **Web Alert Contents** section of the Web Alerts tab.
6. **Ektron CMS400.NET** determines which subscription lists should receive the email. These are identified on the **Available Web Alerts** area of the Web Alerts tab. Each list contains the email address of every subscribed user.



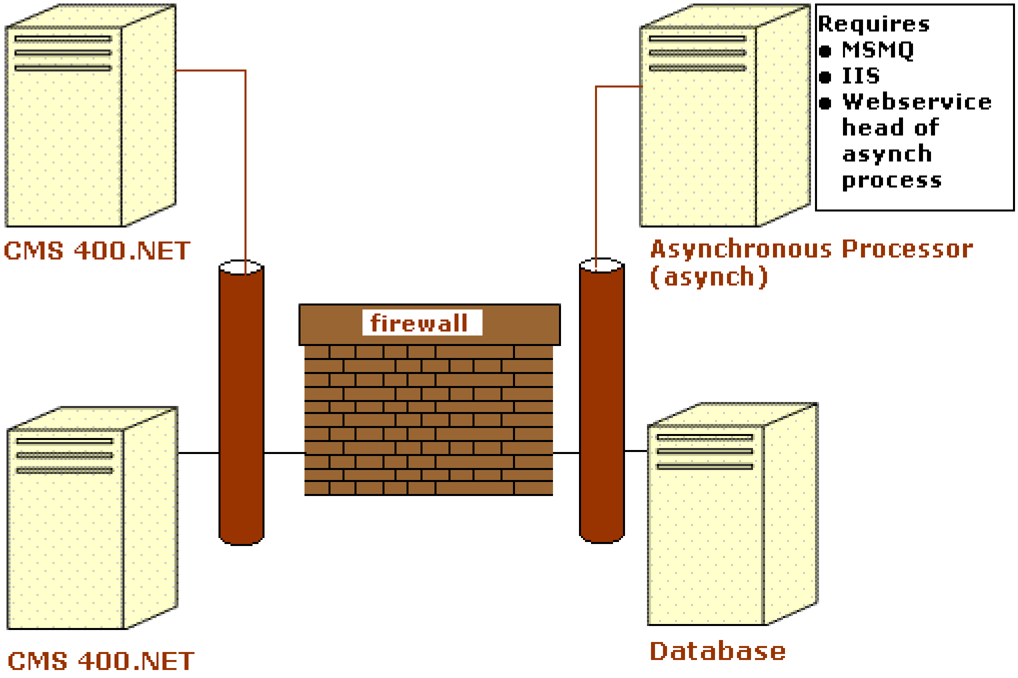
Available Web Alerts:

Assigned	Name
☐	Automobiles
☐	Motorcycles
☐	Trucks

Note: These are just examples of subscriptions

Server Configuration

The following illustration depicts a typical Web server configuration you would use with the Web Alerts feature.


CMS 400.NET
Requires
• MSMQ
• IIS
• Webservice head of asynch process
Asynchronous Processor (asynch)
firewall
CMS 400.NET
Database

- **Firewall** - the **Ektron CMS400.NET** business tier must have Web access to the asynchronous server. The business tier maintains the CMS files. This configuration enables proper communication between **Ektron CMS400.NET** and the asynchronous processor.

  - The asynchronous processor must have port 25 (SMTP) access to a valid mail server to send emails
  - The mail server (omitted from the illustration) must be allowed to send out port 25 (SMTP) traffic and can be on the Async server

- **Queuing** - Message queuing must be installed on the Async server.

  You must create a message queue on the Async machine and record its name. The message queue is specified in the exe.config file for the service, and in the web.config file for the Web Service interface.

- **CMS** - The web.config file includes a key for the location of the asynchronous processor. This needs to be verified as working.

- **Other** - IIS must be installed on the asynchronous processor. IIS allows a Web service call to schedule a file download and send commands.

  Ektron recommends that the Async machine only allow HTTP traffic from **Ektron CMS400.NET** servers. This provides additional security on the Async processor.

Verifying Connections

- You can verify the Web service > queue connection by
  - leaving the Ektron asynchronous processor service off, submitting content with notifications, and verifying that a message arrived in the queue
  - turning on journaling for the queue. Submit a message in the queue. The Ektron asynchronous processor service picks it up and places it in the journaled messages.
  - turning on logging for the Ektron asynchronous processor service

- To verify the CMS > Web service connection, open the asynchronous processor location inside a Web browser and test the Web services.

  To verify the writing of files, ensure that **Ektron CMS400.NET** has write access to the `[sitepath]subscriptions` directory and submit content that will trigger notifications. This action places a file inside that directory.

- To verify that the Ektron asynchronous processor service can download a file, open a Web browser on the Async machine and connect to the location of the notification command files. Attempt to download one.

Enabling the Web Alert Feature

Enabling the Web Alert feature involves the following steps. This section explains each step in detail.

Step	Description	For more information, see
1. Set up message queue and asynchronous processor.		”Setting Up the Message Queue and Asynchronous Processor” on page 771
2. Create messages.	Define components of the email to be sent to subscribers.	”Creating the email Message” on page 780
3. Define subscriptions.	Categories of information on your site. Site visitors can subscribe to be notified when content in a category is added or updated.	”Defining Subscriptions” on page 786
4. Assign Web Alert information to folders and content.	Assign Web Alert information to folders and content items which, when published, trigger emails. For each folder or content item to which you assign subscriptions, determine • activities that trigger emails (for example, only upon initial publication of content) • the content of the email • the subscription list(s) to whom the email is sent	”Assigning Web Alert Information to Folders and Content” on page 789
5. Create and publish site visitor registration page.	Create a new Web form and drop the membership server control onto it. Then, publish that form on your Web site. Note: This task is typically done by a developer.	Developer’s Manual > “Introduction to Ektron CMS400.NET Server Controls “> “Membership Server Control”

Step	Description	For more information, see
6. Site visitors subscribe to lists of interest.	Someone signs up to be notified when changes in a selected subscription (category) are published on your Web site.	"How Users Sign up for Subscriptions" on page 796
7. CMS users can also subscribe.		"CMS User Subscription Sign Up" on page 800
8. Subscribers are automatically notified when content is updated.	Web content is either first published or updated. If at least one subscription is assigned to the content or its folder, email is sent according to pre-defined criteria for the folder.	

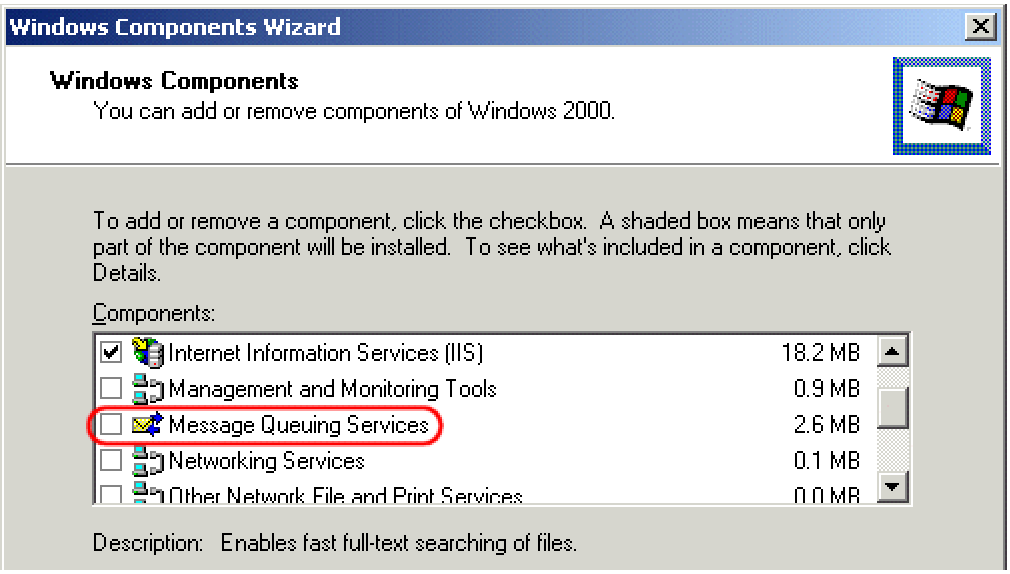
Setting Up the Message Queue and Asynchronous Processor

After installing **Ektron CMS400.NET** version 5.1 or higher, you need to set up the Microsoft Message Queuing and the Ektron Asynchronous Processor. It is assumed that the following directories and files are installed on your server:

- `C:\Program Files\Ektron\CMS400v61\EktronAsyncProcessor_Service\`
- `C:\inetpub\wwwroot\cms400demo\bin\EktronAsyncProcessorWS.dll`
- `C:\inetpub\wwwroot\cms400demo\Workarea\webservices\EktronAsyncProcessorWS.asmx`

NOTE If you need to move Web services file, use the **Asynchronous Processor Location** field in the Configuration > Setup screen to specify the new folder location.

1. On the server that hosts **Ektron CMS400.NET**, go to **Control Panel > Add/Remove programs > Add/Remove Windows Components**.
2. If it is not checked, check **Message Queuing Services**.



Windows Components

You can add or remove components of Windows 2000.

To add or remove a component, click the checkbox. A shaded box means that only part of the component will be installed. To see what's included in a component, click Details.

Components:

☑	Internet Information Services (IIS)	18.2 MB
☐	Management and Monitoring Tools	0.9 MB
☐	Message Queuing Services	2.6 MB
☐	Networking Services	0.1 MB
☐	Other Network File and Print Services	0.0 MB

Description: Enables fast full-text searching of files.

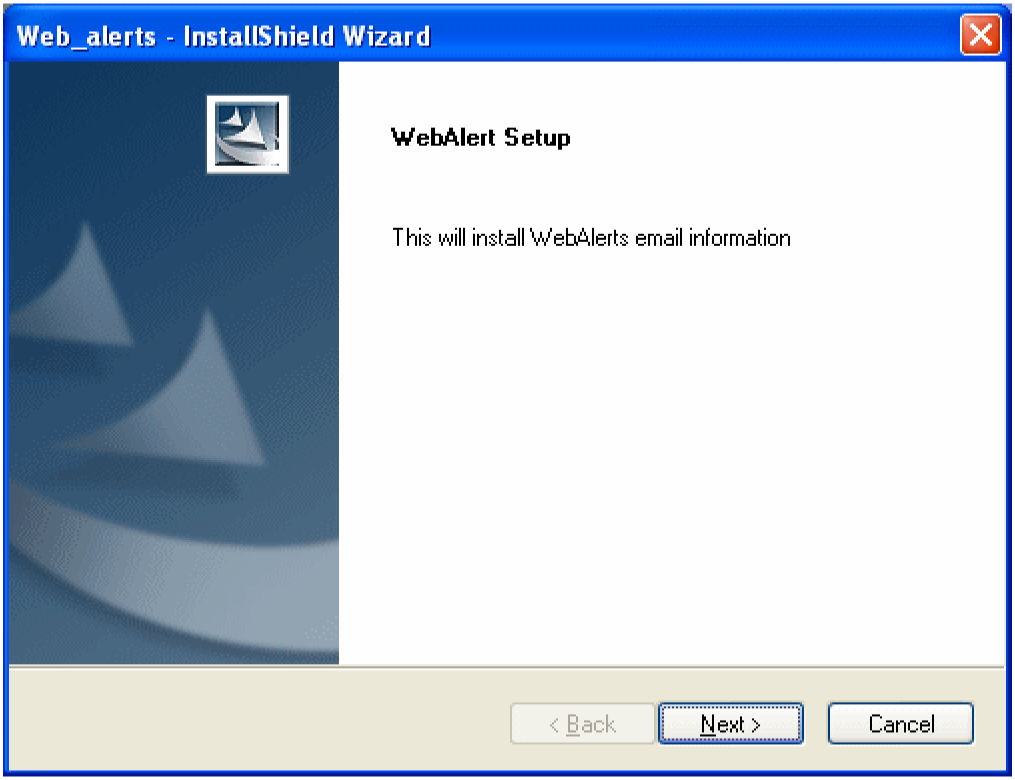
NOTE On Windows 2003, it is within the Application Server Components group.

3. If **Message Queuing Services** was checked when you viewed it, go to step 4.

   If it was not checked, click **Next**. A wizard creates the component.

NOTE The rest of this procedure employs a wizard that saves you several manual steps. If you have a problem using the wizard, or prefer to install Web Alerts manually so you can track the files being installed to your server, see "Manual Steps for Setting up the Message Queue and Asynchronous Processor" on page 777.

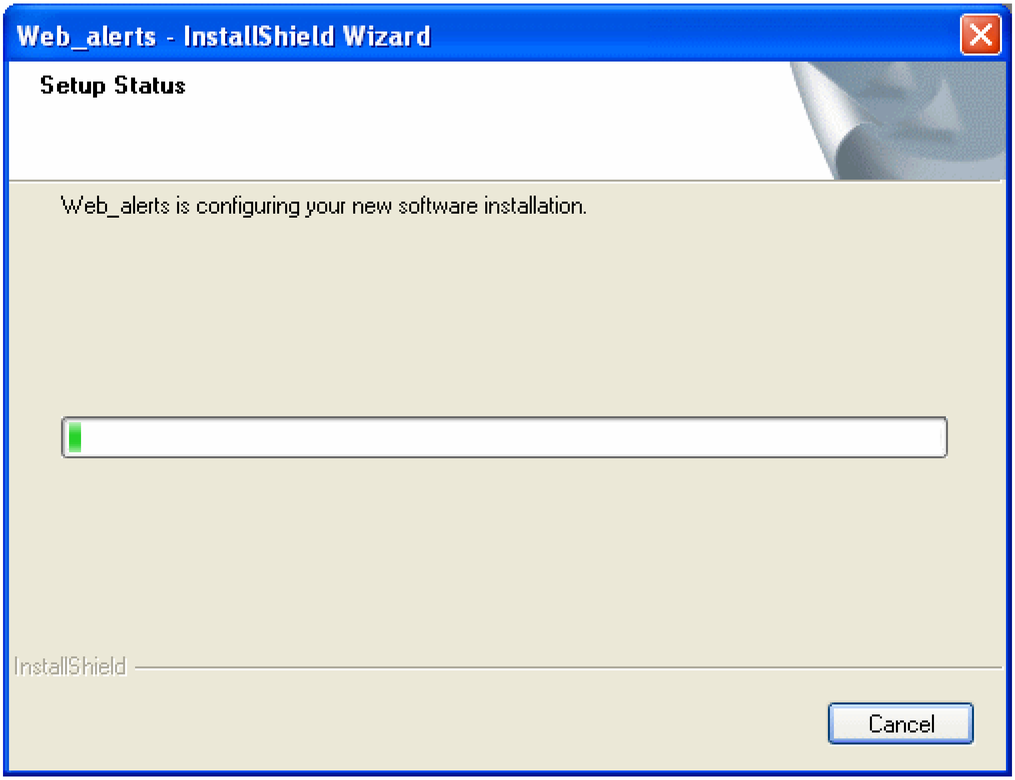
4. From the Windows Start Menu, click **All Programs > Ektron > CMS400 > Utilities > Web Alerts Setup**.
5. The Web Alert Wizard setup screen appears.


Web_alerts - InstallShield Wizard
< Back
Next >
Cancel

WebAlert Setup

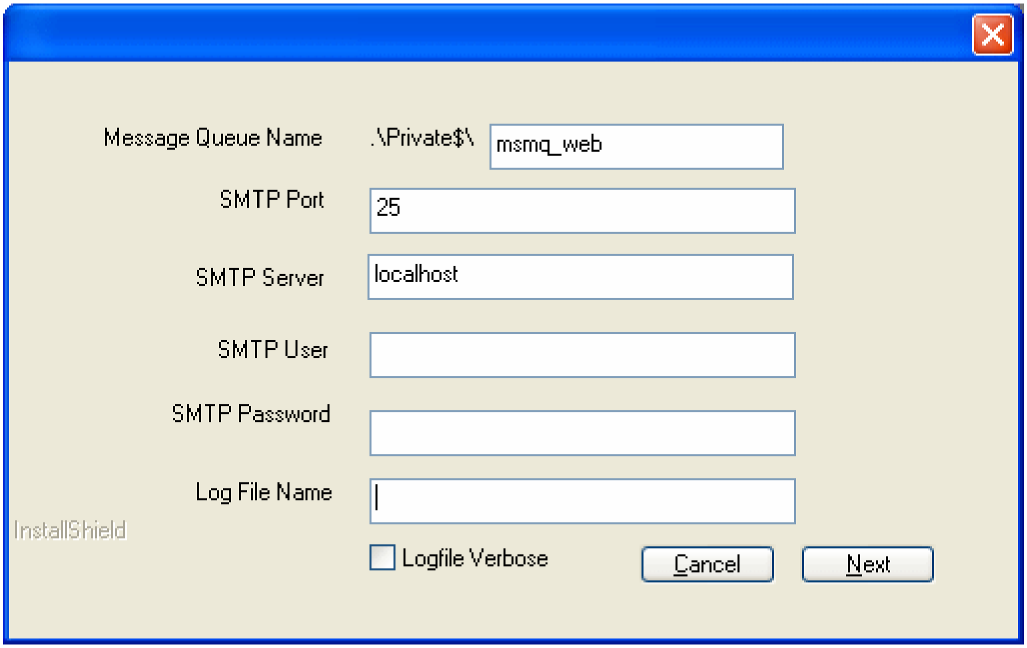
This will install WebAlerts email information

6. Press **Next**. The wizard begins installing the Web Alerts feature.


Web_alerts - InstallShield Wizard
Setup Status
InstallShield
Cancel

Web_alerts is configuring your new software installation.

7. The following screen appears.



Message Queue Name .\Private$\ msmq_web

SMTP Port 25

SMTP Server localhost

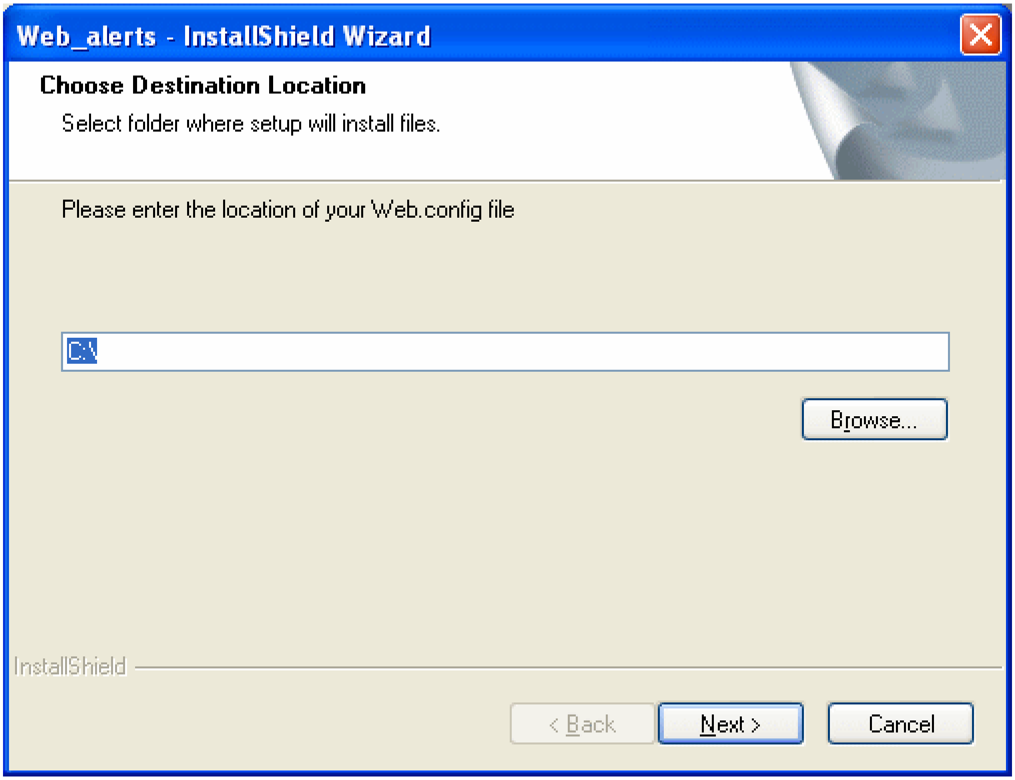
SMTP User

SMTP Password

Log File Name

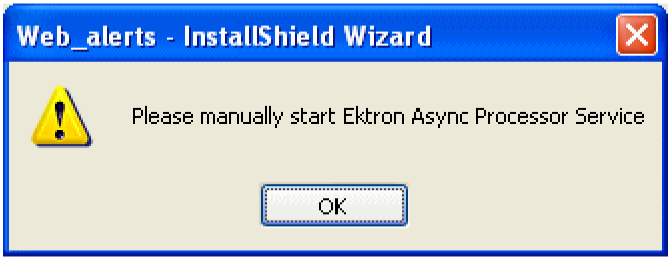
8. Enter the username and password that will be used to send and receive email.
9. At the **Log File Name** field, enter the name of the file that will track Web Alert activities. If you enter nothing, the file is named listener.log.

   The file resides in the `C:\Program Files\Ektron\CMS400v61\EktronAsyncProcessor_Service` folder. It is also available from the Workarea. See ”Asynchronous Log File Reporting” on page 779.
10. If you want a very detailed log file, click **Logfile Verbose**.
11. Press **Next**. The following screen appears.


Web_alerts - InstallShield Wizard
Choose Destination Location
Select folder where setup will install files.
Please enter the location of your Web.config file
C:\
Browse...
InstallShield
< Back
Next >
Cancel

12. Either insert or browse to the folder that contains your web.config file. This is your site root folder. Then press **Next**.

13. If your Asynchronous Processor service is not running, the following message appears.


Web_alerts - InstallShield Wizard
OK

Please manually start Ektron Async Processor Service

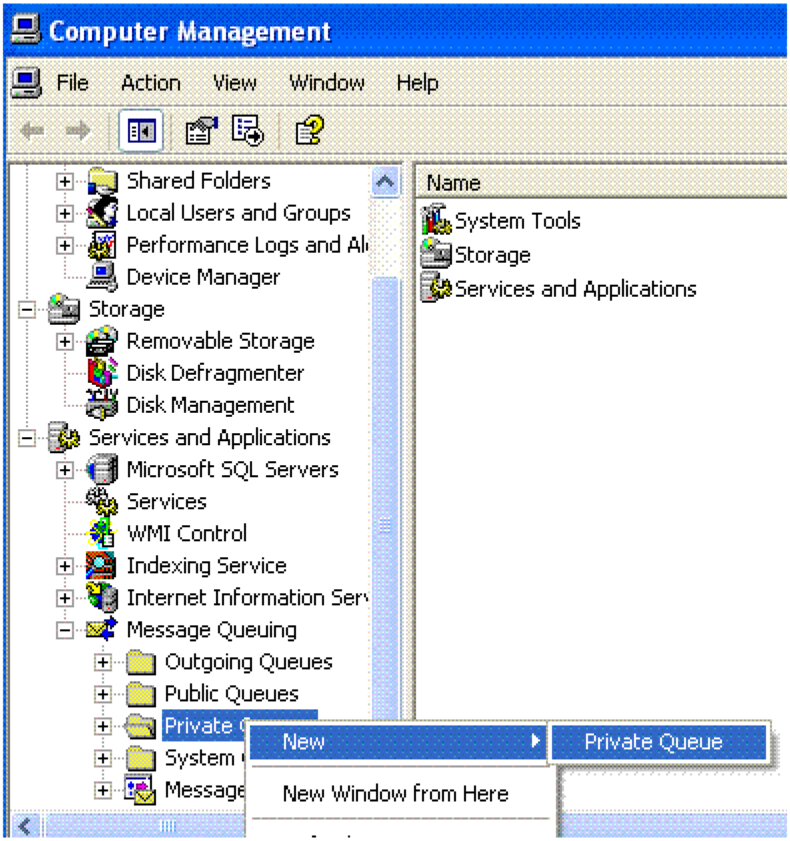
14. If you see this message, press **OK** then click **Finish**.

15. Go to **Control Panel > Administrative Tools > Computer Management > Services and Applications > Services**. Start the Ektron Async Processor Service.

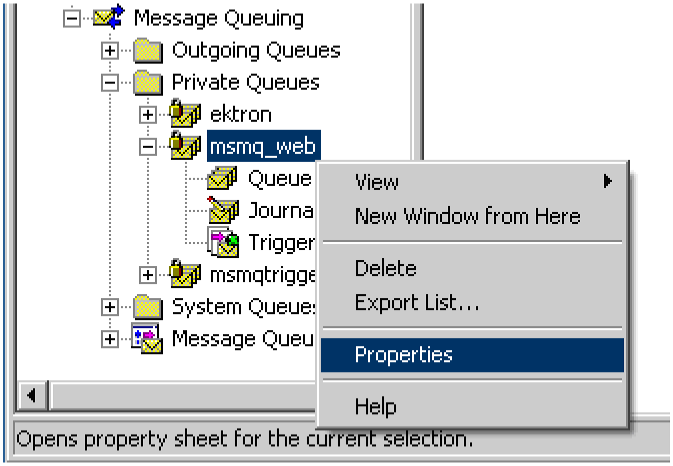
Manual Steps for Setting up the Message Queue and Asynchronous Processor

This section describes manual steps for setting up the Message Queue and Asynchronous Processor. You can use this procedure if you had a problem using the wizard, or you want to know which files are being installed to your server.

1. Go to **Control Panel > Administrative Tools > Computer Management > Services and Applications > Message Queuing**.
2. Right click the Private Queues folder and select **New > Private Queue**.


Computer Management
File
Action
View
Window
Help
Shared Folders
Local Users and Groups
Performance Logs and Al
Device Manager
Storage
Removable Storage
Disk Defragmenter
Disk Management
Services and Applications
Microsoft SQL Servers
Services
WMI Control
Indexing Service
Internet Information Serv
Message Queuing
Outgoing Queues
Public Queues
Private Q
System
Message
New
New Window from Here
Private Queue
Name
System Tools
Storage
Services and Applications

3. Create a private queue named `msmq_web`.
4. Right click `msmq_web` and select Properties.


Message Queuing
Outgoing Queues
Private Queues
ektron
msmq_web
Queue
Journa
Trigger
msmqtrigge
System Queue:
Message Queu
View
New Window from Here
Delete
Export List...
Properties
Help

Opens property sheet for the current selection.

5. Go to the **Security** tab. You can give the Everyone group Full Control if you are in a testing environment. If you are on a production server or want better security, give the local system account (the account which the EktronAsyncProcessor Service runs as) the following permissions:
   - Delete
   - Receive Message
   - Peek Message
   - Send Message

   Give the ASP.NET account (the account that the Web services interface runs as) Send Message permission.
6. Click **OK**.
7. Open the following file:
   ```
   C:\Program
   Files\Ektron\CMS400v52\EktronAsyncProcessor_Service\RegEktron.S
   ervices.EktronAsyncProcessor.bat
   ```
8. Review and update as necessary the paths to the .NET directory and `Ektron.Services.EktronAsyncProcessor.exe` file.

WARNING! Update the paths to the .NET Directory and the .exe file if necessary.

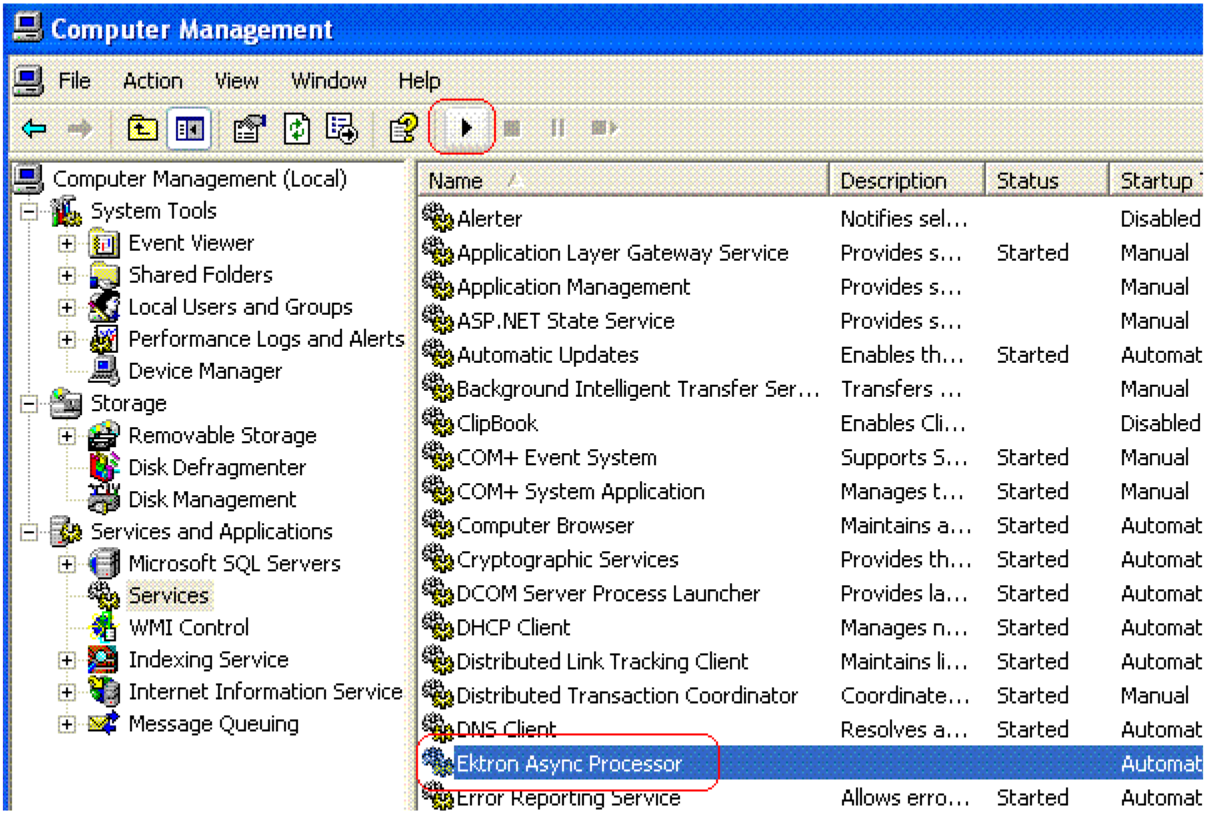
9. Execute the .bat file.

   Or, from a command line or **Start Menu > Run**, enter:
   ```
   C:\Windows\Microsoft.NET\Framework\v1.1.4322\installutil
   “C:\program
   ```

`Files\Ektron\CMS400v52\EktronAsyncProcessor_Service\Ektron.Services.EktronAsyncProcessor.exe`”

10. Open the following file and enter your SMTP connection settings: `C:\Program Files\Ektron\CMS400v52\EktronAsyncProcessor_Service\Ektron.Services.EktronAsyncProcessor.exe.config`.

11. Go to **Control Panel > Administrative Tools > Computer Management > Services and Applications > Services**. Start the **Ektron Async Processor** Service.


Computer Management
File
Action
View
Window
Help
Computer Management (Local)
System Tools
Event Viewer
Shared Folders
Local Users and Groups
Performance Logs and Alerts
Device Manager
Storage
Removable Storage
Disk Defragmenter
Disk Management
Services and Applications
Microsoft SQL Servers
Services
WMI Control
Indexing Service
Internet Information Service
Message Queuing

Name	Description	Status	Startup
Alerter	Notifies sel...		Disabled
Application Layer Gateway Service	Provides s...	Started	Manual
Application Management	Provides s...		Manual
ASP.NET State Service	Provides s...		Manual
Automatic Updates	Enables th...	Started	Automat
Background Intelligent Transfer Ser...	Transfers ...		Manual
ClipBook	Enables Cli...		Disabled
COM+ Event System	Supports S...	Started	Manual
COM+ System Application	Manages t...	Started	Manual
Computer Browser	Maintains a...	Started	Automat
Cryptographic Services	Provides th...	Started	Automat
DCOM Server Process Launcher	Provides la...	Started	Automat
DHCP Client	Manages n...	Started	Automat
Distributed Link Tracking Client	Maintains li...	Started	Automat
Distributed Transaction Coordinator	Coordinate...	Started	Manual
DNS Client	Resolves a...	Started	Automat
Ektron Async Processor			Automat
Error Reporting Service	Allows erro...	Started	Automat

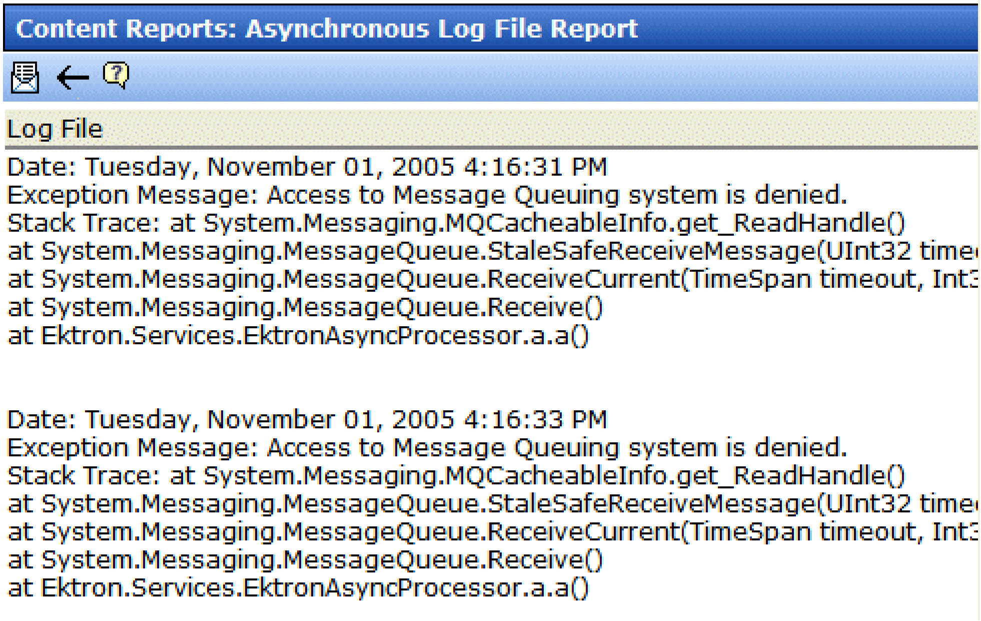
Asynchronous Log File Reporting

Once the Message Queuing and Asynchronous Process are set up and running, you can access a log report about the Asynchronous process. This report shows any problems with the Asynchronous Processor.

