What do you want your website to do?

ektron

PROJECT MANAGEMENT STARTER SITE
DEVELOPER'S GUIDE

VERSION 1.1
REVISION 2

Ektron Project Management Starter Site 3

Ektron Project Management Starter Site

Overview

What is a Starter Site?

With version 6.1 of CMS400.Net, Ektron released a Software Development Kit (SDK) and a revised Application Programming Interface (API). These tools significantly enhanced CMS400's ability to provide a foundation for enterprise-class, Web-based content management initiatives.

To demonstrate the effectiveness of these tools, Ektron set out to develop an application proof-of-concept, based on a real-world use case. The resulting application had to demonstrate how CMS400.NET plus the SDK and revised API could be used as a development *platform*.

Thus was born an initiative to create a *Starter Site* – a fully-functional application that addresses a real-world problem using CMS400.NET as a development platform. An Ektron *Starter Site* is open-source application included with a CMS400.NET purchase. You are free to use starter sites as they ship, or customize them to suit your needs.

What is the *Project Management Starter Site?*

The Project Management Starter Site (PMSS) addresses a common use case at Ektron: managing communication between Ektron and our clients.

Ektron routinely opens initiatives with clients that require ongoing management. These initiatives are not always contract-based – the PMSS is not a time-tracking application used for billing purposes. From a content deliverables perspective, these initiatives resemble a professional-services engagement. Ektron's initiatives comprise

- Stakeholder communications
- Status/Progress reporting
- Milestones
- Ongoing discussions – both internally and with clients
- Deliverable definition/specification documentation

The PMSS application provides a central place for initiative-based teams to communicate and store initiative-specific documentation.
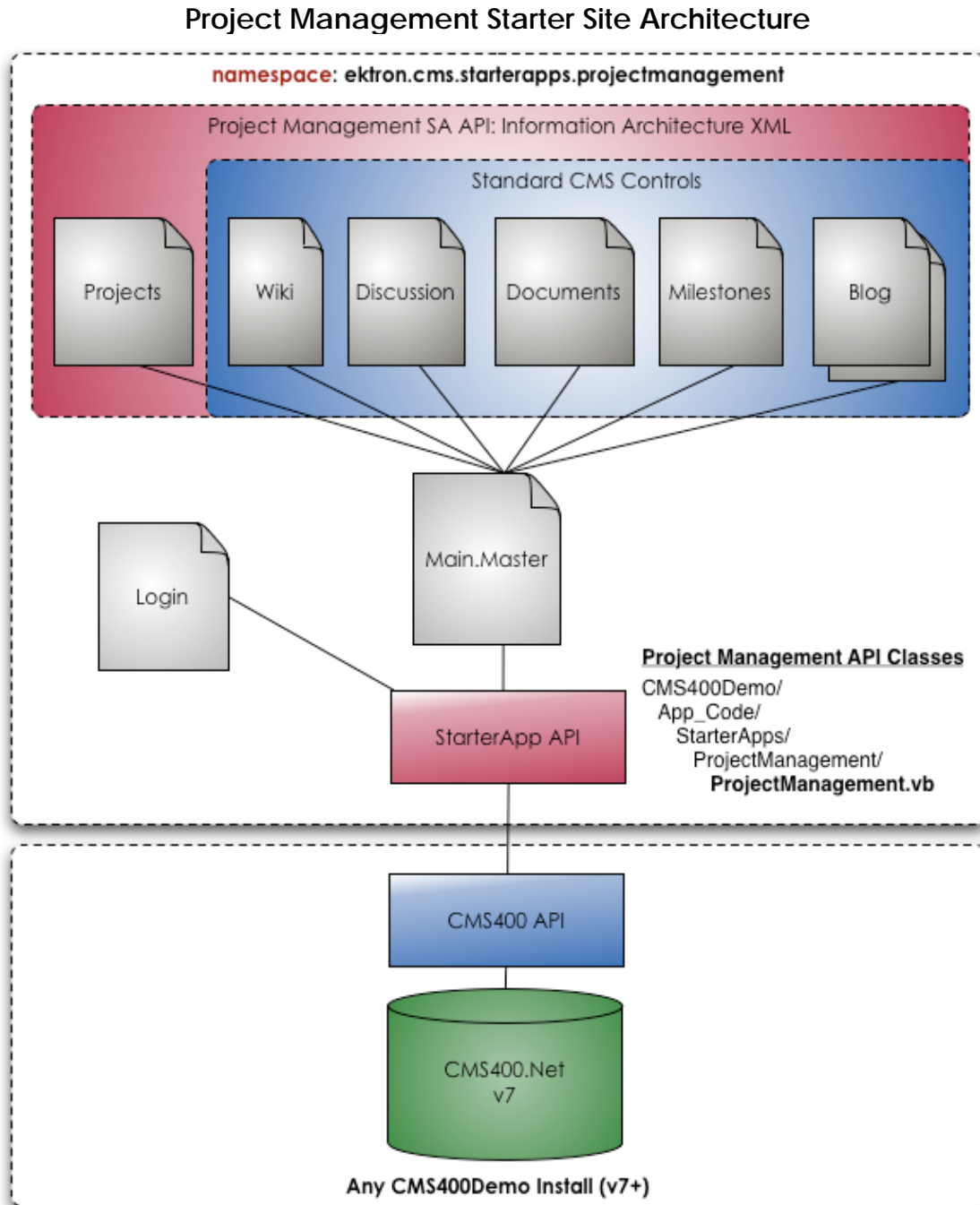
Specifically, the PMSS provides a permissions-based
- Wiki (HTML content)

