Ektron

Redefining Web Content Management

Ektron CMS300
Setup Manual

Version 4.8, Revision 1

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For updated versions of this manual, please visit:
http://www.ektron.com/cms300-web-cms.aspx?id=906#documentation

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Table of Contents

What's In This Manual....................1
Online Learning Center.................... 1

Preparing for Windows XP SP2 2
More Information on Windows XP Service Pack 2 2
Disabling the Popup Blocker.................... 2
Enabling Popup Windows.................... 2
Download and Installation with Windows XP SP2 3

Upgrading Ektron CMS300 6
Before You Upgrade.................... 6
Upgrading 6
Performing the Upgrade.................... 7
Upgrading the Database....................11
Updating Strings 13
What Happens After You Run the Upgrade 15
What Happens Next? 16
Upgrading Your Database 17
Prerequisites.................... 17
Performing the Database Upgrade 17
Backing Up Databases 19
Backing Up a Microsoft SQL Database 19
Restoring a Microsoft SQL Database 23
Backing Up an MSDE2000 Database 26
Restore an MSDE2000 Database 26
Updating Application Messages.................... 28
Upgrading Ektron CMS300.................... 28
Using the Language Update Utility 28
Updating Your Setup File 29

Installing Ektron CMS300 30
Before You Install.................... 30
System Requirements 30
Server Requirements.................... 30
Client Requirements 31
Optional Requirements.................... 31
Preparing for Installation 31
Installing Microsoft Data Access Component (MDAC) Drivers........ 32
After You Install... 32

Performing the Install 33
Running Ektron CMS300 Setup 33
Ektron CMS300 Hosting Example 40
Install Ektron CMS300 40
Setting up Directories.. 40
Creating DSNs 41
Updating Site_Scripts_Path.xxx 44
Overview.. 44
Updating Site_Scripts_Path.xxx 45
Creating a New File 45
Updating Setup.xxx.. 46
What’s Next?.. 47

Ektron CMS300 Databases 48
Microsoft Access Databases 49
CMS300_v47_Access.mdb.. 49
Setting Up an MS-SQL Database.................................... 50
Creating An Empty SQL Database 50
Running the SQL Script 50
Creating New DSN... 51
Moving the Data 53
Modifying Setup.xxx... 53
Updating Setup.xxx Files... 53
What’s Next?.. 54
Setting Up a MySQL Database....................................... 55
Requirements... 55
Connecting to MySQL 55
Creating the Database 56
Building the Ektron CMS300 Tables 57
Creating a DSN for the MySQL Database 58
Moving Data into the MySQL Database... 59
Modifying Setup.xxx... 60
Updating Setup.xxx Files... 60
What’s Next?.. 61
Setting Up an Oracle 9i Database.................................. 62
Before You Begin... 62
Test Configuration... 62
Configuration Procedure.. 62
Case Sensitivity 63
Creating Necessary Tables 63
Building Tables in Your Oracle Database 63
Testing the Script 64
Creating New DSN... 65
Moving the Data 67
Modifying Setup.xxx... 68
Updating Setup.xxx Files... 68

What's Next? ... 69

Configuring Ektron CMS300 ... 70
Configuring E-Mail Notifications ... 71
CDOSYS ... 71
Set up SMTP Server ... 71
Verification for Relay ... 72
Customizing Ektron CMS300 to Work with CDOSYS ... 76
SMTPServer ... 77
SMTPPort ... 78
SMTPUser ... 78
SMTPPass ... 78
Using the Encrypt Email Password Utility ... 78
Allowing HTML in eMail ... 79
Error Messages ... 80
What's Next? ... 80
SSL Support ... 81
Setting Up the Certificate ... 81
Updating Ektron CMS300 ... 84
DSN-less Connection ... 86
Before You Begin ... 86
Creating a UDL File ... 86
Windows 98/ME/NT ... 86
Windows 2000 ... 87
Configuring The UDL File ... 87
Configuring Ektron CMS300 for the UDL File ... 88
Configuring Ektron CMS300 for the Provider String ... 89
Converting UDL File to a Provider String ... 89
Configuring Ektron CMS300 to use the Provider String ... 89

Customizing Ektron CMS300 ... 91
Language SDK ... 91
Customizing Automatic email ... 91
Using the Language SDK to Customize Email ... 92
Variables ... 93
List of Ektron CMS300 Emails ... 94
Notify Approval Process Complete ... 94
Deletion of Content Approved ... 94
Immediate Deletion of Content ... 95
Approved Content Awaiting Go Live Date ... 95
Approved Content Published Immediately ... 95
Decline Approval Request ... 95
Send Approval Message ... 96
Branding Ektron CMS300 ... 96
Style Sheet ... 96
Class Explanation ... 97

General Classes 97
Calendar Classes 98
Workarea Classes 98
History Classes 98
Login Classes 98
Folder Control Classes 99
Library Classes 99
Images 99
Application Images 99
Language Images 100

Moving Content from Staging to Production Server....101

Overview 101
Best Practice 101
Managing an Architectural Change 102
Deploying Separate Staging and Production Servers 103
Basic Deployment 104
SQL Replication and CMS Load Balancing 104
Deploying with MS Application Center 104

Migrating Your Site to Ektron CMS300 106

Overview 106
Initial Steps 106
Installation 106
Verify Installation 107
Setting up Your New Site 107
What to Copy to Your Site 107
Setting up the Database 107
Modifying Application Parameters 108
Creating a Login Page 109
Logging In 109
Modifying Configuration Settings 110
Setting up Active Directory 110
Modifying the Setup Screen 110
Setting up Meta Data 111
Setting up XML Configurations (Ektron CMS300 only) 112
Creating Ektron CMS300 Users 112
Creating User Groups 112
Configuring Content Folders 113
Creating Your Templates 113
Guidelines for Creating a Template 114
Migrating/Creating Content 115
Deployment 115
Setting Up a Multilingual Web Site 116

Deploying Ektron CMS300 via MS Application Center 117

Overview 117
What is Deployment? 118
Other Configurations 119
Audience 119
Requirements..119
Prerequisites 120
Deployment Model Configuration 120
Configuration Overview 120
Installing Ektron CMS300 on the Staging Server 121
Setting Up an MS-SQL Database for Ektron CMS300 121
Modifying web.config.. 121
Configuring Staging Server’s Application Center.......................... 121
Connecting to the Staging Server’s Application Center................. 122
Configuring the Application Settings for the Cluster 131
Adding the Production Server to the Cluster 135
Deploying the Files 138
Viewing The Results 142
Configuring the Production Server 144
Before You Configure the Production Server............................... 145
Creating Blank MS-SQL Database 145
Configuring MS-SQL Database 145
Registering Production Server’s MS-SQL Server......................... 146
Configuring the Staging Server’s Database................................. 151
Configuring the Production Server’s Database 157
Synchronizing the Databases 166
What’s Next? 168
Using the Deployment Model.. 168

Additional Information 170

Supporting Documents 170
Support 170
Sales 170

What's In This Manual

In this manual, the Ektron CMS300 Setup Manual, Version 4.8, you will find information including:

- Preparing for Windows XP SP2
- Ektron CMS300 Minimum Requirements
- Pre installation Tasks
- Upgrading Ektron CMS300
- Installing Ektron CMS300
- Ektron CMS300 Hosting Example
- Setting Up an MS-SQL, MySQL, or Oracle Database
- Creating a DSN-less Connection
- Configuring and Using SSL for Ektron CMS300
- Migrating Your Existing Web Site to Ektron CMS300

Online Learning Center

A lot of the information in this manual is also presented in an tutorial, animated format on Ektron's Web site. To access Ektron's CMS300 Web Training, go to http://www.ektron.com/training/cms300training/.

Preparing for Windows XP SP2

Microsoft Windows XP Service Pack 2 includes significant changes affecting **Ektron CMS300** security, especially in regard to the installation of the eWebEditPro ActiveX control. The most significant change affects the eWebEditPro+XML editor in data design or data entry modes. To work around this change, configure **Ektron CMS300** to allow pop-up windows for automatic download and installation.

More Information on Windows XP Service Pack 2

For more information on Windows XP Service Pack 2, visit the Microsoft site at www.microsoft.com/technet/prodtechnol/winxppro/maintain/winxpsp2.mspx. One article on that site of particular interest to developers is "Changes to Functionality in Microsoft Windows XP Service Pack 2". Part 5 of that article, "Enhanced Browsing Security," details changes to Internet Explorer.

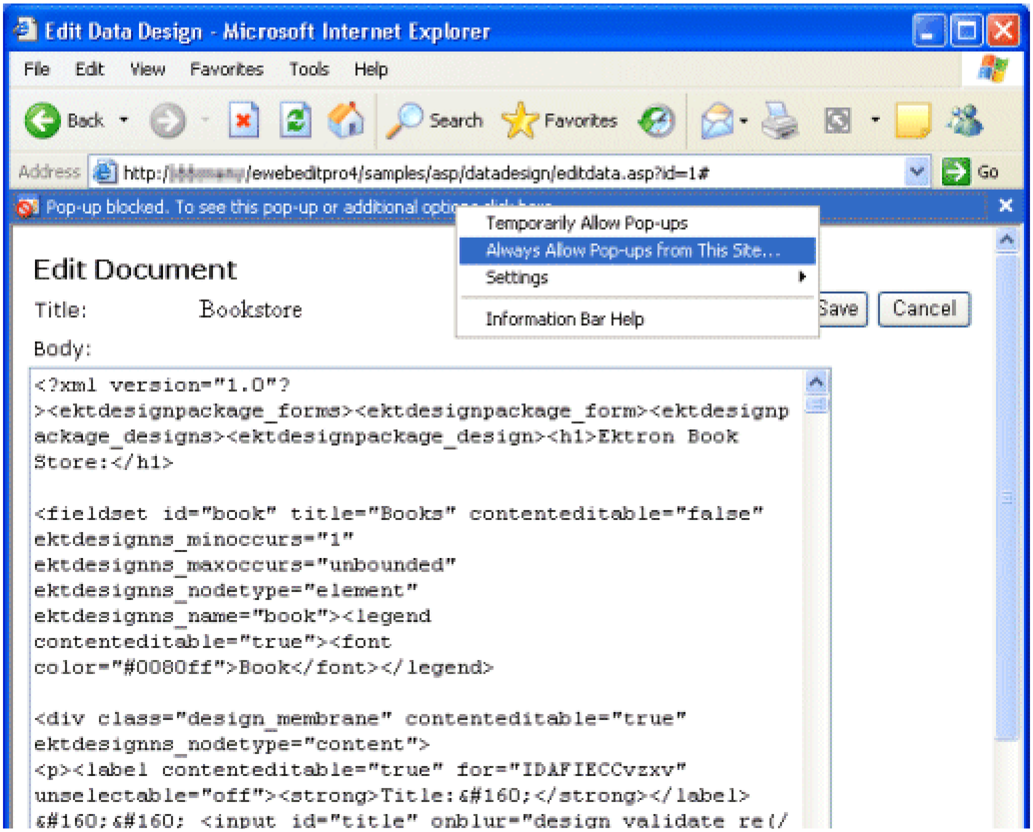
Disabling the Popup Blocker

Pop-up windows are used to initially install the editor in Internet Explorer (IE) and by other features, such as selecting an image and setting Section 508 Data Table properties. By default, Windows XP SP 2 blocks pop-up windows. For Ektron products to operate effectively, allow pop-up windows for web sites that host Ektron products.

Enabling Popup Windows

When a Web page in IE running on Windows XP Service Pack 2 (XPSP2) attempts to open a pop-up, the Information Bar appears at the top of the page. The message on the Information Bar is **Pop-up blocked. To see this pop-up or additional options click here...**.

To allow proper operation of the editor, enable pop-up windows for the Web site. To do so, click the Information Bar and select **Always Allow Pop-ups from This Site**.



For easier administration, add the Web site as a Trusted site. By default, this change disables the pop-up blocker.

Download and Installation with Windows XP SP2

The installation of the Ektron editor is only required the first time it is used and for every upgrade. The automatic installation supported in IE uses a pop-up to walk the user through the process. Therefore, the first step is to enable pop-up windows (see "Enabling Popup Windows" on page 2). An additional step to install the editor requires an extra mouse click by the user.

If you are an administrator, you may want to configure client computers to avoid these extra steps. One simple way is to add the Web site that hosts Ektron products as a Trusted Site.

When installing the editor, the user should follow these steps.

1. When the Automatic Download and Installation page appears, click the **Install** button.
2. When the next window appears, the Information Bar displays this message:

   To help protect your security, Internet Explorer stopped this site from installing an ActiveX control on your computer. Click here for options...
3. In place of the editor, the following message appears.

   Click here to install the following ActiveX control: 'eWebEditPro' from 'Ektron Inc'...
4. Click on either message and select **Install ActiveX Control...**.


http://www.ektron.com - eWebEditPro Installation - Micros...
To help protect your security, Internet Explorer stopped this site from installing an ActiveX control on your computer. Click here for options...
eWebEditPro
Automatic
Download and Installation
If successful, the words "Installation complete" will appear in the box below.
Click here to install the following ActiveX control: 'eWebEditPro' from 'Ektron Inc'...
Install ActiveX Control...
What's the Risk?
If a small red X appears, try downloading the client installation program and running it.
Error loading DoneMsg
Internet

Upgrading Ektron CMS300

Before You Upgrade

License keys from versions prior to 4.0 do not work. If you have not yet performed the license key upgrade wizard on the Ektron.com Web site, go to the following URL and follow the screen instructions.

http://www.ektron.com/ektron_store.aspx

Upgrading

If you are using a previous version of Ektron CMS300, you can upgrade through the installation program. The upgrade consists of the following steps.

1. ”Performing the Upgrade” on page 7
2. ”Upgrading the Database” on page 11
3. ”Updating Strings” on page 13
4. ”Updating Your Setup File” on page 29

This chapter explains the upgrade process and any other steps needed to upgrade **Ektron CMS300**.

Performing the Upgrade

If you are using a previous version of Ektron CMS300, you can use the upgrade included in the installation file. The upgrade installs the new files for Ektron CMS300.

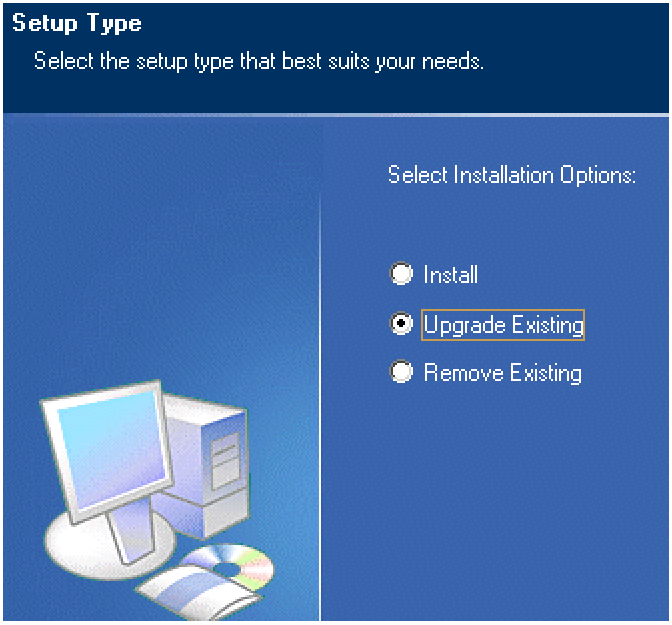
This section explains the steps for a Ektron CMS300 upgrade.