In addition to viewing the report, you can email it to any CMS400.NET user. For an explanation of emailing a report, see the User Manual section “Content Workflow Reports” > “Common Report Topics” > “emailing Reports”.

To access the Asynchronous Process log, follow these steps.

1. In the **Workarea’s Smart Desktop**, click the Reports folder.
2. Click the Asynchronous Log File link.
3. Any problems appear on the screen.



```
Date: Tuesday, November 01, 2005 4:16:31 PM
Exception Message: Access to Message Queuing system is denied.
Stack Trace: at System.Messaging.MQCacheableInfo.get_ReadHandle()
at System.Messaging.MessageQueue.StaleSafeReceiveMessage(UInt32 time
at System.Messaging.MessageQueue.ReceiveCurrent(TimeSpan timeout, Int3
at System.Messaging.MessageQueue.Receive()
at Ektron.Services.EktronAsyncProcessor.a.a()


Date: Tuesday, November 01, 2005 4:16:33 PM
Exception Message: Access to Message Queuing system is denied.
Stack Trace: at System.Messaging.MQCacheableInfo.get_ReadHandle()
at System.Messaging.MessageQueue.StaleSafeReceiveMessage(UInt32 time
at System.Messaging.MessageQueue.ReceiveCurrent(TimeSpan timeout, Int3
at System.Messaging.MessageQueue.Receive()
at Ektron.Services.EktronAsyncProcessor.a.a()
```

Creating the email Message

This section has the following topics.

- ”Predefining Message Components” on page 781
- ”Combining Message Components to Create the Message” on page 783
- ”Previewing the email Message” on page 785

Predefining Message Components

Before you can create an email message, define the following information.

- default message text
- opt out message
- unsubscribe message
- “from” address

You can define as many as you want of each item. You must, however, define at least one opt-out message, unsubscribe message, and “from” address to use the Web Alert feature.

These message components are later inserted into an email message that is sent to your subscribers. *See Also:* ”Creating the email Message” on page 780

Creating Default Message Text

You can create one or more default messages to contain the text of the email. A simple editor lets you apply some XHTML formatting the message.

Including Variables in the Default Message

The default message can include variables that retrieve information about the content and display it in the message text. The variables are surrounded by at signs (@). For example

```
The following content was recently updated: @AppContentLink@
```

In the email, this text might read:

```
The following content was recently updated: The Effect of Coumadin
on Cardiac Patients
```

To see a complete list of variables that can be inserted into the default message, see the **Ektron CMS400.NET** Setup manual > “Customizing **Ektron CMS400.NET**” > “Variables.”

To create default message text, follow these steps.

1. In the Workarea, go to **Settings > Configuration > Web Alerts > Messages**.
2. Click the Add button ( ).
3. Enter a title that describes the message.
4. At the **Type** field, select **DefaultMessage**.
5. In the editor, enter the message text.
6. Click the Save button ( ).

Creating Opt Out Message Text

An Opt-Out message appears as the first line of every email. It directs the reader to the Unsubscribe message at the bottom. Here is an example:

```
You have subscribed to receive alerts from the Ektron CMS400.NET
email alert system. See below for removal instructions.
```

You can add variables to the Opt Out text. *See Also:* ”Including Variables in the Default Message” on page 781

To create Opt-Out message text, follow these steps.

1. Go to **Settings > Configuration > Web Alerts > Messages**.
2. Click the Add button ( ).
3. Enter a title that describes the Opt-Out message.
4. At the **Type** field, select **OptOut**.
5. In the editor, enter the message text.
6. Click the Save button ( ).

Creating Unsubscribe Message Text

An Unsubscribe message lets the person receiving the email remove himself from the subscription list.

You can add variables to the Unsubscribe text. *See Also:* ”Including Variables in the Default Message” on page 781

To create Unsubscribe message text, follow these steps.

1. Go to **Settings > Configuration > Web Alerts > Messages**.
2. Click the Add email Message button ().
3. Enter a title that describes the Unsubscribe message.
4. At the **Type** field, select **Unsubscribe**.
5. In the editor, enter the message text.
6. Click the Save button ().

Creating “From” Addresses

Any email generated by the Web Alert feature must have a “from” address. To create one or more “from” addresses, follow these steps.

1. Go to **Settings > Configuration > Web Alerts > Email From List**.
2. Click the Add email From Address button ().
3. Enter an email address that will be used in the From field of messages generated by the Web Alert feature.
4. Click the Save button ().

Combining Message Components to Create the Message

You create the content of an email message by configuring the following components. Some are required. Then, when content is published, **Ektron CMS400.NET** retrieves the field values to create the email Web Alert.

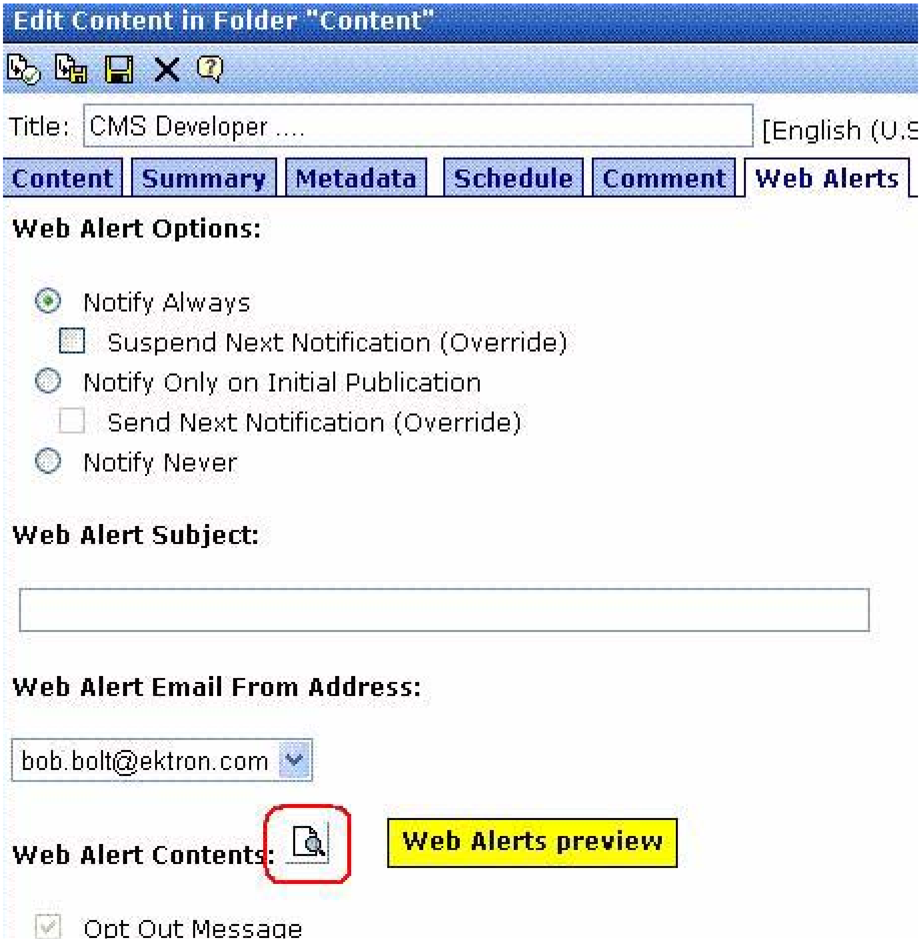
NOTE To set or modify this information, you must have permission to edit the folder.

Component	**Comment**	**Required?**
1. Subject line	Plain text you enter on the Web Alerts tab of the Folder Properties screen	No
2. From address	See ”Creating “From” Addresses” on page 783	Yes
3. Opt out message	See ”Creating Opt Out Message Text” on page 782	Yes
4. Default message	See ”Creating Default Message Text” on page 781	No
5. Content Summary	The Summary of the content item whose creation or change generates the email. Note: The Summary can include variables that retrieve information about the content item. See ”Including Variables in the Default Message” on page 781	No
6. Any CMS content item	Identify CMS content to include within the email content. • To identify an existing content item, click **Select** next to the **Use Content** checkbox. Then, navigate to the content item. Note: If the content item is an Office document or a managed file, a *link* to that item appears within the email message, not the item itself. • To insert this content item (that is, the one whose creation or change triggers this Web Alert), click **Use Current**. • To create a new content block to insert into this message, click **Select** next to the **Use Content** checkbox. When the folder navigation window appears, click the Add Content button (🗋). Then, see ”Adding HTML Content” on page 73.	No
7. Unsubscribe message	See ”Creating Unsubscribe Message Text” on page 782	Yes

The elements appear within the email in the sequence shown above.

Previewing the email Message

You can preview the email message at any time by clicking the preview button, which appears to the right of the **Web Alert Contents:** label on the Web Alerts tab (see below).


Edit Content in Folder "Content"
Content
Summary
Metadata
Schedule
Comment
Web Alerts
Web Alerts preview

Title: CMS Developer .... [English (U.S

Web Alert Options:

● Notify Always

☐ Suspend Next Notification (Override)

○ Notify Only on Initial Publication

☐ Send Next Notification (Override)

○ Notify Never

Web Alert Subject:

Web Alert Email From Address:

bob.bolt@ektron.com

Web Alert Contents:

☑ Opt Out Message

The button appears on the Web Alerts tab for folders as well as content.

When you click the preview button, a new window displays the body of the email message. (The components used in an email message are listed in "Combining Message Components to Create the Message" on page 783.)

After previewing the message, you can change any message components and click the button again to review the updated message. You don't need to save or check in the content to update the preview.

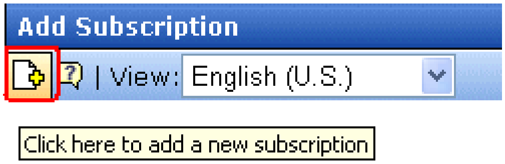
Defining Subscriptions

Create a subscription for each type of information site visitors might want to be notified about. For example, if your site sells electronics, you could set up one subscription for televisions, another for computers, and a third for stereo equipment. Site visitors can then subscribe to appropriate areas of interest.

CMS and membership users can also sign up for subscriptions.

To create one or more subscriptions, follow these steps.

1. Go to **Settings > Configuration > Web Alerts > Subscriptions**.
2. Click the Add Subscription button (shown below).



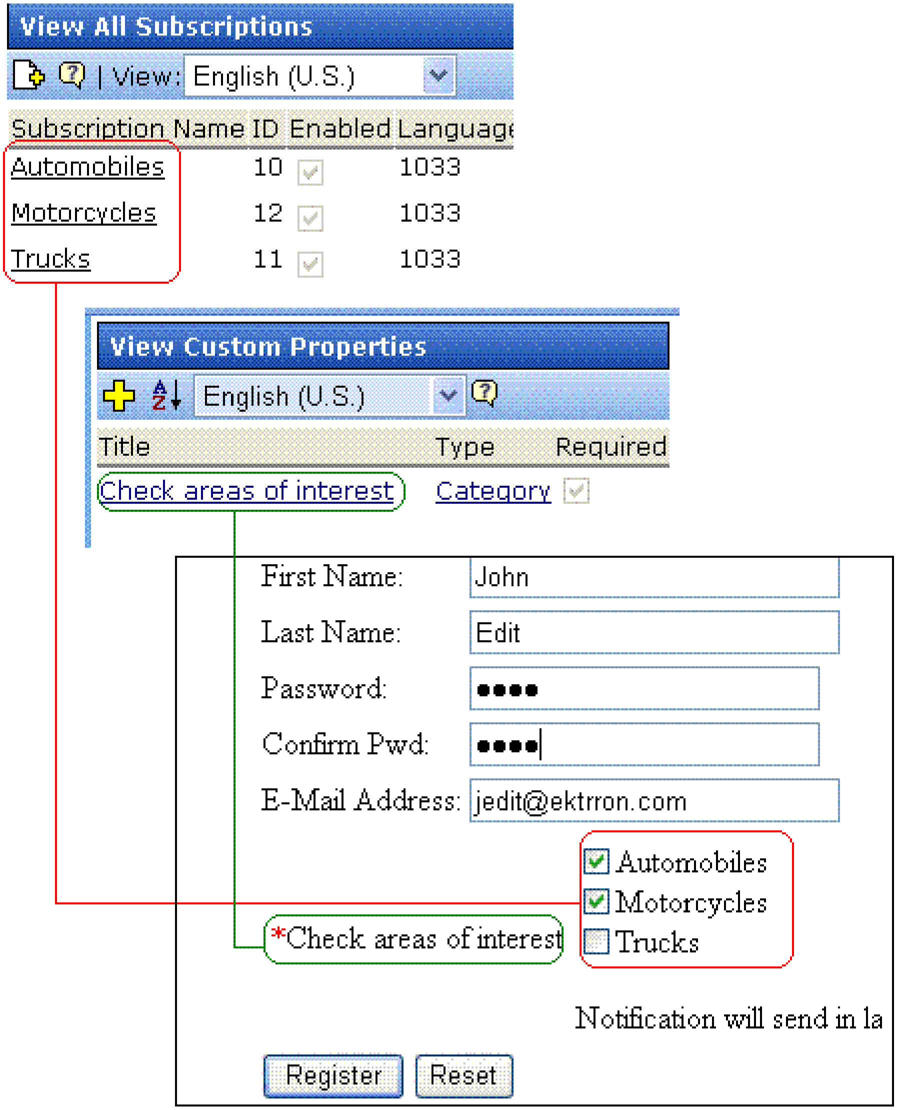
3. Enter a name for the subscription. The name should indicate the kind of information that it will cover.
4. Use the **Enabled** check box to indicate if the subscription is currently active.
5. Press the Save button (💾).

Effect on Custom User Properties

When you create the first subscription, a new entry is automatically created in the Custom User Properties screen. By default, its name is **Subscriptions**, and its type is **Category.** This occurs because all custom user properties appear on the Site Visitor Registration screen. In this way, users visiting that page can select areas of interest about which to be notified when content is updated.

The default name (**Subscriptions**) appears on the Site Visitor Registration screen. You may want to change it to something more helpful, such as **Select Areas of Interest**. To do this, select the Subscriptions entry and edit the **Label** field in the Custom User Properties screen.

The following graphic illustrates the relationship among the Subscriptions, Custom Properties, and Site Visitor Registration screens.



View All Subscriptions

| View: English (U.S.)

Subscription Name	ID	Enabled	Languag
Automobiles	10	☑	1033
Motorcycles	12	☑	1033
Trucks	11	☑	1033

View Custom Properties

English (U.S.)

Title	Type	Required
Check areas of interest	Category	☑

First Name:	John
Last Name:	Edit
Password:	●●●●
Confirm Pwd:	●●●●
E-Mail Address:	jedit@ektrron.com

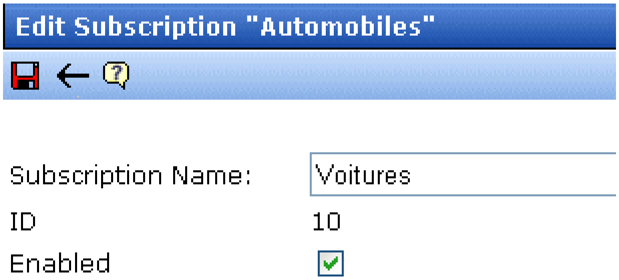
*Check areas of interest
☑ Automobiles
☑ Motorcycles
☐ Trucks

Notification will send in la

If you add more subscriptions later, they have no effect on the **Subscriptions** entry in the Custom User Properties screen -- that single entry covers all subscriptions.

Using Subscriptions in a Multi-Language System

When you create a subscription, a version of it is created for every enabled language in your system. You can edit the subscription name and **Enabled** values for any language but the ID number cannot be changed.



Subscription Name: Voitures

ID 10

Enabled ☑

To translate any subscription, follow these steps.

1. Go to **Settings** > **Configuration** > **Subscriptions**.
2. From the View Languages dropdown list, select the language into which you want to translate the subscription.
3. Click the subscription that you want to translate.
4. Click the Edit button (📝).
5. Enter the translation for the subscription name. If desired, you can check or uncheck the **Enabled** checkbox. Only enabled subscriptions appear on the Site Visitor Registration screen.
6. Click the Save button (💾).

Assigning Web Alert Information to Folders and Content

After creating predefined messages (as explained in ”Predefining Message Components” on page 781) and subscriptions (as explained in ”Defining Subscriptions” on page 786), you need to identify which folders include content that, when updated, trigger a Web Alert. For example, new product announcements are placed in the Marketing folder.

NOTE In order to set or modify Web Alert information, you must have permission to edit the folder.

For each folder, you can assign the following kinds of message information.

- whether Web Alert information is *inherited* from a parent folder or customized
- whether a folder’s Web Alert information is inherited by all content items in the folder
- *when* email is sent: always, only on initial publication, or never
- the *content* of the Web Alert email
- the subscriptions assigned to the folder. These determine which recipients receive email when content in this folder is created or updated.

Customizing Web Alert Information for a Folder

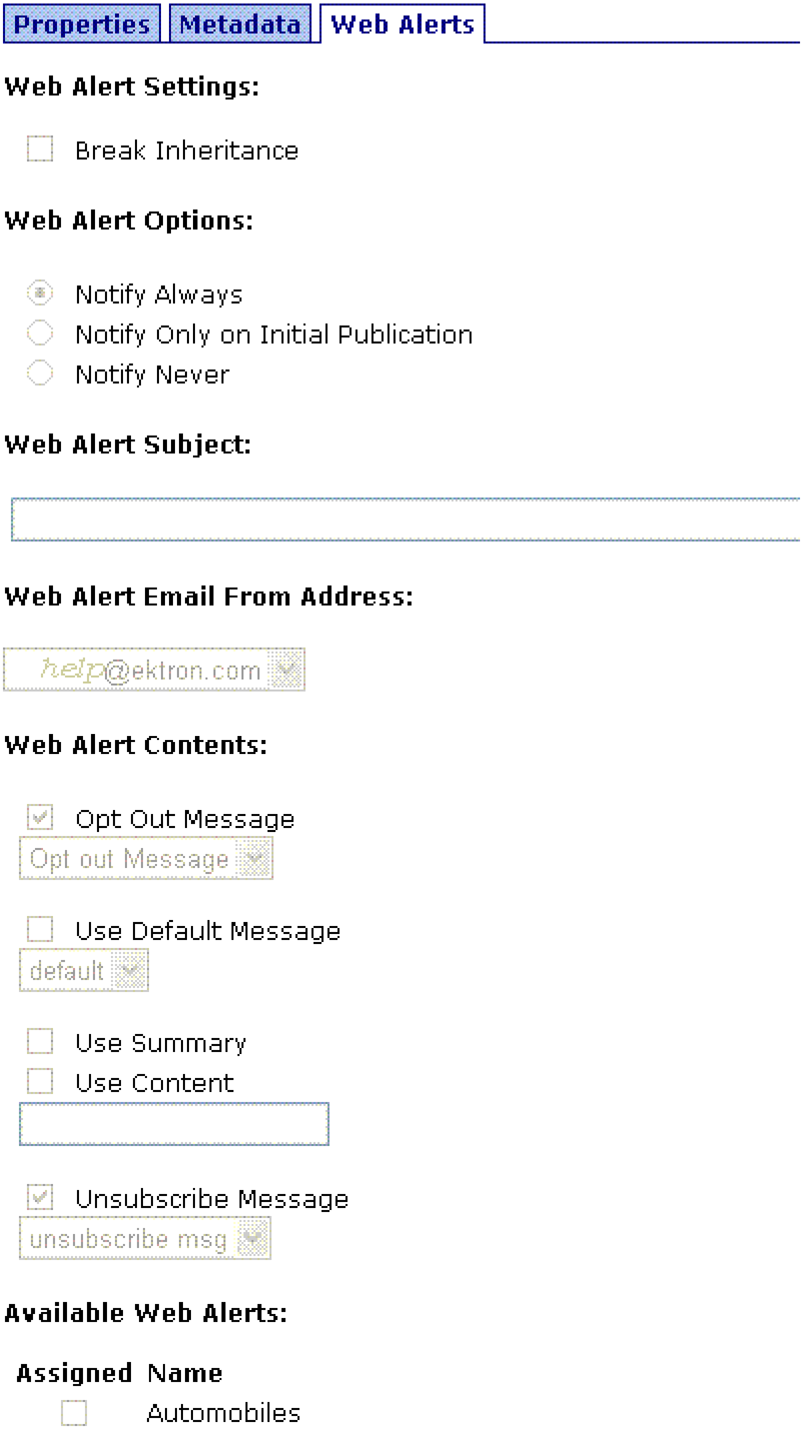
Like other folder-level information in **Ektron CMS400.NET**, Web Alert information is inherited from a parent folder. By default, all folders inherit these settings from the root (Content) folder.

However, inheritance can be broken and customized at any folder level or even the content level. Breaking inheritance means that custom settings can be made at any folder level. Subsequent changes to Web Alert settings at the parent level are ignored.

See Also: ”Assigning Web Alert Information to Content” on page 793

To view, enter, or modify folder-level Web Alert information, follow these steps.

1. Navigate to the folder whose Web Alert information you want to edit.
2. Click the Folder Properties button ().
3. Click the **Web Alerts** tab.
4. Scroll down to view the Web Alert options.



Web Alert Settings:

☐ Break Inheritance

Web Alert Options:

● Notify Always
○ Notify Only on Initial Publication
○ Notify Never

Web Alert Subject:

Web Alert Email From Address:

help@ektron.com

Web Alert Contents:

☑ Opt Out Message
Opt out Message

☐ Use Default Message
default

☐ Use Summary
☐ Use Content

☑ Unsubscribe Message
unsubscribe msg

Available Web Alerts:

Assigned	Name
☐	Automobiles

5. To change any value, click the Edit Properties button (📝).
6. The following table describes the fields.

Web Alert Fields

Field Group	**Description**
Web Alert Settings: Break Inheritance	To inherit Web Alert settings (described below) from this folder’s parent folder, leave this box (**Break Inheritance**) empty. To assign custom Web Alert settings for this folder, check this box and use the fields below to customize the settings.
Web Alert Options	Check *when* Web Alert emails are sent as content in this folder is published. • **Notify Always** - send email whenever any content is published. It doesn’t matter if the content is being published for the first time or being updated. • **Notify only on Initial Publication** - send email the first time content is published. After that, email is not sent. • **Notify Never** - email is never sent for content in this folder.
Web Alert Subject	Enter the subject line of the email.
Web Alert email From Address	Select the address of the person from whom the email will be sent. *See Also:* ”Creating “From” Addresses” on page 783
Web Alert Contents	Check any or all of the following components to determine the text of the email. *See Also:* ”Combining Message Components to Create the Message” on page 783 • OptOut Message - see ”Creating Opt Out Message Text” on page 782 • Use Default message - see ”Creating Default Message Text” on page 781 • Use Summary - include the content summary in the email • Use Content - see ”Any CMS content item” on page 784 • Unsubscribe message - See ”Creating Unsubscribe Message Text” on page 782 The components appears within the email in the order listed above.

Field Group	**Description**
Available Web Alerts	All enabled subscriptions set up in the Subscriptions screen appear. Check those to be notified when content in this folder is added or updated. *See Also:* "Defining Subscriptions" on page 786 Note: If you uncheck all subscriptions, you disable the Web Alert feature for this folder and all of its content. This applies even if unique subscription information has been assigned to content items within the folder.

Assigning Web Alert Information to Content

You can customize Web Alert settings for any content item. If you do, you break the inheritance from its folder. This means that any subsequent changes to the folder settings do not affect the content's Web Alert settings. From then on, its settings are independent of the folder's settings.

See Also: "Web Alert Feature" on page 765

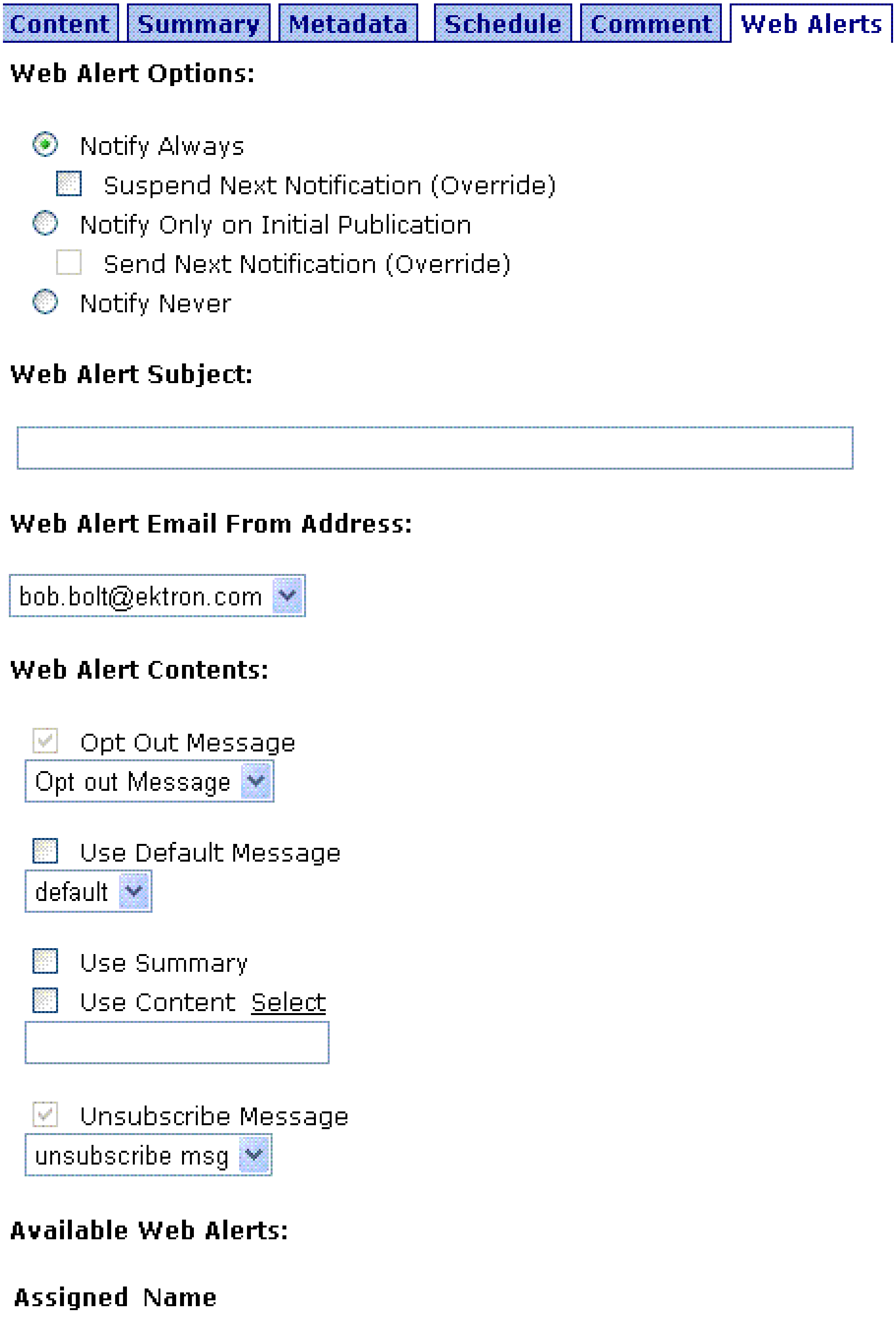
EXCEPTION! If *all subscriptions* are unchecked for a folder, the Web Alert feature is disabled for all content in the folder. This applies even if unique Web Alert information has been assigned to content.

To customize the Web Alert settings for any content item, follow these steps.

1. Navigate to the content item.
2. Click the Edit button (✎).
3. Click the **Web Alerts** tab.

NOTE The Web Alerts tab only appears if required messages, "from" email addresses, and at least one subscription are assigned to the content's folder.

4. The Web Alert settings for the content appear.



Web Alert Options:

● Notify Always

☐ Suspend Next Notification (Override)

○ Notify Only on Initial Publication

☐ Send Next Notification (Override)

○ Notify Never

Web Alert Subject:

Web Alert Email From Address:

bob.bolt@ektron.com

Web Alert Contents:

☑ Opt Out Message

Opt out Message

☐ Use Default Message

default

☐ Use Summary

☐ Use Content Select

☑ Unsubscribe Message

unsubscribe msg

Available Web Alerts:

Assigned Name

The following table describes the settings.

Field Group	**Description**
Web Alert Options	Check *when* Web Alert emails are sent as this content is published. • **Notify Always** - send email whenever content is published. It doesn’t matter if the content is being published for the first time or being updated. • **Suspend Next Notification (override)** - Check this box if you want to suspend the next email to be sent for this content. You might use this feature is you notice a small error in the content and don’t want to notify all subscribers that the page was updated. **Important**! - This setting only applies until the next time this content is published. When that happens, this box is automatically unchecked. • **Notify only on Initial Publication** - send email the first time content is published. After that, email is not sent. • **Send Next Notification (override)** - Send an email to all subscribers the next time this content is published. Use this checkbox to send a one-time mailing to all subscribers about content that has already been published. **Important**! - This setting only applies until the next time this content is published. When that happens, this box is automatically unchecked. • **Notify Never** - email is never sent when content in this folder is published.
Web Alert Subject	Same as for a content folder. See ”Web Alert Subject” on page 792
Web Alert email From Address	Same as for a content folder. See ”Web Alert email From Address” on page 792
Web Alert Contents	Same as for a content folder. See ”Web Alert Contents” on page 792
Available Web Alerts	Only Web Alerts assigned to the folder appear. Check ones that you want to assign to this content item. For more information, see ”Available Web Alerts” on page 793.

Inheriting Content-Level Web Alert Information from Its Folder

If you customized Web Alert information for content items and later decide to standardize that information for all content in a folder, use the Restore Web Alert Inheritance toolbar button (☒).

This button copies folder-level Web Alert information to every content item in the folder, replacing whatever content-level information exists. In this way, all content in a folder will have the same Web Alert information.

How Content that is Dragged and Dropped is Handled

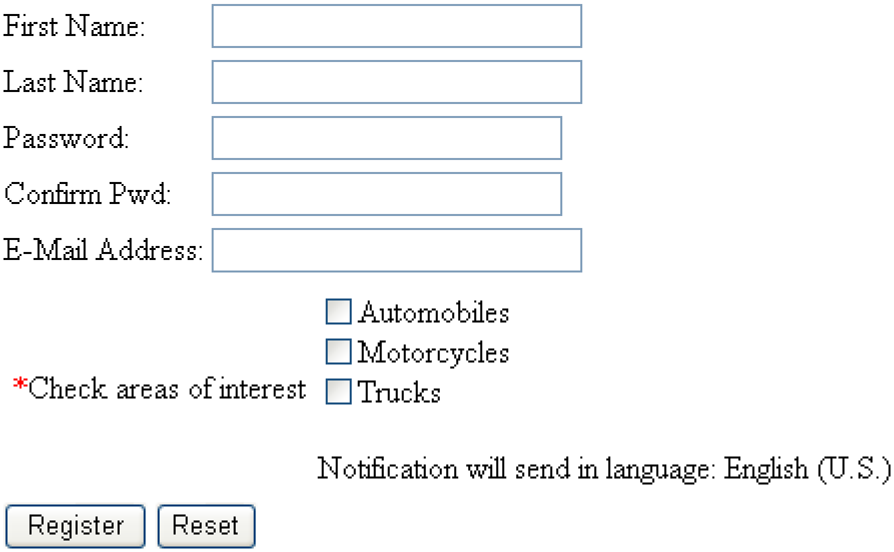
Web Alert emails are not generated for files that are dragged and dropped into **Ektron CMS400.NET** and immediately published. To generate email for these files, you must manually publish them.