- Discussion Area (Forums)
- Document repository
- Date-based "Milestones" repository
- Issue Tracker
- Open and Private Blogs

PMSS Architecture

Diagram

Project Management Starter Site Architecture

PMSS Architecture Detail

The PMSS has two main template types. These types and their associated .NET aspx templates are described below.

Template Type	Template Name(s)	Description
Navigation-based	Projects.aspx	The user's *landing* page upon logging-in. Provides clients and projects the user is authorized to view and interact with.
Ektron server control-based	Wiki.aspx	Displays Wiki content for each project
	Discussion.aspx	Displays discussion forums available for each project
	Documents.aspx	Displays document repository for each project
	Milestones.aspx	Displays calendar milestones for each project
	Issues.aspx	Open, track and close issues that arise in the project
	Blog.aspx	Displays two blogs per project • An "open" blog – viewable by any user authorized to view the project • A "private" blog – viewable only by certain users

PMSS's Relationship to CMS400.NET

The PMSS is built on top of the CMS400 SDK and API. This means it is entirely *forwards*-compatible with any version of CMS400.NET version 7.0 and above. So, you may independently upgrade your CMS400.NET installation with point releases without disturbing the PMSS.

PMSS Installation

Since the PMSS is built on top of CMS400.NET, no separate installation is required. When you install CMS400.NET, the following files are moved to the locations specified below.

File Type	Location	Contains
Visual Basic .NET class file	<siteroot/> / App_Code / VBCode/ StarterApp / ProjectManagement / ProjectManagement.vb	Object classes used by the PMSS
PMSS application files	<siteroot/> / StarterApps / ProjectManagement	The main files of the PMSS

Logging In

Logging in to the PMSS means entering admin credentials to the PMSS login template, which is normally "installed" at the following address:

http://localhost/CMS400/StarterApps/ProjectManagement/login.aspx

In addition, CMS400.NET's default home page has a link to PMSS.

PMSS Initialization

An initialization process occurs upon your first login to PMSS. The process performs several tasks, such as

- creates the "StarterApps" and "ProjectManagement" folders in the CMS400 database
- creates CMS400 usergroups
- creates metadata definitions
- registers display templates (see PMSS Architecture Detail above)

You will notice additions to your CMS400 Workarea after you copy the PMSS files to their proper locations and log in.

PMSS Navigation

Overview

The PMSS manages navigation by instantiating an XML-based information architecture for every user, on every page-load. The PMSS generates InformationArchitecture.xml by looping through each client folder, checking to see if the user making the request has been invited to projects belonging to each client.

Thus, InformationArchitecture.xml contains a list of all clients and projects the user can view and interact with, and all information necessary to generate navigation widgets.