1. Double click the Ektron CMS300 executable file you downloaded from the Ektron site.

2. At the setup type screen, click **Upgrade Existing**.

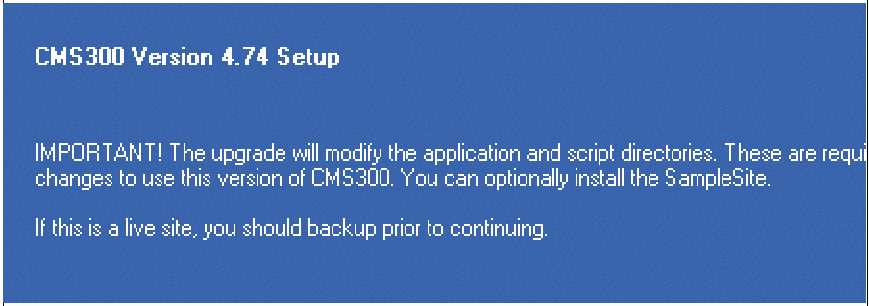
   Click **Next** to continue.

For information about installing a new instance of Ektron CMS300, see ”Installing Ektron CMS300” on page 30.



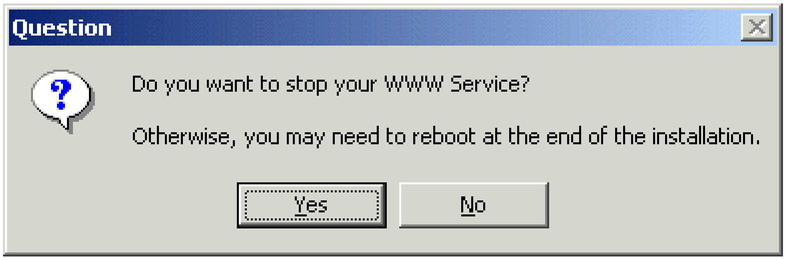
3. The screen on the right appears. Read it and click **Next**.

   Later, this procedure gives you a chance to backup your site.



4. To avoid the possibility of rebooting at the end of the upgrade, you may stop your WWW service here.

   Click **Yes** to stop your WWW service.

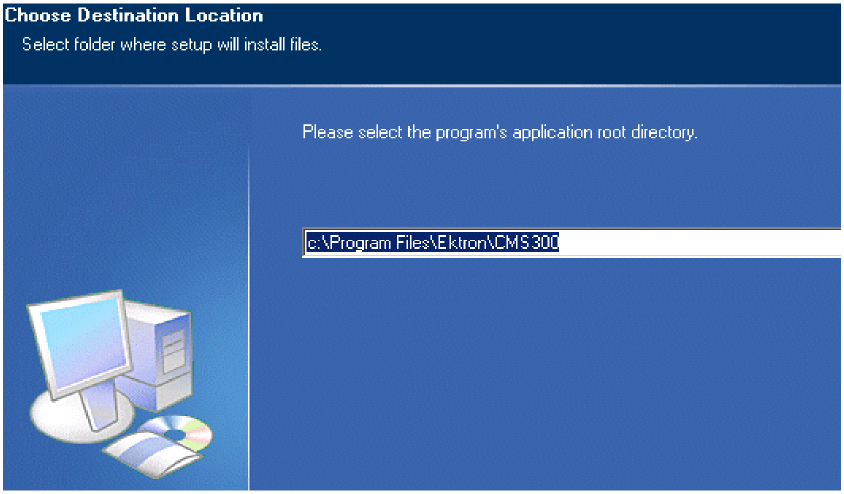


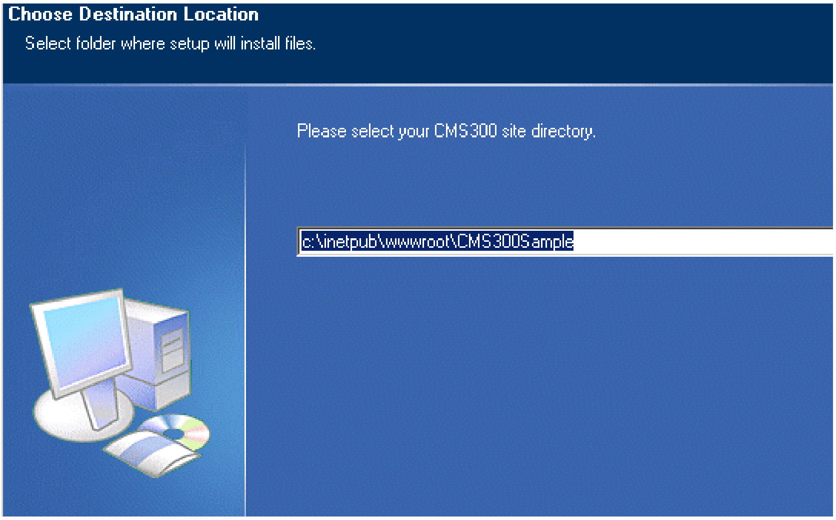
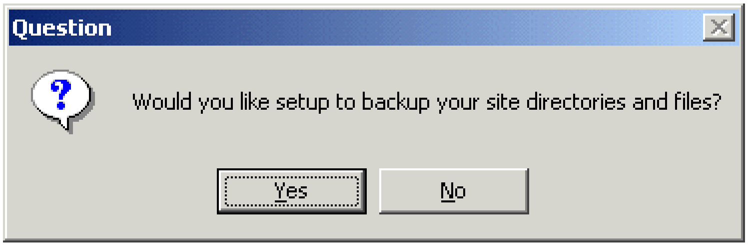
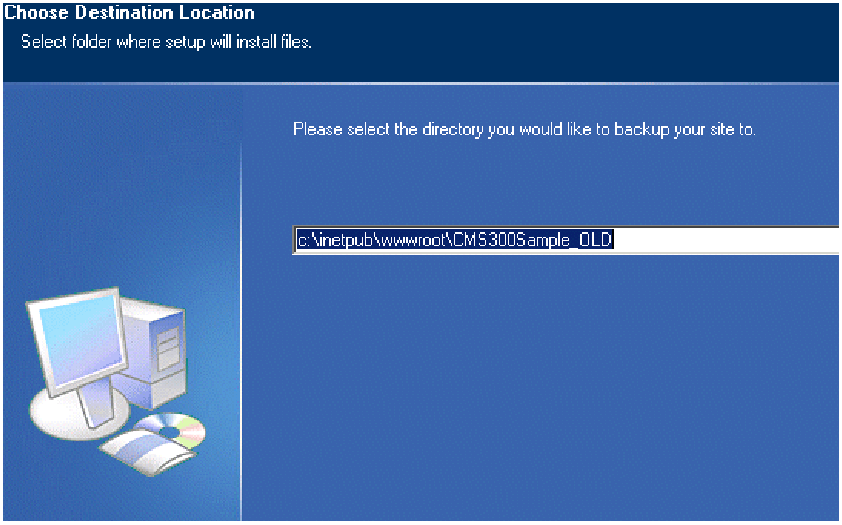
5. At the Choose Destination Location screen, specify the location of your application root directory.

   This is the location of the **Ektron CMS300** components and utilities.

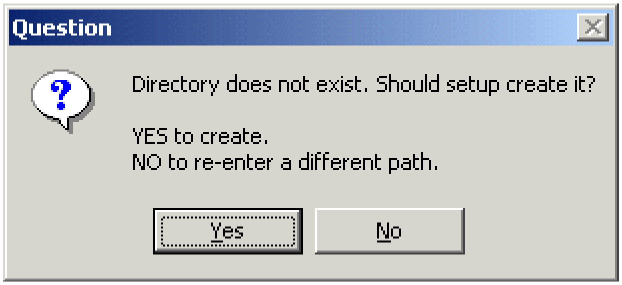
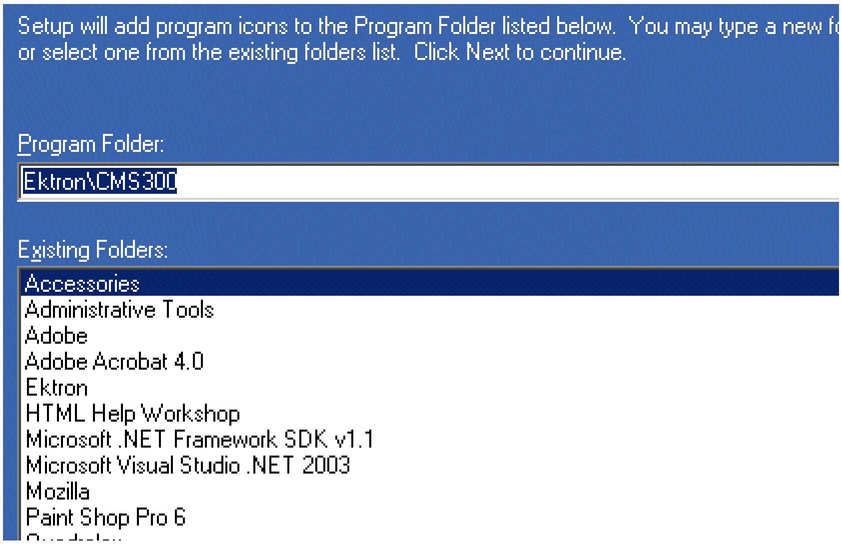
   If the default is incorrect, click the browse button to locate the correct directory. Or, enter the path into the text field.

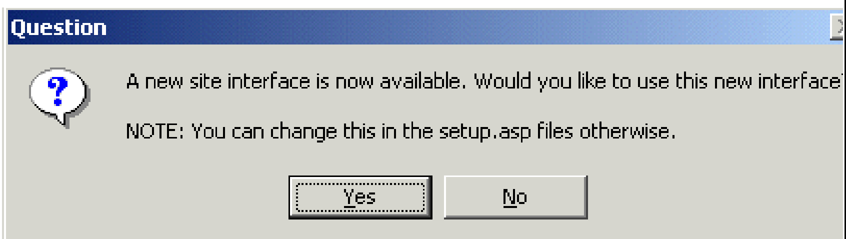
   Click **Next** to continue.



6. Specify the location of your Ektron CMS300 Web site. The site directory is the location of your Web site templates, CMS300scripts directory, etc. If the default location is incorrect, click the browse button to locate the correct directory, or enter the full path into the text field. Click **Next** to continue.	
7. The screen on the right appears. Click **Yes** to make a backup of your Ektron CMS300 Web site files. If you click **No**, proceed to step 13.	
8. Specify the location to which you want to backup your Ektron CMS300 files. Keep the default, enter a new path, or click the browse button to browse for a folder. Click **Next** to continue.	

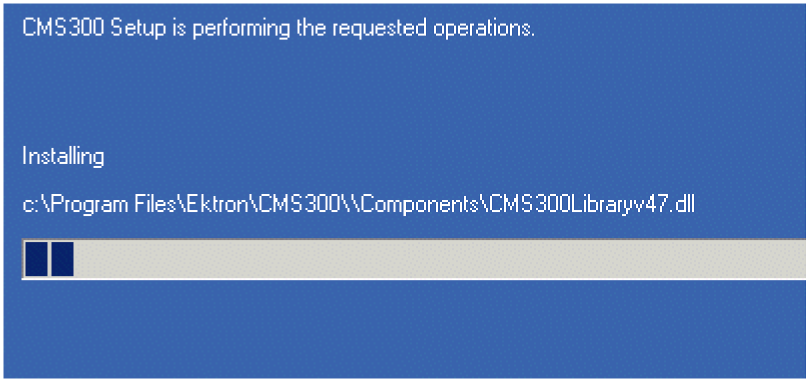
<table>
<tr><td>9. If the directory does not exist, you are asked if you want to create it.

Click **Yes** to create a new directory. Click **No** to go back and select a different folder to backup the files to.</td><td>
</td></tr>
<tr><td>10. The upgrade program installs and configures the necessary files.</td><td>
</td></tr>
<tr><td>11. You are prompted to select a program folder for **Ektron CMS300**.</td><td>
</td></tr>
<tr><td>12. You are asked if you want to use the new interface.

The new interface uses a floating tool bar rather than a fixed one. The toolbar appears when the user logs in and browses the Web site.</td><td>
</td></tr>
</table>

For more information, see the **Ektron CMS300** Administrator manual section “Introduction to Ektron CMS300” > “Getting Started” > “Recognizing Content Blocks” > “The Floating Toolbar”

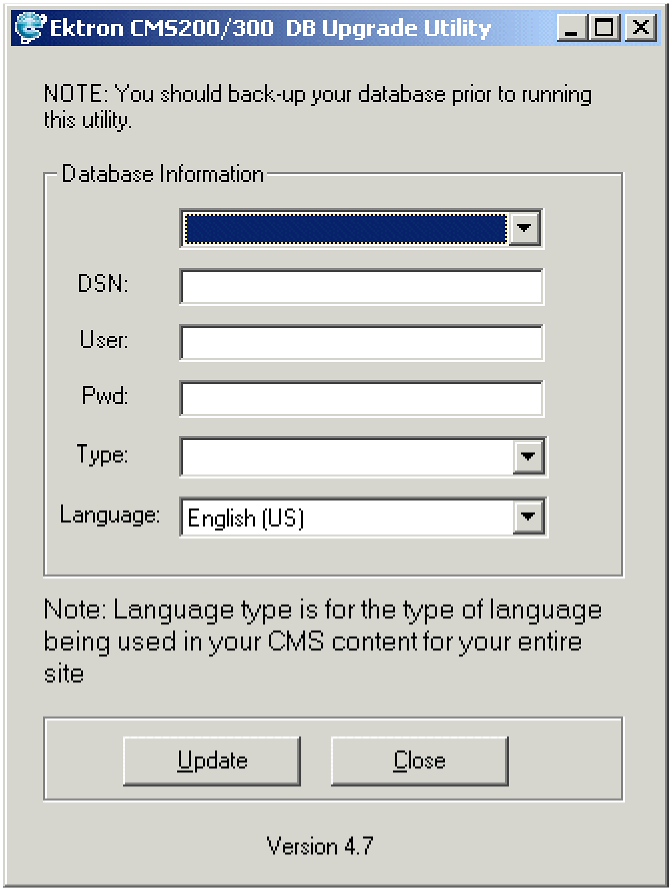
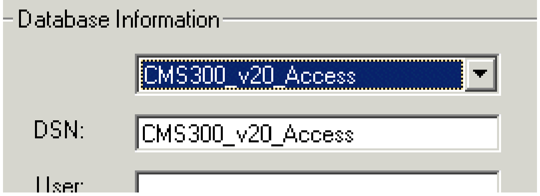
13. **Ektron CMS300** installs the files.



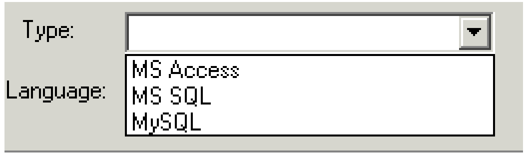
14. After all files are installed, you are prompted to upgrade the database. To upgrade the database now, click **Yes**.