Like HTML content, these files must reside in a folder for which the Web Alert feature is enabled.

How Users Sign up for Subscriptions

Once subscriptions are set up, you create a page on your Web site to let site visitors subscribe to areas of interest. An example of that page is below.

NOTE The email address collected on the screen is used for the membership **Username** field.



First Name:

Last Name:

Password:

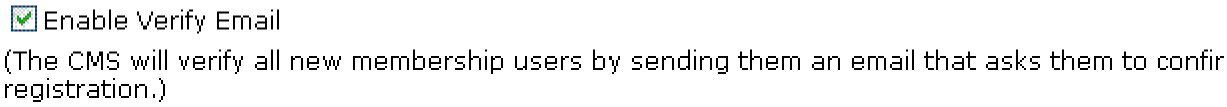
Confirm Pwd:

E-Mail Address:

*Check areas of interest ☐ Automobiles ☐ Motorcycles ☐ Trucks

Notification will send in language: English (U.S.)

What happens next depends on the **Enable Verify email** check box in the Application Setup screen (shown below).



☑ Enable Verify Email

(The CMS will verify all new membership users by sending them an email that asks them to confir registration.)

- ”What Happens if Verification email is Not Used” on page 797
- ”What Happens if Verification email is Used” on page 797
- ”Setting up Other Web Pages for Site Visitor” on page 800
- ”CMS User Subscription Sign Up” on page 800

What Happens if Verification email is Not Used

If the **Enable Verify email** checkbox is *not* checked, everyone who signs up automatically becomes a membership user.

What Happens if Verification email is Used

Typically, when managing a self-subscribe list, you want new users to confirm their interest in being on the list. This prevents people from being subscribed by someone else without their permission.

If the **Enable Verify email** checkbox *is* checked, everyone who signs up is placed on the Users Not Verified list. (To see this list, go to **Workarea > Modules > Memberships > Users Not Verified**.)

These people then receive an email. You define the content of this email in **Workarea > Modules > Memberships > User Groups > Messages**. The email should direct the unverified user to a new Web page that asks him to confirm his interest in signing up for the subscription. (See "The Verification Message" on page 798.) New users are activated when the subscriber confirms his interest.

To create such a page, your Web developer creates or updates a Web Form using the Membership Server Control. For this purpose, set the control's **DisplayMode** property to **AccountActivate**.

NOTE Users can also be manually activated or removed via the View Not Verified Users screen. For more information, see "The View Not Verified Users Screen" on page 799.

The Verification Message

By default, **Ektron CMS400.NET** supplies a generic message asking the user to confirm his password and directing him to the `acitvatemyaccount.aspx` page on your Web site. If you want to customize that message, follow these steps.

1. Go to **Workarea > Modules > Memberships > User Groups Messages**.
2. Click the Add button ().
3. Assign a title to the message, such as **Verification Message**.
4. Click to place a check mark in the **Default** box.
5. Enter the text of the confirmation message you want the subscriber to receive. Be sure to place a link to the confirmation page. After the URL of that page, you must add this text: `@appQueryLink@`. For example:

```
Welcome to Ektron.Com. You have registered to be notified of updates
to our site.

Before we can do this, you need to activate your account. To do so,
please visit http://www.ektron.com/workarea/
activateuser.aspx@appQueryLink@.
```

If you want the message to include the user’s name and email address, use the following variables to retrieve that information:

- name - `@appEmail@`
- email address - `@appActivateId@`

For example:

```
Your user name is @appEmail@.

Your account id is @appActivateId@
```

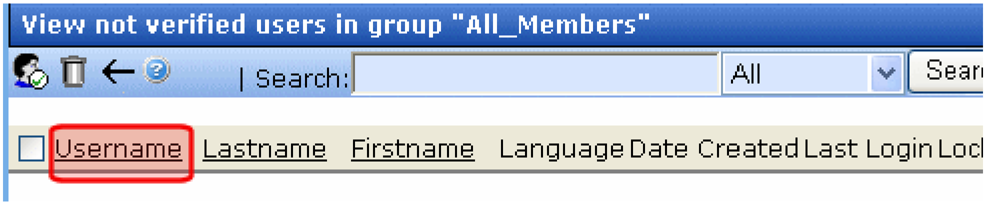
The View Not Verified Users Screen

All users who have signed up for a subscription but who have not yet verified that subscription appear on the View Not Verified Users Screen. This screen is available via **Modules > Memberships > Users not Verified**.

After viewing membership users on the screen, you can manually activate their account. To do so, selecting one or more users then click the Activate button ( ). Alternatively, you can delete members by selecting one or more and clicking the Delete button (🗑).

NOTE The `ek_PageSize` setting in the web.config file determines the maximum number of users that can appear on a page before it “breaks.” When a page breaks, additional entries appear on another screen, and the following text appears near the bottom of the list:
Page 1 of 2
[First Page] [Previous Page] [Next Page] [Last Page]

To select all members, click the check box in the header line, next to **Username** (circled below).



You can also change the way membership users are sorted, or use the **Search** button to find users that match your criteria (for example, users whose username includes *yahoo.com*.) These features are explained in ”Sorting Membership Users” on page 513 and ”Searching for Membership Users” on page 514.

Setting up Other Web Pages for Site Visitor

You can set up other Web pages that let the subscriber perform the following actions:

- Activate their account
- Reset their password
- Unsubscribe

To create these pages on your web site, place the membership server control on the page. Then use the control’s **DisplayMode** property to determine the kind of screen you want to place. For example, to create a screen that lets the user reset his password, set the Membership server control’s **DisplayMode** property to **ResetPassword**.

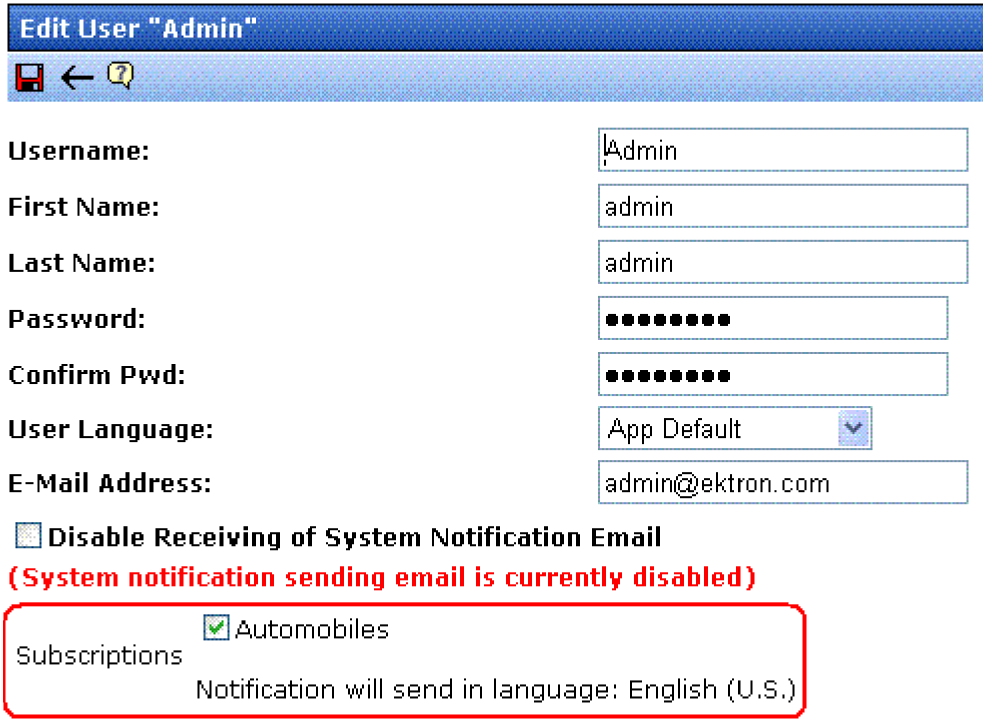
For more information, see the documentation for the Membership server control in the **Ektron CMS400.NET** Developer’s Manual.

CMS User Subscription Sign Up

CMS users can also subscribe to any subscription list. This would be particularly useful on an intranet where, for example, employees are notified when job-related information is updated.

Another example would be for your internet site. The manager of the Marketing Department could sign up to be notified whenever Marketing content is added or updated.

To do so, users go to **Settings > User Profile > Edit User** (see illustration).



Username:	Admin
First Name:	admin
Last Name:	admin
Password:	●●●●●●●●●
Confirm Pwd:	●●●●●●●●●
User Language:	App Default
E-Mail Address:	admin@ektron.com

☐ **Disable Receiving of System Notification Email**

(System notification sending email is currently disabled)

Subscriptions ☑ Automobiles

Notification will send in language: English (U.S.)

Ektron Windows Service

Ektron CMS400.NET provides a Windows Service to handle background processing functions. This section explains the service, including

- the CMS functions it performs
- how it propagates updates to the connection string and site path
- where it resides in IIS and the file system
- its activity log

Functions Performed by the Ektron Windows Service

The Ektron Windows Service performs the following processes.

- ”XML Indexing” on page 185
- ”Quick Deploy” on page 730
- ”Load Balancing Assets” on page 826
- ”PDF Generation” on page 314
- Bad Links Report - See **Ektron CMS400.NET** User Manual section “Content Workflow Reports” > “Bad Links Report” > “Running the Bad Links Report on a Schedule”
- Publication of content scheduled to go live at a future time. See **Ektron CMS400.NET** User Manual section “Scheduling Content to Begin and End”
- When a new metadata definition is created, the Windows service applies it to all content in the CMS database. However, the metadata definition is only activated for the content when it is enabled for the content’s folder. *See Also:* ”Metadata” on page 94

In addition, the Ektron Windows Service propagates updates made to the database connection string or the site path in the web.config file. The service copies the new value to the data.config and sitedb.config files (respectively). These are located in `C:\Program Files\Ektron\EktronWindowsService`. Any CMS components that reference these values can retrieve the current information from these files.

IMPORTANT! Do not edit the data.config and sitedb.config files. They are dynamically generated by **Ektron CMS400.NET**. If these files have incorrect values, edit the web.config file, which is used to generate them.

The following topics explain various aspects of using the Ektron Windows Service.

- ”Enabling Load Balancing of Assets” on page 803
- ”Changing the Update Time” on page 804
- ”Preventing Configuration Information from Being Updated” on page 804
- ”Changing the Name of the data.config File” on page 804
- ”Changing the http Port” on page 805
- ”Disabling PDF Generation” on page 805
- ”Disabling XML Indexing” on page 805
- ”Viewing in IIS” on page 806
- ”Viewing in the File System” on page 808

Enabling Load Balancing of Assets

By default, load balancing of assets is disabled within the Ektron Windows Services file:

```
C:\Program Files\Ektron\EktronWindowsService\Ektron.ASM.EktronServices.exe.config
```

To enable load balancing of assets, follow these steps.

NOTE To learn about load balancing assets, see ”Load Balancing Assets” on page 826.

1. Open that file using a word processor such as Notepad
2. Find the `LoadBalanceRead` and `LoadBalanceWrite` tags
3. Set the `Enabled` attribute to `true`. See example below.

```
<add name="LoadBalanceRead"
type="Ektron.ASM.EktronServices.LoadBalancing.Read.LoadBalanceReadService,
Ektron.ASM.EktronServices" IntervalSeconds="59" Enabled="false" />


<add name="LoadBalanceWrite"
type="Ektron.ASM.EktronServices.LoadBalancing.Write.LoadBalanceWriteService,
Ektron.ASM.EktronServices"  ServerCount="2" Enabled="false" />
```

4. For the `"LoadBalanceWrite"` tag, make sure the `ServerCount` attribute is set to the number of servers in your load balance cluster. This number must be the same for all servers in the cluster.

```
<add name="LoadBalanceWrite"
type="Ektron.ASM.EktronServices.LoadBalancing.Write.LoadBalanceWriteService,
Ektron.ASM.EktronServices"  ServerCount="2" Enabled="false" />
```

Changing the Update Time

The update of the data.config and sitedb.config files occurs once a day at a time prescribed in the `C:\Program Files\Ektron\EktronWindowsService\Ektron.ASM.EktronServices.exe.config` file's `updateTime` value. If desired, you can change this time.

Preventing Configuration Information from Being Updated

You can prevent the information in the data.config and sitedb.config files from being changed by the automatic daily update. To do so, surround them with `<preserve>` tags.

Changing the Name of the data.config File

If your server already has a file named data.config, and you want to change the name of the one in `C:\Program Files\Ektron\EktronWindowsService` to avoid confusion, follow these steps.

1. Open Ektron.ASM.EktronServices.exe.config.
2. Find this line: `<connectionStrings configSource="data.config"/>`.
3. Replace `data.config` with the new file name. For example: `<connectionStrings configSource="Ektron_data.config" />`
4. Save Ektron.ASM.EktronServices.exe.config.

Changing the http Port

If your Web site is already using port 6060, follow these steps to change the port number used by the Ektron Windows Web Service.

1. Open Ektron.ASM.EktronServices.exe.config.
2. Find this line: `<add key="HttpServicePort" value="6060"/>`.
3. Change the `value` to the port number you will use for the Ektron Windows Service.

Disabling PDF Generation

By default, PDF generation is enabled. If you want to disable it within the Ektron Windows Services configuration file, follow these steps.

1. Open Ektron.ASM.EktronServices.exe.config.
2. Find these lines:

```
<add name="PdfFileRead"
type="Ektron.ASM.EktronServices.PdfFileManager.Read.PdfFileManagerReadService,
Ektron.ASM.EktronServices" IntervalSeconds="101" Enabled="true" />

<add name="PdfFileWrite"
type="Ektron.ASM.EktronServices.PdfFileManager.Write.PdfFileManagerWriteService,
Ektron.ASM.EktronServices" IntervalSeconds="149" Enabled="true" />
```

3. For both tags, set `enabled` to `false`.

Disabling XML Indexing

If you want to disable XML indexing, follow these steps.

1. Open Ektron.ASM.EktronServices.exe.config.
2. Find these lines:

```
<add name="XmlIndexing" type="Ektron.ASM.EktronServices.XmlIndexing.IndexingService,
Ektron.ASM.EktronServices" Enabled="true" />
```

3. Change the value of `enabled` to `false`.

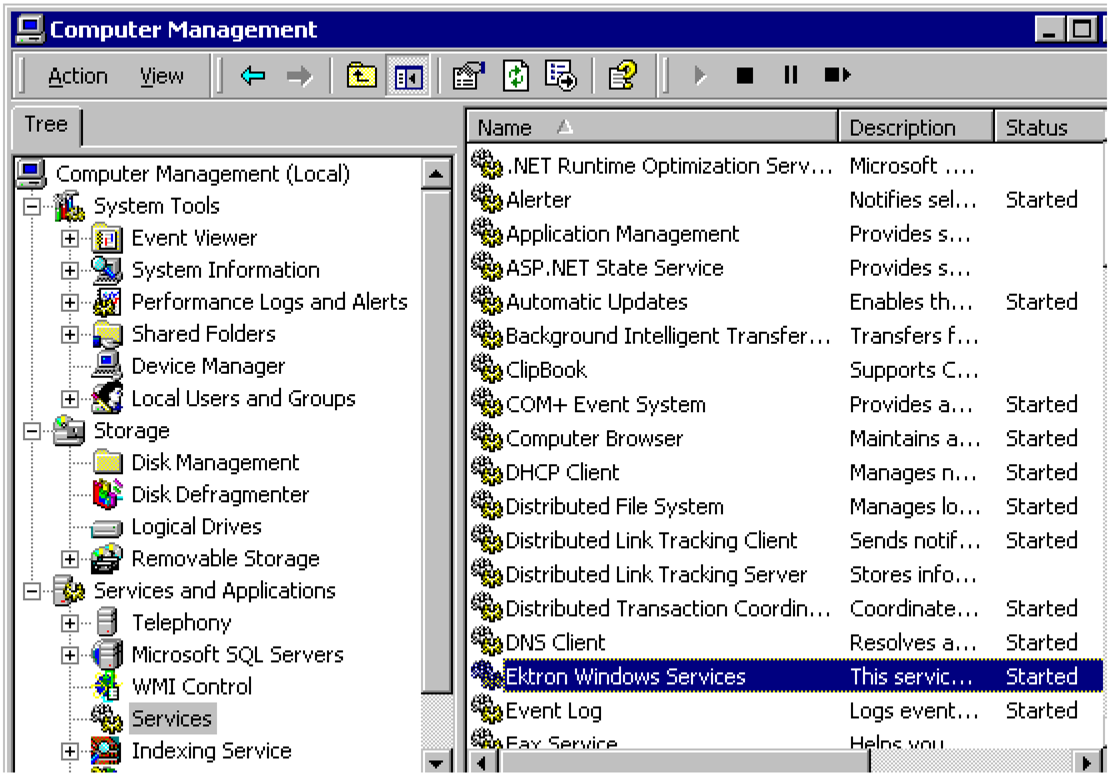
Viewing the Ektron Windows Service

Viewing in IIS

The Windows Service starts automatically when **Ektron CMS400.NET** is installed, and again whenever the server is restarted.

1. To see the status of the service, go to **Computer Management > Services and Applications > Services**.

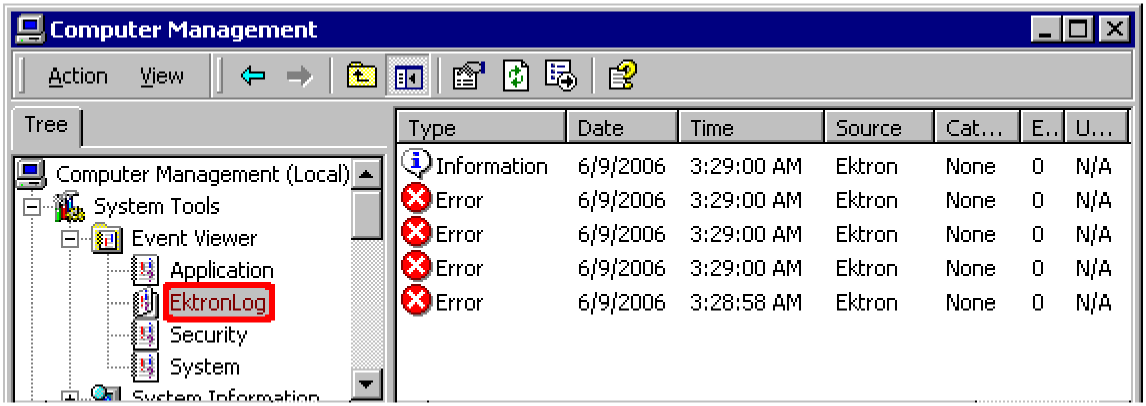
   Look for **Ektron Windows Services**. You can see its status in the **Status** column.


Computer Management
Action
View
Tree
Computer Management (Local)
System Tools
Event Viewer
System Information
Performance Logs and Alerts
Shared Folders
Device Manager
Local Users and Groups
Storage
Disk Management
Disk Defragmenter
Logical Drives
Removable Storage
Services and Applications
Telephony
Microsoft SQL Servers
WMI Control
Services
Indexing Service

Name	Description	Status
.NET Runtime Optimization Serv...	Microsoft	
Alerter	Notifies sel...	Started
Application Management	Provides s...	
ASP.NET State Service	Provides s...	
Automatic Updates	Enables th...	Started
Background Intelligent Transfer...	Transfers f...	
ClipBook	Supports C...	
COM+ Event System	Provides a...	Started
Computer Browser	Maintains a...	Started
DHCP Client	Manages n...	Started
Distributed File System	Manages lo...	Started
Distributed Link Tracking Client	Sends notif...	Started
Distributed Link Tracking Server	Stores info...	
Distributed Transaction Coordin...	Coordinate...	Started
DNS Client	Resolves a...	Started
Ektron Windows Services	This servic...	Started
Event Log	Logs event...	Started
Fax Service	Helps you...	

The Activity Log

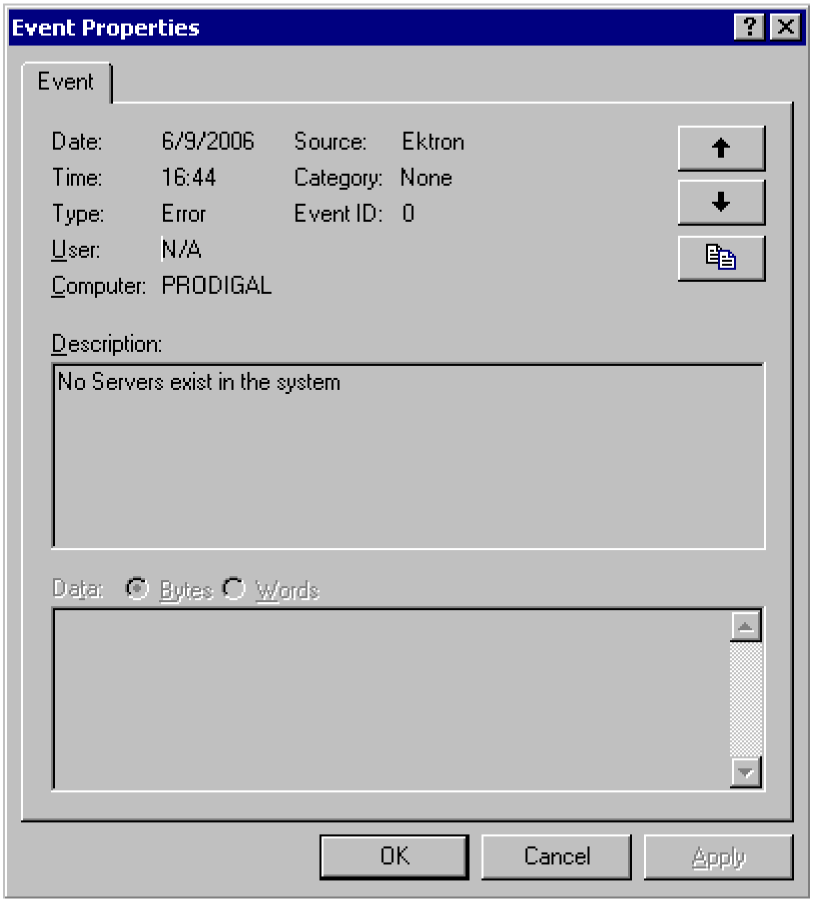
The service has an Activity Log, which tracks all related events. To see it, go to **Computer Management > System Tools > Event Viewer > Ektron Log**.


Computer Management
Action
View
Tree
Computer Management (Local)
System Tools
Event Viewer
Application
EktronLog
Security
System
System Information

Type	Date	Time	Source	Cat...	E..	U...
Information	6/9/2006	3:29:00 AM	Ektron	None	0	N/A
Error	6/9/2006	3:29:00 AM	Ektron	None	0	N/A
Error	6/9/2006	3:29:00 AM	Ektron	None	0	N/A
Error	6/9/2006	3:29:00 AM	Ektron	None	0	N/A
Error	6/9/2006	3:28:58 AM	Ektron	None	0	N/A

To view detail for any event, double click it.

A common source of errors is that the service cannot find **Ektron CMS400.NET** sites, because they have not been created yet, as shown in the sample below.

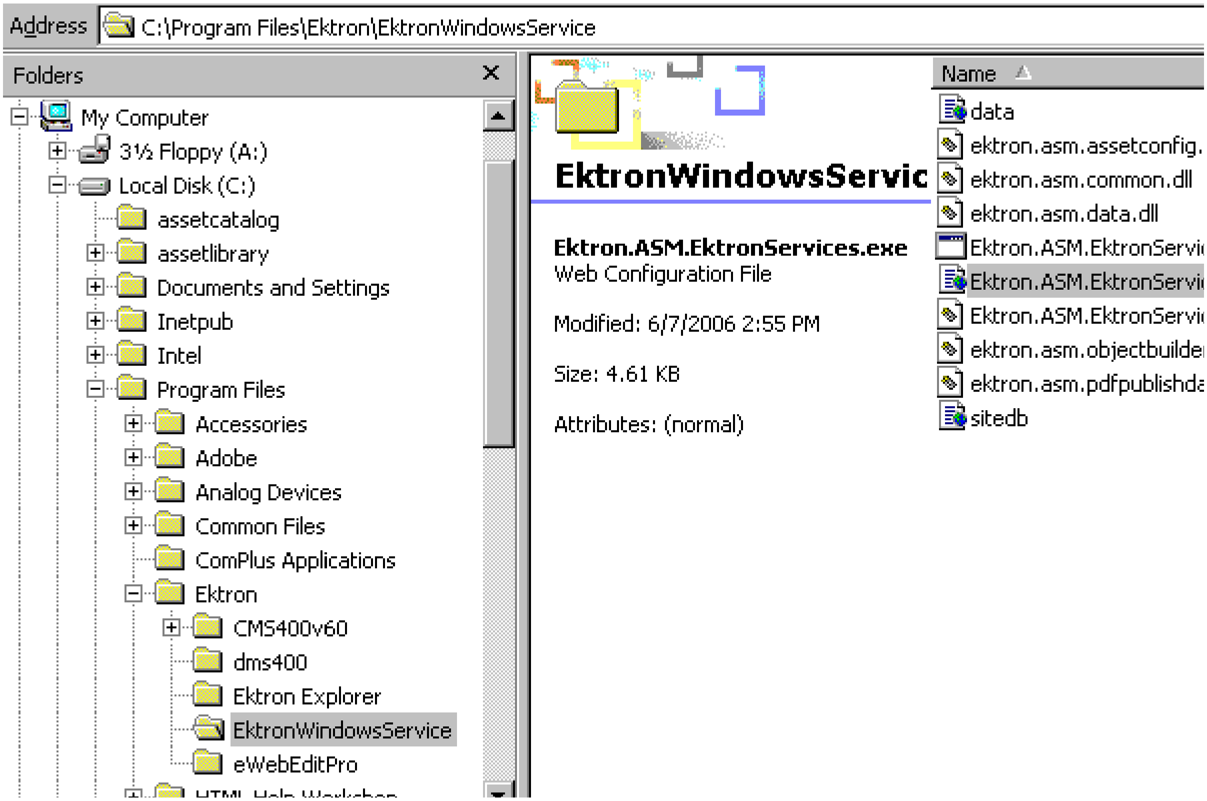

Event Properties
Event
Description:
Data: ● Bytes ○ Words
OK
Cancel
Apply

Date: 6/9/2006
Time: 16:44
Type: Error
User: N/A
Computer: PRODIGAL
Source: Ektron
Category: None
Event ID: 0

No Servers exist in the system

Viewing in the File System

On your file system, the Ektron Windows Service is located in `C:\Program Files\Ektron\EktronWindowsService`. Within that folder, the Ektron.ASM.EktronServices.exe.config file runs the Ektron Windows service.



Address C:\Program Files\Ektron\EktronWindowsService

Folders

My Computer
  3½ Floppy (A:)
  Local Disk (C:)
    assetcatalog
    assetlibrary
    Documents and Settings
    Inetpub
    Intel
    Program Files
      Accessories
      Adobe
      Analog Devices
      Common Files
      ComPlus Applications
      Ektron
        CMS400v60
        dms400
        Ektron Explorer
        EktronWindowsService
        eWebEditPro

EktronWindowsServic

Ektron.ASM.EktronServices.exe
Web Configuration File

Modified: 6/7/2006 2:55 PM

Size: 4.61 KB

Attributes: (normal)

Name
data
ektron.asm.assetconfig.
ektron.asm.common.dll
ektron.asm.data.dll
Ektron.ASM.EktronServi
Ektron.ASM.EktronServi
Ektron.ASM.EktronServi
ektron.asm.objectbuilde
ektron.asm.pdfpublishda
sitedb

Web Services

Web Services are reusable software components that can be consumed over the Web by means of standard Internet technologies. Mechanisms exist to publish and discover Web Services on the Web, allowing users to locate and integrate them into their applications.

A Web Service is comprised of one or more methods that expose functionality. A Web Service can be thought of as an Application Program(ming) Interface (API), the one big difference being, consumers can access the service using Simple Object Access Protocol (SOAP) over HTTP.

SOAP is an XML based lightweight protocol that defines the message format for Web Services, which allows heterogeneous systems to communicate with each other in a standard way. Seeing Web Services are based on ubiquitous technologies, they have been quickly accepted for the interchange of data.

For information about implementing Ektron CMS400.NET's Web services support for your Web site, refer to Web Services in the Ektron CMS400.NET Developer's Reference Manual*.*

Load Balancing

Load Balancing has two important purposes:

- Provides redundancy for your Web site - if one server fails, a second can still handle the requests
- Balances requests - distributes requests across two or more servers

To enable load balancing, set up several servers that include the same files. Then, purchase load balancing equipment to evenly distribute requests for content among the servers. Whenever an image or file gets uploaded to your Web site, regardless of the Web server the user is working on, the asset is replicated on both servers.

The client browser is unaware that more than one server is involved. All URLs point to a single Web site. The load balance software resolves them.

Ektron provides different strategies for load balancing *library images and files* and *DMS assets*. See

- ”Load Balancing Library Images and Files” on page 811
- ”Load Balancing Assets” on page 826

Load Balancing Library Images and Files

Ideally, your load balancing strategy involves automatic replication of files in each directory specified by Ektron CMS400.NET to all servers.

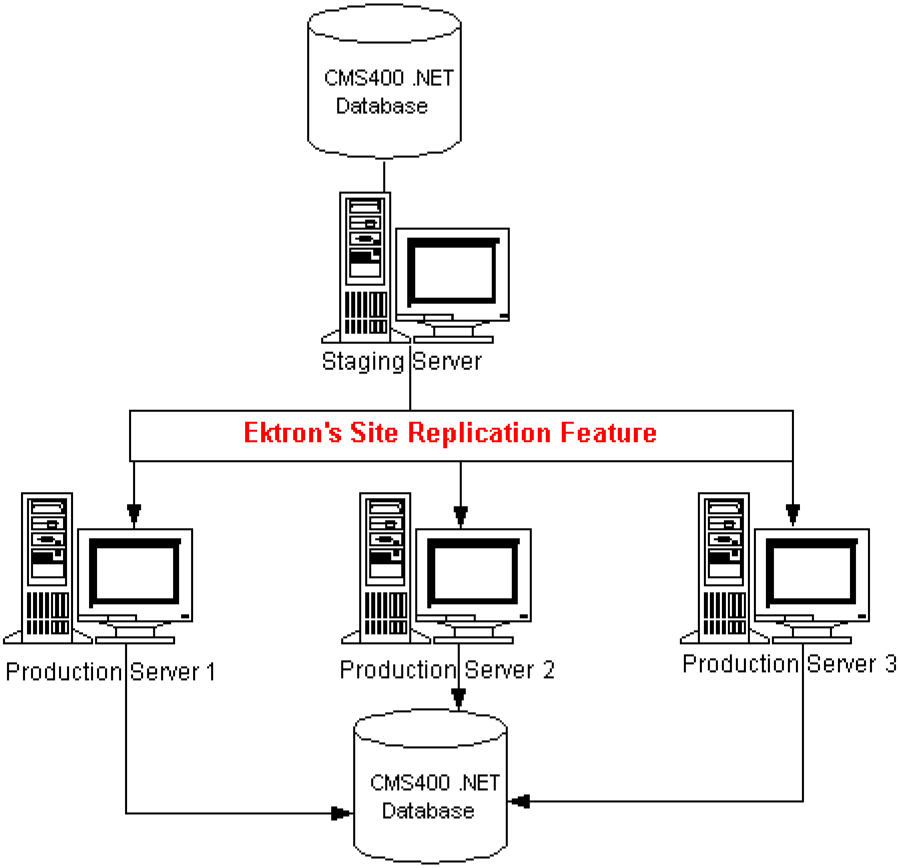
The easiest way to enable Load Balancing involves using Ektron’s Site Replication Feature (see ”Using Site Replication for Load Balancing” on page 812). If your site has not purchased that option, an alternative approach involves creating virtual directories and setting up load balance paths (see ”Configuring Load Balancing without Site Replication” on page 813).

See Also:

- ”Using Site Replication for Load Balancing” on page 812
- ”Configuring Load Balancing without Site Replication” on page 813
- ”Ektron CMS400.NET on Three Servers” on page 824

Using Site Replication for Load Balancing

The easiest way to configure **Ektron CMS400.NET** for this setup is illustrated below. Have all content authoring, editing, and review occur on a staging server. Then, when new content is ready to go live, use the Site Replication feature to copy content from staging to production server.