The methods used to create InformationArchitecture.xml check to see if the user has been invited to a client. If so, he may view and interact with all of that client's projects. However, he cannot see nor interact with clients to which he is not invited.

User Types

CMS400.NET and the PMSS have three user types

- CMS400.NET Administrator group members
- CMS users
- Membership users

Administrator group members have view/add/remove rights to all clients and projects. They don't need to be invited to any clients.

Any Ektron CMS400.NET CMS user may log in. If you add a CMS400.NET user to the PMSS CMS usergroup ("starterapps.pm") in the Workarea, he can view/add/remove clients and projects, and invite members to projects. starterapps.pm members have "admin"-level rights to the PMSS.

Membership users are authenticated "guests" of PMSS. Any Membership user may log in. However, Membership users can only view and interact with clients and projects to which they have been invited. Membership users are invited to projects at the client level. That is, they are added to a user group set up for each client ("starterapps.pm.*<clientName/>*").

The Projects Template

The projects template (project.aspx) is the landing page for users after log in.
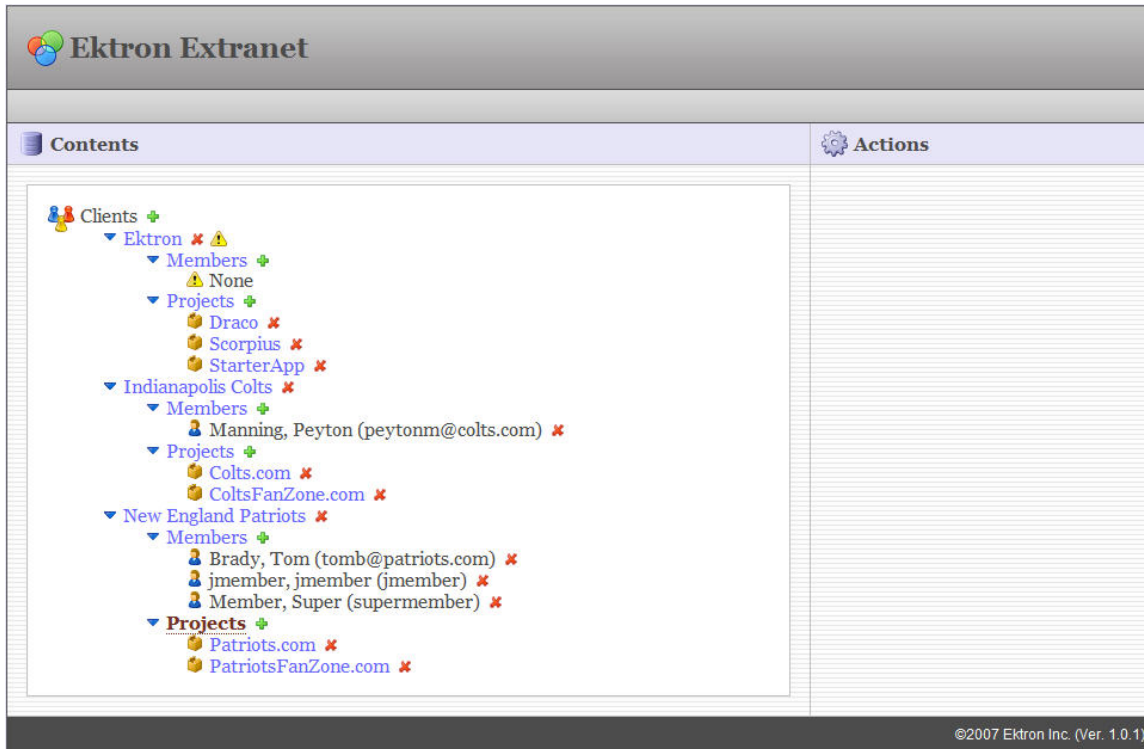
Using InformationArchitecture.xml as its data source, the projects template displays all clients and projects the user can view and interact with. If the user is the CMS400.NET Administrator or a starterapps.pm members, he also sees remove buttons next to clients, projects and members.

Adding, Removing and Inviting

Three main actions a user can take from the Projects template are described below.