Note: For important information about upgrading the database, see ”Performing the Database Upgrade” on page 17.

Upgrading the Database

15. The Ektron CMS300 Database Upgrade Utility appears.	
16. **Ektron CMS300** attempts to create an ODBC connection. If it cannot, follow the directions in "Creating DSNs" on page 41. Then, continue with the next step. If it can create an ODBC connection, the screen in the right column appears. 17. Select the DSN for the database from the drop down list.	
18. Specify the username and password that is needed to access the DSN if required.	

19. Choose the database type of your previous (source) Ektron CMS300 database.



20. Select the **Language** of your content blocks. If your content blocks are in several languages, select the language of the majority of them.

    After upgrading your database, all content blocks are assigned the language that you select. If some should not be in that language, find those content blocks and change their language. For more information, see the **Ektron CMS300** Administrator manual section **Special Features** > **Multi-Language Support** > **Working with non-English Content** > **Resolving Conversion Issues**.

Warning!
If you select a language other than English, you must also open the webroot\`CMS300sample\CMS300Scripts\setup.xxx` file. (The file extension matches your server platform.) Then, change the `DefaultContentLanguage` variable to the language to which you assigned the content via the **Language** field above. In setup.xxx, you must enter the new language's locale ID value. A list of supported languages and their locale id values is in "Appendix A: List of Supported Languages," in the Ektron CMS300 Administrator manual.

---

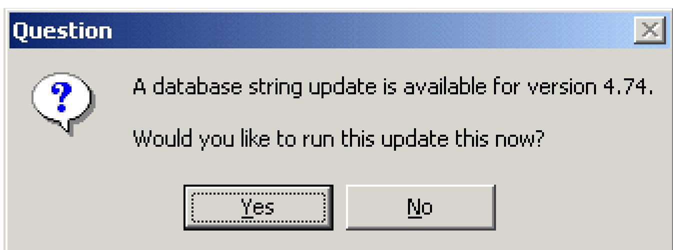
21. Click the **Update** button to execute the database upgrade utility.

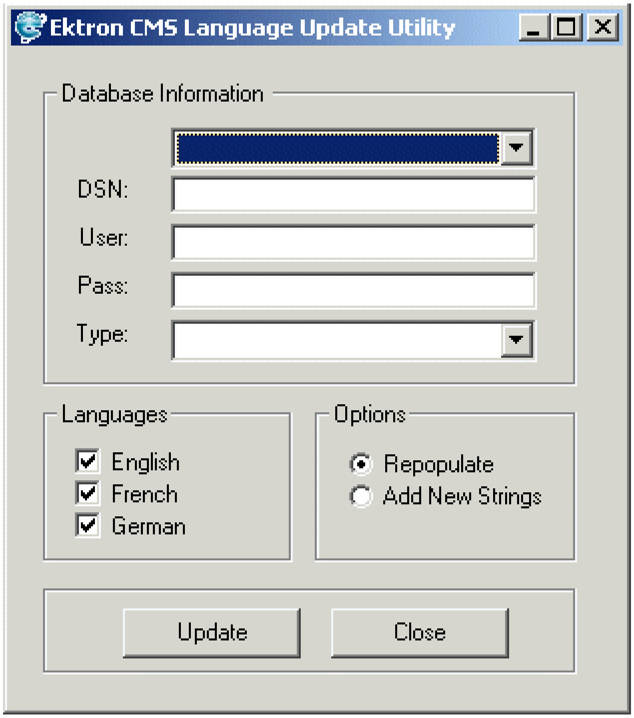
Updating Strings

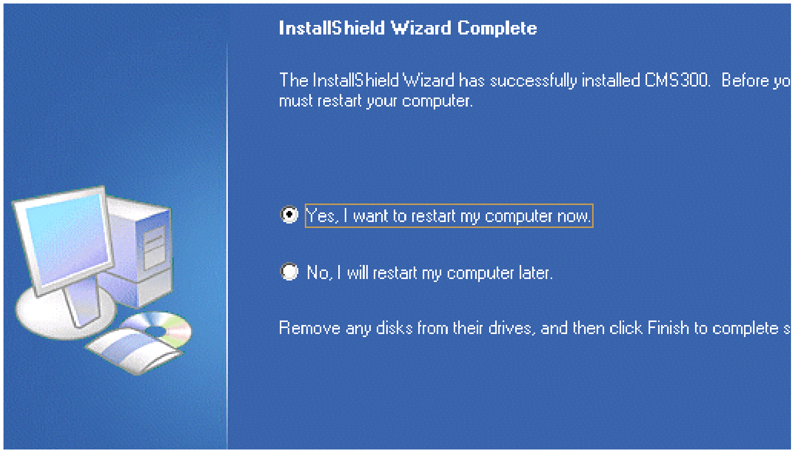
Ektron CMS300 provides language support for French and German. If you are upgrading from a previous version and using your old database, the translated strings are not included. The installation includes a utility that populates your old database with the translated strings.

22. After the database is upgraded, you are prompted to update the database with new, required strings.

    Click **Yes** to continue, or **No** to update the strings at a later time.



23. The Language Update utility opens.	
24. Select the DSN for the database from the drop down list.	
25. Enter a username and password with permissions to the DSN if required.	
26. Select the type of database you are currently using. It will be updated with the language strings.	
27. Select the action you want to perform. • **Repopulate** - deletes all strings and repopulates the database • **Add New Strings** - adds only new strings in the current release of **Ektron CMS300**. (Recommended if you changed existing strings)	
28. Select the **Languages** to be updated/added to the database.	
29. Click the **Update** button. The changes are made to your language strings.	

30. You are asked if you want to restart your computer now or later. You must restart before beginning to use **Ektron CMS300**.	

What Happens After You Run the Upgrade

During the upgrade, the following changes occur.

- A backup of your old Sample site is created.
- The `/CMS300Scripts` directory and all files and folders under it are replaced with new files.

NOTE The installation replaces the old /CMSx00Scripts directory with the new scripts directory. So, you don't need to manually update the /CMS300Scripts directory.

- The database gets updated.

NOTE If you ran the dbupgrade and the language update utilities during the upgrade, your old database is updated to match the new database. The DSN, however, remains what you used in the previous version. Hence, do not update setup.xxx file with the new Database and DSN.

- The new COM Objects get added under `C:/Program Files/Ektron/CMS300/Components` directory.

NOTE While the old COM objects still exist under the Components directory, the application uses the new COM objects. During the upgrade, install automatically registers the v4.7 COM Objects. You do not need to register them.

- The webimagefx directory under `C:/Program Files/Ektron/CMS300/Components` directory is overwritten with the new WebImageFX files.

- The new scripts are added under the utilities directory.
- Install does not upgrade the sample site. It places new sample sites under `C:/Program Files/Ektron/CMS300/Utilities/CMS300Sample`.

NOTE If you want to replace the old CMS300 Samples folder with the new sample site, copy the CMS300Sample folder from `C:/Program Files/Ektron/CMS300/Utilities` directory and paste it in your CMS300Samples directory under `C:/Inetpub/wwwroot/CMS300Samples`.

- The databases cms300_v47_min_access2000.mdb and cms300_v47_sample_access2000.mdb get placed under `C:/Program Files/Ektron/CMS300/Utilities` directory.

What Happens Next?

After upgrading your sample site, you are ready to use **Ektron CMS300**. If you did not run the dbupgrade or language update during installation, you need to do so manually. The next chapter explains how.

Upgrading Your Database

If the database upgrade wasn't successful during the installation, or you chose to do it outside the install, use the Ektron CMS300 database upgrade utility to upgrade your database.

Prerequisites

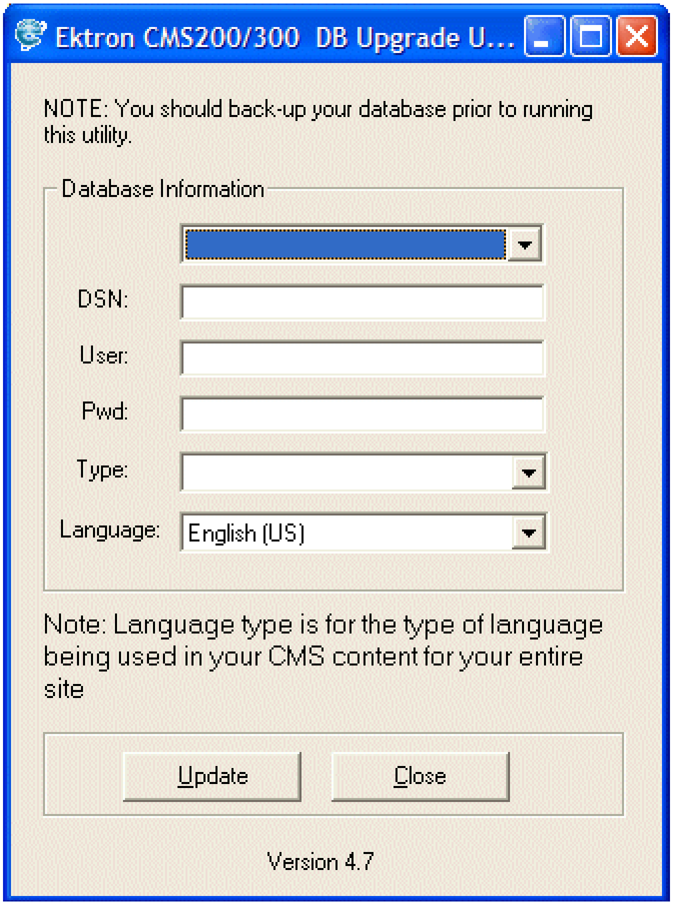
Before upgrading your database, be sure the following conditions are met:

- Ektron CMS300 is installed on your server.
  See "Installing Ektron CMS300" on page 30 or "Performing the Upgrade" on page 7 for more information.
- A DSN pointing to the old database exists on your server. It will be updated.

Performing the Database Upgrade

To perform the database upgrade, follow these steps.

1. Click the Windows Start button then follow this path: **Programs> Ektron > CMS300 > Utilities > Database Upgrade**. (If this path does not work, click the dbupgrade.exe file, located under `C:\Program Files\Ektron\CMS300\Utilities` folder.)
2. The Database Upgrade utility opens.



For information on backing up a database, see "Backing Up Databases" on page 19

3. Follow the directions beginning with "Ektron CMS300 attempts to create an ODBC connection. If it cannot, follow the directions in "Creating DSNs" on page 41. Then, continue with the next step." on page 12.

Backing Up Databases

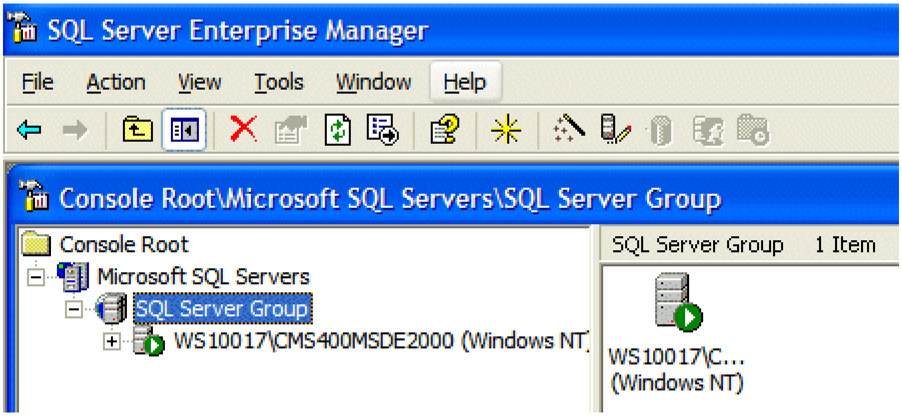
To protect information contained within the database, it is recommended that you back it up before performing a database upgrade. This section describes how to backup and restore Microsoft SQL and MSDE2000 databases. The steps to perform each are in the following sections:

- "Backing Up a Microsoft SQL Database" on page 19.
- "Restoring a Microsoft SQL Database" on page 23.
- "Backing Up an MSDE2000 Database" on page 26.
- "Restore an MSDE2000 Database" on page 26

Backing Up a Microsoft SQL Database

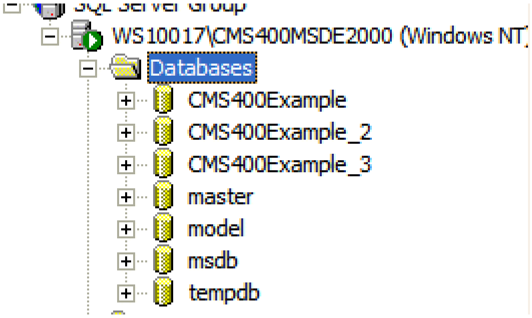
The following is an example of the steps to create a backup of a Microsoft SQL database.

1. Open Microsoft SQL Server Enterprise Manager.
2. Click on **Microsoft SQL Servers > SQL Server Group**.



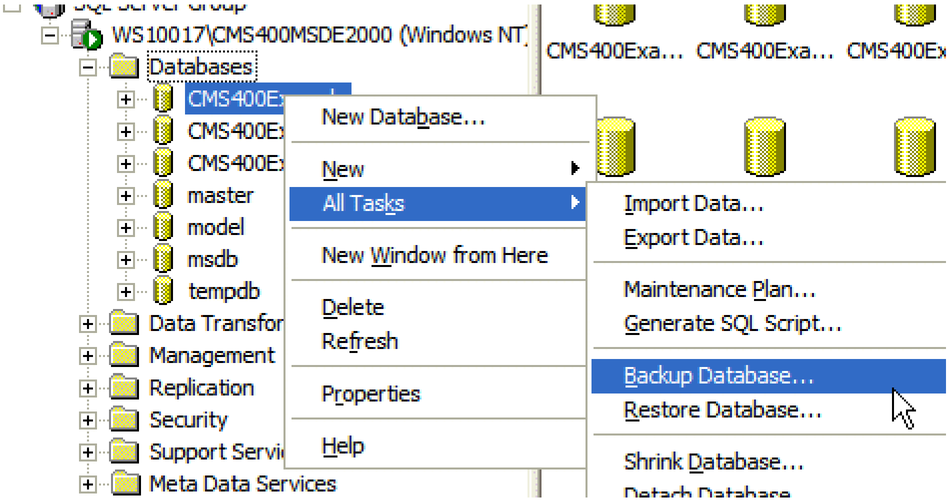
3. Click on the server where the database is located.