CMS400 .NET Database
Staging Server
Ektron's Site Replication Feature
Production Server 1
Production Server 2
Production Server 3
CMS400 .NET Database

For more information about Site Replication, see "Site Replication" on page 680.

Configuring Load Balancing without Site Replication

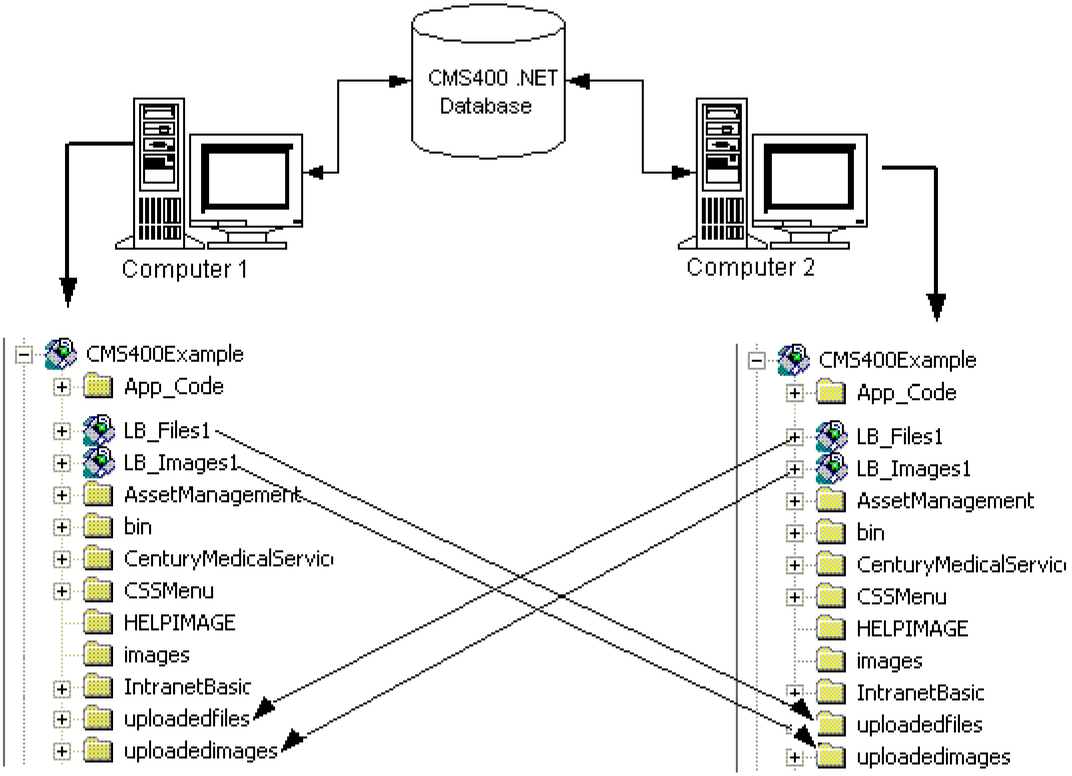
If your site has not purchased Site Replication software, enabling load balancing requires additional set-up outside of Ektron CMS400.NET. To set this up, you perform three tasks.

Instructions are provided for a configuration that involves both two and three Web servers.

Task	Directions for 2 Web Servers	Directions for 3 Web Servers
1. Set up Ektron CMS400.NET on multiple Web servers, sharing one database	”Set Up Two Ektron CMS400.NET Web Sites” on page 815	”Setting Up Multiple Web Sites” on page 825
2. Create virtual directories to uploadedimages and uploadedfiles folders	”Set Up Virtual Directories for Two Web Sites” on page 816	”Setting Up Virtual Directories for Three Sites” on page 825
3. Set load balance paths in Ektron CMS400.NET	”Setting Up Load Balance Paths in Ektron CMS400.NET” on page 822	”Setting Up Load Balancing for Three Servers” on page 825

Set Up Two Ektron CMS400.NET Web Sites

The following diagram illustrates how to set up IIS consoles for load balancing two Ektron CMS400.NET Web servers.


CMS400 .NET Database
Computer 1
Computer 2
CMS400Example
App_Code
LB_Files1
LB_Images1
AssetManagement
bin
CenturyMedicalServic
CSSMenu
HELPIMAGE
images
IntranetBasic
uploadedfiles
uploadedimages

Both servers point to the same database, and two virtual directories are set up in each Web server's IIS console. To set this up, follow these steps.

1. Install the .exe file for Ektron CMS400.NET on each Web server.

NOTE Read the Ektron CMS400.NET Setup Manual for information on performing an install.

2. Select one database as the master. Each Web site points to this database for content, users, and load balance paths.

3. By default, the `<connectionStrings>` element of the web.config file contains connection information to the sample database. Replace the sample values with your server, database name, and login information

Set Up Virtual Directories for Two Web Sites

Through Internet Information Services (IIS) on both Web servers, create virtual directories for all image or file folders used with your load balancing model. For our example, create the following virtual directories on both Web servers.

Virtual Directory	Points to
LB_Images1	UploadedImages folder installed on the second Ektron CMS400.NET Web server.
LB_Files1	UploadedFiles folder installed on the second Ektron CMS400.NET Web server.

These identical, virtual directories must exist in the IIS console for each Web server in your load balancing model.

Why Must Virtual Directory Names Be Identical?

Virtual directory names must be identical because load balance paths are stored in one database. IIS resolves the path to the virtual directory stored on the server being used.

For example, a load balance path is called `LB_Images1`. Ektron CMS400.NET talks to IIS and resolves the path for the virtual directory `LB_Images1`, which is `\\{Computer1}\UploadedImages`.

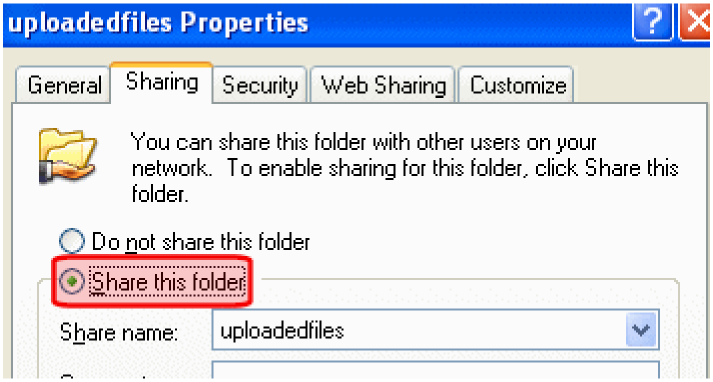
If the Web site is accessed from another Web server, the load balance path `LB_Images1` points to the physical directory `\\{Computer2}\UploadedImages`.

IMPORTANT! For load balancing to work correctly, the virtual directories on each Web server must be identical.

Creating a Virtual Directory

This section explains how to create a virtual directory in IIS. Follow this procedure for all servers being load balanced.

1. Open Windows Explorer and navigate to the your Web site's `uploadedimages` and `uploadedfiles` folders.
2. Select each folder, right click the mouse, and select **Properties**.
3. Click the **Sharing** tab, select **Share this folder**, and press **OK**.



uploadedfiles Properties
General
Sharing
Security
Web Sharing
Customize

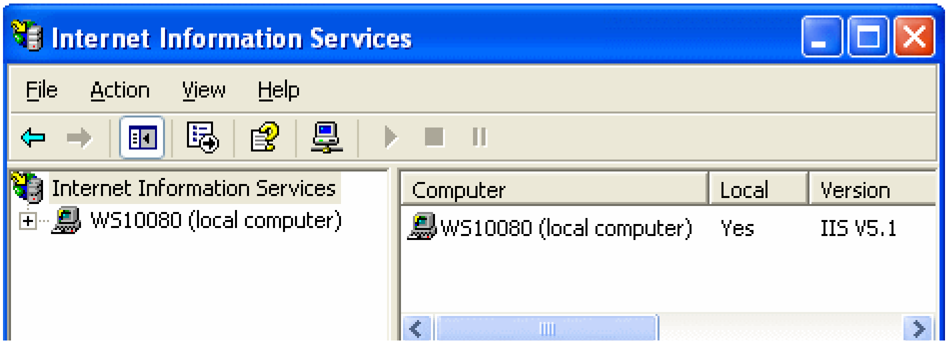
You can share this folder with other users on your network. To enable sharing for this folder, click Share this folder.

○ Do not share this folder

● Share this folder

Share name: uploadedfiles

4. Access your IIS management console.

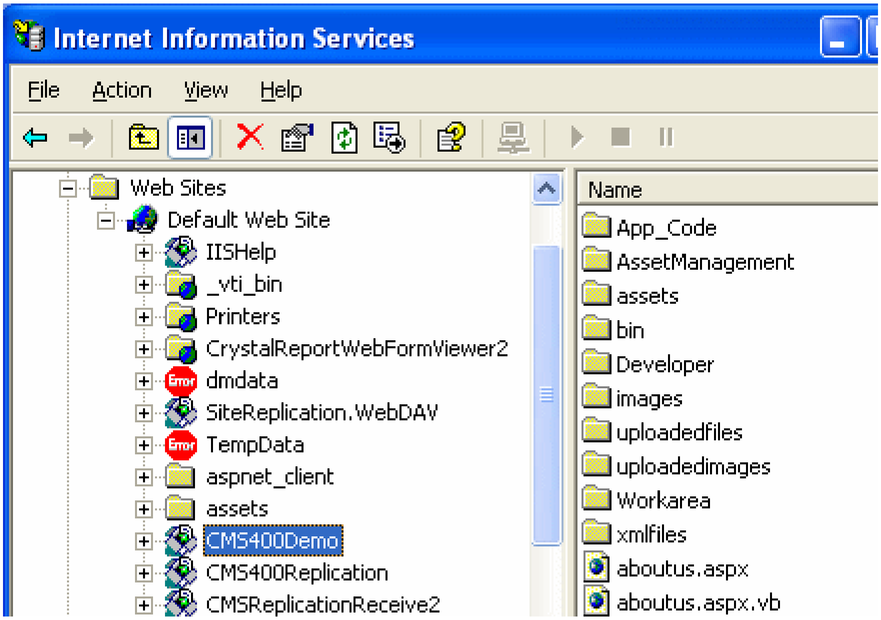


Internet Information Services
File
Action
View
Help

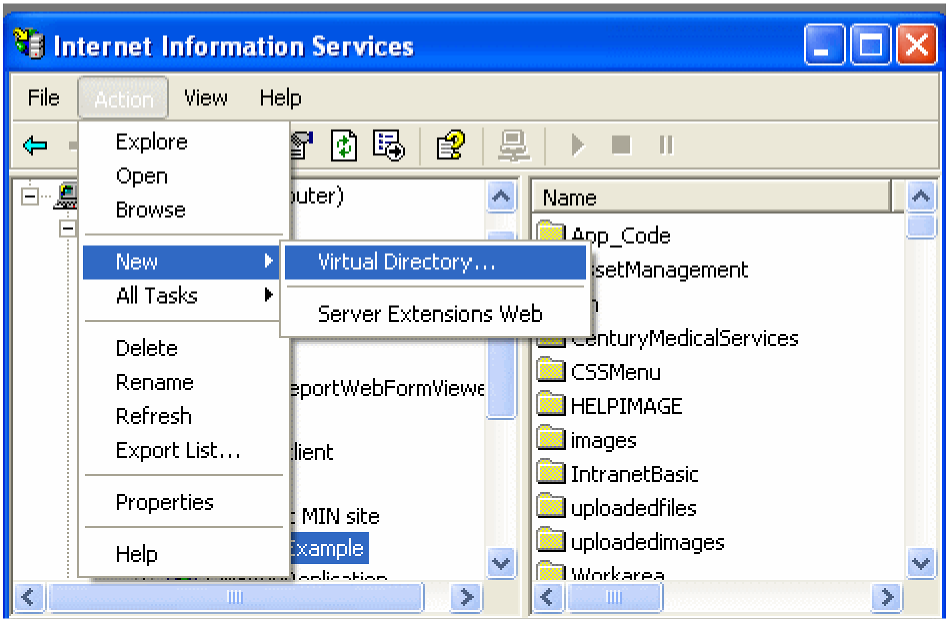
Internet Information Services
- WS10080 (local computer)

Computer	Local	Version
WS10080 (local computer)	Yes	IIS V5.1

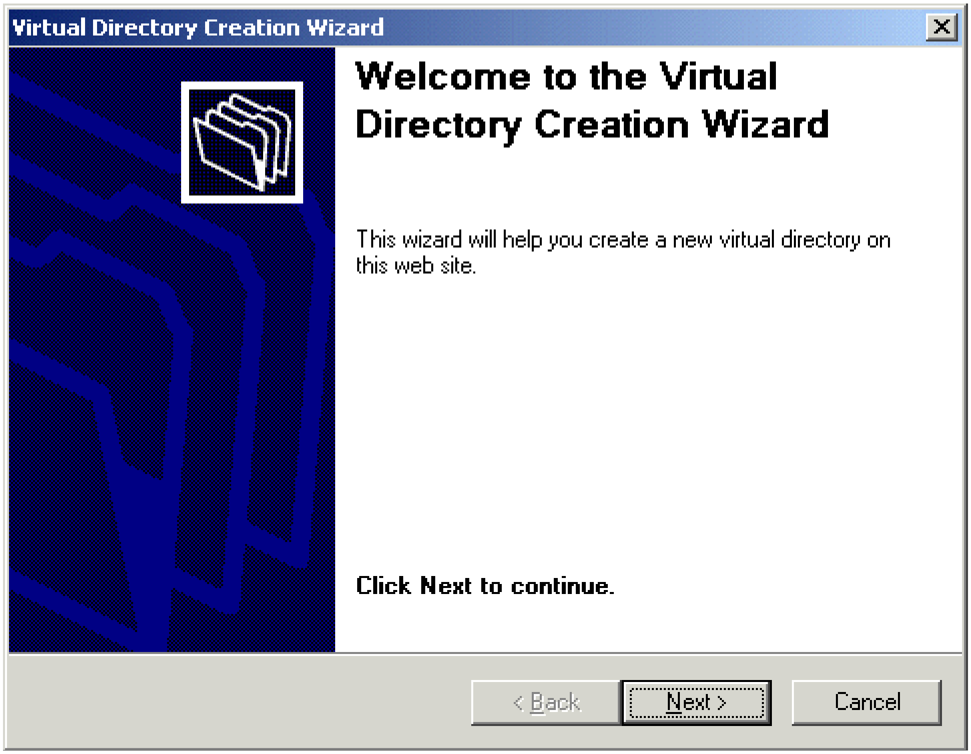
5. In the folder tree on the left side of the console, navigate to the Ektron CMS400.NET Site root folder. In this example, it is **CMS400Demo**.


Internet Information Services
File
Action
View
Help
Web Sites
Default Web Site
IISHelp
_vti_bin
Printers
CrystalReportWebFormViewer2
dmdata
SiteReplication.WebDAV
TempData
aspnet_client
assets
CMS400Demo
CMS400Replication
CMSReplicationReceive2
Name
App_Code
AssetManagement
assets
bin
Developer
images
uploadedfiles
uploadedimages
Workarea
xmlfiles
aboutus.aspx
aboutus.aspx.vb

6. In the toolbar at the top of the screen, follow the path **Action > New > Virtual Directory...**


Internet Information Services
File
Action
View
Help
Explore
Open
Browse
New
All Tasks
Delete
Rename
Refresh
Export List...
Properties
Help
Virtual Directory...
Server Extensions Web
Name
App_Code
AssetManagement
CenturyMedicalServices
CSSMenu
HELPIMAGE
images
IntranetBasic
uploadedfiles
uploadedimages
Workarea

7. The Virtual Directory Creation Wizard is displayed.



Virtual Directory Creation Wizard

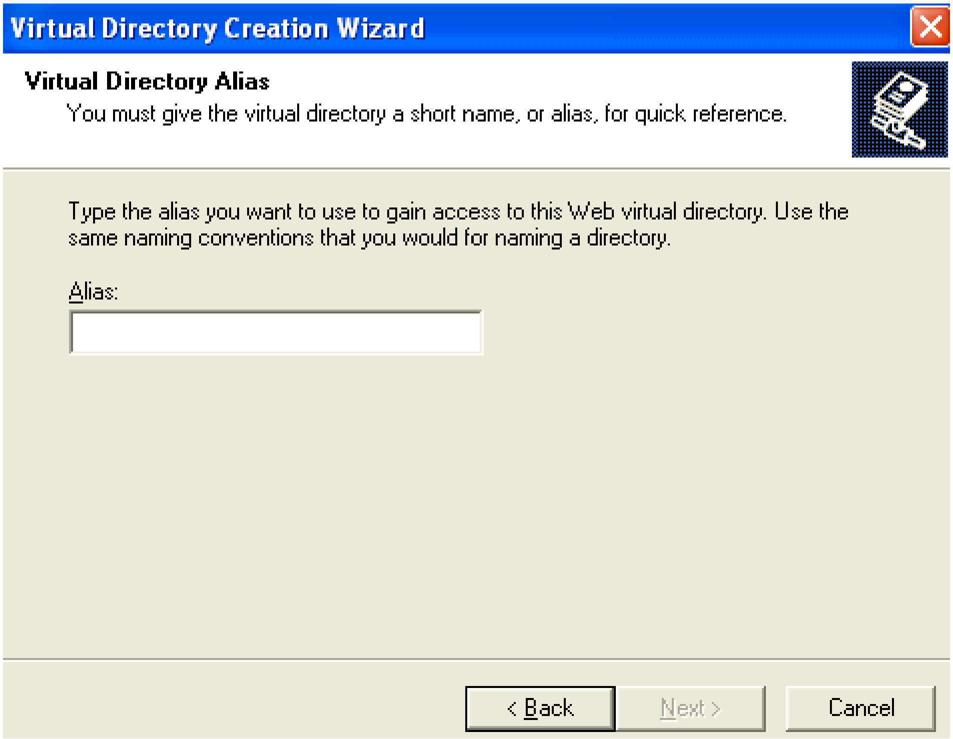
Welcome to the Virtual Directory Creation Wizard

This wizard will help you create a new virtual directory on this web site.

Click Next to continue.

8. Click **Next** to proceed.

9. The Virtual Directory Alias screen is displayed.



Virtual Directory Alias

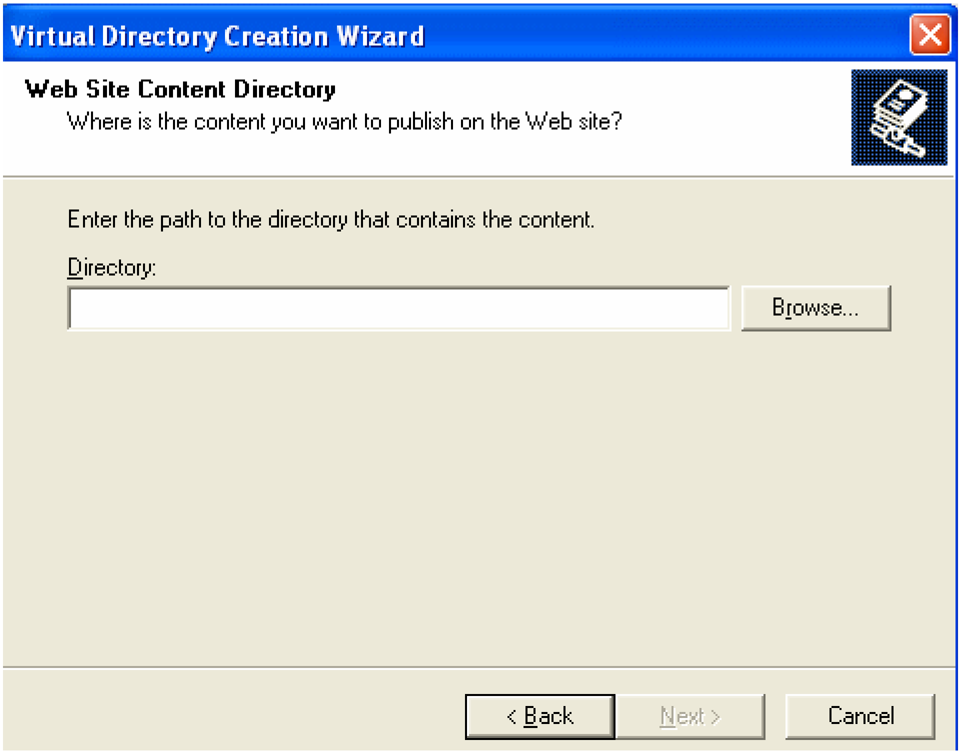
You must give the virtual directory a short name, or alias, for quick reference.

Type the alias you want to use to gain access to this Web virtual directory. Use the same naming conventions that you would for naming a directory.

Alias:

10. Enter an alias for the virtual directory. For example, **LB_Images1**. You will use this name to reference the virtual directory in Ektron CMS400.NET.
11. Click **Next**.

12. The Web Site Content Directory screen is displayed.



Web Site Content Directory

Where is the content you want to publish on the Web site?

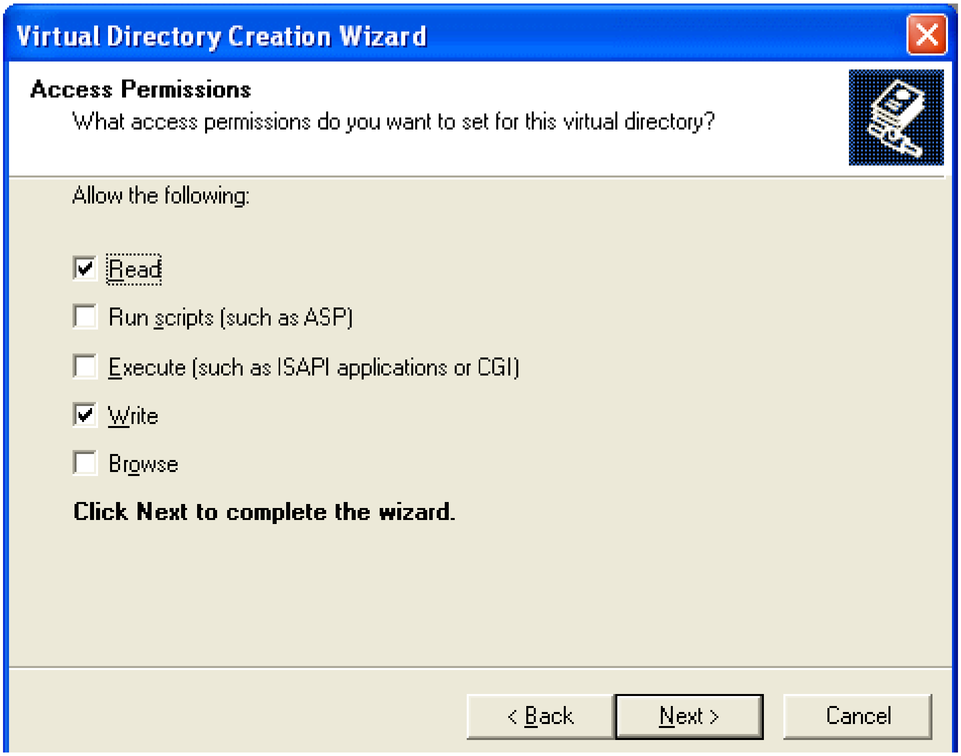
Enter the path to the directory that contains the content.

Directory:

13. Enter the path to the directory to be used for the virtual directory.

NOTE The path must follow the UNC syntax, that is \\{ComputerName}\{FilePath}. For example, `\\Ws10080\uploadedfiles`.

14. Click **Next** to continue.
15. Enter a user and his password that will be used to access the virtual folders. To see a list of possible users, click the **Browse** then **Advanced** buttons.
16. Check off permissions you want to allow for the virtual folder.



Access Permissions
What access permissions do you want to set for this virtual directory?

Allow the following:

☑ Read
☐ Run scripts (such as ASP)
☐ Execute (such as ISAPI applications or CGI)
☑ Write
☐ Browse

Click Next to complete the wizard.

NOTE At a minimum, the IIS user needs Read and Write permissions.

17. Click **Next** to complete the wizard.
18. A confirmation indicates that you have created a virtual directory. Click the **Finish** button.
19. The IIS console is displayed with the virtual directory added to the specified location.
20. Repeat the above steps for each virtual directory you need to create on each Web server running Ektron CMS400.NET.

NOTE Remember, the names of the virtual directories on each server *must* be identical!

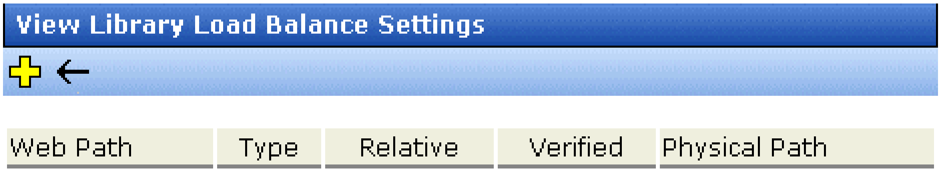
Setting Up Load Balance Paths in Ektron CMS400.NET

In this section, you set up load balance paths in Ektron CMS400.NET that point to the `LB_Images1` and `LB_Files1` virtual directories created earlier.

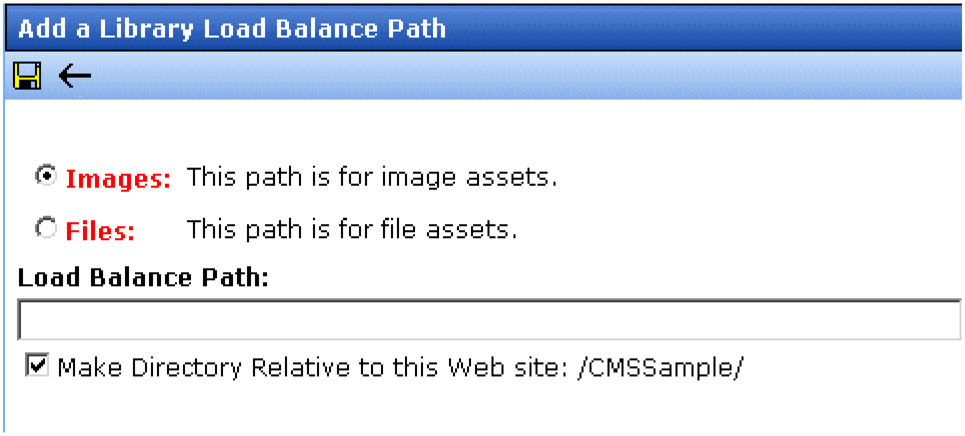
NOTE For additional information about working with load balance paths in Ektron CMS400.NET, refer to ”Load Balancing” on page 157.

To add a load balance path in Ektron CMS400.NET, follow these steps.

1. Log in as an administrator to the Web site you set up in ”Set Up Two Ektron CMS400.NET Web Sites” on page 815.
2. Go to **Library > View Properties > Load Balance** ().


View Library Load Balance Settings
Web Path
Type
Relative
Verified
Physical Path

3. Click the Add button (✚).
4. The Add a Library Load Balancing Path screen is displayed.


Add a Library Load Balance Path

● **Images:** This path is for image assets.

○ **Files:** This path is for file assets.

Load Balance Path:

☑ Make Directory Relative to this Web site: /CMSSample/

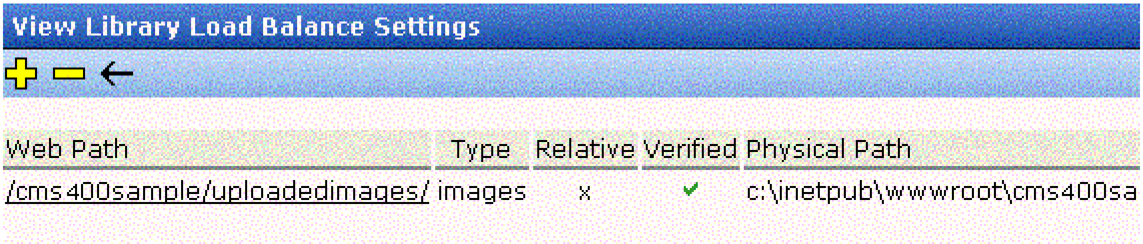
5. Use the following table to help you complete the screen.

Field	Description
Images/Files	Specify if the load balance path folder is for images or files.
Load Balance Path	Enter the path to the virtual directories on your server. (These were set up in ”Creating a Virtual Directory” on page 816.)
Make Relative	If the folder (or virtual folder) resides under your Ektron CMS400.NET site root, check the box to make the path relative to that. Otherwise, remove the check.

6. Click the Save button (💾) to add the load balance folder to the Ektron CMS400.NET library.

   The View Library Load Balance Settings screen appears with the changes. Notice the green check, which indicates that IIS on the local Web server resolved the virtual directory and located its physical folder.

7. To further verify the load balance path is working successfully, go to the View Library Load Balance Setting screen in the Workarea for the other Ektron CMS400.NET Web server.



Web Path	Type	Relative	Verified	Physical Path
/cms400sample/uploadedimages/	images	x	✓	c:\inetpub\wwwroot\cms400sa

Notice that the two Web path names are identical, but the physical paths are different. This proves that IIS resolves each differently.

Ektron CMS400.NET on Three Servers

This section examines a Web site driven by Ektron CMS400.NET and three Web servers through the following topics.

- ”Setting Up Multiple Web Sites” on page 825
- ”Setting Up Virtual Directories for Three Sites” on page 825

- ”Setting Up Load Balancing for Three Servers” on page 825

Setting Up Multiple Web Sites

To run an identical Ektron CMS400.NET Web site on three machines, you must use the same database for each site. To do so, follow instructions in ”Set Up Two Ektron CMS400.NET Web Sites” on page 815.

Setting Up Virtual Directories for Three Sites

Through Internet Information Services (IIS) on all three Web servers, create virtual directories for each image or file folder to be used with your load balancing model. For our example, we create virtual directories on all Ektron CMS400.NET Web servers.

Virtual Directory	Description
LB_Images1	Virtual directory that points to the UploadedImages folder installed on the second Ektron CMS400.NET Web server.
LB_Files1	Virtual directory that points to the UploadedFiles folder installed on the second Ektron CMS400.NET Web server.
LB_Images2	Virtual directory that points to the UploadedImages folder installed on the third Ektron CMS400.NET Web server.
LB_Files2	Virtual directory that points to the UploadedFiles folder installed on the third Ektron CMS400.NET Web server.

These virtual directories must exist in the IIS console for each Web server machine in your load balancing model.

Creating a Virtual Directory

See ”Creating a Virtual Directory” on page 816

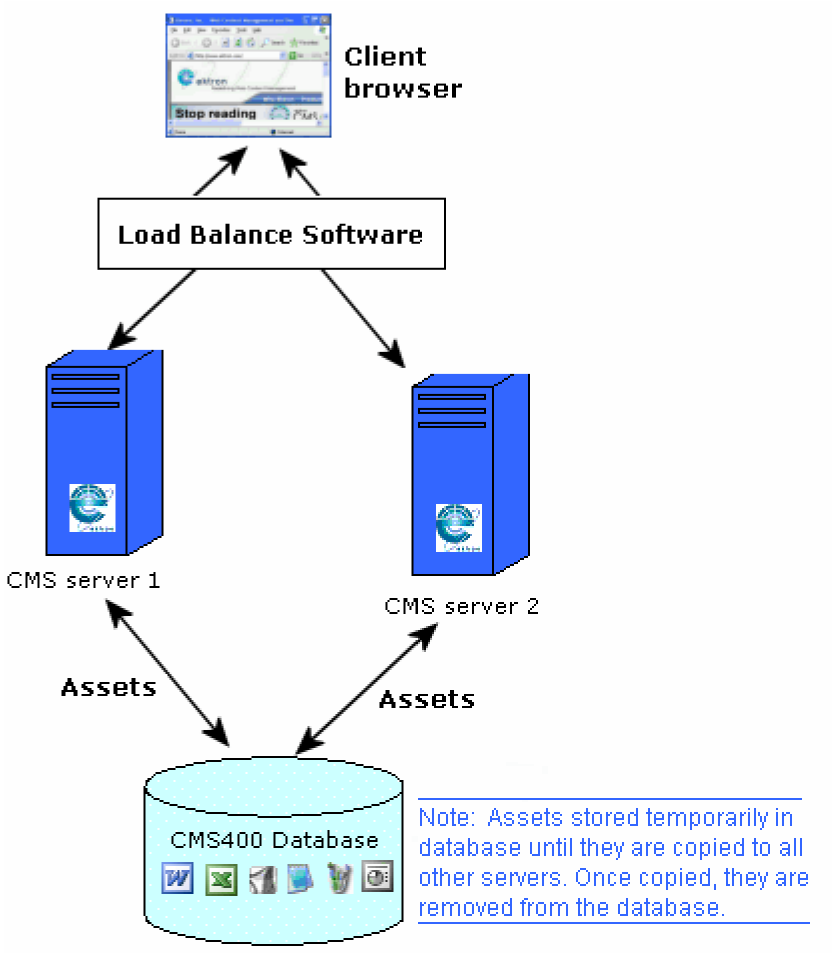
Setting Up Load Balancing for Three Servers

After setting up virtual directories on all Web servers, you’re ready to create load balance paths in Ektron CMS400.NET.