Action	Glyph	Notes
Add	✚	• CMS400.NET Administrators and CMS400.NET users may add Clients and Projects • Membership users may add Projects
Remove	✖	CMS400.NET Administrators and CMS400.NET users may remove Clients, Projects, and Members *Note:* Removing a member does not delete the membership account
Invite	✚	CMS400.NET Administrators , CMS400.NET users, and Membership users may invite membership users to clients

PMSS Ektron Server Control-Based Templates

Overview

The following templates are based mainly on Ektron Server Controls

- Wiki
- Discussion
- Documents
- Milestones
- Issue Tracker
- Blog

WIKI Template

The PMSS Wiki is the project's landing page.

This template provides an interface to Ektron Wiki capabilities (see CMS400 documentation for more information). This template is based on three Ektron Server Controls, described below.

Control	Notes
ListSummary	Uses EKML for presentation (<sitepath/> / StarterApps / ProjectManagement / ekml / Wiki.ekml)
Directory	Uses EKML for presentation (<sitepath/> / StarterApps / ProjectManagement / ekml / Taxonomy.ekml)
ContentBlock	

Discussion Template

The PMSS discussion template provides an interface to Ektron's Discussion Forum (see CMS400 documentation for more information). This template does not modify the discussion control's feature set.
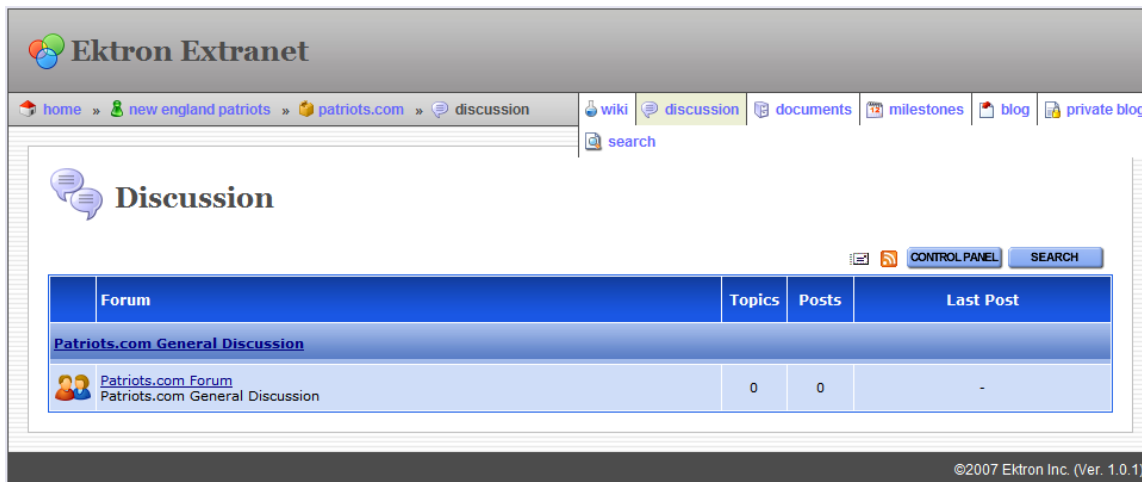
Documents Template