4. Click on **Databases**.

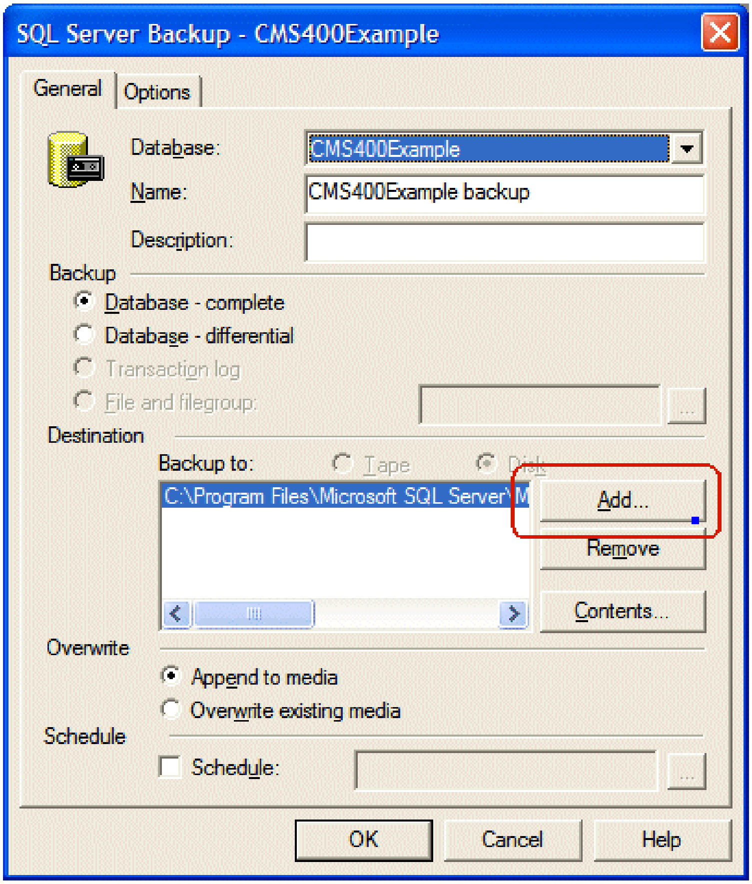


5. Choose the database to backup.

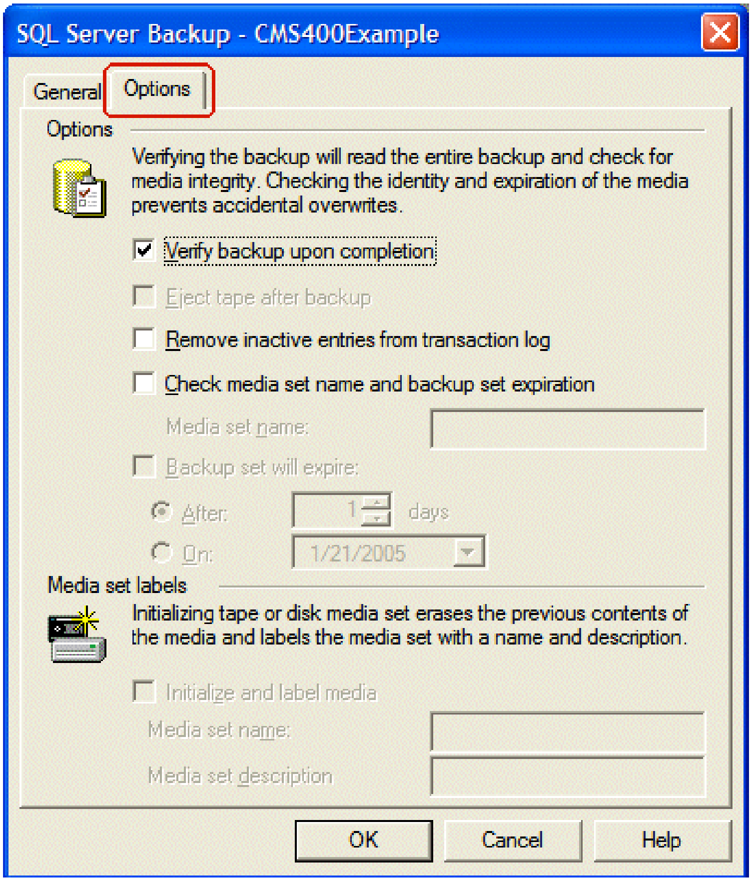
6. Right click on the **Database** and click **All Tasks > Backup Database**.



7. Add a location to backup the file.

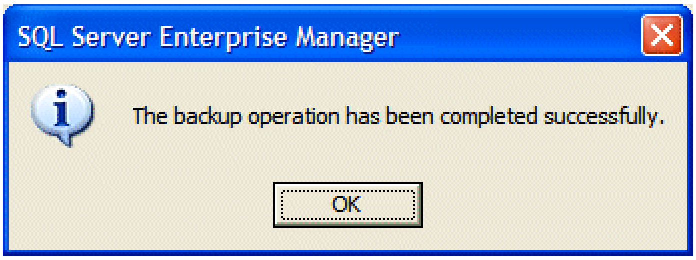


8. Set any options.



9. Click **OK**.

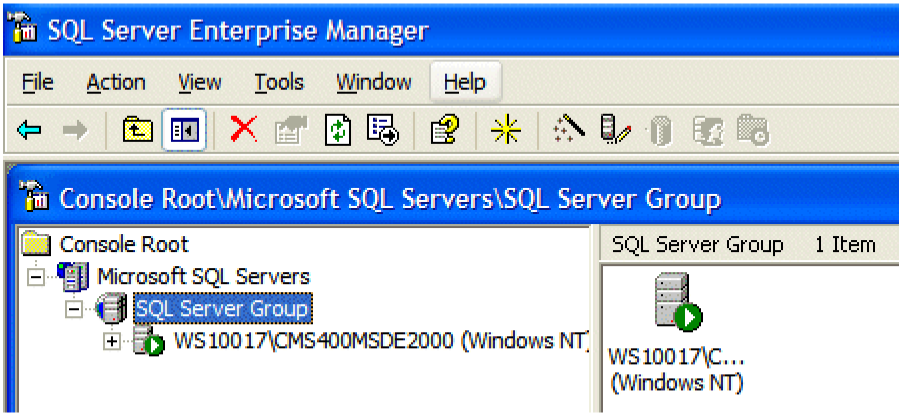
If the Backup is successful, this window appears.



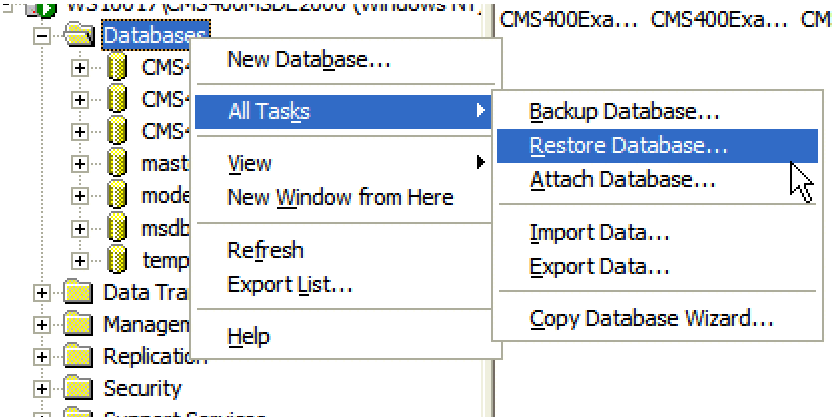
Restoring a Microsoft SQL Database

The following is an example of the steps to restore a backup copy of a Microsoft SQL Database.

1. Open Microsoft SQL Server Enterprise Manager.
2. Click on **Microsoft SQL Servers > SQL Server Group**.

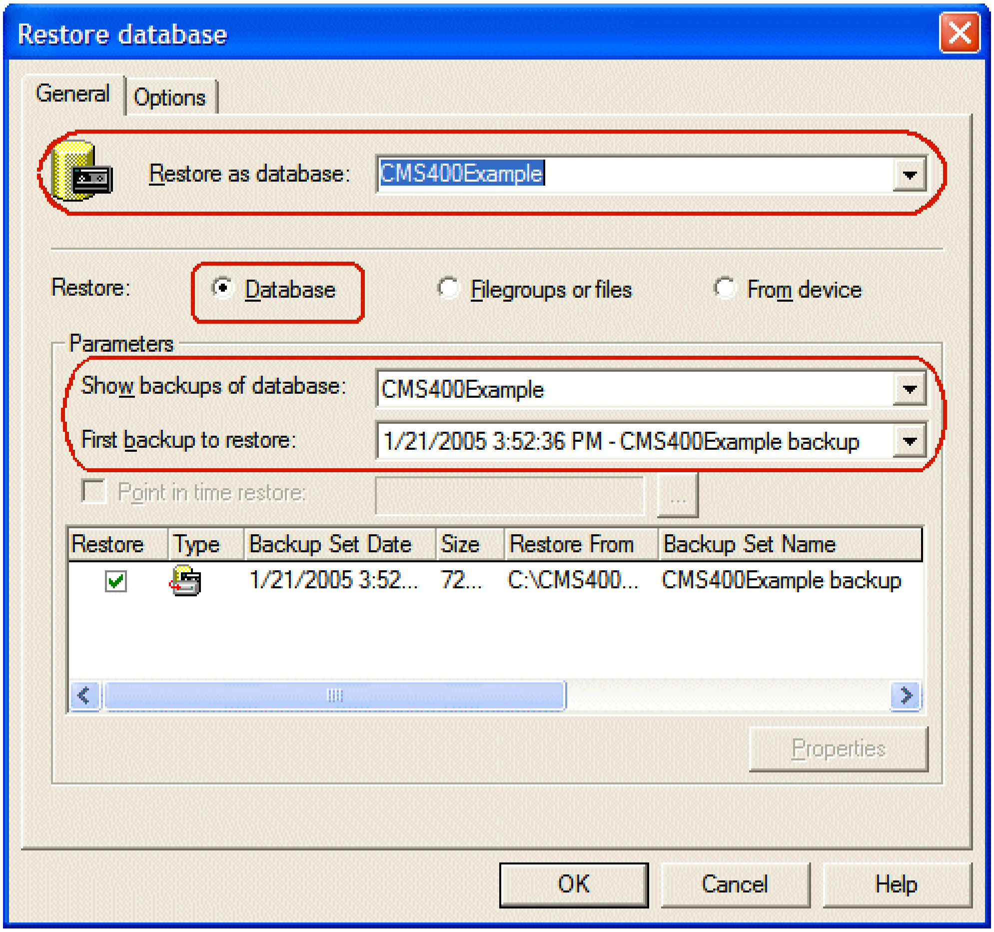


3. Click the server you want to restore the database to.
4. Right click on **Databases > All Tasks > Restore Databases**.

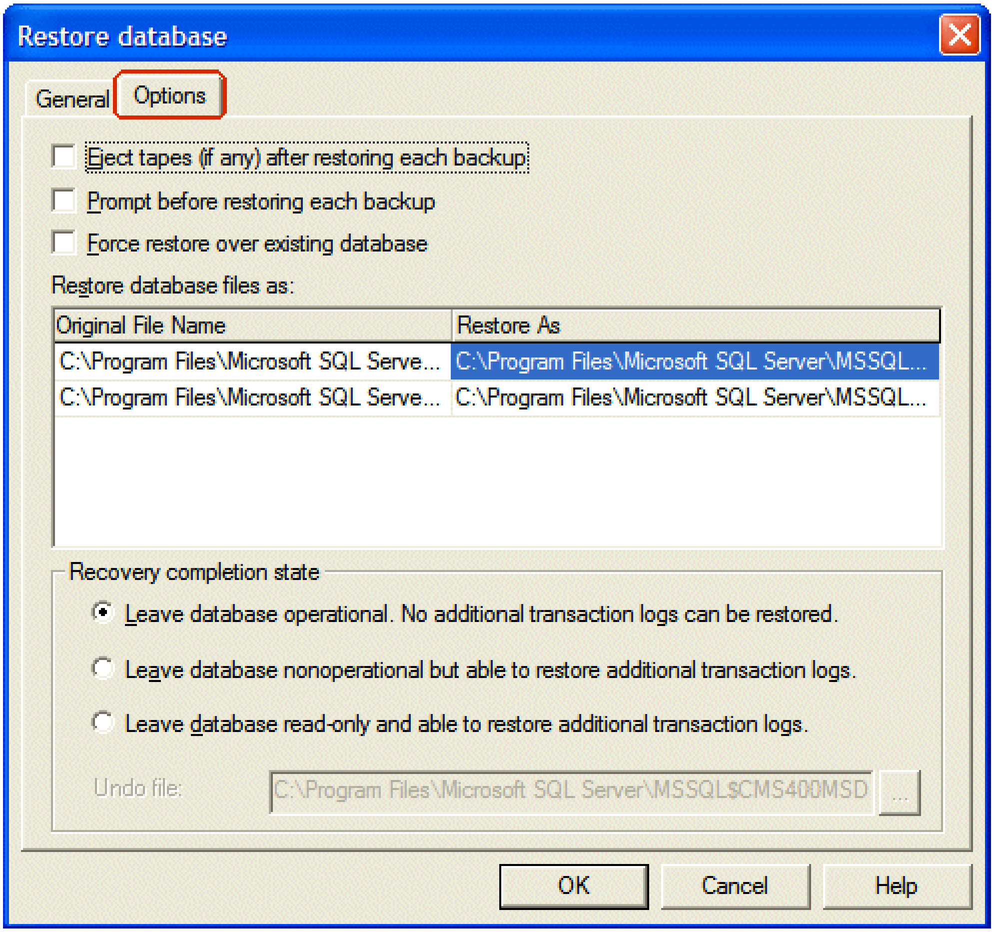


5. In the **Restore as database** field, type the name you want the database to be restored as.
6. Choose the **Database radio button**.

7. In **Parameters**, choose a backup to restore.

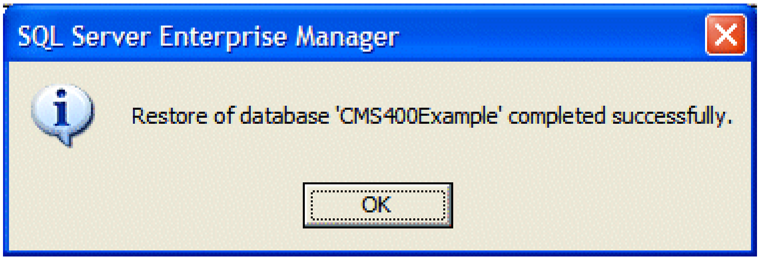


8. Set any options.



9. Click **OK**.

If the restore is successful, this window appears.



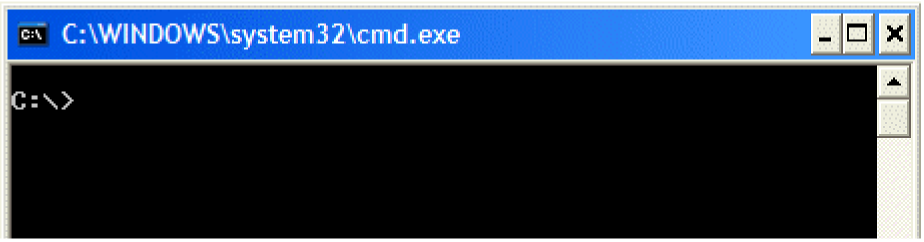
Backing Up an MSDE2000 Database

Below are examples of syntax to back up your database and create a log of your backup. You may need to modify them or add switches based on the configuration of your database. To find a list of switches and their definitions, type **osql -?** at the prompt.

NOTE Switches used by OSQL are case sensitive.

To backup an MSDE2000 database, follow these steps.