See ”Setting Up Load Balance Paths in Ektron CMS400.NET” on page 822

Load Balancing Assets

Ektron CMS400.NET lets you balance requests to view or work with *assets* among two or more servers. To achieve this, each server has its own copy of every asset.


Client browser
Load Balance Software
CMS server 1
CMS server 2
Assets
Assets
CMS400 Database
Note: Assets stored temporarily in database until they are copied to all other servers. Once copied, they are removed from the database.

To accomplish this, **Ektron CMS400.NET** initially stores every new asset in the database. An Ektron service constantly checks to see if all database assets also exist on each server's file system. To learn about this service, see "Ektron Windows Service" on page 802.

If an asset does not exist on any server in the cluster, it is copied from the database to the server's file system. Once there, the asset is available for requests to work with it. After an asset is copied to all servers, **Ektron CMS400.NET** removes it from the database.

There is no limit to the number of servers or databases that can be load balanced.

See Also: ”Setting up Load Balancing” on page 827

Setting up Load Balancing

To set up load balancing for assets, you need to follow three steps, described below.

1. *Update the AssetManagement.config File*. Within each site’s root folder, open the AssetManagement.config file. To enable load balancing, set the value of the `LoadBalanced` element to **1**.
2. *Update the web.config File*. Within each site’s root folder, open the web.config file. To enable load balancing, make sure the `httphandlers` element is not commented out. (By default, `httphandlers` is commented out.)

   `httpHandlers` should look like below.

```
<httpHandlers>
      <add verb="*" path="*/Assets/*" type="Ektron.ASM.FileHandler.AssetHttpHandler"/>
                   <add verb="*" path="*.asmx"

Additional elements not shown.....

</httpHandlers>
```

3. Enable load balancing for assets in the Ektron Web services file. See ”Enabling Load Balancing of Assets” on page 803

After updating these files for each server in the load balance cluster, sign on to Ektron CMS400.NET. This action sets up the load balance software in the database.

email Features

Configuring SMTP Server

For information about configuring Microsoft's SMTP service for your Ektron CMS400.NET Web server, please refer to Configuring Email Notifications, in the Ektron CMS400.NET Setup Manual.

Automatic eMail Notification

Ektron CMS400.NET has an automated email system that sends emails to the proper users when an action has been, or needs to be, performed. Emails are generated when any of the following actions takes place.

email sent to	When content is
Next approver	Submitted to be published
Next approver	Submitted to be deleted
Author	Published to Web site
Author	Declined to be published or deleted

In order for users to be notified of these actions, the following criteria must be met:

- Valid system email address
- Enabled email notification
- User email address
- User email notification enabled

These values are set in the Edit User screen. *See Also:* "Managing Users" on page 501

The Tasks feature also has automatic email notification. For more information, see ”Email Notification” on page 375.

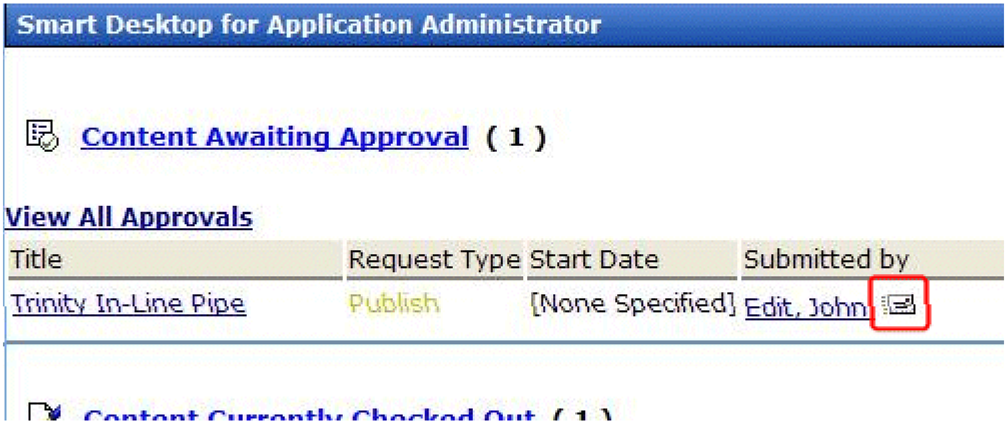
Content of Automatic email

The automatic emails are stored in and received from the database. Each email consists of one string for the subject and one for the body. **Ektron CMS400.NET** does not currently support HTML emails, but the messages are fully customizable. To learn about customizing them, see Customizing **Ektron CMS400.NET** emails in the **Ektron CMS400.NET** Setup Manual.

Instant eMail

In addition to automatic email, **Ektron CMS400.NET** lets you send email instantly to a user or user group from many screens. Your ability to send instant mail is indicated by either

- a small mail icon next to a user or group name, as indicated in red below
- a small mail icon on the toolbar (see second image below)

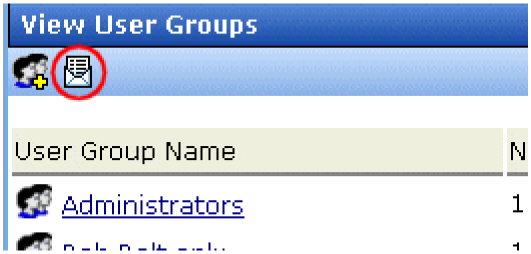


Smart Desktop for Application Administrator

Content Awaiting Approval (1)

View All Approvals

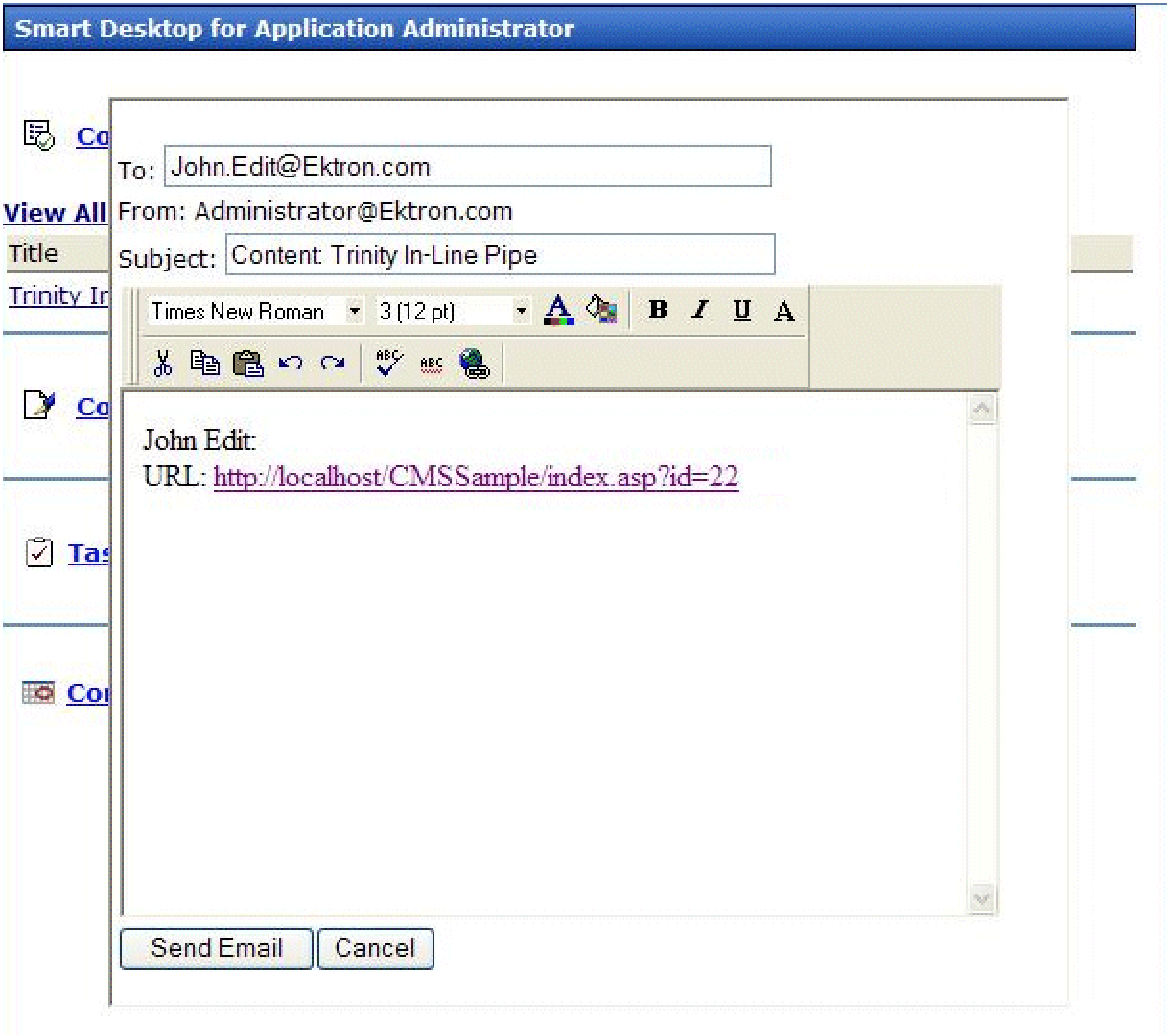
Title	Request Type	Start Date	Submitted by
Trinity In-Line Pipe	Publish	[None Specified]	Edit, John


View User Groups

User Group Name | N

Administrators | 1

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


Smart Desktop for Application Administrator
Co
View All
Title
Trinity Ir
Co
Tas
Cor
Times New Roman
3 (12 pt)
B
I
U
A
Send Email
Cancel

To: John.Edit@Ektron.com

From: Administrator@Ektron.com

Subject: Content: Trinity In-Line Pipe

John Edit:
URL: http://localhost/CMSSample/index.asp?id=22

Conditions for Instant eMail

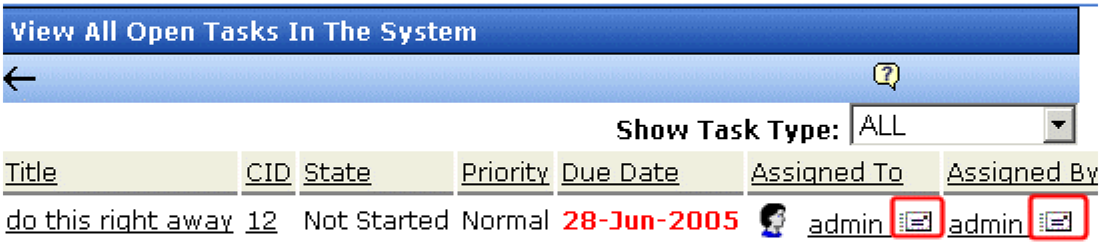
- The user who is using **Ektron CMS400.NET** must have a valid from email address set up in the user profile. If not, email icons do not appear in **Ektron CMS400.NET**.
- The email software must be configured for your server. See "Configuring SMTP Server" on page 828

Where Instant email is Available

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

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

Wherever instant email is available, an email icon appears (circled in the illustration below).

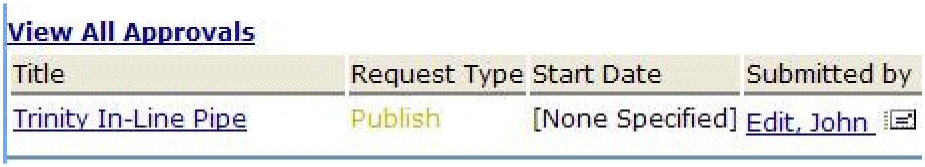


Title	CID	State	Priority	Due Date	Assigned To	Assigned By
do this right away	12	Not Started	Normal	28-Jun-2005	admin	admin

Modifying Instant eMail

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

Field	Source of Default Information	Editable?
To	User you selected to receive the email. If the user does not have valid email address, an error message appears. If you then insert a valid email address, the email is sent. If you specify a group to receive the message, as long as one group member has a valid email address, all group members with valid addresses receive the email.	Yes. If desired, you can add recipients by typing them into this field.

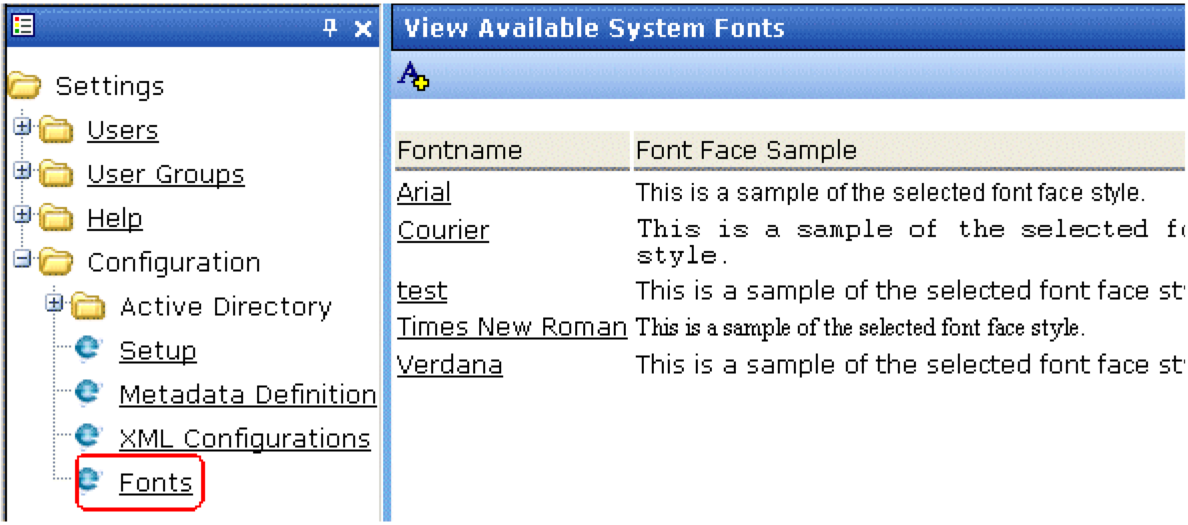
<table>
<tr><th>Field</th><th>Source of Default Information</th><th>Editable?</th></tr>
<tr><td>From</td><td>User who signed on to **Ektron CMS400.NET**.</td><td>No</td></tr>
<tr><td>Subject</td><td>If the email message is linked to content, its title appears.
The screen section below provides an example of content (**Trinity In-Line Pipe**) that is linked to a message.</td><td>Yes</td></tr>
<tr><td colspan="3">
View All Approvals
<table>
<tr><th>Title</th><th>Request Type</th><th>Start Date</th><th>Submitted by</th></tr>
<tr><td>Trinity In-Line Pipe</td><td>Publish</td><td>[None Specified]</td><td>Edit, John</td></tr>
</table></td></tr>
<tr><td>Body of message</td><td>If the email message is linked to content, a link to the content appears.</td><td>Yes</td></tr>
</table>

Font Manager

As an administrator, you can add, edit, and delete fonts to and from the Ektron CMS400.NET application. By adding fonts, you are allowing the content contributors to use them when creating content. Administrators can also edit the name of a font, and delete a font from the system.

Minimizing the number of available fonts makes the Web site look more uniform.

Below is the Font Manager screen.


Settings
Users
User Groups
Help
Configuration
Active Directory
Setup
Metadata Definition
XML Configurations
Fonts

View Available System Fonts

Fontname	Font Face Sample
Arial	This is a sample of the selected font face style.
Courier	This is a sample of the selected f style.
test	This is a sample of the selected font face st
Times New Roman	This is a sample of the selected font face style.
Verdana	This is a sample of the selected font face st

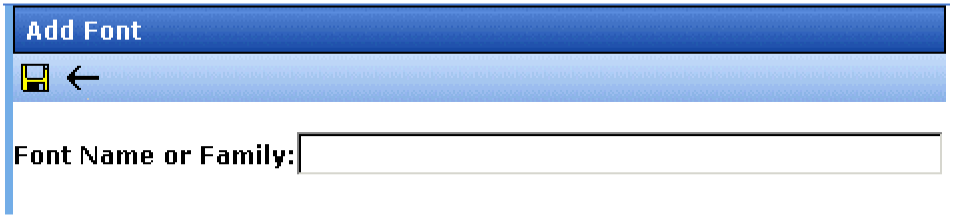
NOTE Only members of the Administrator User Group can view, add, or edit fonts.

Adding Fonts

To add a font to the application, follow these steps.

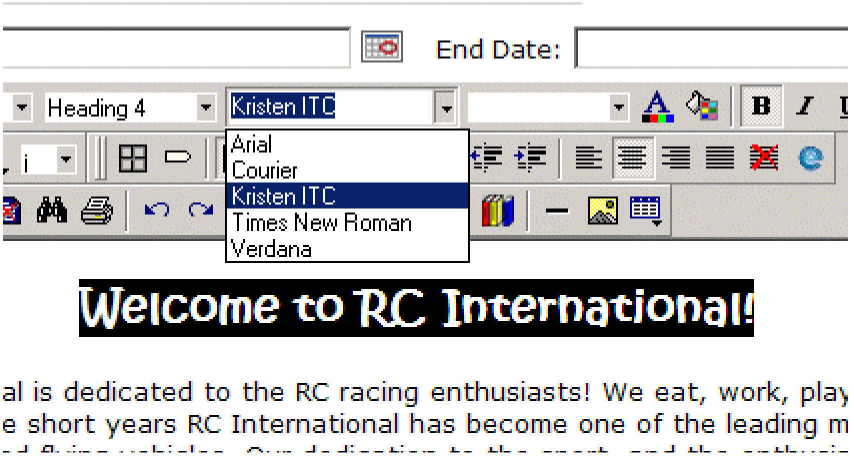
1. From the left frame of the Workarea, click **Settings > Configuration > Fonts**.

2. Click the Add Font button ( ).
3. The add font screen is displayed.


Add Font
Font Name or Family:

4. Enter the font name or family into the text field provided.
5. Click the Save button (.)

The new font is available to use when adding or editing content.


End Date:
Heading 4
Kristen ITC
Arial
Courier
Kristen ITC
Times New Roman
Verdana

Welcome to RC International!

al is dedicated to the RC racing enthusiasts! We eat, work, play
e short years RC International has become one of the leading m

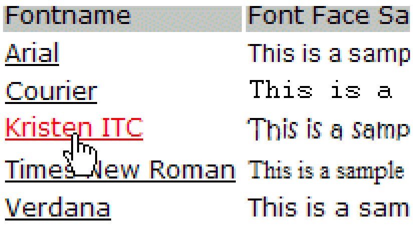
Viewing Fonts

When viewing fonts, you can also edit or delete them.

To view a font:

1. Access the font manager in your Workarea as described in ”Adding Fonts” on page 834.

2. Click the font you want to view.



Fontname	Font Face Sa
Arial	This is a samp
Courier	This is a
Kristen ITC	This is a samp
Times New Roman	This is a sample
Verdana	This is a sam

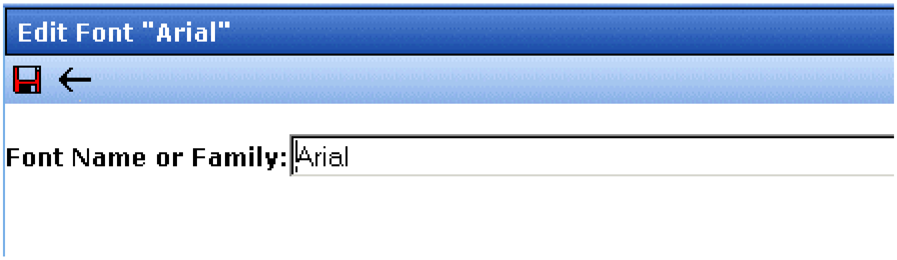
3. The view font screen is displayed.

Edit Fonts

When you edit a font, the font or family name is changed. Editing does not change any fonts in existing content.

To edit a font name, follow these steps.

1. Access the view font screen, as described in "Viewing Fonts" on page 835.
2. Click the Edit button ().
3. The Edit Font screen is displayed.



Edit Font "Arial"

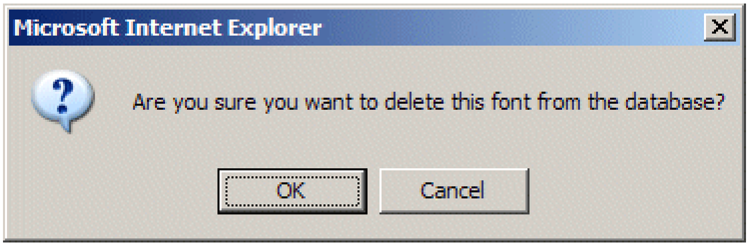
Font Name or Family: Arial

4. Edit the font name or family in the text field specified.
5. When finished, click the Update button ().

Delete Fonts

By deleting a font from the system, you are taking away the content contributors’ use of that font in their content. To delete a font, follow these steps.

1. Access the view font screen, as described in ”Viewing Fonts” on page 835.
2. Click the Delete button (🗑).
3. A message is displayed.



Are you sure you want to delete this font from the database?

4. Click **OK** to delete the font.
5. The screen is refreshed, and the updated fonts table is displayed.

NOTE When you delete a font from Ektron CMS400.NET, you do not delete it from your computer.

Integrating with Other Systems

Microsoft SharePoint Portal Server Integration

Before you begin using the Ektron CMS400.NET Web Parts, it is recommended that you read the following section of the documentation. It provides information about installing and configuring the Ektron CMS400.NET Web Parts, as well as overview information about Microsoft SharePoint Portal Server 2003.

Once completed, you can move on to ”Ektron CMS400.NET Web Parts” on page 852 for information about how to use the Ektron CMS400.NET Web Parts.

Overview

Ektron CMS400.NET can easily be integrated with Microsoft’s SharePoint Portal Server. Ektron CMS400.NET’s custom display functions, as well as other functions, have been configured to be used as Web Parts within the SharePoint Portal Server. By combining the simplicity of Ektron CMS400.NET and the power of Microsoft SharePoint Portal Server, users can easily access, share, and manage Ektron CMS400.NET Web site content from a single application.

This section explains how Ektron CMS400.NET easily, and seamlessly, integrates with Microsoft SharePoint Portal Server through the following topics.

- ”Prerequisites” on page 839
- ”Configuring Your SharePoint Portal Server” on page 840
- ”Microsoft SharePoint Portal Server Overview” on page 848
- ”Ektron CMS400.NET Web Parts” on page 852

Prerequisites

Ektron CMS400.NET Server

A server running Ektron CMS400.NET must have a directory under the web site root folder called `\Workarea\Portals\SharePoint2003`, which contains the necessary SharePoint Portal Server .aspx display pages.

These pages installed when you install the SharePoint integration file. See ”Performing the Installation” on page 840.

This directory is referenced by SharePoint Portal Server’s Web.config file.

NOTE These files enable Ektron CMS400.NET’s Web Parts to work.

SharePoint Portal Server

For Ektron CMS400.NET to successfully integrate with Microsoft SharePoint Portal Server, a Web server must first be set up and configured with the following applications:

- Windows 2003 Server Operating System
- Microsoft SharePoint Portal Server 2003

IMPORTANT! SharePoint requires its own IIS site -- it cannot use the IIS site set up for Ektron CMS400.NET. This is because SharePoint alters some of the settings in the IIS site to which it is installed.

Configuring Your SharePoint Portal Server

Ektron CMS400.NET includes a separate installation program to install necessary files onto your SharePoint Portal server, as well as update necessary files.

The installation program performs many actions, including:

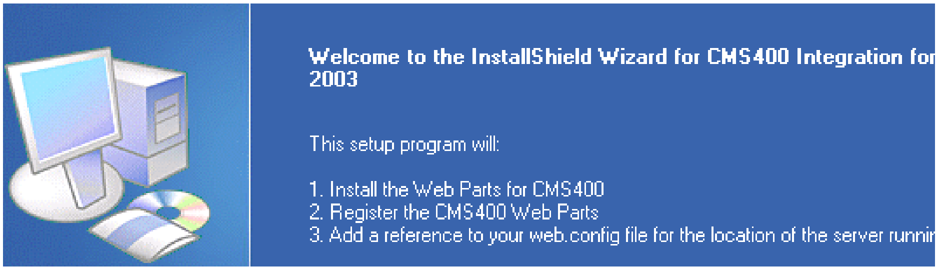
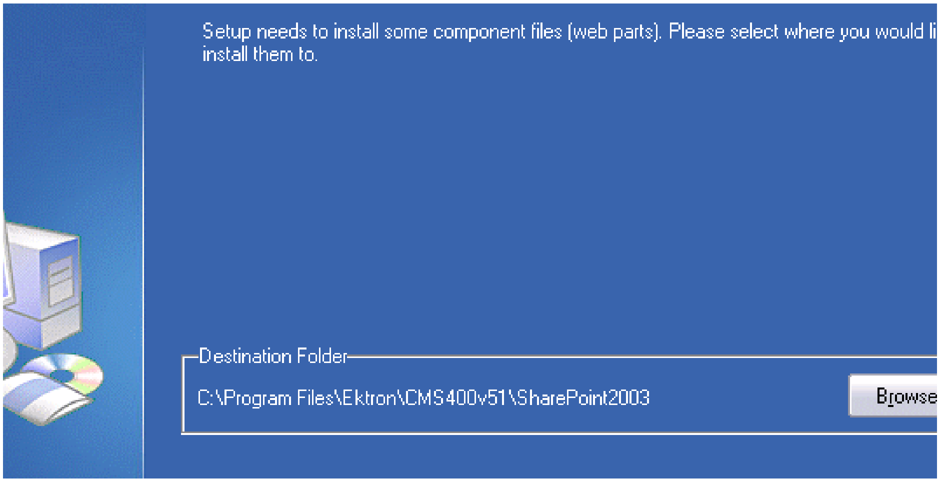
- installing Ektron CMS400.NET Web parts
- registering Web Parts in your SharePoint Web.config file
- updating the **Ektron CMS400.NET** Web.config file with a reference to your Ektron CMS400.NET Web site

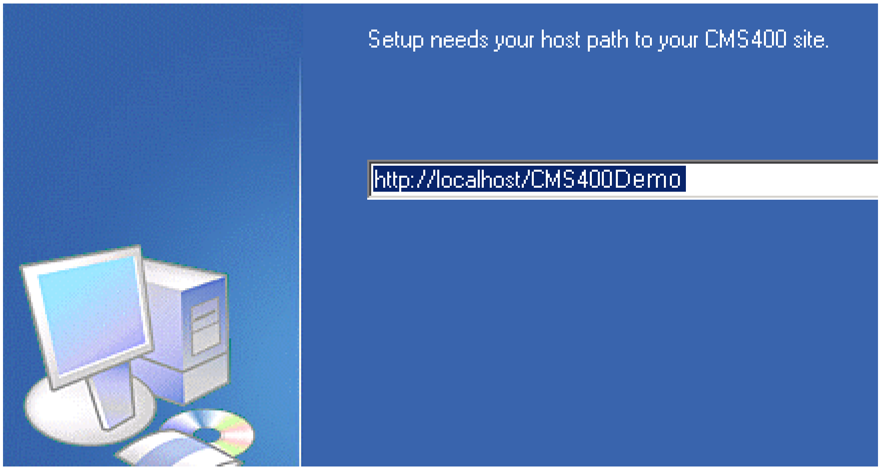
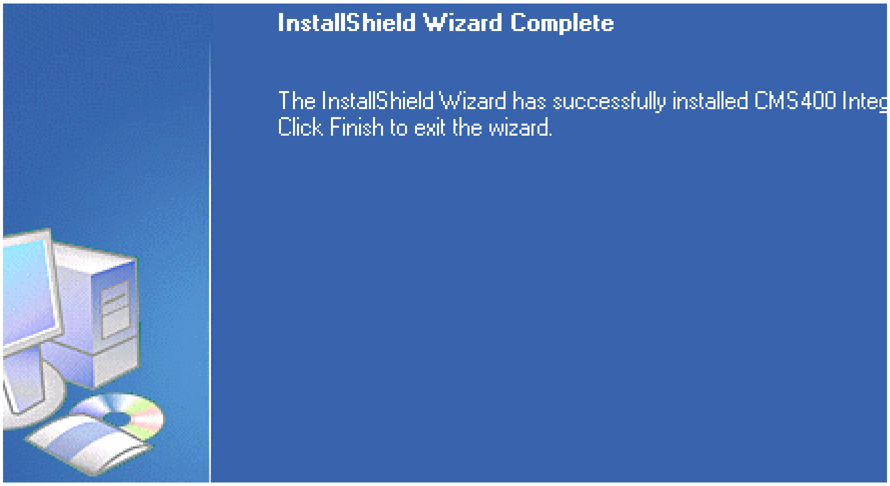
Performing the Installation

To configure your SharePoint Portal server using the Ektron CMS400.NET SharePoint integration .exe, follow these steps.

1. Move the installation file, `C:\Program Files\Ektron\CMS400v61\Utilities\SharePointForCMS400.exe`, to your SharePoint Portal Server.
2. Double-click the installation file.
3. The installation begins.

The following table guides you through the rest of the installation.

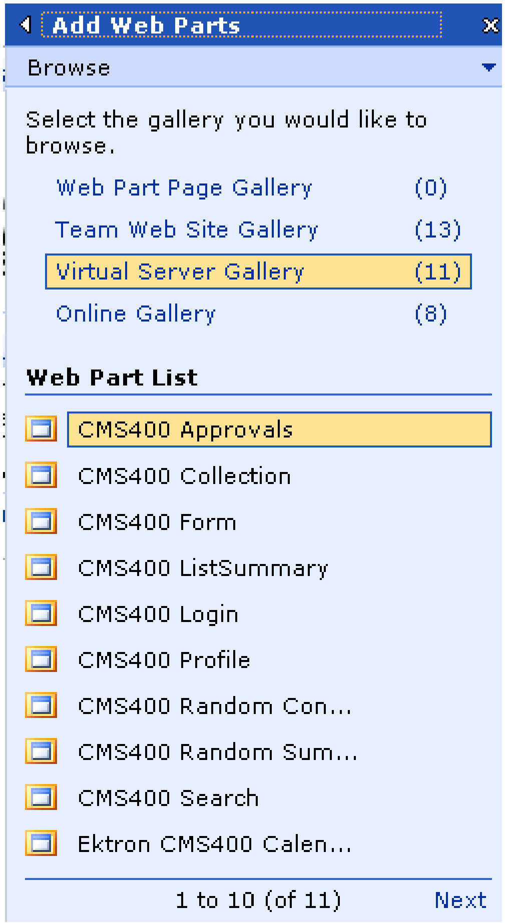
Action	Setup Screen
4. Click **Next** to proceed. The CMS Cab Files screen is displayed.	 **Welcome to the InstallShield Wizard for CMS400 Integration fo 2003** This setup program will: 1. Install the Web Parts for CMS400 2. Register the CMS400 Web Parts 3. Add a reference to your web.config file for the location of the server runni
5. Specify the location on your SharePoint server where you want to install the Ektron CMS400.NET Web Part CAB files. Click **Browse** to specify a directory other than the default. 6. Click **Next** to proceed. The SharePoint Portal Site Location screen is displayed.	 Setup needs to install some component files (web parts). Please select where you would l install them to. Destination Folder: C:\Program Files\Ektron\CMS400v51\SharePoint2003

Action	Setup Screen
7. Enter the fully qualified path of your Ektron CMS400.NET Web site's root directory. For example, `http://www.yourEktronwebsite.com/cms400demo.` Click **Next** to proceed. The installation performs the Web Part registrations. When complete, the Installation Complete screen is displayed.	 Setup needs your host path to your CMS400 site. http://localhost/CMS400Demo
8. Click **Finish** to exit the installation program. The necessary Ektron CMS400.NET integration files and settings are installed and configured on your SharePoint Portal Server.	 **InstallShield Wizard Complete** The InstallShield Wizard has successfully installed CMS400 Integ Click Finish to exit the wizard.

Testing the Installation

Once the installation is complete, perform a test to make sure everything is working. To do this, access SharePoint Portal in a browser and view your **Virtual Server Gallery**.

A list of Web Parts that were added to the Virtual Server Gallery, including the Ektron CMS400.NET Web Parts, appear at the bottom of the page.


Add Web Parts

Browse

Select the gallery you would like to browse.

Web Part Page Gallery	(0)
Team Web Site Gallery	(13)
Virtual Server Gallery	(11)
Online Gallery	(8)

Web Part List

- CMS400 Approvals
- CMS400 Collection
- CMS400 Form
- CMS400 ListSummary
- CMS400 Login
- CMS400 Profile
- CMS400 Random Con...
- CMS400 Random Sum...
- CMS400 Search
- Ektron CMS400 Calen...

1 to 10 (of 11) Next

If the installation was not successful, see ”Installation Troubleshooting” on page 843.