The Documents template provides an interface to CMS400.NET's document management features.
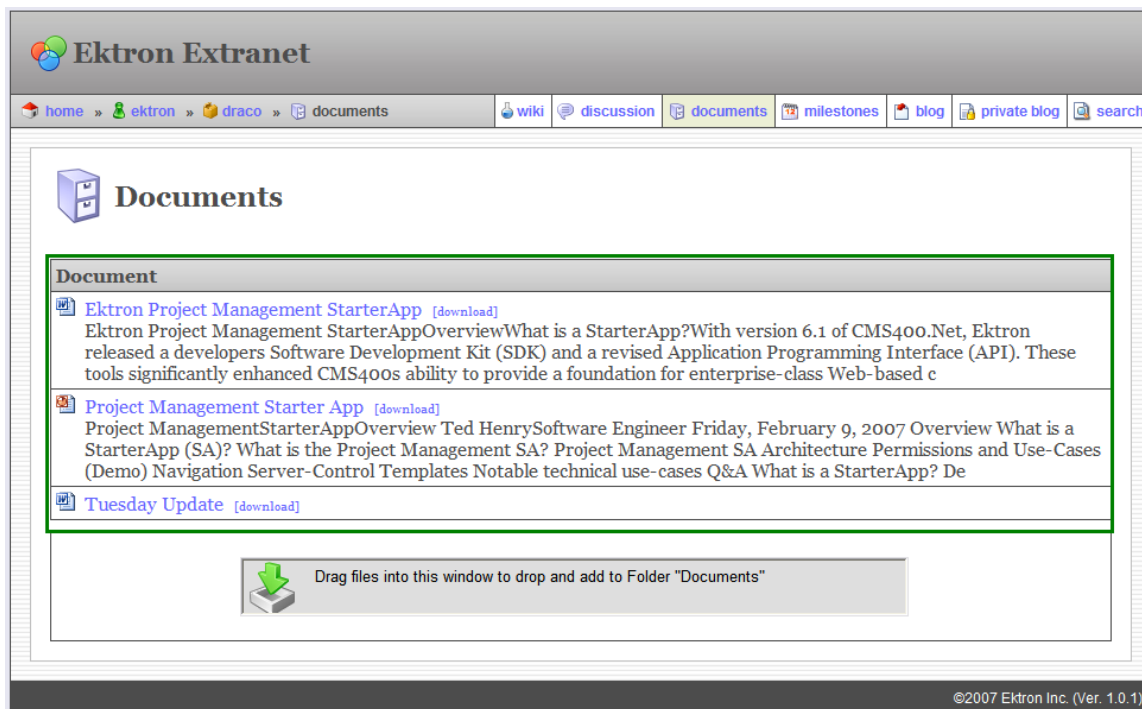
Using the Directory and ListSummary controls, users may drag-and-drop documents within this page, and have them listed for display.

This ListSummary control uses an EKML file to control the display. This file resides at *<siteroot/>* / StarterApps / ProjectManagement / ekml / Documents.ekml.