1. Open a command window.



2. Add the following line after the prompt.

```
osql -d CMS300Example -E -n -Q "BACKUP DATABASE CMS300Example TO DISK = 'c:\CMS400Example.bak'"
```

3. Press <Enter>.
4. To make a log of the backup, add the following line after the prompt.

```
osql -d CMS300Example -E -n -Q "BACKUP LOG CMS300Example TO DISK = 'c:\CMS400Example _log.bak'"
```

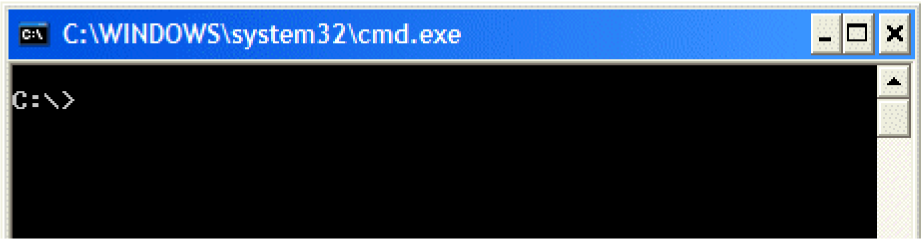
5. Press <Enter>.

Restore an MSDE2000 Database

Below is an example of syntax to restore your database. You may need to modify it or add switches based on the configuration of your database. To find a list of switches and their definitions, type **osql -?** at the prompt.

To restore an MSDE2000 database, follow these steps.

1. Open a command window.



2. Add the following line after the prompt.

```
osql -d master -E -n -Q “RESTORE DATABASE CMS300Example FROM DISK = ‘c:\CMS300Example.bak’”
```

3. Press <Enter>.

Updating Application Messages

Ektron CMS300 provides language support for French and German. If you are upgrading from a previous version and using your old database, the translated strings are not included. The installation includes a utility that populates your old database with the translated strings.

This section explains how to use the language upgrade utility.

Upgrading Ektron CMS300

Before you can use the language upgrade utility, you must upgrade your version of Ektron CMS300. For information on this, see "Performing the Upgrade" on page 7. During the upgrade, if you opted to keep your previous database, proceed with this chapter.

Using the Language Update Utility

To use the language update utility, follow these steps.

1. Click the Windows Start button then follow this path: **Programs> Ektron > CMS300 > Utilities > CMS String Update Utility**. (If this path does not work, click the LangUpdate.exe file, located under `C:\Program Files\Ektron\CMS300\Utilities` folder.)
2. Double click the langupdate.exe file.
3. Follow the directions beginning with "The Language Update utility opens." on page 14.

Updating Your Setup File

After upgrading Ektron CMS300, you must update your setup files. This is because, by default, the DSN in the new setup file points to a new database. To use your existing database, update the setup files.

NOTE The pre-existing database *must* have been updated before you begin this procedure. See ”Upgrading Your Database” on page 17 and ”Updating Application Messages” on page 28 for more information.

To update these files:

1. Open the file(s):
   - CMS300Sample/CMS300Scripts/setup.asp
   - CMS300Sample/CMS300Scripts/setup.aspx
   - CMS300Sample/CMS300Scripts/setup.php
   - CMS300Sample/CMS300Scripts/setup.cfm

NOTE If you update any setup file other than setup.asp, you must make the same changes to setup.asp.

2. Locate the line that begins with `DSN=” “`
3. Within the quotation marks, enter the DSN of your existing Ektron CMS300.
4. Save and close the file(s).

You are ready to use your updated Web site.

Installing Ektron CMS300

Before You Install

Before you install **Ektron CMS300**, make sure your system meets the system requirements.

System Requirements

Server Requirements

Recommended Hardware Configuration	• Microsoft® Windows® Server 2003 • Intel® Pentium 4 Hyper-Threaded or Intel® XeonTM processor Processor (with 800MHz Bus) • 1 GB RAM or higher • RAID Array for Hard Drives • MS SQL Server (on separate server)
Operating System	• Microsoft Windows Server 2003 (recommended) • Microsoft Windows 2000/XP Professional • Microsoft Windows NT Server, SP6
Web Application Server	• Microsoft Active Server Pages (ASP) 2.0 or Higher required Optional Web Application Servers: • Microsoft ASP .NET Framework 1.1 • Macromedia ColdFusion 4.0.1 or higher (including ColdFusion MX) • PHP
Web Server	• Microsoft IIS 4.0 or higher

Database	• Microsoft Access • Microsoft SQL Server 2000 (recommended) • Microsoft SQL Server 7.0 • Microsoft SQL Server Desktop Engine (MSDE) 2000 • Oracle 9i • MySQL

Client Requirements

Operating System	• Any IBM-PC compatible system • suggested: 166 MHz or faster with at least 64MB RAM • Macintosh OS X (Using Dreamweaver Extension, Terminal Services, or Virtual PC)
Browser for editing	• Microsoft Internet Explorer 5.0 or higher • Netscape 4.7x, 6.1 and higher • Firefox 1.0 or higher • Apple Safari
Browser for viewing	• All browsers

Optional Requirements

Web Development Tools	Visual Studio.NET, Allaire HomeSite, Macromedia/ Allaire ColdFusion Studio, Macromedia Dreamweaver, Microsoft FrontPage 2000, NotePad

Preparing for Installation

Prior to installing Ektron CMS300, perform the following steps.

1. Install Microsoft Data Access Component (MDAC) drivers version 2.1 or greater.

NOTE You do not need to install MDAC 2.1 drivers if you have Windows 98 Second Edition or greater or any Microsoft Office application is installed on your machine.

2. Install a web server (such as the Microsoft® Personal Web Server or Internet Information Server).
3. Install and configure your Web Application Server.

Installing Microsoft Data Access Component (MDAC) Drivers

Install MDAC drivers version 2.1 or higher. We recommend the latest available from Microsoft.

To find out which drivers are installed on your machine, download the Component Checker tool from Microsoft. See www.microsoft.com/Data/download.htm.

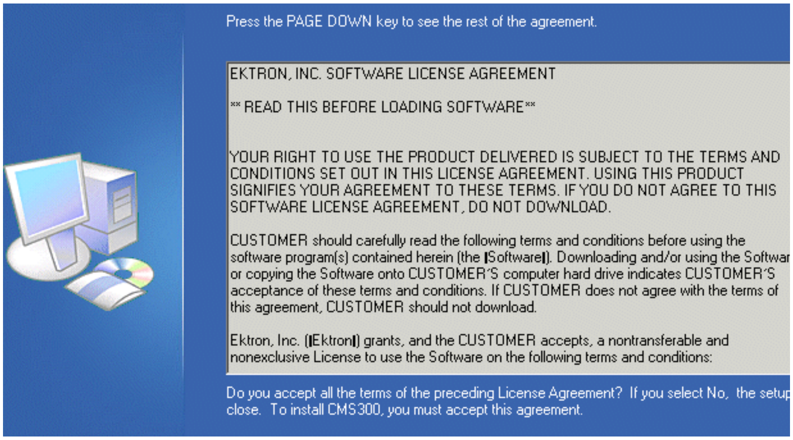
After You Install...

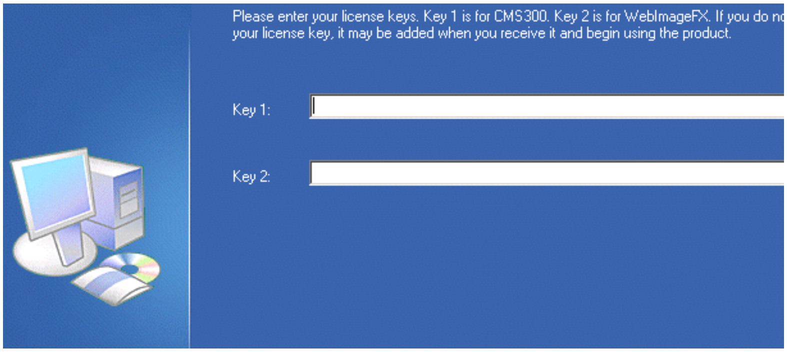
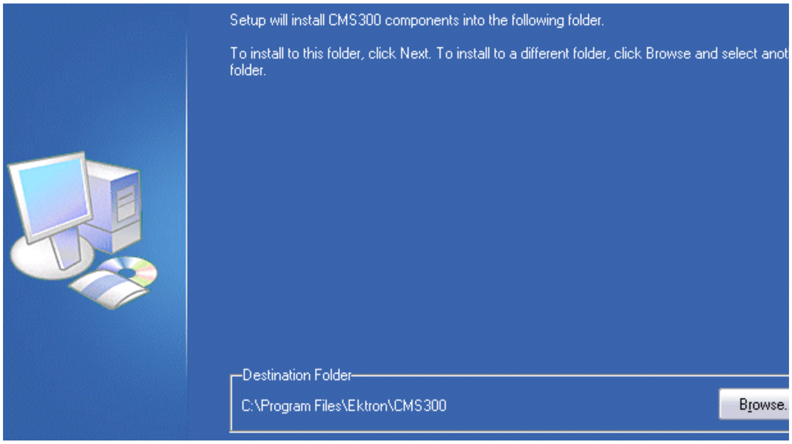
Ektron strongly recommends configuring a secure socket layer (SSL), especially if you are using Active Directory Integration, to encrypt passwords that would otherwise be sent to the Ektron CMS300 server as clear text. See ”SSL Support” on page 81 for more information.

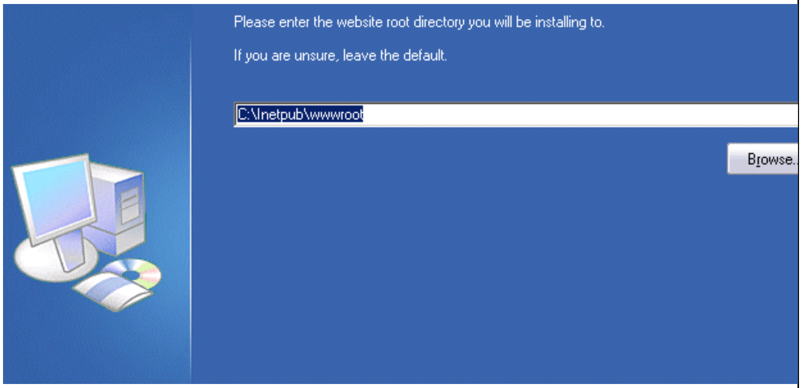
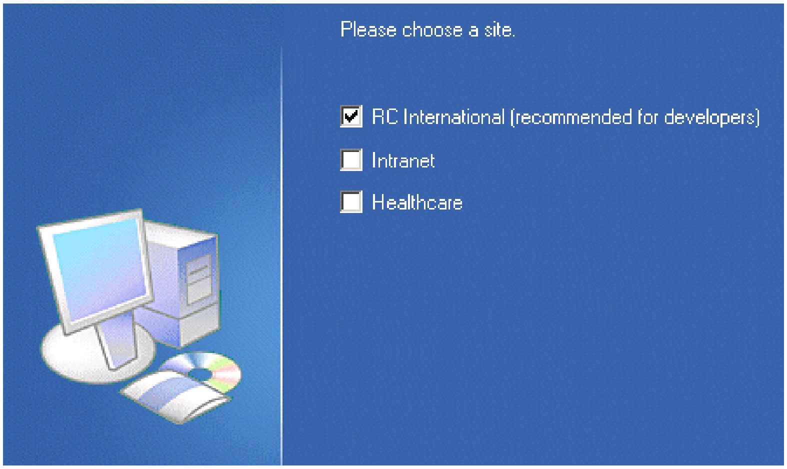
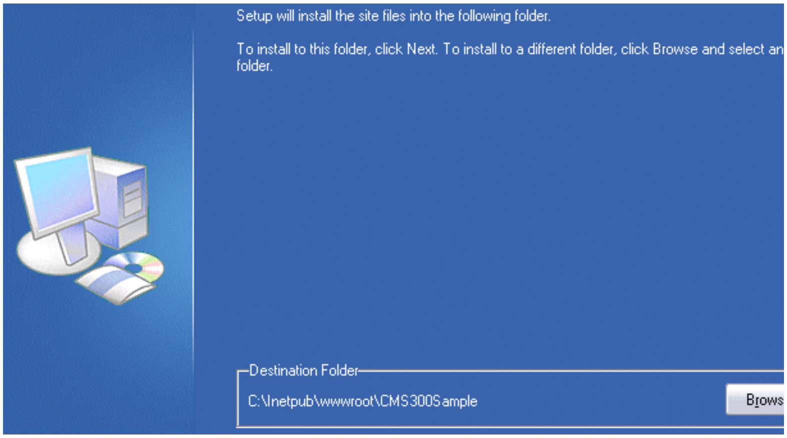
Also, if you want to enable support for multiple languages, see the Ektron CMS300 Administrator manual section “Multi-Language Support” > “Working with non-English Content” > “Enabling Support for Multiple Language Content.”

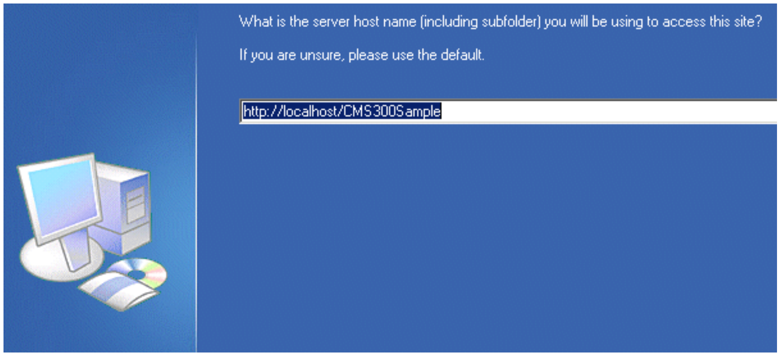
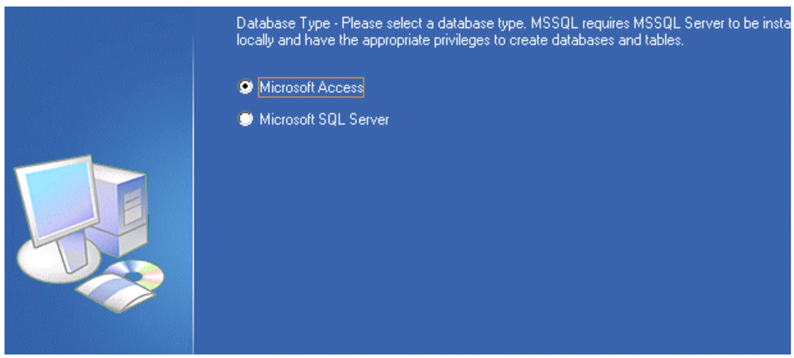
Performing the Install

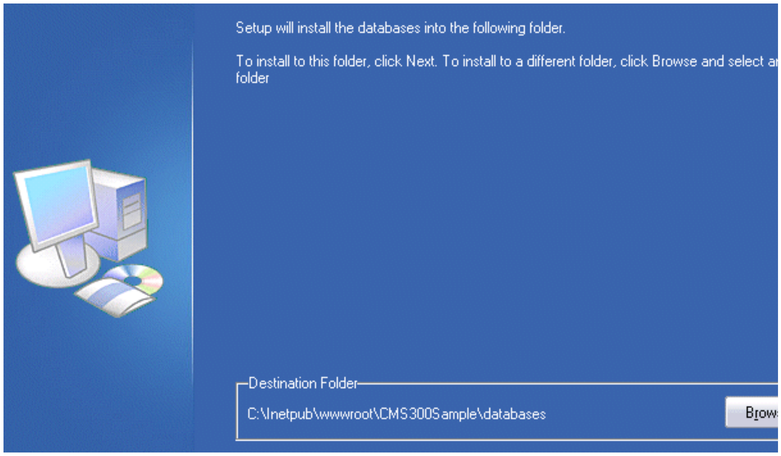
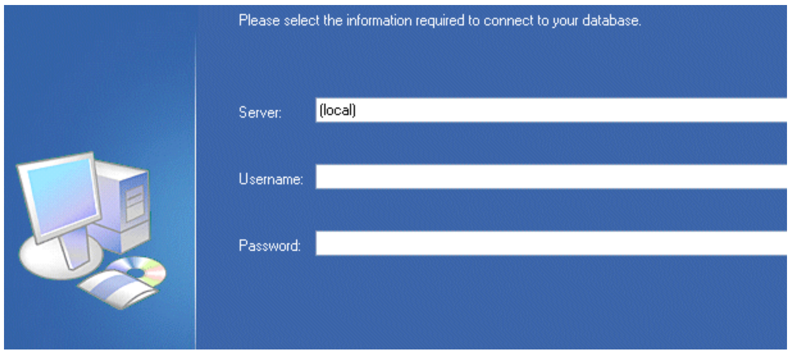
Running Ektron CMS300 Setup

Step	Setup Screen
1. Double click the executable file that was downloaded from the Ektron Web site.	
2. The following screen appears. Click **Next** to proceed.	
3. The next screen displays the Ektron License Agreement. Please read it. • Click **Yes** to accept the agreement and continue. • Click **No** if you do not accept the terms of the agreement. Note: Clicking **No** ends the setup program.	