What’s Next?

Having configured the SharePoint Portal Server, you are ready to add Ektron CMS400.NET Web Parts into your portal pages. See ”Microsoft SharePoint Portal Server Overview” on page 848 for information about working with Ektron CMS400.NET Web Parts.

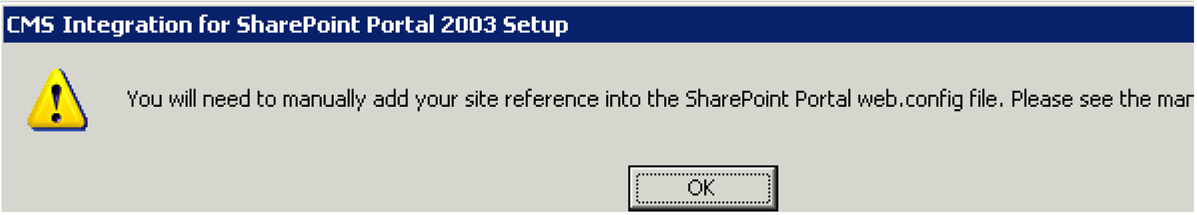
Installation Troubleshooting

During installation, you may receive messages that information you entered is not correct. If you continue the installation with incorrect data, it might be necessary to register the Ektron CMS400.NET Web Parts or update your Web.config file manually.

The following section explains solutions to problems that can occur if incorrect information was submitted during installation.

Incorrect SharePoint Portal Location

If an incorrect SharePoint Portal Server path location is given, the following message is displayed.

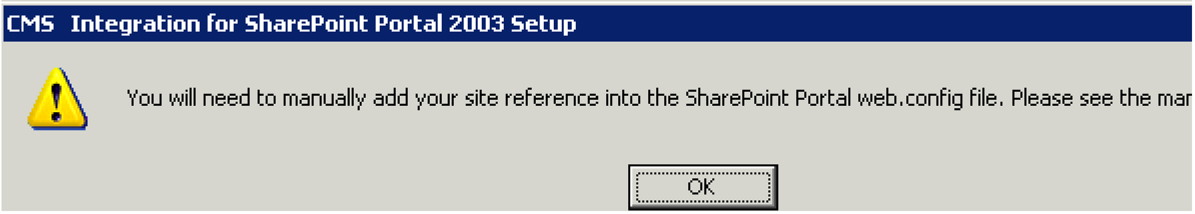

CMS Integration for SharePoint Portal 2003 Setup

You will need to manually add your site reference into the SharePoint Portal web.config file. Please see the mar

When the installation is complete, update your Web.config file manually (or perform the installation program again using the correct path). See "Updating Web.config Manually" on page 845 for more information.

Incorrect Ektron CMS400.NET Host Path

If an incorrect Ektron CMS400.NET Host Path is given during installation, the following message appears.


CMS Integration for SharePoint Portal 2003 Setup

You will need to manually add your site reference into the SharePoint Portal web.config file. Please see the mar

When the installation is complete, update your Web.config manually (or perform the installation program again using the correct path).

See "Updating Web.config Manually" on page 845 for more information.

Updating Web.config Manually

Your SharePoint Portal Server’s Web.config file must contain the following Ektron CMS400.NET information for integration to work:

- Ektron CMS400.NET Web Parts as safe controls
- Ektron CMS400.NET site location

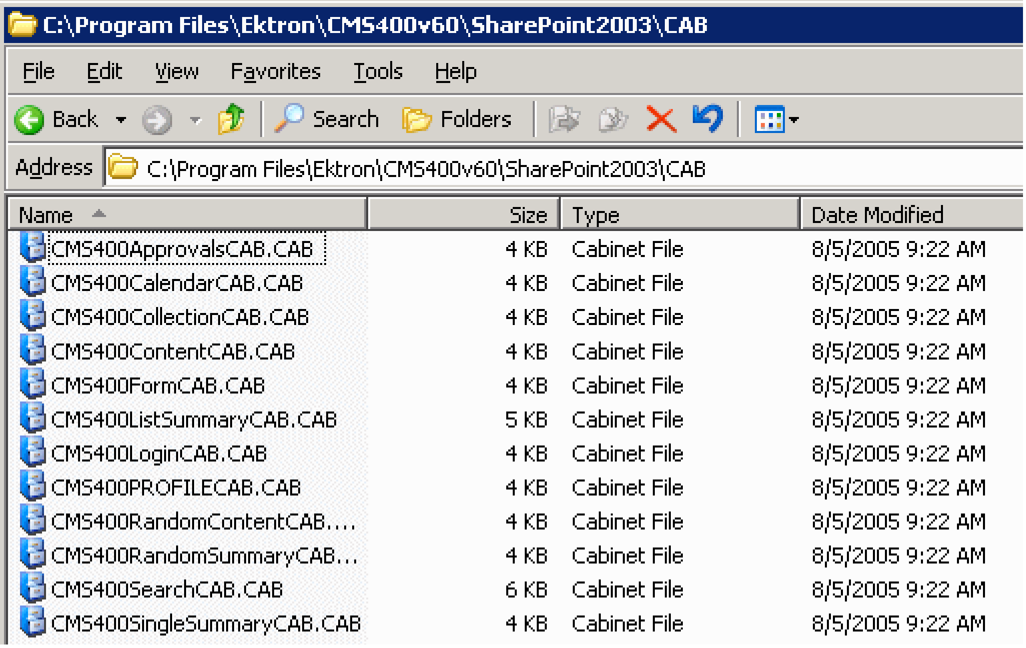
During installation, if you receive a message that you must update your Web.config file manually, the following section explains the actions that you must perform.

Registering Ektron CMS400.NET Web Parts as Safe Controls

In order for SharePoint to use Ektron CMS400.NET Web Parts, they must be registered by SharePoint as safe controls. To do that manually, follow these steps.

1. Complete the Ektron CMS400.NET SharePoint Portal Integration Installation program. This installs the files that need to be registered. *See Also:* ”Configuring Your SharePoint Portal Server” on page 840
2. Access the directory to which you installed CMS cab files during installation.

NOTE The default location is C:\Program Files\Ektron\CMS400\SharePoint2003\CAB



C:\Program Files\Ektron\CMS400v60\SharePoint2003\CAB

Name	Size	Type	Date Modified
CMS400ApprovalsCAB.CAB	4 KB	Cabinet File	8/5/2005 9:22 AM
CMS400CalendarCAB.CAB	4 KB	Cabinet File	8/5/2005 9:22 AM
CMS400CollectionCAB.CAB	4 KB	Cabinet File	8/5/2005 9:22 AM
CMS400ContentCAB.CAB	4 KB	Cabinet File	8/5/2005 9:22 AM
CMS400FormCAB.CAB	4 KB	Cabinet File	8/5/2005 9:22 AM
CMS400ListSummaryCAB.CAB	5 KB	Cabinet File	8/5/2005 9:22 AM
CMS400LoginCAB.CAB	4 KB	Cabinet File	8/5/2005 9:22 AM
CMS400PROFILECAB.CAB	4 KB	Cabinet File	8/5/2005 9:22 AM
CMS400RandomContentCAB....	4 KB	Cabinet File	8/5/2005 9:22 AM
CMS400RandomSummaryCAB...	4 KB	Cabinet File	8/5/2005 9:22 AM
CMS400SearchCAB.CAB	6 KB	Cabinet File	8/5/2005 9:22 AM
CMS400SingleSummaryCAB.CAB	4 KB	Cabinet File	8/5/2005 9:22 AM

3. Double-Click **RegisterWebParts.bat** to execute the batch file that registers Ektron CMS400.NET Web Parts.

NOTE If you receive errors when running the .bat file, edit the file and make sure the correct location to **stsadm.exe** is referenced.

4. When complete, the following lines are added to your Web.config file:

```
<SafeControl Assembly="System.Web, Version=1.0.5000.0, Culture=neutral,
PublicKeyToken=b03f5f7f11d50a3a" Namespace="System.Web.UI.WebControls" TypeName="*"
Safe="True" />
      <SafeControl Assembly="System.Web, Version=1.0.5000.0, Culture=neutral,
PublicKeyToken=b03f5f7f11d50a3a" Namespace="System.Web.UI.HtmlControls" TypeName="*"
Safe="True" />
      <SafeControl Assembly="Microsoft.SharePoint, Version=11.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce111e9429c" Namespace="Microsoft.SharePoint" TypeName="*" Safe="True" />
      <SafeControl Assembly="Microsoft.SharePoint, Version=11.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce111e9429c" Namespace="Microsoft.SharePoint.WebPartPages" TypeName="*"
Safe="True" />
      <SafeControl Assembly="Microsoft.SharePoint, Version=11.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce111e9429c" Namespace="Microsoft.SharePoint.WebControls" TypeName="*"
Safe="True" />
      <SafeControl Assembly="Microsoft.SharePoint, Version=11.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce111e9429c" Namespace="Microsoft.SharePoint.ApplicationPages"
TypeName="*" Safe="True" />
      <SafeControl Assembly="Microsoft.SharePoint, Version=11.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce111e9429c" Namespace="Microsoft.SharePoint.SoapServer" TypeName="*"
Safe="True" />
```

```
      <SafeControl Assembly="Microsoft.SharePoint, Version=11.0.0.0, Culture=neutral, 
PublicKeyToken=71e9bce111e9429c" Namespace="Microsoft.SharePoint.Meetings" TypeName="*" 
Safe="True" />
      <SafeControl Assembly="CMS400Approvals" Namespace="CMS400Approvals" TypeName="*" 
Safe="True" />
     <SafeControl Assembly="CMS400Content" Namespace="CMS400Content" TypeName="*" Safe="True" 
/>
      <SafeControl Assembly="CMS400Login" Namespace="CMS400Login" TypeName="*" Safe="True" />
     <SafeControl Assembly="CMS400RandomSummary" Namespace="CMS400RandomSummary" TypeName="*" 
Safe="True" />
      <SafeControl Assembly="CMS400Calendar" Namespace="CMS400Calendar" TypeName="*" 
Safe="True" />
      <SafeControl Assembly="CMS400Form" Namespace="CMS400Form" TypeName="*" Safe="True" />
     <SafeControl Assembly="CMS400Profile" Namespace="CMS400Profile" TypeName="*" Safe="True" 
/>
      <SafeControl Assembly="CMS400Search" Namespace="CMS400Search" TypeName="*" Safe="True" /
>
      <SafeControl Assembly="CMS400Collection" Namespace="CMS400Collection" TypeName="*" 
Safe="True" />
      <SafeControl Assembly="CMS400ListSummary" Namespace="CMS400ListSummary" TypeName="*" 
Safe="True" />
     <SafeControl Assembly="CMS400RandomContent" Namespace="CMS400RandomContent" TypeName="*" 
Safe="True" />
     <SafeControl Assembly="CMS400SingleSummary" Namespace="CMS400SingleSummary" TypeName="*" 
Safe="True" />
```

The Ektron CMS400.NET Web Parts are successfully registered, and your Web.config is updated with the Web Parts registered as safe controls.

Specifying Your Ektron CMS400.NET Site Path Manually

The Web.config file must contain a reference to your Ektron CMS400.NET Web site. During installation, if an incorrect path or no path was given, you need to update your Web.config file with the correct Ektron CMS400.NET's site path. To do this, follow these steps.

1. Open your SharePoint Portal Server's Web.config for editing with a text editing program such as NotePad.
2. Enter the following information within the `<configuration>` tags.

```
<appSettings>

<add key="CMS400sitelocation" value="[CMS400SitePath]" />

</appSettings>
```

   Where `[CMS400SitePath]` is a fully qualified path to the directory in your Ektron CMS400.NET Web server that contains the Ektron CMS400.NET display files for SharePoint.

For example, `http://www.yourEktronwebsite.com/cms400demo/cms400scripts/portals/sharepoint2003/`

3. Save and close your Web.config file

Microsoft SharePoint Portal Server Overview

SharePoint Portal Server 2003 enables enterprises to develop an intelligent portal that seamlessly connects users, teams, and knowledge so that people can take advantage of relevant information across business processes to help them work more efficiently.

SharePoint Portal Server 2003 provides an enterprise business solution that integrates information from various systems into one solution through single sign-on and enterprise application integration capabilities, with flexible deployment options and management tools.

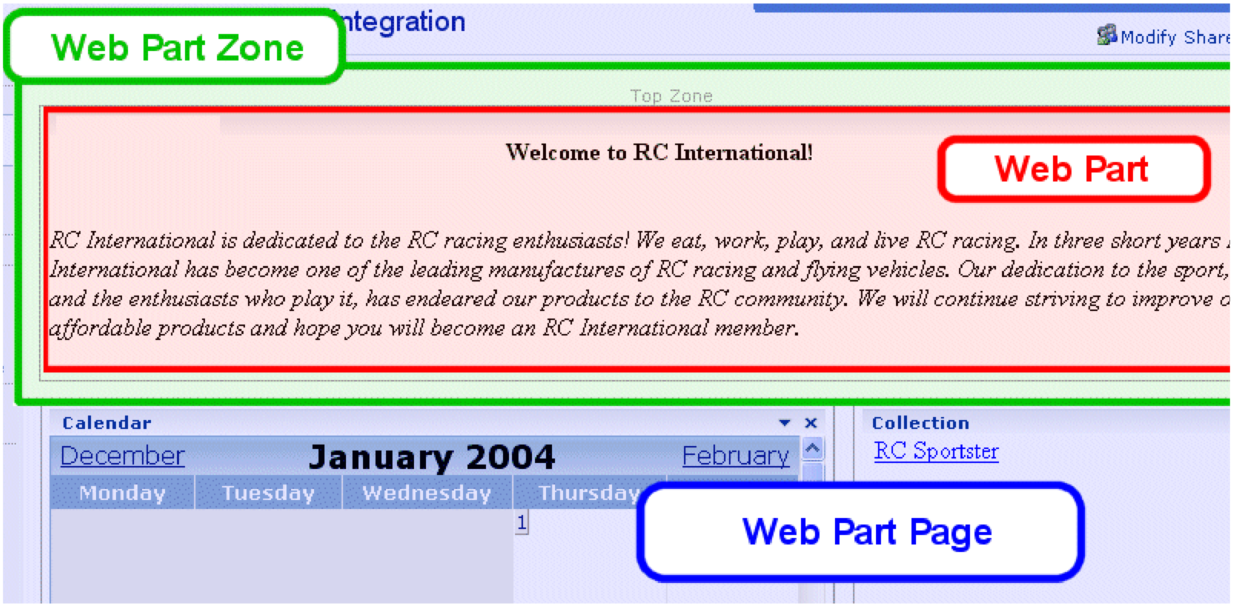
The portal facilitates end-to-end collaboration by enabling aggregation, organization, and search capabilities for people, teams, and information. Users can find relevant information quickly through customization and personalization of portal content and layout, as well as by audience targeting. Organizations can target information, programs, and updates to audiences based on their organizational role, team membership, interest, security group, or any other membership criteria that can be defined.

SharePoint Portal Web Page Layout

All Web pages in SharePoint have the same layout characteristics. Each Web page is comprised of the following:

- Web Part page
- Web Part zone
- Web Part

The following graphic shows the relationship of these components on a Web page in SharePoint.



Welcome to RC International!

RC International is dedicated to the RC racing enthusiasts! We eat, work, play, and live RC racing. In three short years
International has become one of the leading manufactures of RC racing and flying vehicles. Our dedication to the sport,
and the enthusiasts who play it, has endeared our products to the RC community. We will continue striving to improve o
affordable products and hope you will become an RC International member.

Web Part Zone
ntegration
Modify Share
Top Zone
Web Part
Calendar
December
January 2004
February
Monday
Tuesday
Wednesday
Thursday
1
Collection
RC Sportster
Web Part Page

What is a Web Part?

Components of a SharePoint Portal page are called Web Parts.

Microsoft defines a Web Part as:

> A modular unit of information that consists of a title bar, a frame, and content. Web Parts are the basic building blocks of a Web Part Page. A Web Part is the combination of a Web Part Description file (.dwp) and a Web Part assembly file (.dll). All Web Parts are based on Web Custom Controls.

Ektron has created a Web Part for each Ektron CMS400.NET display function, as well as Web Parts for other useful Ektron CMS400.NET information.

Three Types of Web Parts

There are three types of Web Parts.

Type	Description	Available to
Shared	A Web Part added to a Web Part Page by a user who is creating or making changes to the Web Part Page in shared view	All users of a Web Part Page with appropriate permissions
Personalized	A shared Web Part with one or more property values modified by a user who has made changes to the Web Part in personal view	The user who made the changes. Other users continue to see the shared Web Part.
Private	A Web Part that a user has • added to a Web Part Page from a Web Part gallery or • imported from a computer while creating or making changes to the Web Part Page in personal view	The user who added or imported the Web Part. Other users cannot see private Web Parts.

When properly configured, Ektron CMS400.NET Web Parts are shared Web Parts that can be personalized by different users (assuming they have the necessary permissions).

The type of Web Part you are working with can be important because:

- You may have permission to modify only some types of Web Parts on certain Web Part Pages, but not on other Web Part Pages
- You may be able to connect to certain types of Web Parts on a Web Part Page, but not to other types of Web Parts on the same Web Part Page

Web Part Zones

The areas, or zones, are the locations on a SharePoint Web Parts page where Web Parts can be inserted. Web Part zones can contain one or more Web Parts.

Microsoft defines a Web Part zone as:

> A container with a set of properties that can be configured to control the organization and format of Web Parts on a Web Part Page. Web Part zones can also be used to provide protection against changes to Web Parts.

Although their sizes are customizable, all Web Part pages contain right and left Web zones.

SharePoint Server Permissions

Regardless of other permissions, a SharePoint Portal Server user must have at least **Member** permissions to be able to insert and customize Ektron CMS400.NET Web Parts. These permissions are configured on the SharePoint server by the *SharePoint Portal Server* administrator, not the Ektron CMS400.NET administrator.

Refer to your SharePoint documentation for information about giving SharePoint users Member permissions.

Personal vs. Shared View

When adding Web Parts to a SharePoint Portal page, you may either insert them into a shared or personal Web page. The following table contrasts the views.

Web Page View	Description
Shared	A view of a list, document library, or Web Part Page that every user with appropriate permissions for a site can see. The shared view of a Web Part Page uses shared property values. Changes made to a shared view apply to the list, library, or page as it appears to all users.
Personal	A view of a list, SharePoint document library, or Web Part Page that is available only to a particular user. The personal view of a Web Part Page uses a combination of shared property values and personalized property values. Changes made to a personal view apply only to the list, library, or page in that view and are therefore visible to that user only.

Keep this information in mind when inserting Web Parts.

Toggling Between Shared and Personal View

When logged in and in Edit Page mode, you can toggle between shared view and personal view by following these steps.

1. Click **Modify Shared Page** or **Modify My Page** (depending on your current settings).
2. A menu appears.
3. Click **Shared View** or **Personal View** to display the respective view.
4. The page refreshes, and the change is reflected.
5. Repeat this process to return to the previous view.

Ektron CMS400.NET Web Parts

When configured properly, all Ektron CMS400.NET Web Parts are available to be inserted by browsing to the SharePoint Portal **Virtual Server Gallery**.

See Also:

- ”Inserting Ektron CMS400.NET Web Parts” on page 852
- ”Modifying Web Parts” on page 855
- ”Managing Ektron CMS400.NET Web Parts” on page 856

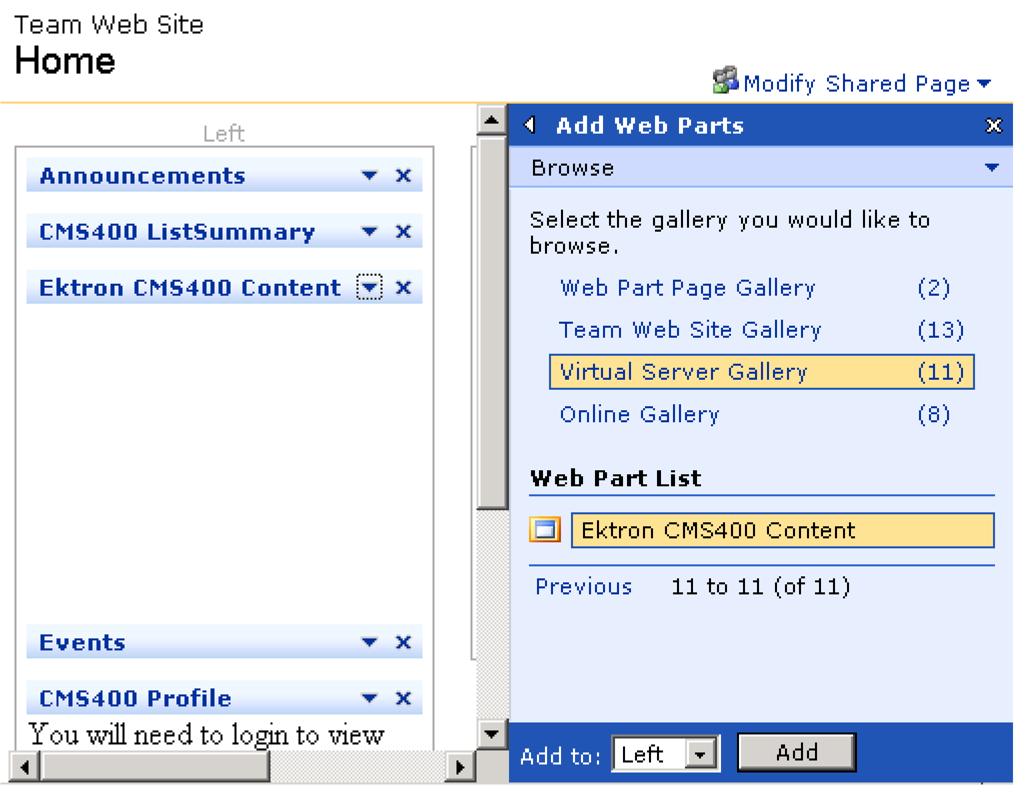
Inserting Ektron CMS400.NET Web Parts

This section explains the basics of inserting Ektron CMS400.NET Web Parts.

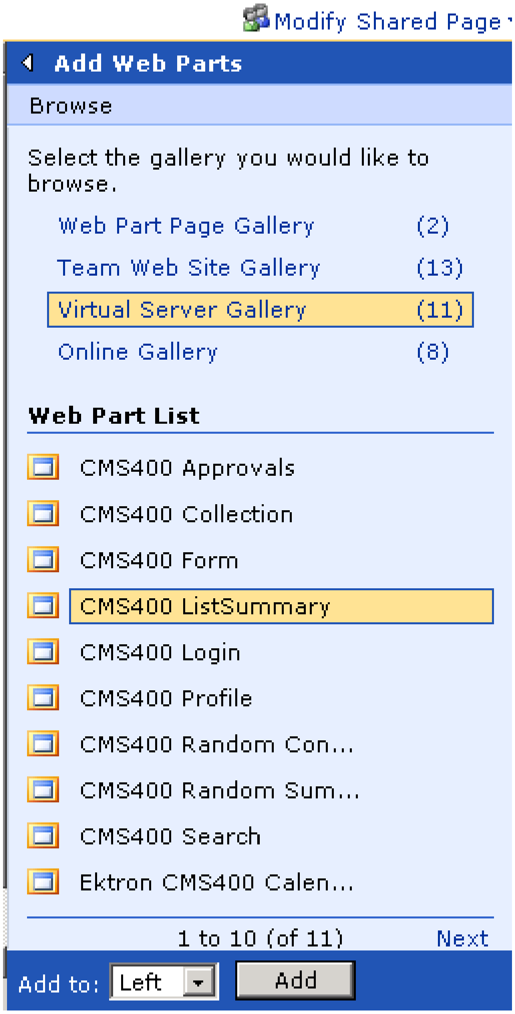
1. Log in to SharePoint Portal Server.
2. Create or navigate to the Web Part zone into which you want to insert an Ektron CMS400.NET Web Part.
3. Click **Modify Shared Page**, **Add Web Parts**, then **Browse**.
4. The Web Part zones are displayed, and the Add Web Parts menu appears on the right side of the screen.
5. Click **Virtual Server Gallery**.
6. All Web Parts added to the Virtual Server Gallery, including the Ektron CMS400.NET Web Parts, appear at the bottom of the page.

NOTE For information about Ektron CMS400.NET Web Parts, see "Managing Ektron CMS400.NET Web Parts" on page 856.

7. Insert an Ektron CMS400.NET Web Part one of two ways:

Method	Screen
Drag and drop the Web Part to the desired zone	

Team Web Site
Home
Modify Shared Page
Left
Announcements
CMS400 ListSummary
Ektron CMS400 Content
Events
CMS400 Profile
You will need to login to view
Add Web Parts
Browse
Select the gallery you would like to browse.
Web Part Page Gallery (2)
Team Web Site Gallery (13)
Virtual Server Gallery (11)
Online Gallery (8)
Web Part List
Ektron CMS400 Content
Previous 11 to 11 (of 11)
Add to: Left
Add

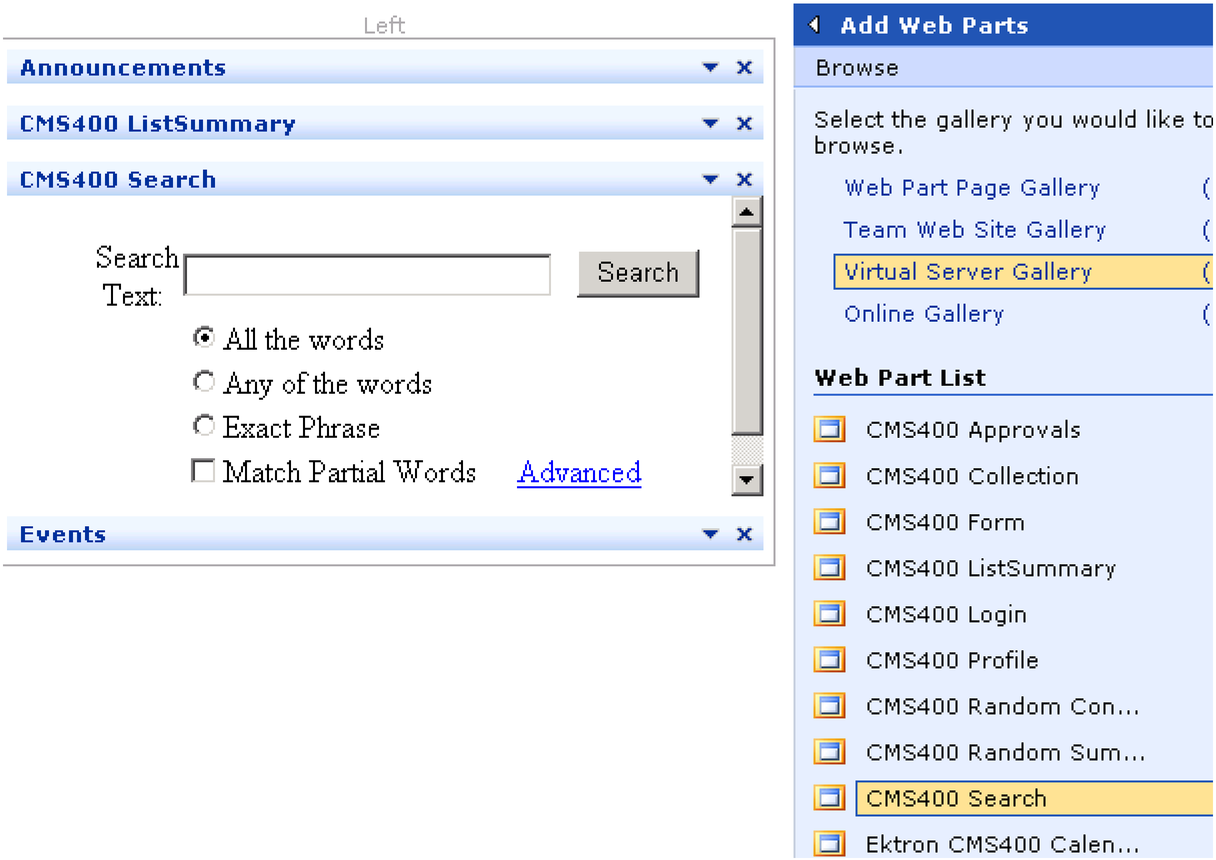
Method	Screen
1. Click a Web Part. 2. Choose the location at the bottom of the page. 3. Click **Add**.	

Select the gallery you would like to browse.

Add to: Left

Modify Shared Page
Add Web Parts
Browse
Web Part Page Gallery (2)
Team Web Site Gallery (13)
Virtual Server Gallery (11)
Online Gallery (8)
Web Part List
CMS400 Approvals
CMS400 Collection
CMS400 Form
CMS400 ListSummary
CMS400 Login
CMS400 Profile
CMS400 Random Con...
CMS400 Random Sum...
CMS400 Search
Ektron CMS400 Calen...
1 to 10 (of 11)
Next
Add

The selected Web Part is added to the selected zone.



Select the gallery you would like to browse.

Left
Announcements
CMS400 ListSummary
CMS400 Search
Search Text:
Search
All the words
Any of the words
Exact Phrase
Match Partial Words
Advanced
Events
Add Web Parts
Browse
Web Part Page Gallery
Team Web Site Gallery
Virtual Server Gallery
Online Gallery
Web Part List
CMS400 Approvals
CMS400 Collection
CMS400 Form
CMS400 ListSummary
CMS400 Login
CMS400 Profile
CMS400 Random Con...
CMS400 Random Sum...
CMS400 Search
Ektron CMS400 Calen...

4. Continue to insert all desired Web Parts onto your shared or personal Web page.

Modifying Web Parts

All Web Parts have three properties that you can modify.

Property	Lets you
Appearance	Adjust appearance settings such as height, width, and title.
Layout	Adjust location, order, and other layout information.
Advanced	Set advanced options.

NOTE Refer to your Microsoft SharePoint documentation for information about configuring these properties.

Some Ektron CMS400.NET Web Parts have additional configuration settings.

Modifying a Web Part

To modify a Web Part that has been inserted into a Web Part zone, follow these steps.

1. Log into your SharePoint Portal Server.
2. Navigate to a Web Part zone that contains an Ektron CMS400.NET Web Part that you want to modify.
3. Click the Down Arrow (▼) at the top right corner of the Web Part you want to modify.
4. The Web Part Menu is displayed.
5. Click **Modify Shared Web Part**.
6. The Web Part is surrounded by a yellow dashed border, and the modify Web Part menu appears on the right side of the screen.
7. Modify the Web Part.

NOTE Information about modifying Ektron CMS400.NET Web Parts can be found in ”Managing Ektron CMS400.NET Web Parts” on page 856.

8. Click **Apply** for the changes to take effect without closing the menu. Or, click **OK** to save and close the menu.

Managing Ektron CMS400.NET Web Parts

Ektron created Web Parts for all display functions in Ektron CMS400.NET, as well as two others. The following table lists each Web Part and its functionality.

Web Part	Displays	More Information
Approvals	A list of content awaiting approval by the logged in Ektron CMS400.NET user.	”Approvals Web Part” on page 857
Calendar	A calendar created for the Ektron CMS400.NET Web site.	”Calendar Web Part” on page 859

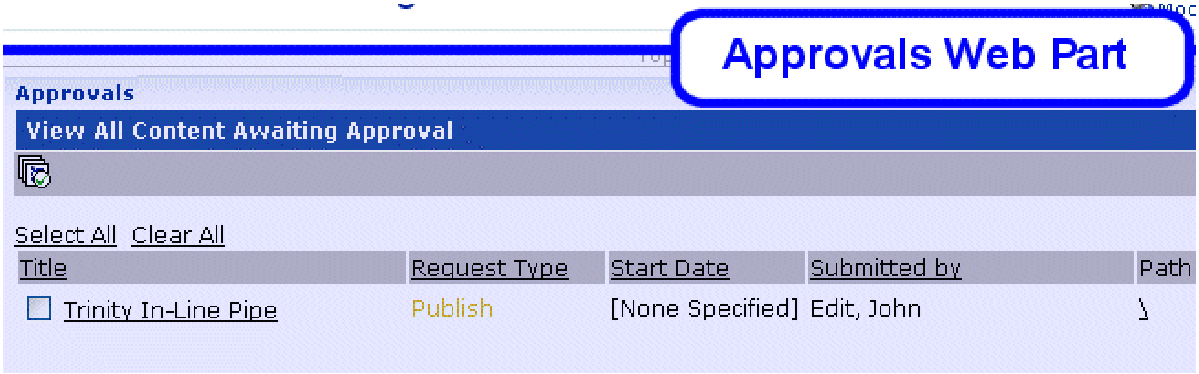
Web Part	**Displays**	**More Information**
Collection	A collection, as well as its display function, for a collection created in the Ektron CMS400.NET Web site.	”Collection Web Part” on page 861
Content	Content created for the Ektron CMS400.NET Web site.	”Content Web Part” on page 863
Form	A form content item created for the Ektron CMS400.NET Web site.	”Form Content Web Part” on page 865
ListSummary	A summary list for a specified content folder in the Ektron CMS400.NET Web site.	”Summary List Web Part” on page 868
Login	A login button which allows users to log in, and be authorized, by the Ektron CMS400.NET Web site.	”Login Web Part” on page 872
Profile	Configurable profile settings for the logged in Ektron CMS400.NET user.	”Profile Web Part” on page 873
Random Content	Randomly displays the content of a content block that belongs in a specified collection. • “id” represents the ID number of the collection to which the content block belongs • “XSLTId” is the ID number of the display XSLT that will be applied to content blocks in the collections	
Random Summary	Randomly displays the summary of a content block that belongs in a specified collection. The “id” property represents the ID number of the collection to which the content blocks belong.	
Search	Ektron CMS400.NET Web site search box and search results.	”Search Web Part” on page 875

Approvals Web Part

When logged into Ektron CMS400.NET via Microsoft SharePoint Portal Server, the approvals Web page displays a list of content awaiting your approval.