Milestones Template

The Milestones template provides an interface to collect and display important calendar dates (Milestones) for the project.
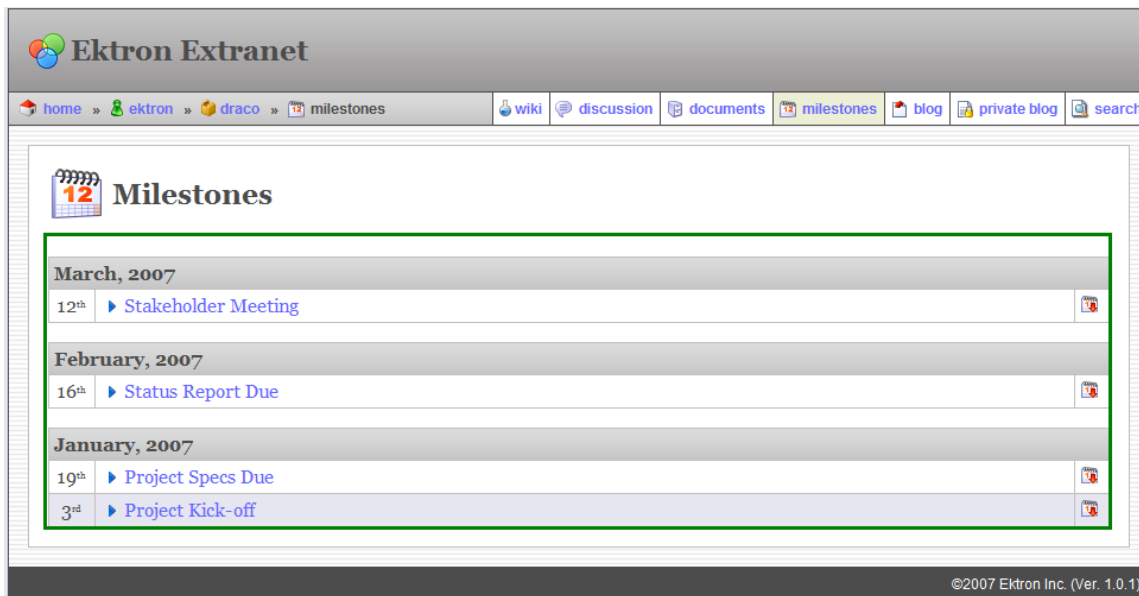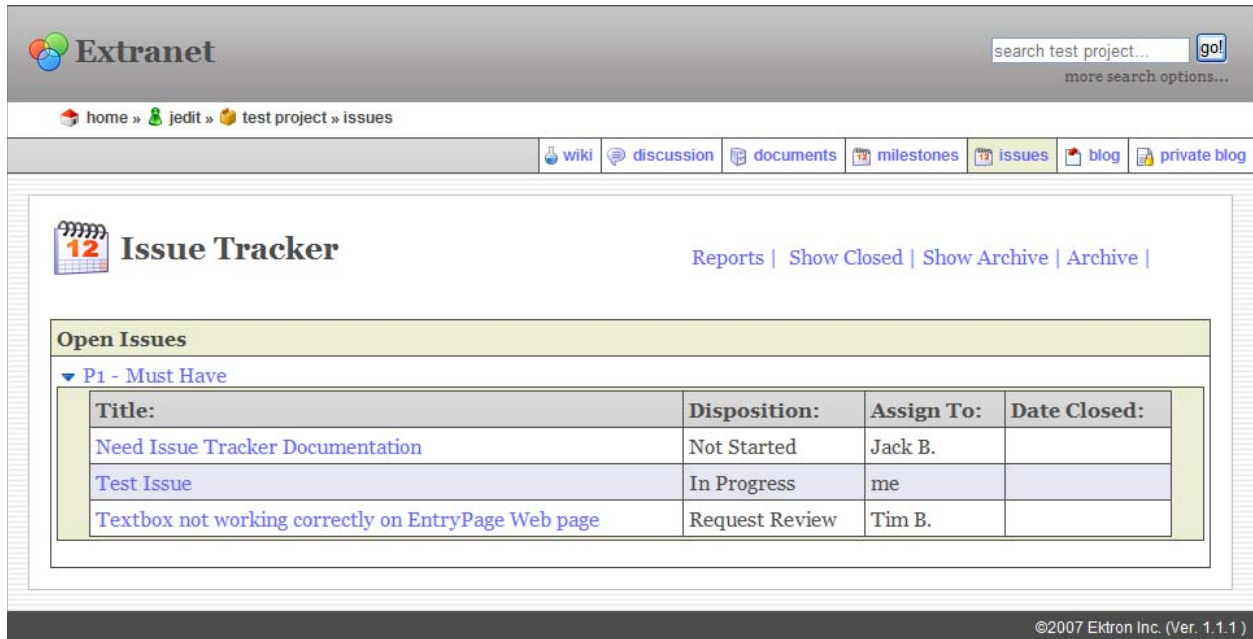
This template is based on the ListSummary control and uses an XSLT as its presentation medium. The control is data-bound, and the XML is extracted via code-behind in .NET.

Only CMS users can add Milestone content. Membership users may only view Milestones. Milestones are added via a CMS400 "SmartForm." After a Milestone is created, it may be imported into Microsoft Outlook's calendar.

Issue Tracker Template

The Issue Tracker template provides an interface for members of the project to track issues with a project. *See Also:* Ektron CMS400.NET Project Management Starter Site User Manual

This template is based on the ListSummary control and uses an XSLT as its presentation medium. The control is data-bound, and the XML is extracted via code-behind in .NET.

CMS users can add, edit, close and archive Issues. Membership users may only view Issues. Issues are added via a CMS400.NET "SmartForm."

Blog Template

The Blog template uses the standard CMS400 Blog control.

The control renders two types of blogs per project.

- a public blog - all project members can view and interact with
- a private blog - only CMS users can view and interact with

Based on the requesting user's type (CMS user or Membership user), the navigation methods that retrieve the Information Architecture (see PMSS Navigation above) will include a link to the private blog.

Only a CMS user can view and interact with the private blog. Membership users do not see the link to "Private Blog."