Step	Setup Screen
4. At the license key screen, enter your license key(s) for Ektron CMS300 and Ektron WebImageFX (if purchased) into the respective fields. Click **Next** to proceed. If you do not have a license key, click **Next** to continue. When the installation is complete, refer to the Ektron CMS300 Administrator Manual for information about inserting a license key via the Administrator Workarea.	
5. At the application path screen, you are prompted to specify the destination location for the Ektron CMS300 components and utilities. If desired, click the Browse button to specify a new location. Click **Next** to proceed.	

Step	Setup Screen
6. At the choose destination location screen, specify the Web directory where you want to install the Ektron CMS300 files. Click **Next** to proceed.	
7. At the choose sample sites screen, select the sample Web sites that you want to install. Click **Next** to proceed.	
8. Specify where the site files will be installed on the server. To change the directory, click the browse button and locate the folder you want to install the files to. Click **Next** to proceed.	

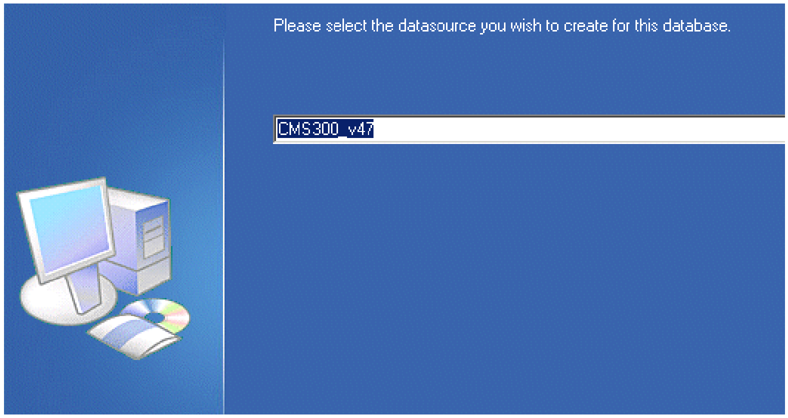
Step	Setup Screen
9. At the Host screen, specify the host name. It is used to define the URL that will be entered to access your Ektron CMS300 Web site. It is also used to configure variables during the installation. The host name can be any of the following: • An IP address (123.456.7.890) • A server name (WebServer1234) • A domain name (www.ektron.com). Click **Next** to proceed.	
10. At the database type screen, select the type of database you want to set up for your Ektron CMS300 Web site. Click **Next** to proceed. For information about using MySQL or Oracle as your Ektron CMS300 database, see ”Ektron CMS300 Databases” on page 48.	

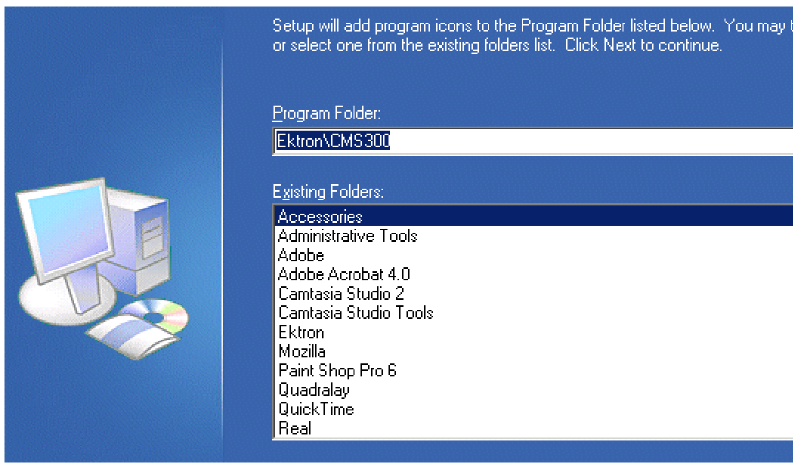
Step	Setup Screen
11. At the next screen, specify information for the database. • If you chose MS Access as your database type, specify where the database will be installed. Click the Browse button to specify a different location for the database. Click **Next** to proceed.	
• If you chose MS-SQL as your database type, specify the following: • MS-SQL Server Name • Username (if required) to access the MS-SQL Server • Password (if required) of the username for the MS-SQL Server Click **Next** to proceed.	

<table>
<tr><th>Step</th><th>Setup Screen</th></tr>
<tr><td>12. At the DSN screen, specify a DSN that will be used to connect to the database.

Click Next to proceed.

Note: When the DSN is setup, the database type is added to the end of the DSN you specify. For example, CMS300_v47_Access or CMS300_v47_MSSQL.

Note: For information about setting up an OLE DB connection, see ”DSN-less Connection” on page 86</td><td>
</td></tr>
<tr><td>13. At the select program folder, specify the program folder in the Windows Start menu you would like to add the Ektron CMS300 information to.

Click Next to proceed.</td><td>
</td></tr>
<tr><td colspan="2">14. The installation checks to see if parent pathing is enabled in IIS. If not, the following message appears:
It appears that Microsoft IIS does not have Parent Pathing enabled. This is required for this setup. Would you like setup to automatically enable this for your local site?
Yes is the default response. If it is selected, Parent Pathing is enabled. If it fails, a warning appears.
Setup Error: Setup could not enable Parent Pathing in Microsoft IIS. You will need to do this manually.
If you select No, the following message appears:
Please remember to setup Parent Pathing in Microsoft IIS before using the product."</td></tr>
</table>

Step	Setup Screen
15. The setup program installs all necessary files. During this process, the installation grants the system user group, Everyone, write permissions to the following system folders: - \CMS300Sample\UploadedImages - \CMS300Sample\UploadedFiles - \CMS300Sample\Databases After completing the installation, you should further configure your permissions based on your network security model before using Ektron CMS300.	
16. When completed, a completion message is displayed. To immediately access the Ektron CMS300 Sample Web site when you click the Finish button, check off the displayed box. Click **Finish** to complete the installation.	

Ektron CMS300 Hosting Example

To use Ektron CMS300 as a hosting solution, first install Ektron CMS300 according to the “Installing Ektron CMS300” chapter. When that is complete, create separate directories for each hosted web site. The process is described below.

NOTE The following examples use a MS-Access database. If you are using MS-SQL, MySQL, or Oracle databases, the steps are similar.

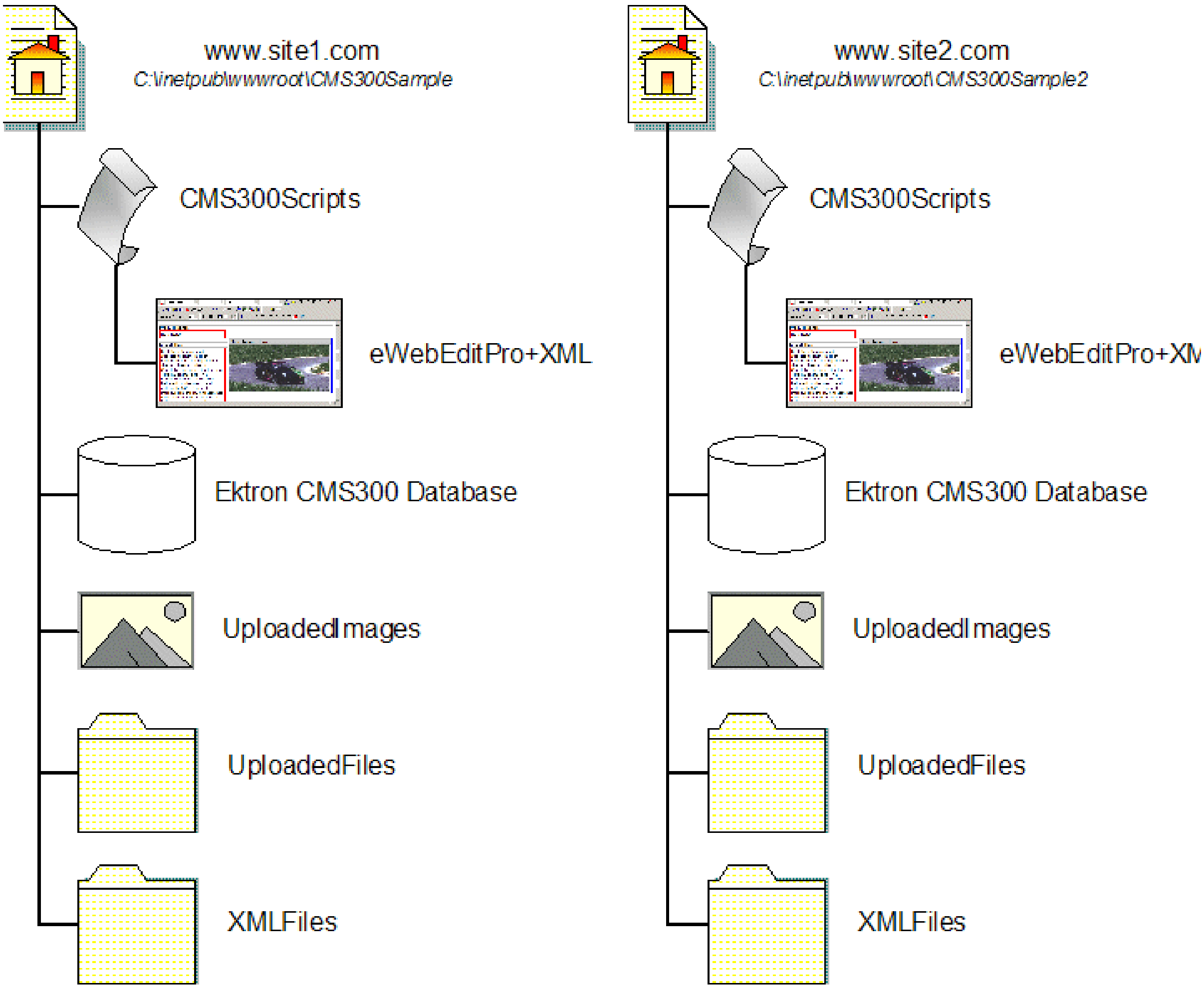
Install Ektron CMS300

Begin by installing Ektron CMS300, as described in ”Running Ektron CMS300 Setup” on page 33.

Setting up Directories

After you run the install, create new Web enabled directories for each Web site to be hosted with Ektron CMS300.

1. Go to the `\inetpub\wwwroot` directory.
2. Create a folder for each site to be hosted. Name each folder uniquely.
3. Copy the contents of the `CMS300Sample` directory into each folder.

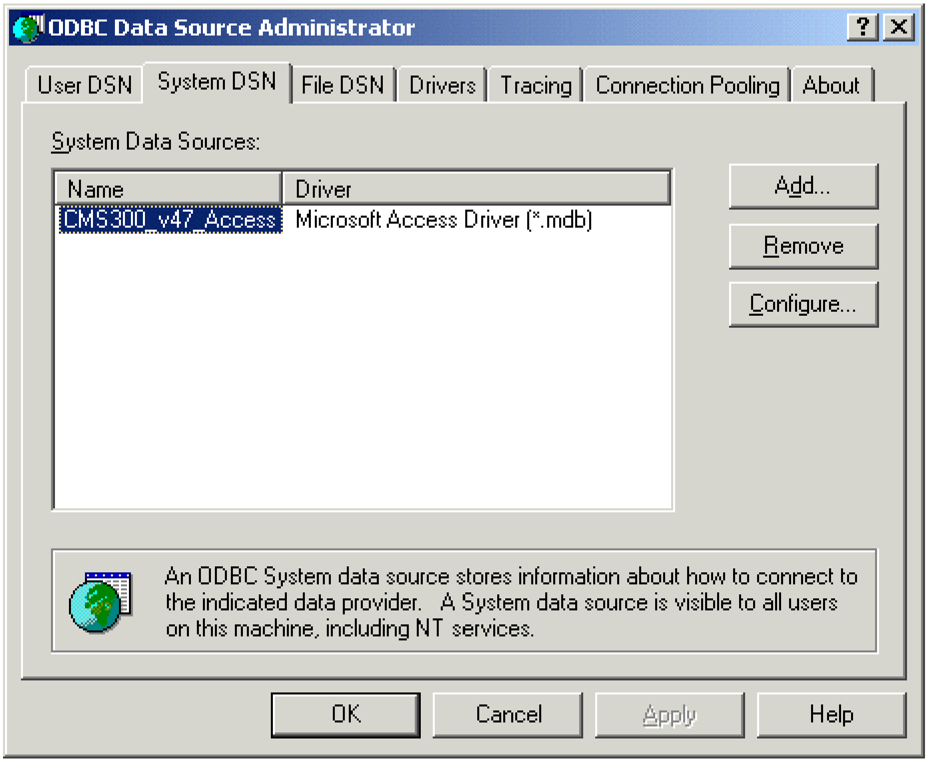


Creating DSNs

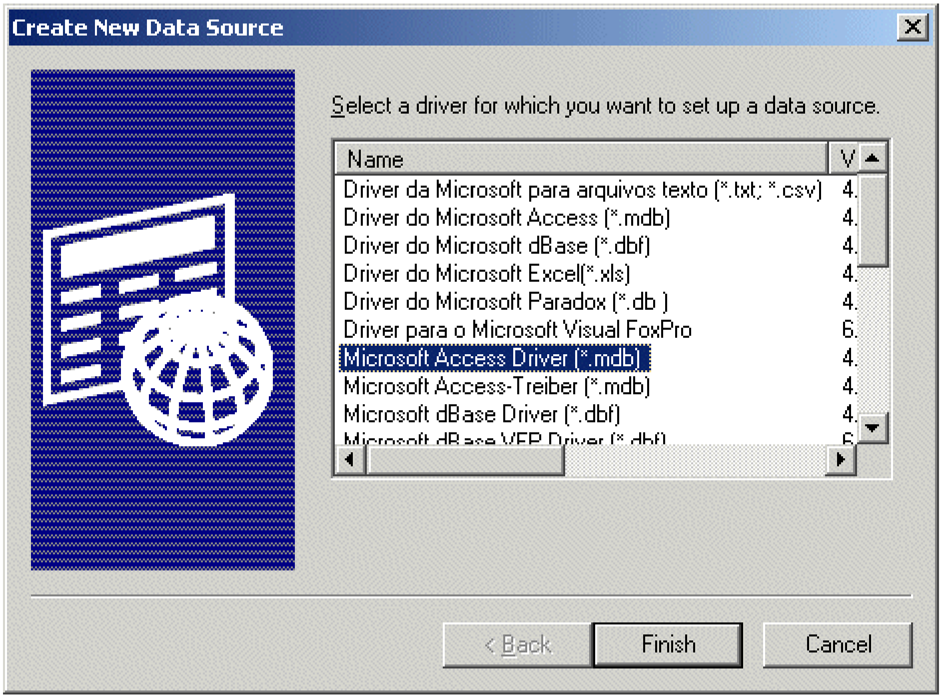
When finished copying data into the directories, create a unique DSN for each site.