NOTE See ”Login Web Part” on page 872 for additional information.

Here is an example of the approvals Web Part displayed in SharePoint Server.


Approvals Web Part
Approvals
View All Content Awaiting Approval
Select All
Clear All

Title	Request Type	Start Date	Submitted by	Path
☐ Trinity In-Line Pipe	Publish	[None Specified]	Edit, John	\

The approvals Web Part is identical to the approvals report page within the Ektron CMS400.NET Workarea.

Approvals Web Part Settings

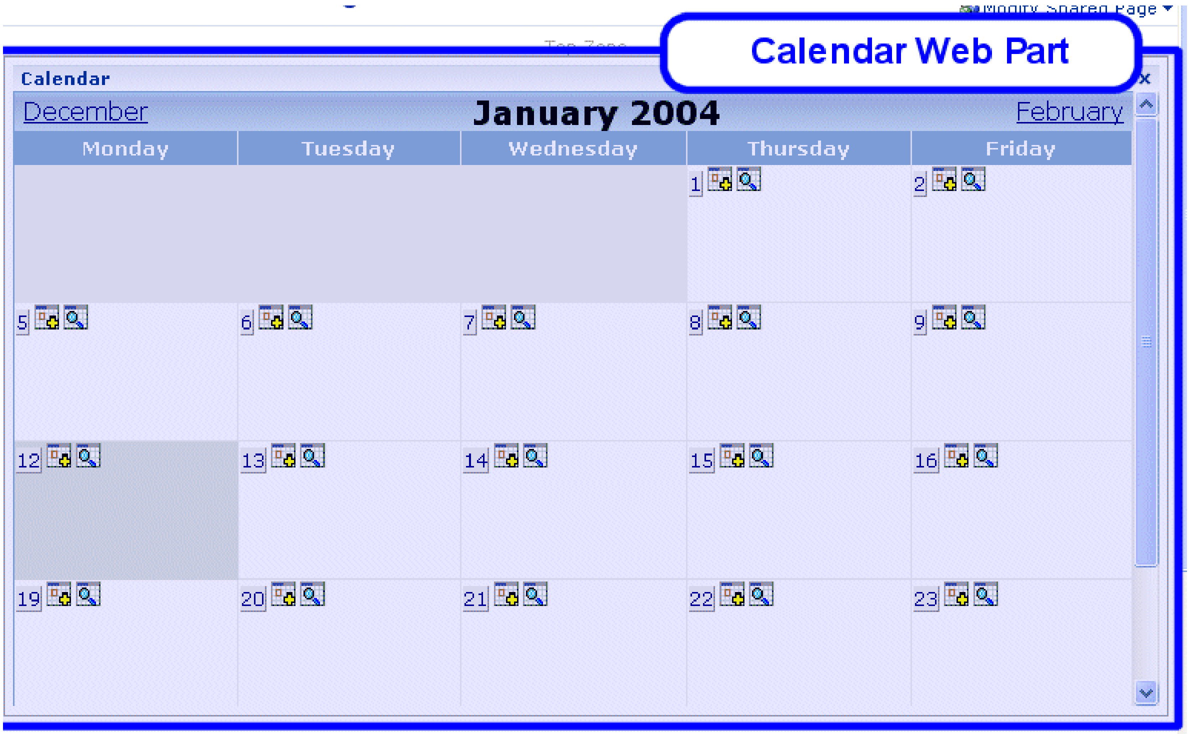
The Approvals Web Part includes no additional settings.

Approving Content via SharePoint

After viewing approvals, you can approve any content as you would in the Ektron CMS400.NET Web site.

Calendar Web Part

The calendar Web Part displays an event calendar created within the Ektron CMS400.NET Web site. Here is an example of a calendar Web Part displayed in the SharePoint Portal Server.


Calendar Web Part
Calendar
December
January 2004
February
Monday
Tuesday
Wednesday
Thursday
Friday
1
2
5
6
7
8
9
12
13
14
15
16
19
20
21
22
23

In addition to displaying the event calendar, if you are logged into the Ektron CMS400.NET Web site via SharePoint Portal Server, you can add and manage calendar events (assuming you have permissions to do so).

NOTE See "Login Web Part" on page 872 for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

Calendar Web Part Settings

The calendar Web Part can be configured to display any event calendar from your Ektron CMS400.NET Web site. To configure the calendar Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the calendar Web Part, as described in "Modifying Web Parts" on page 855.

2. Minimize the **Appearance Settings**, and expand the **CMS400.NET Calendar settings**.
3. The Calendar Web Part Settings page is displayed.
4. Change the value in the **CalendarID** field to the ID number of the event calendar you want to be displayed.
5. Click **Apply** for the changes to take effect without closing the menu.
6. The screen is refreshed with the updated calendar displayed.
7. Make additional changes to the Calendar Web Part. Or, click **OK** to close the Modify Web Part area.

   Clicking **OK** returns you to the Edit Page view.

Managing Calendars and Calendar Events

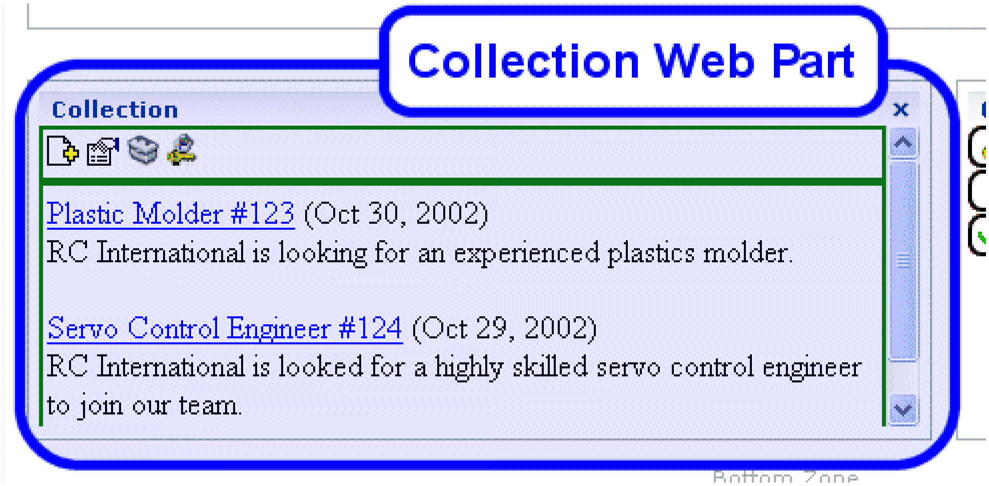
When you are logged into the Ektron CMS400.NET Web site via SharePoint Server, you can manage your calendars and calendar events. Actions that you can perform from the SharePoint server include

- Adding new event calendars
- Editing and deleting existing event calendars
- Adding new calendar events
- Editing, viewing, and deleting existing calendar events

as well as other actions.

Collection Web Part

The collection Web Part displays a collection that has been created in your Ektron CMS400.NET Web site. Here is an example of a collection Web Part displayed in the SharePoint Portal Server.



Plastic Molder #123 (Oct 30, 2002)
RC International is looking for an experienced plastics molder.

Servo Control Engineer #124 (Oct 29, 2002)
RC International is looked for a highly skilled servo control engineer to join our team.

In addition to displaying the collection in the portal, if you are logged into the Ektron CMS400.NET Web site via SharePoint, you can perform all actions related to collections.

NOTE See "Login Web Part" on page 872 for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

Collection Web Part Settings

After a collection Web Part is added to the portal, you may configure it to display any collection on your Web site, as well as specify the display function you want to apply to it. To configure the collection Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the collection Web Part as described in "Modifying Web Parts" on page 855.
2. Minimize the **Appearance Settings**, and expand the **CMS400.NET Content settings**.
3. The Collection Web Part Settings information is displayed.

4. Make the necessary changes to the available fields using the following table as a reference.

Field	Description
CollectionID	The ID of the collection you want to display in the portal.
Collection Display Function	The name of the display function you want to apply to the collection. Contact your Ektron CMS400.NET Web site developer for a list of available display functions.

5. Click the **Apply** button for the changes to take effect.
6. The screen is refreshed with the updated collection displayed.
7. Make additional changes to the collection Web Part, or click the **OK** button to close the Modify Web Part area.

   Clicking **OK** returns you to the Edit Page view.

Managing Ektron CMS400.NET Content

When logged into the Ektron CMS400.NET Web site via SharePoint, you may perform any action on the collection, assuming you have the proper permissions. Some collection-related actions you may perform include

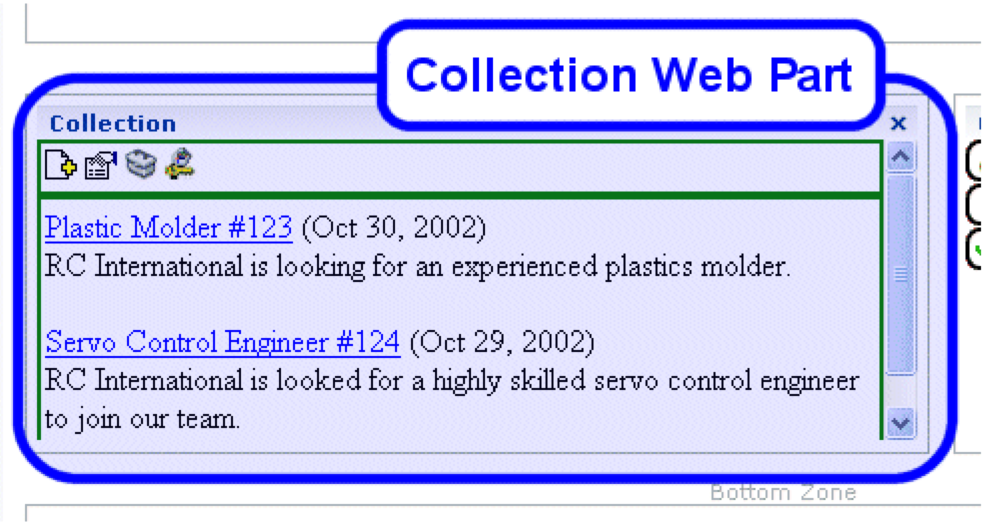
- Adding new content to the collection
- Re-ordering items in the collection
- Removing items from the collection
- Editing collection information

To manage the Ektron CMS400.NET Web site collection within SharePoint, follow these steps.

1. Log In to the Ektron CMS400.NET Web site via the Login Web Part (see "Login Web Part" on page 872 for more information).

NOTE If the collection Web Part is in a different zone than the login Web Part, it may be necessary to refresh the zone in which the content Web Part is located.

2. The collection displayed by the collection Web Part is surrounded by a colored border.



Plastic Molder #123 (Oct 30, 2002)
RC International is looking for an experienced plastics molder.

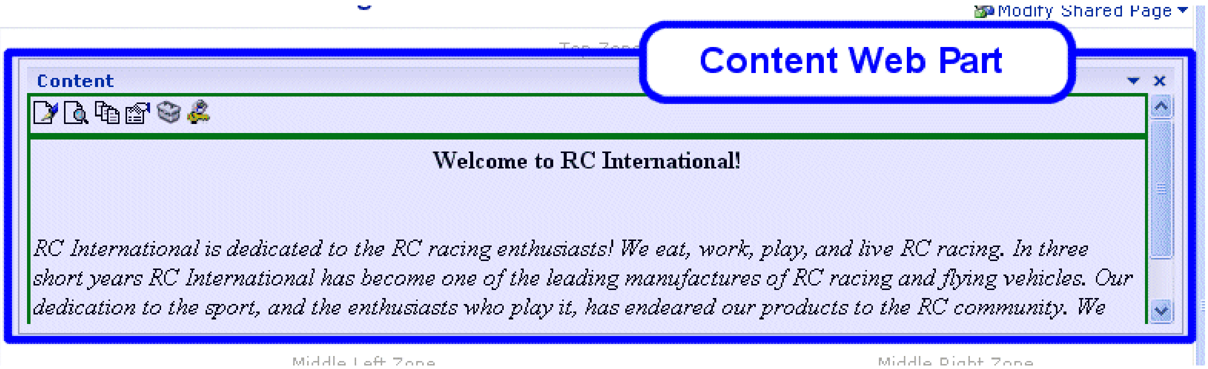
Servo Control Engineer #124 (Oct 29, 2002)
RC International is looked for a highly skilled servo control engineer to join our team.

3. Perform actions by using the floating toolbar, or by clicking on the Workarea button to access the Ektron CMS400.NET Workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS400.NET collections.

Content Web Part

The content Web Part is used to display any content created in the Ektron CMS400.NET Web site. Here is an example of one displayed in the SharePoint Portal Server.



Welcome to RC International!

RC International is dedicated to the RC racing enthusiasts! We eat, work, play, and live RC racing. In three short years RC International has become one of the leading manufactures of RC racing and flying vehicles. Our dedication to the sport, and the enthusiasts who play it, has endeared our products to the RC community. We

If you are logged into the Ektron CMS400.NET Web site via SharePoint server, you may also manage the content (see

”Managing Ektron CMS400.NET Content” on page 864 for more information).

NOTE See ”Login Web Part” on page 872 for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

Content Web Part Settings

The content Web Part can be configured to display any content from your Ektron CMS400.NET Web site. To do so, follow these steps.

1. Access the Modify Shared Web Part area for the content Web Part, as described in ”Modifying Web Parts” on page 855.
2. Minimize the **Appearance Settings** and expand the **CMS400.NET Content settings**.
3. The Content Web Part Settings page is displayed.
4. Change the value in the **ContentID** field to the ID number of the content you want to be displayed.
5. Click the **Apply** button for the changes to take effect.
6. The screen is refreshed with the updated content displayed.
7. Make additional changes to the Content Web Part, or click **OK** to close the Modify Web Part area.

   Clicking **OK** returns you to the Edit Page view.

Managing Ektron CMS400.NET Content

As stated earlier, when logged into the Ektron CMS400.NET Web site via SharePoint, you may manage content displayed by the content Web Part (assuming you have permissions to do so within the Ektron CMS400.NET Web site).

Content-related actions you may perform include:

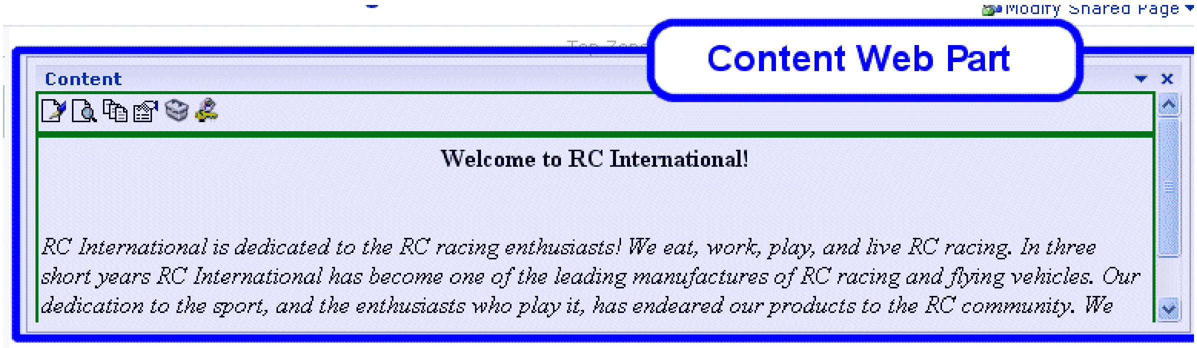
- Editing existing content, summaries, and metadata
- Creating new content
- Deleting content
- Viewing historical versions of content and restoring them
- Managing collections

To manage the Ektron CMS400.NET Web site content within SharePoint, follow these steps.

1. Log in to the Ektron CMS400.NET Web site via the Login Web Part (see "Login Web Part" on page 872 for more information).

NOTE If the content Web Part is in a different zone than the login Web Part, it may be necessary to refresh the zone the content Web Part is in.

2. The content displayed by the content Web Part is surrounded by a colored border.



Welcome to RC International!

RC International is dedicated to the RC racing enthusiasts! We eat, work, play, and live RC racing. In three short years RC International has become one of the leading manufactures of RC racing and flying vehicles. Our dedication to the sport, and the enthusiasts who play it, has endeared our products to the RC community. We

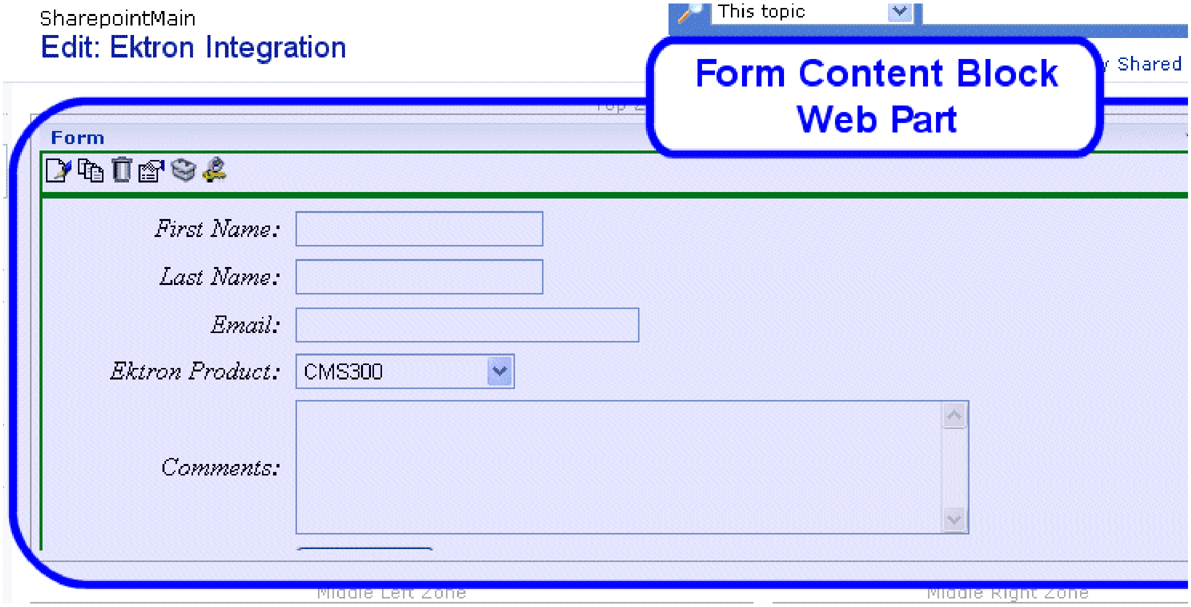
3. Perform actions by using the floating toolbar, or by clicking the Workarea button to access your Ektron CMS400.NET Workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS400.NET content.

Form Content Web Part

A form content Web Part is used to display Ektron CMS400.NET form content.

Here is an example of form content displayed in SharePoint as a Web Part.


SharepointMain
Edit: Ektron Integration
This topic
Shared
Form Content Block Web Part
Form
First Name:
Last Name:
Email:
Ektron Product:
CMS300
Comments:
Middle Left Zone
Middle Right Zone

If you are logged into the Ektron CMS400.NET Web site via SharePoint server, you may also manage the form content (see ”Managing Ektron CMS400.NET Form Content” on page 867 for more information).

NOTE See ”Login Web Part” on page 872 for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

Form Content Web Part Settings

The form content Web Part can be configured to display any form content from your Ektron CMS400.NET Web site. To configure one, follow these steps.

1. Access the Modify Shared Web Part area for the form content Web Part, as described in ”Modifying Web Parts” on page 855.
2. Minimize the **Appearance Settings**, and expand the **CMS400.NET Form Content settings**
3. The Form Content Web Part Settings information is displayed.
4. In the **Form Block ID** field, enter the ID number of the form content you want to display.
5. Click the **Apply** button for the changes to take effect.

The screen is refreshed with the updated content displayed.

6. Make additional changes to the Form Content Web Part, or click the **OK** button to close the Modify Web Part area.

   Clicking **OK** returns you to the Edit Page view.

Managing Ektron CMS400.NET Form Content

When logged into the Ektron CMS400.NET Web site via SharePoint, you may manage form content displayed by the form content Web Part (assuming you have permissions to do so within Ektron CMS400.NET).

Some form content related actions that you may perform include

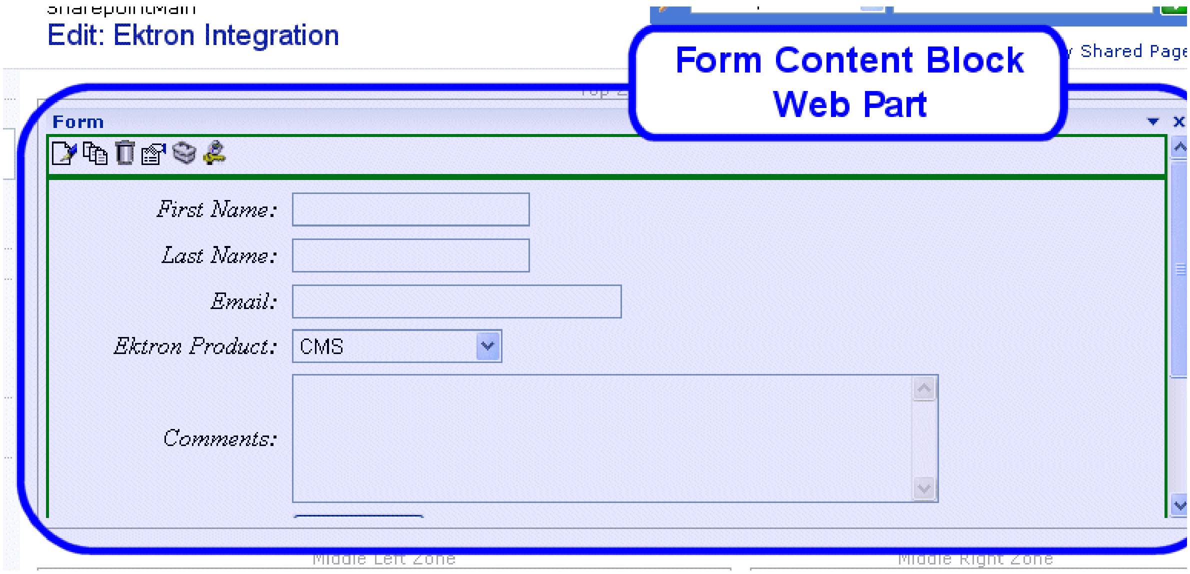
- Editing form content
- Modifying form processing information
- Creating new form content

To manage the Ektron CMS400.NET Web site form content within SharePoint, follow these steps.

1. Log in to the Ektron CMS400.NET Web site via the Login Web Part (see ”Login Web Part” on page 872 for more information).

NOTE If the form content Web Part is in a different zone than the login Web Part, it may be necessary to refresh the zone that includes the form Web Part.

2. The form content displayed by the form content Web Part is surrounded by a colored border.



Edit: Ektron Integration

Form Content Block Web Part

Form

First Name:

Last Name:

Email:

Ektron Product: CMS

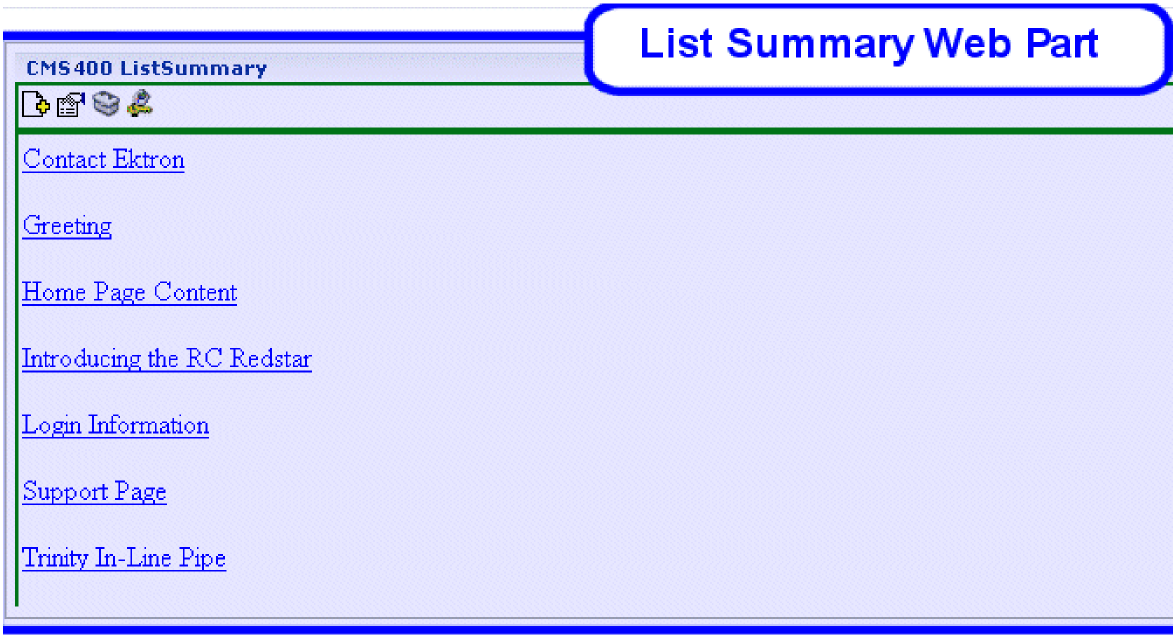
Comments:

3. Perform actions by using the floating toolbar, or by clicking on the Workarea button to access your Ektron CMS400.NET Workarea.

Summary List Web Part

The summary list, or list summary, Web Part displays a list of summaries for some, or all, content in a specified Ektron CMS400.NET content folder.

Here is an example of a summary list Web Part being displayed in the SharePoint Portal Server.



Contact Ektron

Greeting

Home Page Content

Introducing the RC Redstar

Login Information

Support Page

Trinity In-Line Pipe

If you are logged into the Ektron CMS400.NET Web site via SharePoint Server, you can also manage the summary list (see ”Managing the Summary List” on page 871 for more information).

NOTE See ”Login Web Part” on page 872 for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

List Summary Web Part Settings

The list summary Web Part can be configured to fully customize the summary list. Several options are configurable including:

- Starting folder
- Style information
- Maximum amount to display

To configure the list summary Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the content Web Part, as described in ”Modifying Web Parts” on page 855.

2. Minimize the **Appearance Settings**, and expand the **CMS400.NET ListSummary settings**.
3. The List Summary Web Part Settings screen is displayed.
4. Make the necessary changes to the List Summary settings using the following table as a guide.

Field	**Description**	**Default**
Starting Folder	Ektron CMS400.NET content folder from which the summary list begins to retrieve summary information. Examples: `\Products\RC Cars` or\ (root content folder)	\\
Recursive	Specifies whether the summary list includes information from the starting folder's subfolders. • **No** - *summary list is not recursive* • **Yes** - *summary list is recursive*	No
Show Summary	Used to specify if the summaries for the content in summary list are displayed. • **No** - *summaries are not displayed* • **Yes** - *summaries are displayed*	No
Style Information	Insert an inline style that is applied to the hyperlinks generated by the summary list. Example: `backgroundcolor:#cccccc; border:solid blue 1pt;`	
Order By	Choose how you want to order the summary list by. • **Title** - title of the content • **DateModified** - date the content was last modified • **DateCreated** - date the content was created • **AuthorFname** - first name of the last editor • **AuthorLname** - last name of the last editor	Title
Order By Asc/ Desc	Choose how to sort the summary list. • **Asc** - ascending order (A >Z) • **Desc** - descending order (Z>A)	Asc

Field	**Description**	**Default**
Show Info	Additional information to display in the summary list. • **None** - *no* additional information • **DateModified** - date and time content was last modified • **DateCreated** - date and time content was created • **AuthorFname** - first name of the last editor • **AuthorLname** - last name of the last editor	None
Maximum Number	Specify the maximum number of results you want to display. Note: Enter zero (**0**) to display unlimited, or all, results.	0 (unlimited)

5. Click the **Apply** button for the changes to take effect.
6. The screen is refreshed with the updated summary list is displayed.
7. Make additional changes to the List Summary Web Part, or click the **OK** button to close the Modify Web Part area.

   Clicking **OK** returns you to the Edit Page view.

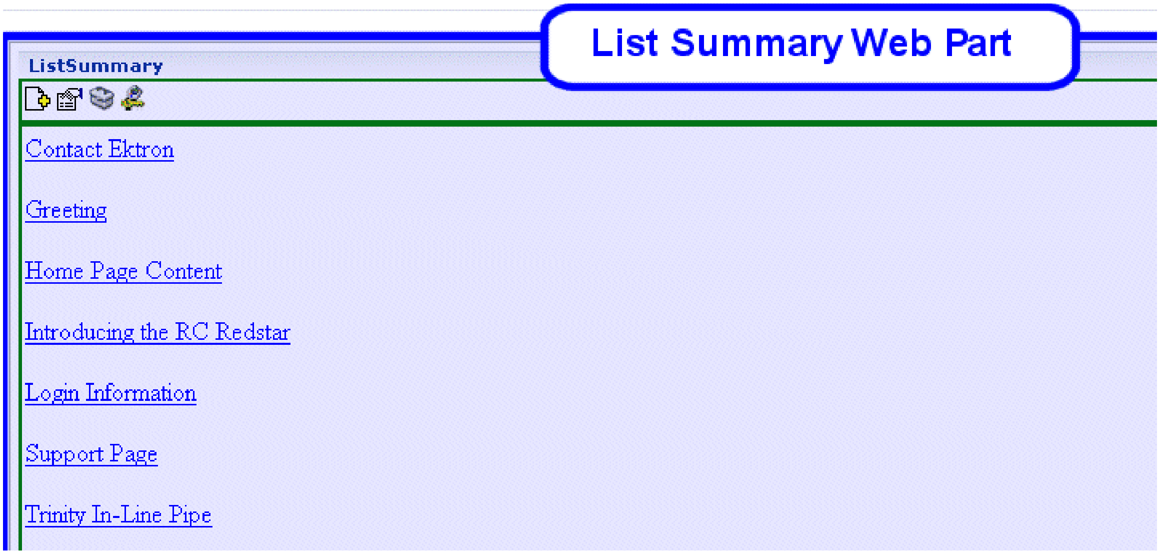
Managing the Summary List

When logged into the Ektron CMS400.NET Web site via SharePoint, you may manage the summary list displayed by the list summary Web Part. To do so, follow these steps.

1. Log in to the Ektron CMS400.NET Web site via the Login Web Part (see ”Login Web Part” on page 872 for more information).

NOTE If the summary list Web Part is in a different zone than the login Web Part, it may be necessary to refresh the summary list Web Part’s zone.

2. The summary list displayed by the summary list Web Part is surrounded by a colored border.



Contact Ektron

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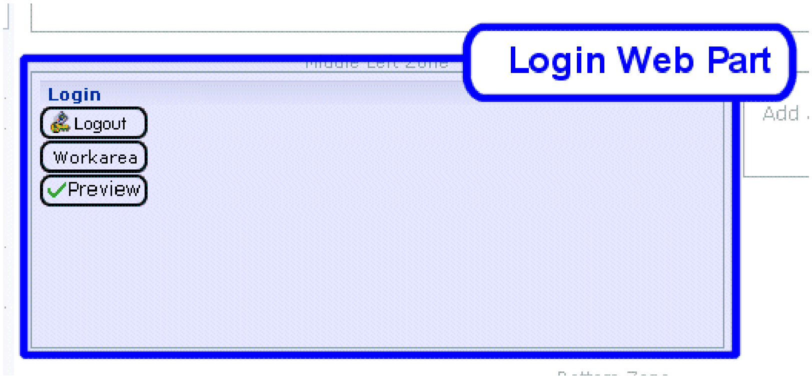
3. Perform actions by using the floating toolbar, or by clicking the Workarea button to access the Ektron CMS400.NET Workarea.