NOTE For information about using an OLE DB connection instead of an ODBC, see "DSN-less Connection" on page 86.

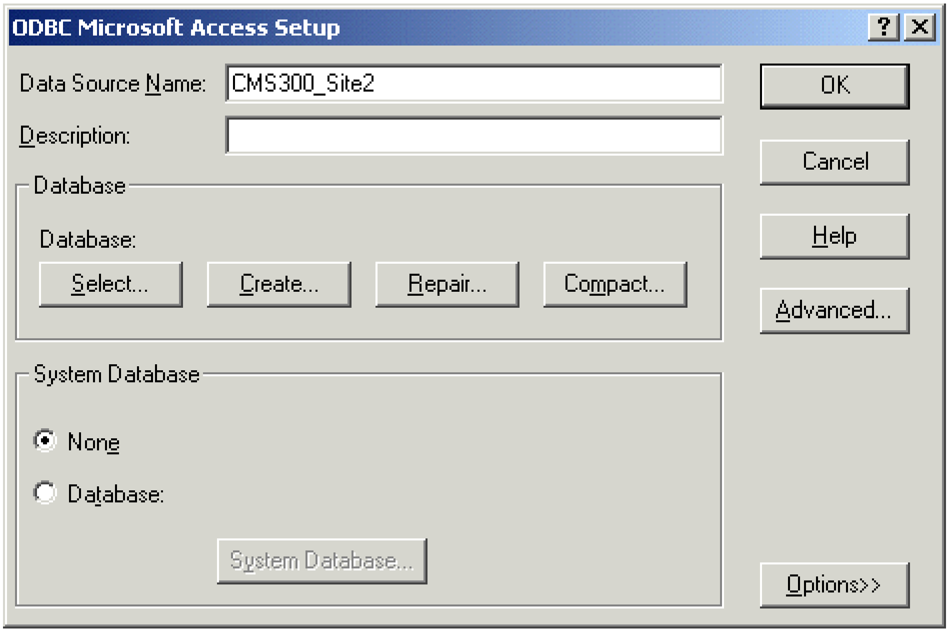
1. Follow the path **Start > Programs > Administrative Tools > Data Sources (ODBC)**.
2. Click the **System DSN** tab.



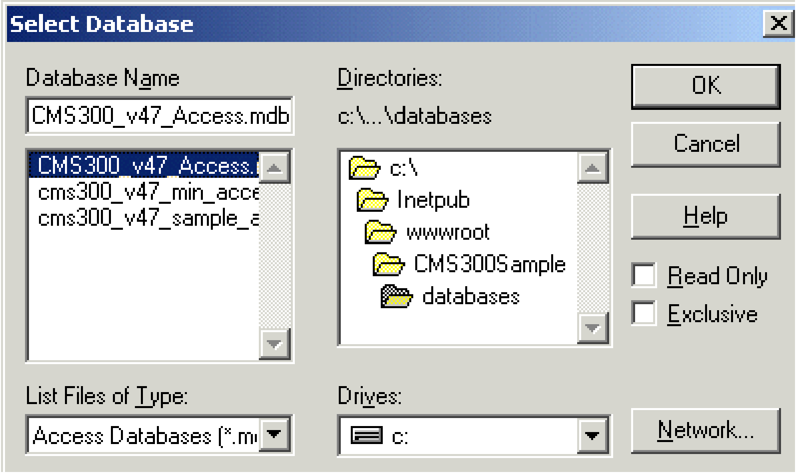
3. Click the **Add** button to add a driver for the database.
4. Select **Microsoft Access Driver (*.mdb)**.



5. Click **Finish**.
6. Enter a **Data Source Name**.



7. Click the **Select** button.
8. Navigate to the correct database, then click **OK**.



9. Click **OK** on the ODBC Microsoft Access Setup window.

Repeat these steps for each Web Site the server will host. Then, click **OK**.

Updating Site_Scripts_Path.xxx

Overview

All Ektron CMS300 templates require an `include` statement that points to the ApplicationAPI.xxx file. This lets the standard methods within the template function properly.

Ektron recommends creating a file in your Ektron CMS300 root directory that specifies this include file. Then, use that file in each template.

The Site_Scripts_Path.xxx file is an example of this. It is called by all templates in the Ektron CMS300 sample site. By examining this file, you will notice it calls the correct applicationAPI.xxx file.

When configuring your Web site, you have three options:

- Update Site_Scripts_Path.xxx
- Create a new file

- Insert an `include` to ApplicationAPI.xxx in all templates

NOTE Ektron does not recommend using the third option. If changes are made to the location of the file applicationapi.xxx, all templates would have to be updated instead changing one file.

Each option is explained in the following section.

Updating Site_Scripts_Path.xxx

During the site creation process, if you copied this file into your new site's root directory, update the path within the file to reflect the changes. To do that, follow these steps.

1. Locate the file, Site_Scripts_Path.xxx, in your new Web site's root folder.
2. Open the file for editing with your editing tool.
3. The contents of the file are displayed.
4. Update the path within the quotation marks to reflect the new site path for your Web site. For example:

```
<!-- #include virtual="/NewSite1/cms300scripts/applicationAPI.xxx" -->
```

5. Save and close the file.
6. Repeat these steps for each new site you set up.

Creating a New File

Instead of using the default file, site_scripts_path.xxx, you may create your own unique file and call the applicationAPI.xxx file through that. To configure this file properly, perform the following steps:

1. Open any text editor (for example, NotePad).
2. Enter the following text:

   ```
   <!-- #include virtual= "[filepath]" -->
   ```

   Where the file path is the relative location to the file ApplicationAPI.xxx.
3. Save the file to the root directory of the new site.

Updating Setup.xxx

You need to update code in the setup.asp file to assign each Web site the proper DSN and site path.

NOTE If you update another setup file (such as setup.cfm), you also need to make the same changes to the setup.asp file.

1. Go to the file: `C:\inetpub\wwwroot\NewSite1\CMS300scripts\setup.asp`, and open it with any web development tool.
   - Change DSN="CMS300_v47_Access" to DSN="*your new DSN*"
   - Change sitepath="/CMS300Sample/" to sitepath="/*your new sitepath*/"

   An example for this is:

```
DSN = "CMS300_Site2"

 ' Designate the database type below

 ' Vaild values are "mysql", "sql", "access", "Oracle"

DBType = "access"

 DateFormat="dd-mmm-yyyy hh:mm AM/PM"

sitePath = "/CMS300Sample2/"

buildNumber = ""

 DBusername=""

 DBpassword=""

Version = ""

 UseSSL = false

 SSL_Port = 443

 ADEnabled = true

 AUTH_Protocol = "LDAP"
```

2. Save the settings, and close the window.

Repeat these steps for each Web site you are hosting.

What's Next?

After you create the DSNs for each site and configure the setup.asp files, you are ready to run each Web site from your server.

Ektron CMS300 Databases

Ektron CMS300 is compatible with the following types of databases:

- Microsoft Access
- Oracle 9i
- Microsoft SQL Server (7.0 and 2000)
- Microsoft SQL Server Desktop Engine (MSDE) 2000
- MySQL

You can easily change databases for your Ektron CMS300 Web site via utilities that Ektron provides in the installation. This chapter explains the databases supported by Ektron CMS300, and how to convert to an MS-SQL, MySQL, or Oracle database.

Microsoft Access Databases

Ektron CMS300 contains databases a sample Microsoft Access database, which contains sample data to familiarize you with the use and integration of Ektron CMS300.

CMS300_v47_Access.mdb

Ektron CMS300's initial database is a Microsoft Access database. This database is used on the sample Web site. It contains the following:

- Two users - one administrator, one editor
- Sample content
- Sample images
- Fonts

NOTE You do not need Access installed on your system to use the sample database. However, you do need the MDAC and Jet Drivers listed in the system requirements.

Setting Up an MS-SQL Database

Ektron CMS300 can use an MS SQL database. Although the product doesn't come with an MS SQL database ready, you can convert the supplied Access database to an MS SQL database by using the sql script and data mover included in the Ektron CMS300 installation. To create an MS-SQL database, run the cms200-300_mssql_v47.sql script and complete a few other tasks. All this is described below.

Creating An Empty SQL Database

First, create an MS SQL database by following these steps.

1. From the Windows start menu, open MS-SQL Enterprise Manager.
2. Navigate through the `Console Root` folder and select the server that you want to add the database to.
3. **Right click** the database folder, and select **New Database...**
4. The Database Properties dialog box is displayed.
5. Enter a name for the database (for example, `CMS300_SQL`).
6. Click **OK**.
7. The page is refreshed, and the new database appears on the right.
8. Close Enterprise Manager.

Running the SQL Script

The .sql script provided with Ektron CMS300 creates all the necessary tables in the newly created MS-SQL database. The script, cms200-300_mssql_v47.sql, resides in the `c:\Program Files\Ektron\CMS300\Utilities` directory. To access and run it, follow these steps.

1. From Windows Start menu, open your MS-SQL Query Analyzer.
2. The MS-SQL Query Analyzer opens and the Connect to SQL Server dialog box is displayed.
3. Select the server that you used to create the Ektron CMS300 database on, and enter the type of Authentication that you are using to connect to the SQL Server.
4. Click **OK**.
5. The Connect to SQL Server dialog box closes, and you are logged in.
6. Select the new database that was created earlier (CMS300_SQL) from the drop down list at the top of the screen.
7. Load the sql script by selecting **Open File** from the toolbar or the File menu.
8. The Open Query File dialog box is displayed.
9. Browse for the file cms200-300_mssql_v47.sql. If you ran the default installation, you can find the script in the `C:\ProgramFiles\Ektron\CMS300\Utilities` directory.
10. Select the.sql script and click **Open**.
11. The Open Query File dialog box closes, and the script is loaded into the query field.
12. Click the green arrow on the toolbar, press <F5>, or select the execute command from the Query menu to execute the script.
13. The script executes, and a confirmation message that **the command(s) completed successfully** is displayed.
14. Close the SQL Query Analyzer.

You now have a blank SQL database for Ektron CMS300.

Creating New DSN

Because you will use an MS-SQL database, you need to create a new DSN that points to this database. To do this, access the ODBC Manager and point the DSN to the new database.

NOTE For information about creating a DSN-less connection to the MS-SQL database, see "DSN-less Connection" on page 86.

1. Access the ODBC Manager from the Control Panel.
2. The ODBC Data Source Administrator snap-in is displayed.
3. Click the **System DSN** tab.
4. A list of system data sources appears.
5. Click **Add**.
6. The Create New Data Source window appears.
7. Select the driver that best suits your version of MS-SQL server and click **Finish**.
8. The Create a New Data Source to SQL Server window opens.
9. Specify a name, description, and choose the SQL Server to connect to. Then click **Next >**.
10. The next screen appears.
11. Enter the necessary information about the authentication for the DSN, then click **Next >**.
12. The next screen appears.
13. Change the default database to the one that you created earlier. Make any other adjustments on this screen if necessary. Then click **Next >**.
14. The next screen appears.
15. Choose whichever options you would like for the DSN, then click **Finish**.
16. The ODBC Microsoft SQL Server Setup window displays a summary of your settings.
17. Click **Test Data Source** to verify the data source.
18. If the DSN is good, you receive a message that the test completed successfully. If not, edit the DSN and make sure that everything is set up properly.
19. To finish, click the **OK** button at the bottom of the screen, and close the ODBC Manager.

After you create the database, the script has run, and the ODBC connection is made, you are ready to run the data mover. It moves content from the default Access database to the new MS-SQL database.

Moving the Data

The data mover moves everything in the current Access database to the MS-SQL database. To move the data, perform the following steps.

1. Double click the **dbmover.exe** file, which is located in the `C:\Program Files\CMS300\utilities` directory.

   The **Ektron CMS300** Data Mover Utility opens.

2. In the source DSN section, select the source database from the drop down list.
3. Enter a username and password needed to access the DSN if required in the specified fields.
4. Select the type of database the selected DSN is.
5. In the destination DSN section, select the destination DSN from the drop down list.
6. Enter a username and password needed to access the DSN if required.
7. Select the type of database the destination DSN is.
8. When complete, click the **Update** button to move the data.

   A message is displayed when the content is successfully moved.

Modifying Setup.xxx

After you complete the steps described so far, update your Setup.XXX files to reflect the changes. Here is a list of changes that need to be made.

- Specify MS-SQL as the DBType
- Specify a new DSN
- If required, enter a username and password required to access the database.

This section explains these changes.

Updating Setup.xxx Files

To update the setup.xxx files, perform the following steps:

1. Of the following files, open for editing the one that corresponds to your database:
    - CMS300sample/CMS300scripts/setup.asp
    - CMS300sample/CMS300scripts/setup.aspx
    - CMS300sample/CMS300scripts/setup.php
    - CMS300sample/CMS300scripts/setup.cfm

NOTE Setup.asp is used for demonstration purposes. The contents of Setup.ASPX/ PHP/CFM are almost identical.

2. Use the following table to make the necessary modifications to the Setup.xxx file.

Line	Description
DSN	Replace with the DSN that points to the MS-SQL database. *See Also:* "Creating New DSN" on page 51
DBType	Replace the current DBType with **DBType="sql"**
Username	If required, specify the username needed to connect to the DSN.
Password	If required, specify the password for the username given.

3. Save and close the file.

NOTE Although your Web site may not use other platforms, Ektron recommends making the same changes to *all* Setup.XXX files.

What's Next?

Now that you have configured Ektron CMS300 to use an MS-SQL Database, you can use your Ektron CMS300 Web site.

Setting Up a MySQL Database

As mentioned before, Ektron CMS300 is compatible with a MySQL database. To configure Ektron CMS300 to use a MySQL database, you must perform a few basic tasks. All this is described below.

Requirements

- Windows NT/2000
- Stable version of MySQL (3.23 or higher recommended)
- MySQL ODBC driver (3.51or higher recommended)
- Ektron CMS300 v1.6 or higher (earlier version does *not* work)

NOTE The latest versions of MySQL databases and drivers can be found at this Web site: http://www.mysql.org.