Login Web Part

The Login Web Part displays a login button that lets users log in to the Ektron CMS400.NET Web site via SharePoint, and be authorized to work with Ektron CMS400.NET related content.

Here is an example of the login Web Part displayed in the SharePoint portal server.



In this example, the **Logout**, **Workarea**, and **Preview** buttons are displayed because we are currently logged in. If we were not logged in, only **Login** would appear.

Login Web Part Settings

The login Web Part includes no configurable settings.

Logging Into a Ektron CMS400.NET Web Site Via SharePoint Server

You can log in to your Ektron CMS400.NET Web site via SharePoint Portal Server and be authorized to manage content, as well as perform any other action. To log in to your Ektron CMS400.NET Web site via SharePoint Portal Server, follow these steps.

1. Navigate to the SharePoint Zone that contains the Ektron CMS400.NET Login Web Part.
2. Click the **Login** button.
3. The Ektron CMS400.NET Login box appears.
4. Enter a valid Ektron CMS400.NET username and password.
5. Click the **Login** button.
6. The username and password are sent to the Ektron CMS400.NET server. Upon successful authorization, you are logged in to Ektron CMS400.NET.

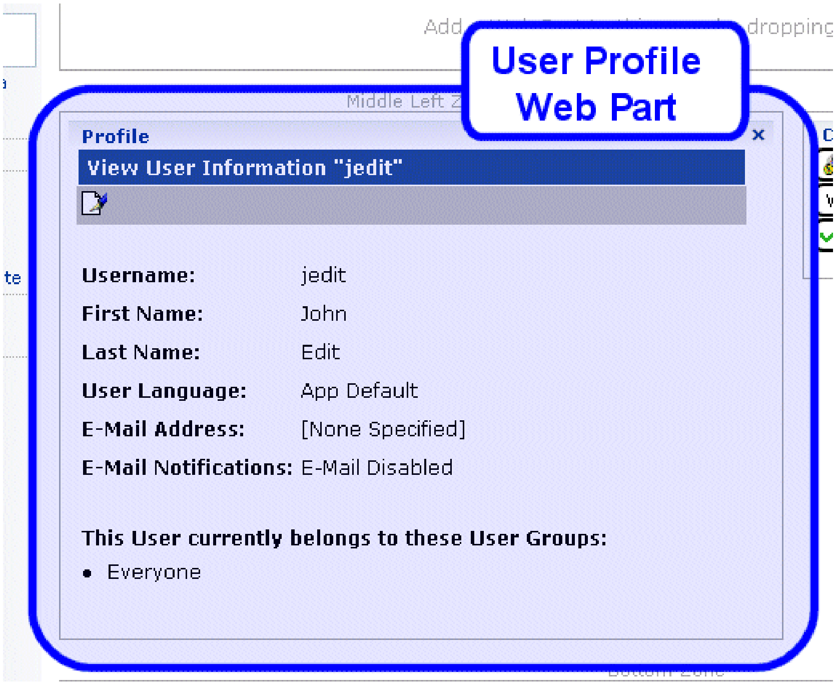
NOTE Logging in via SharePoint does not refresh the entire screen. Instead, only the zone that includes the login Web Part appears to be logged into. Refresh each zone, or the entire screen, for the changes to take effect.

Profile Web Part

Every user of an Ektron CMS400.NET Web site has access to their user profile, which allows them to view and modify information about themselves. When logged into Ektron CMS400.NET via SharePoint, each user can access his profile information.

NOTE See ”Login Web Part” on page 872 for additional information about logging in.

Here is the profile Web Part displayed in the SharePoint portal server, logged in as the user **John Edit**.



Profile

View User Information "jedit"

Username:	jedit
First Name:	John
Last Name:	Edit
User Language:	App Default
E-Mail Address:	[None Specified]
E-Mail Notifications:	E-Mail Disabled

This User currently belongs to these User Groups:

- Everyone

Although you cannot modify the profile Web Part, you can update your Ektron CMS400.NET user profile information (see "Editing Profile Information" on page 874 for additional information).

Profile Web Part Settings

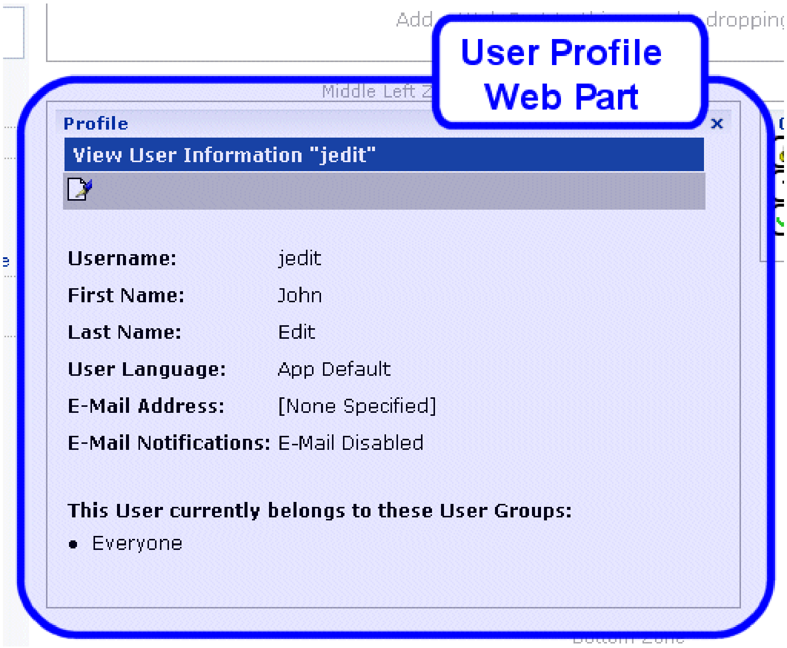
The profile Web Part includes no configurable settings.

Editing Profile Information

All Ektron CMS400.NET users can update their profile information directly from SharePoint. To update Ektron CMS400.NET profile information, follow these steps.

NOTE Before updating profile information, you must be logged in to your Ektron CMS400.NET Web site via SharePoint. See "Logging Into a Ektron CMS400.NET Web Site Via SharePoint Server" on page 873 for more information.

1. Access the SharePoint portal page that contains the Ektron CMS400.NET profile Web Part.



View User Information "jedit"

Username: jedit
First Name: John
Last Name: Edit
User Language: App Default
E-Mail Address: [None Specified]
E-Mail Notifications: E-Mail Disabled

This User currently belongs to these User Groups:

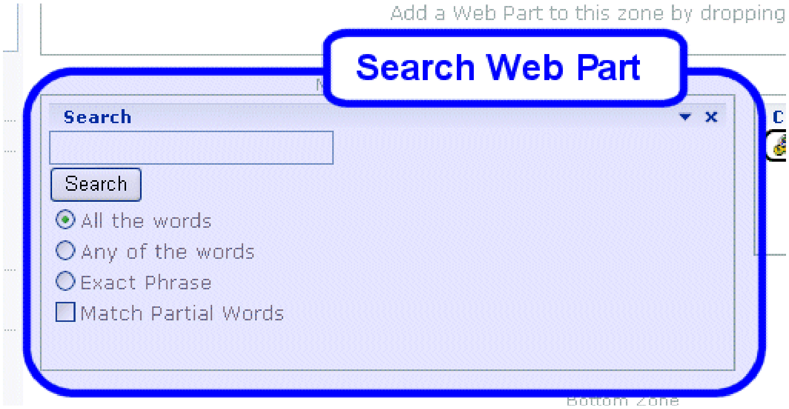
- Everyone

2. Click the Edit button ( ).
3. The Edit User Information screen is displayed.
4. Change your user information.
5. Click the Update button ( ) to save the changes.
6. The Web Part is refreshed, and the view user information screen is displayed with the updated information.

Search Web Part

The search Web Part lets you insert a search text box and search button that search your Ektron CMS400.NET Web site from SharePoint.

Here is an example of a search Web Part inserted into a SharePoint portal server screen.


Add a Web Part to this zone by dropping
Search Web Part
Search
Search
All the words
Any of the words
Exact Phrase
Match Partial Words
Bottom Zone

When visitors to the SharePoint portal page access this search Web Part, they can perform a search on your Ektron CMS400.NET Web site.

Search Web Part Settings

You can configure the search Web Part to fully customize how the search is displayed in the portal, as well as the search's functionality. Several options are configurable, including:

- Starting folder
- Recursive search
- Maximum amount of results to display

To configure the search Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the content Web Part, as described in "Modifying Web Parts" on page 855.
2. Minimize the **Appearance Settings** and expand the **CMS400.NET Search settings**.
3. The Search Web Part Settings screen is displayed.

4. Make the necessary changes to the search settings using the following table as a guide.

Field	**Description**	**Default**
Starting Folder	Ektron CMS400.NET content folder where the search begins to retrieve results from. Example: `\Products\RC Cars` or\ (root content folder)	\
Recursive	Specifies whether the search looks through the starting folder and its subfolders *or* the starting folder only • **No** - search only the starting folder • **Yes** - search starting folder and its subfolders	No
Target Page	The Web page that displays the search results.	search-display.aspx
Text Box Size	The size of the search text box when displayed.	25
Maximum Characters	The maximum number of characters the search text box accepts.	200
Button Text	The text displayed on the search button.	Search
Font Face	The font style of the search box options.	Verdana
Font Color	The font color of the search box options.	#808080
Font Size	The font size of the search box options.	2
Horizontal	The orientation of the search text box and options. • **No** - search options align vertically • **Yes** - search options align horizontally	No
Return: Maximum Results	Determines the maximum number of search results displayed. Note: Enter zero (0) to display unlimited, or all, results.	0
Return: Style Info	An inline style applied to search result hyperlinks. For example: `backgroundcolor:#cccccc; border:solid blue 1pt;`	
Return: Show Date	Specify whether the search results will display the date and time they were last edited.	No

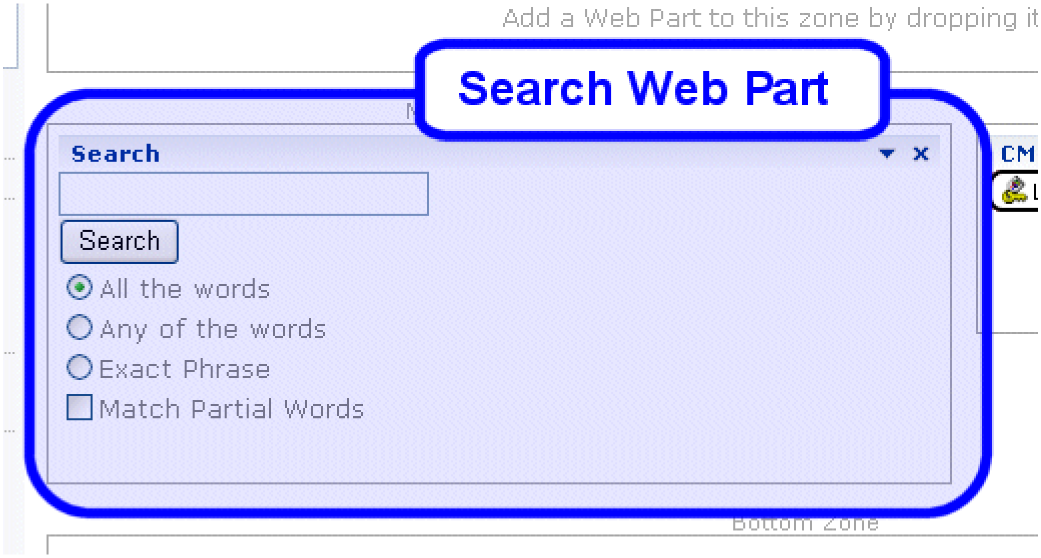
5. Click the **Apply** button.
6. The screen is refreshed, and the updated search Web Part is displayed.
7. Make additional changes to the search Web Part, or click the **OK** button to close the Modify Web Part area.

   Clicking **OK** returns you to the Edit Page view.

Performing a Search

When the search Web Part is inserted into your SharePoint Portal page, you can perform a search. To do so, follow these steps:

1. Access the SharePoint portal page that contains the Ektron CMS400.NET search Web Part.


Add a Web Part to this zone by dropping it
Search Web Part
Search
Search
○ All the words
○ Any of the words
○ Exact Phrase
☐ Match Partial Words
CM
Bottom Zone

2. Enter search criteria in the search text box.
3. Click **Search**.
4. The search is performed, and all content in your Ektron CMS400.NET Web site that matches the criteria appears.

Syndicating Web Content as RSS

RSS stands for Really Simple Syndication, a common method of syndicating Web content as an XML document. There are several versions of RSS. Ektron has implemented version 2.0.

In Ektron CMS400.NET, you use RSS to prepare a collection list or a list summary for reading by an *aggregator*. An aggregator consumes an RSS feed and displays it to the user. (An aggregator is similar in function to a portal.) There are several popular aggregators, including:

- AmphetaDesk (http://www.disobey.com/amphetadesk/)
- NewzCrawler (http://www.newzcrawler.com/).

For information about how to syndicate Ektron CMS400.NET as RSS, refer to Syndicating Web Content as RSS, in the Ektron CMS400.NET Developer’s Reference Manual*.*

Additional Information

Supporting Documents

You can find more detailed information about Ektron CMS400.NET in the following manuals:

- Ektron CMS400.NET Developer’s Reference Manual
- Ektron CMS400.NET User Manual
- Ektron CMS400.NET Quick Start Manual
- Ektron CMS400.NET Setup Manual

Support

If you are experiencing trouble with any aspect of Ektron CMS400.NET, please contact the Ektron Support Team via our Web Site:

http://www.ektron.com/support/cms400_support.aspx

Sales

For questions and answers about purchasing Ektron CMS400.NET from Ektron, contact the sales department by sending an email to:

sales@ektron.com

Information

For general information about Ektron and its products, you may send an email to:

info@ektron.com

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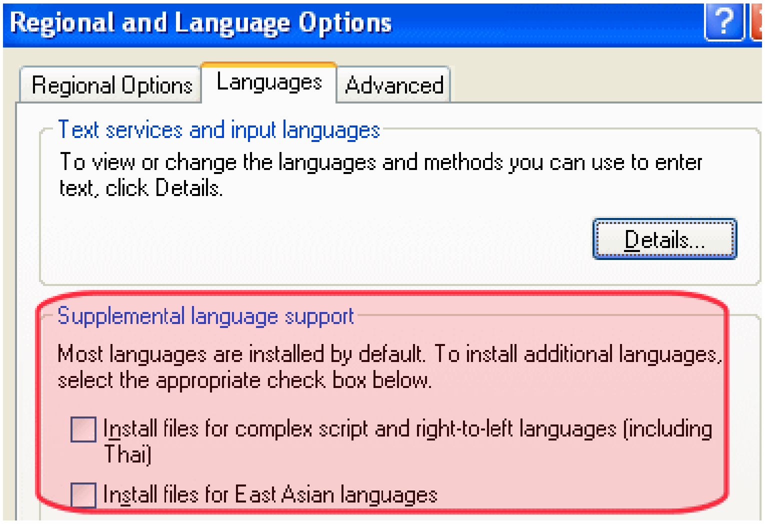
Fax: +1 603.594.0258
http://www.ektron.com

Appendix A: Unicode Support

Ektron CMS400.NET supports Unicode characters in

- the editor
  - source view, from the editor
- dialog boxes

IMPORTANT! To see Unicode characters, each client's Windows installation must include Asian and bidirectional languages. To install them, go to **Control Panel > Regional and Language Options > Languages**. Check both boxes under **Supplemental language support** (see illustration below).


Regional and Language Options
Regional Options
Languages
Advanced
Text services and input languages
Details...
Supplemental language support

To view or change the languages and methods you can use to enter text, click Details.

Most languages are installed by default. To install additional languages, select the appropriate check box below.

☐ Install files for complex script and right-to-left languages (including Thai)

☐ Install files for East Asian languages

Unicode Support in the Ektron CMS400.NET Editor

Ektron CMS400.NET is practically 100% compliant with the Unicode standard. It is only lacking in the following areas.

- **Dialog box title bars** - If the client does not support Unicode characters, the title bar displays English.
- **The toolbar** - If the client does not support Unicode characters, drop-down lists on the toolbar display question marks (?).

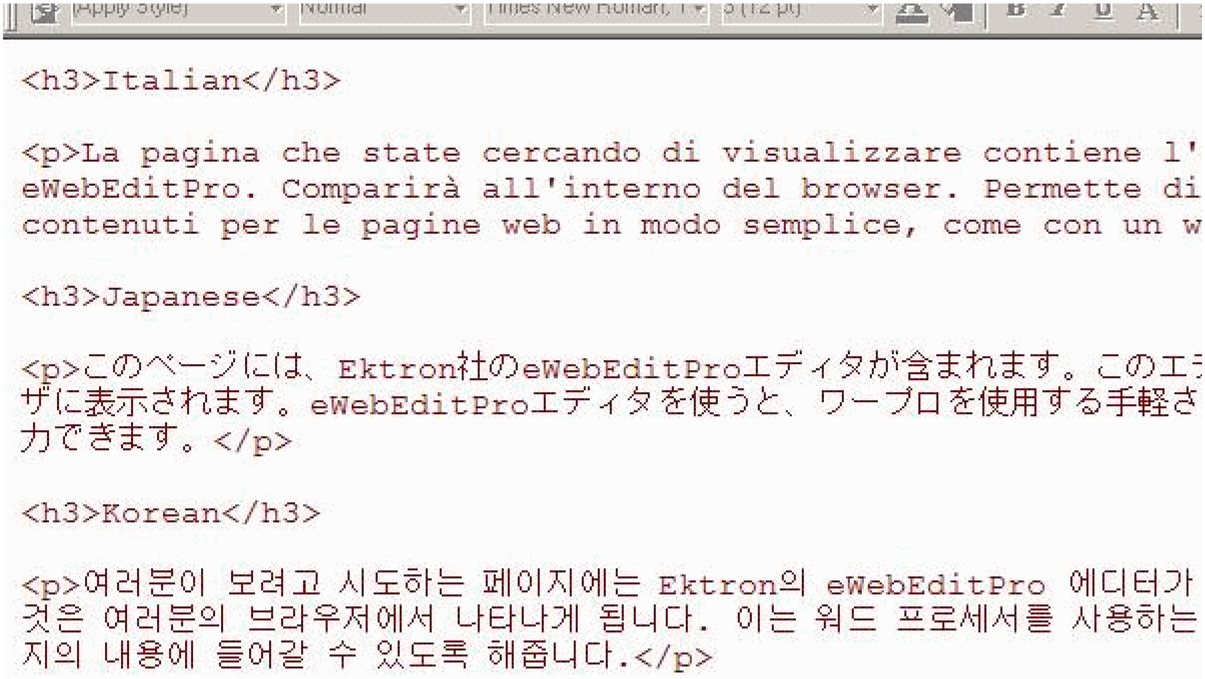
NOTE A client fully supports Unicode characters if the Unicode language is the same as the Windows default language.

- **Toolbar dropdown lists on Korean systems** - Korean characters in a drop-down list may appear as question marks (?) unless one of the following conditions is true:
  - The Arial Unicode MS font is installed. Since this is installed with MS Office, most clients have it.

    or
  - The default system language is Korean.

Unicode Support in Source View

Ektron CMS400.NET also supports Unicode characters in while viewing HTML source code, as illustrated below.



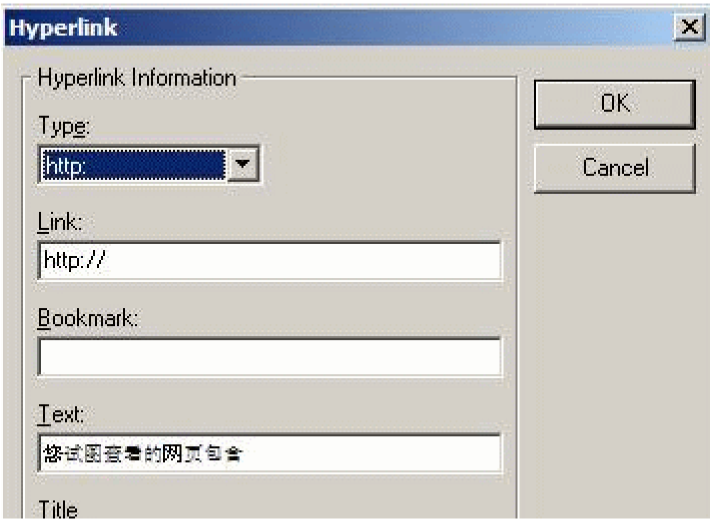
```
<h3>Italian</h3>

<p>La pagina che state cercando di visualizzare contiene l'
eWebEditPro. Comparirà all'interno del browser. Permette di
contenuti per le pagine web in modo semplice, come con un w

<h3>Japanese</h3>

<p>このページには、Ektron社のeWebEditProエディタが含まれます。このエ
ザに表示されます。eWebEditProエディタを使うと、ワープロを使用する手軽さ
力できます。</p>

<h3>Korean</h3>

<p>여러분이 보려고 시도하는 페이지에는 Ektron의 eWebEditPro 에디터가
것은 여러분의 브라우저에서 나타나게 됩니다. 이는 워드 프로세서를 사용하는
지의 내용에 들어갈 수 있도록 해줍니다.</p>
```

For more information about working with HTML source code, see the Ektron CMS400.NET User Manual chapter “Working with HTML.”

Unicode Support in Dialog Boxes

Ektron CMS400.NET supports Unicode in text boxes within dialogs even if the Operating System (OS) language does not match the Unicode language. For example, a content contributor author wants to edit in Korean and Japanese without switching the OS language.

Here is an example of such a dialog.


Hyperlink
Hyperlink Information
OK
Cancel
Bookmark:
Title

Type: http:

Link: http://

Text: 您试图查看的网页包含

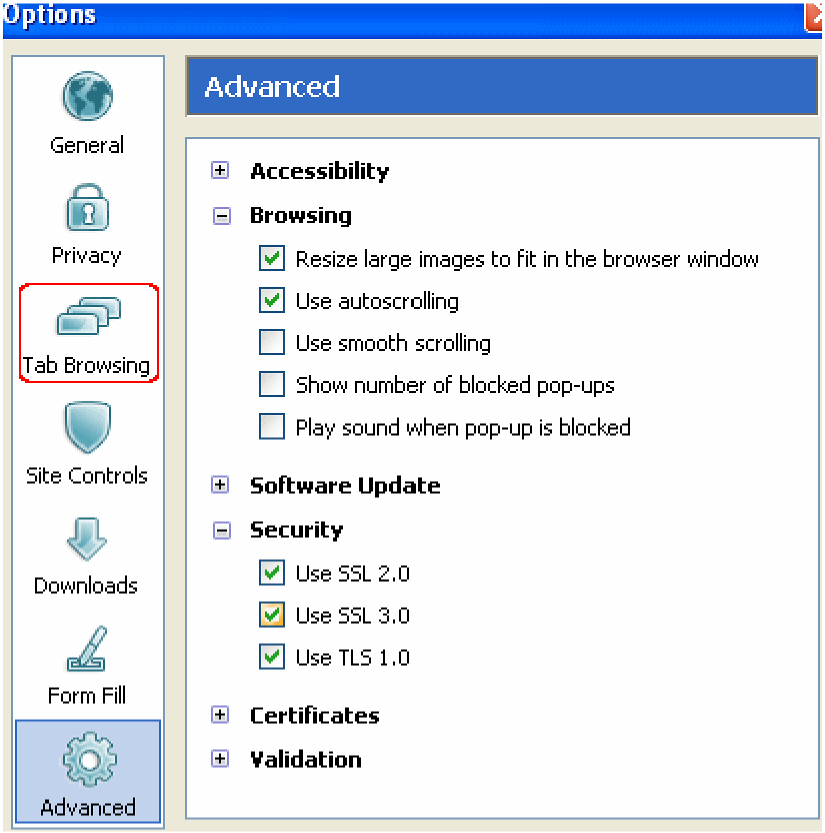
Appendix B: Browser Issues

This section explains how to use **Ektron CMS400.NET** with different browsers.

Netscape 8

To make sure the Netscape 8 browser works properly with **Ektron CMS400.NET**, follow these steps.

1. From the verb strip at the top of the Netscape 8 screen, click **Tools > Options**.
2. Select the **Tab Browsing** screen.


Options
General
Privacy
Tab Browsing
Site Controls
Downloads
Form Fill
Advanced

Advanced

⊞ **Accessibility**

⊟ **Browsing**

☑ Resize large images to fit in the browser window

☑ Use autoscrolling

☐ Use smooth scrolling

☐ Show number of blocked pop-ups

☐ Play sound when pop-up is blocked

⊞ **Software Update**

⊟ **Security**

☑ Use SSL 2.0

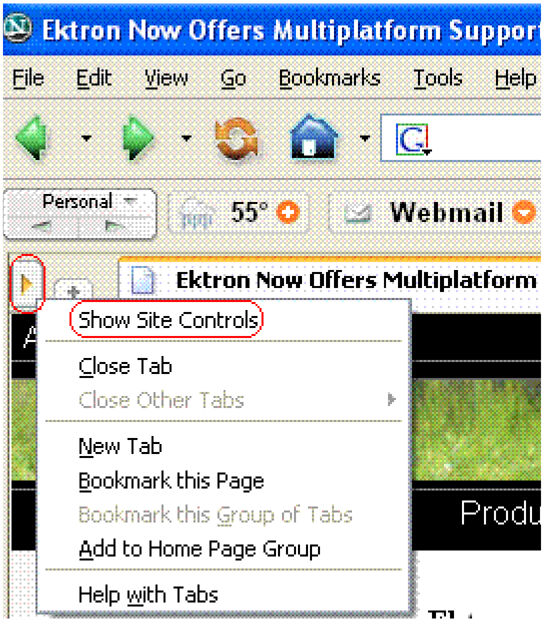
☑ Use SSL 3.0

☑ Use TLS 1.0

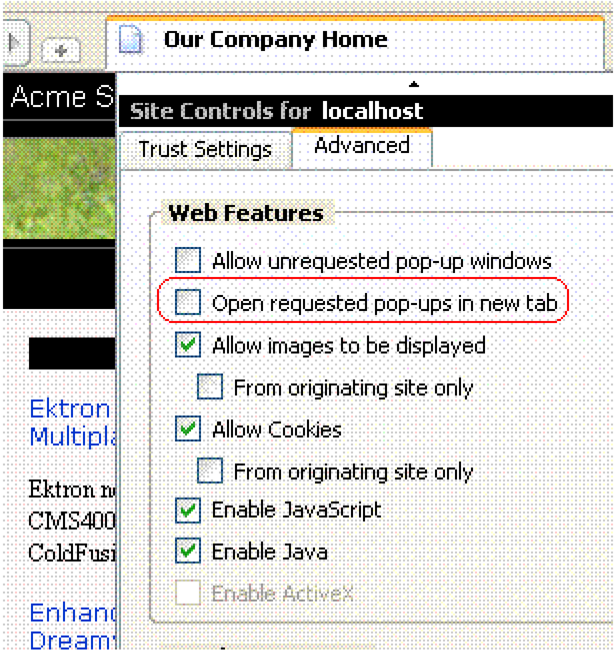
⊞ **Certificates**

⊞ **Validation**

3. After **Open links from other applications in**, check **a new window**.
4. Makes sure the following options are unchecked.
   - **Open non-requested pop-ups in a new tab**
   - **Open a new tab instead of a new window**
5. Click **OK** to save the options.
6. Return to **Ektron CMS400.NET** running in the Netscape 8 browser.
7. Right click the triangle icon to the left of the tab (circled in red below).


Ektron Now Offers Multiplatform Support
File
Edit
View
Go
Bookmarks
Tools
Help
Personal
55°
Webmail
Ektron Now Offers Multiplatform
Show Site Controls
Close Tab
Close Other Tabs
New Tab
Bookmark this Page
Bookmark this Group of Tabs
Add to Home Page Group
Help with Tabs
Produ

8. Click **Show Site Controls**.
9. The Site Controls screen appears.
10. Click the **Advanced** tab.



Site Controls for localhost

Our Company Home
Acme S
Trust Settings
Advanced
Ektron
Multipl
Ektron n
CMS400
ColdFusi
Enhan
Dream

Web Features

☐ Allow unrequested pop-up windows

☐ Open requested pop-ups in new tab

☑ Allow images to be displayed

  ☐ From originating site only

☑ Allow Cookies

  ☐ From originating site only

☑ Enable JavaScript

☑ Enable Java

☐ Enable ActiveX

11. Make sure **Open requested pop-ups in new tab** is unchecked.

Appendix C: List of Supported Languages

NOTE Within Ektron CMS400.NET screens, languages are by indicated by a flag. If you want to change the images, they are contained in the `Workarea/images/application/flags/` directory. The file name format is `flagNNNN`.gif, where `NNNN` is the language's locale id value. For example, flag0409.gif is for English (US).

Language	Locale id value
Afrikaans	1078
Albanian	1052
Arabic (Algeria)	5121
Arabic (Bahrain)	15361
Arabic (Egypt)	3073
Arabic (Iraq)	2049
Arabic (Jordan)	11265
Arabic (Kuwait)	13313
Arabic (Lebanon)	12289
Arabic (Libya)	4097
Arabic (Morocco)	6145
Arabic (Oman)	8193

Arabic (Qatar)	16385
Arabic (Saudi Arabia)	1025
Arabic (Syria)	10241
Arabic (Tunisia)	7169
Arabic (U.A.E.)	14337
Arabic (Yemen)	9217
Azeri (Cyrillic)	2092
Azeri (Latin)	1068
Basque	1069
Belarussian	1059
Bulgarian	1026
Burmese	1109
Catalan	1027
Chinese (Hong Kong SAR PRC)	3076
Chinese (Macau SAR)	5124
Chinese (PRC)	2052
Chinese (Singapore)	4100
Chinese (Taiwan)	1028
Croatian	1050
Czech	1029
Danish	1030
Dutch (Belgium)	2067
Dutch (Netherlands)	1043

English (Australian)	3081
English (Belize)	10249
English (Canadian)	4105
English (Caribbean)	9225
English (Ireland)	6153
English (Jamaica)	8201
English (New Zealand)	5129
English (Philippines)	13321
English (South Africa)	7177
English (Trinidad)	11273
English (United Kingdom)	2057
English (US)	1033
English (Zimbabwe)	12297
Estonian	1061
Faeroese	1080
Farsi	1065
Finnish	1035
French (Belgian)	2060
French (Canadian)	3084
French (Luxembourg)	5132
French (Monaco)	6156
French (Standard)	1036
French (Switzerland)	4108

Gaelic (Ireland)	2108
Galician (Spain)	1110
German (Austria)	3079
German (Liechtenstein)	5127
German (Luxembourg)	4103
German (Standard)	1031
German (Switzerland)	2055
Greek	1032
Gujarati (India)	1095
Hebrew	1037
Hindi (India)	1081
Hungarian	1038
Icelandic	1039
Indonesian	1057
Italian (Standard)	1040
Italian (Switzerland)	2064
Japanese	1041
Kannada (India)	1099
Kashmiri (India)	2144
Kazakh	1087
Korean	1042
Korean (Johab)	2066
Latvian	1062

Lithuanian	1063
Lithuanian (Classic)	2087
Macedonian	1071
Malay (Brunei Darussalam)	2110
Malay (Malaysian)	1086
Manipuri	1112
Marathi	1102
Norwegian (Bokmal)	1044
Norwegian (Nynorsk)	2068
Polish	1045
Portuguese (Brazil)	1046
Portuguese (Standard)	2070
Punjabi (Gurmukhi - India)	1094
Romanian	1048
Russian	1049
Serbian (Cyrillic)	3098
Serbian (Latin)	2074
Sindhi	1113
Slovak	1051
Slovenian	1060
Spanish (Argentina)	11274
Spanish (Bolivia)	16394
Spanish (Chile)	13322

Spanish (Columbia)	9218
Spanish (Costa Rica)	5130
Spanish (Dominican Republic)	7178
Spanish (Ecuador)	12298
Spanish (El Salvador)	17418
Spanish (Guatemala)	4106
Spanish (Honduras)	18442
Spanish (Mexican)	2058
Spanish (Modern Sort)	3082
Spanish (Nicaragua)	19466
Spanish (Panama)	6154
Spanish (Peru)	10250
Spanish (Puerto Rico)	20490
Spanish (Traditional Sort)	1034
Spanish (Uruguay)	14346
Spanish (Venezuela)	8202
Sutu	1072
Swahili (Kenya)	1089
Swedish	1053
Swedish (Finland)	2077
Tamil (India)	1097
Tatar (Tatarstan)	1092
Telugu (India)	1098

Thai	1054
Turkish	1055
Ukrainian	1058
Urdu (India)	2080
Urdu (Pakistan)	1056
Uzbek (Cyrillic)	2115
Uzbek (Latin)	1091
Vietnamese	1066
Welsh (United Kingdom)	1106

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