Connecting to MySQL

1. Locate and open the DOS command prompt on your Windows machine.

NOTE If your DOS prompt opens with a prompt for a drive different from the one to which MySQL is installed, change to the correct drive. Type the correct drive followed by a colon: **D:\> C:**

2. From the prompt for the drive in which MySQL is installed, use the **cd** command to switch to the directory where MySQL is installed.

```
C:\> cd mysql\bin
```

   This takes you to a prompt for the correct directory.

3. From here, start MySQL by typing **mysql** at the command prompt.

```
C:\mysql\bin>mysql
```

The MySQL Monitor Welcome Screen appears, providing a connection id and information about the server version of MySQL that you have.

After connecting to MySQL, you can create the database that Ektron CMS300 will use.

Creating the Database

Let’s create a database in MySQL named CMS300_MySql.

NOTE The database does not have to be named CMS300. If you prefer to name it something else, just remember that name. You will need it when we run the script to build the tables.

1. At the MySQL prompt, enter the following to create the database named CMS300_MySql.

   mysql> create database CMS300_MySql;
2. MySQL should respond by stating something like:

   Query OK, 1 row affected <0.03 sec>.
3. To make sure the database was successfully created, type **show databases** at the mysql prompt.

   mysql> show databases;

   This command prints a list of MySQL databases. Make sure CMS300_MySql appears on this list.

NOTE If the newly created database does not display, run the create statement again.

4. Attempt a connection to the new database using the connect command.

   mysql> connect CMS300_MySql;

   A successful connection is greeted with a connection id.
5. After you make a connection, type **exit** to get out of MySQL.

   mysql>exit;

After you create the database in MySQL, you can build the tables using the script provided by Ektron.

Building the Ektron CMS300 Tables

To build the CMS300 tables, run the script provided by Ektron named **CMS300_mysql_v47.sql**.

NOTE You cannot run the script from the mysql prompt. This is why we exited from the MySQL monitor in the last step.

1. At the command prompt, type:

- **mysql**
- the database name
- a less than sign (**<**)
- the location of the SQL script

NOTE You can also drag and drop the file so you do not have to type it. Do not put a semicolon at the end of this command.

Here is an example of how the line might look:

```
C:\mysql\bin>mysql CMS300_MySql< “c:\program
files\ektron\CMS300\utilities\CMS300_mysql_v47.sql
```

If the script ran correctly, MySQL gives you no feedback. It returns to the prompt from which you ran the script. If MySQL prints a bunch of information, you can assume something went wrong.

2. To see if the script ran correctly, access the database and request the list of tables created. Use the following commands to do this:

C:\mysql\bin>mysql ↵
mysql> connect database name; ↵
mysql> show tables; ↵

If the script ran correctly, MySQL outputs a list of the tables that were created.

After the tables are created in the MySQL database, you are ready to move the content from the existing database to this one. Before you can do that, you must create a DSN for the new MySQL database.

Creating a DSN for the MySQL Database

Both databases (the Access 2000 and MySQL) needs a data source set up. To create the second data source, you need a utility to connect to a MySQL database through an ODBC connection. It can be found at:

http://www.mysql.com/downloads/api-myodbc.html

Use the MySQL driver installed from the MySQL-ODBC utility when creating this System DSN. In the example below, we choose **CMS300_MySql** as the data source name for our MySQL database. The following steps describe the process.

1. Access your ODBC Datasource Administrator console by following the path in Windows:

   Start > Programs > Administrative Tools > Data Sources (ODBC)
2. The ODBC Data Source Administrator snap-in appears.
3. Click the **System DSN** tab.
4. A list of your system data sources are displayed.
5. Click **Add...**
6. The Create New Data Source window opens.
7. Choose **MySQL ODBC 3.51 Driver** from the list of available drivers then click **Finish.**
8. The MySQL ODBC DSN Configuration window appears.
9. Enter the following information into the displayed fields:
   - Datasource Name
   - Database Name
   - Username and Password (if required)
   - Host Name

NOTE For demonstration purposes, we will name the DSN CMS300_MySQL, and point it to the database we created earlier called CMS300_MySql.

10. Click **Test Data Source** to test the connection. If the information is correct, a success message appears.
11. Click **OK**.

NOTE If you receive an error, check your connection information. If problems persist, refer to your **MySQL Documentation** for troubleshooting.

12. At the DSN Configuration window, click **OK** to save and close the changes.

With the creation of the DSN for the Ektron CMS300 MySQL database complete, you are ready to move the content from the default MS Access database to this one.

Moving Data into the MySQL Database

The next step in setting up a MySQL database is to run the data mover that also gets installed with Ektron CMS300. The data mover moves everything in the current Access database to the MySQL database.

To move the data:

1. Double-click the `C:\Program Files\Utilities\dbmover.exe` file to open it.
2. The **Ektron CMS300** Data Mover Utility opens.
3. Choose the Source DSN from the drop down list.
4. Enter a username and password for the source DSN in the proper fields if necessary.
5. Choose **Access** as the DB Type for the source DSN.
6. From the lower drop down list, choose the Destination DSN for the database to which the content will be moved.
7. Enter a username and password for the destination DSN in the proper fields if necessary.
8. Choose the DB type for the Destination DSN.
9. After you enter necessary information for the CMS Data Mover, click **Update** to initiate the move.

NOTE If the data did not populate or you received an error, please review your data sources and their connection information.

Modifying Setup.xxx

After performing the steps described so far, you need to update your Setup.XXX files to reflect the changes. Here is a list of changes to be made:

- Specify MySQL as the DBType
- Specify new DSN
- If required, enter a username and password required to access the database.

This section explains how to make these changes.

Updating Setup.xxx Files

To update the setup.xxx files, perform the following steps:

1. Open the following files for editing:
    - CMS300sample/CMS300scripts/setup.asp
    - CMS300sample/CMS300scripts/setup.aspx
    - CMS300sample/CMS300scripts/setup.php
    - CMS300sample/CMS300scripts/setup.cfm

NOTE Setup.asp is used for demonstration purposes. The contents of Setup.ASPX/PHP/CFM are almost identical.

2. Use the following table to make the necessary modifications to the Setup.xxx file.

Line	Description	More Information
DSN	Replace with the DSN that points to the MySQL database.	"Creating a DSN for the MySQL Database" on page 58
DBType	Replace the current DBType with **DBType="mysql"**	
Username	If required, specify the username needed to connect to the DSN.	
Password	If required, specify the password for the username given.	

3. Save and close the setup.xxx file.

NOTE Although you may not use other platforms on your Web site, Ektron recommends making the change described above to all Setup.XXX files.

What’s Next?

After configuring Ektron CMS300 to use an MySQL Database, you can use your Ektron CMS300 Web site!

Setting Up an Oracle 9i Database

Ektron CMS300 can be configured to use an Oracle 9i database. To properly configure Ektron CMS300 and Oracle9i, perform these steps.

1. ”Creating Necessary Tables” on page 63
2. ”Creating New DSN” on page 65
3. ”Modifying Setup.xxx” on page 68

The following sections explain the steps.

Before You Begin...

Before you begin, read this section to understand the methods and test configuration used for this sample.

Test Configuration

The test machine used in this section is configured as follows:

- Microsoft Windows 2000 Server, Service Pack 3
- Oracle 9i Database (Release 9.2.0.1.0)
- SQL*Plus: Release 9.2.0.1.0
- Oracle 9i ODBC Driver

While this configuration is only a suggested one, it was used by Ektron to successfully use an Oracle database for Ektron CMS300.

Configuration Procedure

This section provides one approach for setting up and configuring an Oracle database for Ektron CMS300. As an Oracle administrator, you may prefer another method that is more appropriate for your needs.

Case Sensitivity

Ektron highly recommends configuring the Oracle database to be case insensitive. Not doing so may result in the creation of duplicate content titles, as well as other problems.

Creating Necessary Tables

The.sql script provided with Ektron CMS300 creates the necessary tables in your Oracle database. The script is in the `c:\Program Files\Ektron\CMS300\Utilities\` directory as cms200-300_oracle_v47.sql.

Building Tables in Your Oracle Database

To access the script and execute it properly, follow these steps:

1. Open SQL Plus Worksheet by following the path in the Windows Start menu:

   Start > Programs > Oracle - OraHome92 > Application Development > SQL Plus Worksheet

2. The Oracle Enterprise Manager Login box is displayed.
3. Choose the option to connect directly to a database, and use the following table to help you complete this login box.

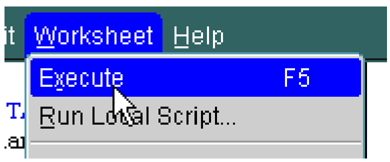
Field	Description
Username	Enter your Oracle Enterprise Manager administrator name for the Oracle Management Server. Note that you are logging in as an administrator of network resources being serviced by a Management Server, not into a database as a database user.
Password	Enter your administrator password for the Oracle Enterprise Manager system.
Service	Type in or select the name of the node from which the Oracle Management Server is running.

4. Click **OK** to connect.
5. The SQL Plus Worksheet interface is displayed.

6. Follow the path **File > Open** to open the Ektron CMS300 Oracle SQL script.
7. The Open Local Script FIle box opens.
8. Locate and click the script cms200-300_oracle_v47.sql, then click **Open**.

NOTE By default, this script is installed to `Program Files/Ektron/CMS300/Utilities.`

9. The script is loaded into the SQL Plus Worksheet.
10. Execute this script by:

	Pressing **<F5>**
	Clicking **Execute**.
	Following the path **Worksheet > Execute**

11. Upon completion of the script, all necessary tables for the database are added.

All the required tables are now added to your Oracle database.

Testing the Script

Once the script has been executed, perform the following steps to ensure that the tables have been added to your Oracle database properly.

1. Access the Oracle Enterprise Manager by following this path in the Windows Start Menu:

   Start > Programs > Oracle - OraHome92 > Enterprise Manager Console.
2. The Oracle Enterprise Manager Console Login box appears.
3. Choose **Launch Standalone** and click **OK**.

4. The Oracle Enterprise Manager, Standalone window is displayed on the screen.
5. In the folder tree on the left side of the console, expand the database folder, then expand the service the Ektron CMS300 sql script was applied to.
6. A Database Connect Information window is displayed in the console.
7. Enter your Oracle Username and Password into the displayed fields, then click **OK**.
8. You are now connected to the service, and the folder tree expands with a list of information about the service.
9. To locate the tables that were added, follow the path in the folder tree:

   Schema > [Username] > Tables

   A list of tables added during the execution of the sql script appear on the right side of the console. Be sure that all 51 tables were added.

Creating New DSN

Because you are now using an Oracle database, you need to create a new DSN that points to it. To do this, go into the ODBC Manager and point the DSN to the new ODBC database.

NOTE For information about creating a DSN-less connection to the Oracle database for Ektron CMS300, see "DSN-less Connection" on page 86.

To create a DSN for your Oracle Database, perform the following procedure.

1. Access the ODBC Datasource Administrator.
2. Click the **System DSN** tab at the top of the console.
3. A list of all the system datasources is displayed.
4. Click **Add.**
5. The Create New Datasource window is displayed.
6. Choose the driver that best suits your needs.
7. Click **Finish**.
8. The Oracle ODBC Driver Configuration window appears.

9. Using the following table, enter the necessary information into the fields.

Field	Enter
Datasource Name	A name for this datasource.
Description	An extended description for the DSN.
TNS Service Name	(or select from the list) the proper TNS Service for your DSN.
User ID	A Username with access permissions for the Oracle Database.

NOTE With the exception of **Description**, the fields in the table above are required for a successful connection. You may set other advanced settings for the DSN, but this manual only describes basic settings.

10. Click **Test Connection** on the right side of the console to ensure that you can connect to the database.
11. The ODBC Driver Connect window is displayed.
12. Ensure the service name and Username are correct, then enter the password for the specified user in the password field,
13. Click **OK**.

If connected successfully, a confirmation message is displayed.

NOTE A message other than **Connection Successful** may be due to an invalid username, password, connection, or service. Be sure that all your information is correct, then try again.

14. Click **OK** on the testing connection window to close it.

    The Oracle ODBC Driver Configuration page is now active again.
15. Close the Oracle ODBC Driver Configuration window by clicking **OK**.
16. Close the ODBC Datasource Administrator window by clicking **OK**.

Moving the Data

The next step in setting up an Oracle database is to run the data mover that gets installed with Ektron CMS300. The data mover moves everything in the default Access database to the Oracle database.

To move the data:

1. Double click the dbmover.exe file, located in the `Program Files/Ektron/CMS300/utilities` directory.
2. The **Ektron CMS300** Data Mover Utility opens.
3. Use the following tables to enter the correct information into the proper fields.

Source Database Information	
Field	**Description**
DSN	Type in, or choose from the list above, the DSN for the source database from which content will be extracted.
User:	If required, enter a username for the DSN to connect to the database.
Pass:	Enter the password for the username given.
Type:	From the list, choose the type of database the source database is.
Service:	If the source database type is Oracle, type in the name of the node from which the Oracle Management Server is running.

Destination Database Information	
Field	**Description**
DSN	Type in, or choose from the list above, the DSN for the destination database to which content will be moved.
User:	If required, enter a username for the DSN to connect to the database.

Destination Database Information	
Field	**Description**
Pass:	Enter the password for the username given.
Type:	From the list, choose the type of database the destination database is.
Service:	If the source database type is Oracle, type in the name of the node from which the Oracle Management Server is running

4. Click the **Update** button to move the data from one database to another.
5. A message appears when the content is successfully moved.

NOTE if you do not see a success message, your information is incorrect. Recheck all data and retry.

Modifying Setup.xxx

After completing the steps described above, update your Setup.XXX files as follows:

- Specify Oracle as the DBType
- Specify DSN
- Enter username and password needed to access the Oracle Database
- Specify the Oracle Service being used by Ektron CMS300

This section explains how to make these changes.

Updating Setup.xxx Files

To update the setup.xxx files, perform the following steps:

1. Open the following files for editing:
    - CMS300sample/CMS300scripts/setup.asp
    - CMS300sample/CMS300scripts/setup.aspx

- CMS300sample/CMS300scripts/setup.php
- CMS300sample/CMS300scripts/setup.cfm

NOTE Setup.asp is used for demonstration purposes. The contents of Setup.ASPX/PHP/CFM are almost identical.

2. Use the following table to change the Setup.xxx file.

Line	Description	More Information
DSN	Replace with the DSN that points to the Oracle database.	"Creating New DSN" on page 65
DBType	Replace the current DBType with: **DBType="Oracle"**	
Username	Specify the username needed to connect to the DSN.	"Username" on page 63
Password	Specify the password for the username given.	"Password" on page 63
OracleSvr	Enter the proper Oracle service.	"Service" on page 63

3. After making the changes to the setup.xxx file, save and close it.

NOTE Although you may not use other platforms on your Web site, Ektron recommends changing *all* Setup.XXX files.

What's Next?

Now that you have configured Ektron CMS300 to use an Oracle database, you can use your Ektron CMS300 Web site.

Configuring Ektron CMS300

This chapter contains extra information about how to further configure your Ektron CMS300 application. The topics that are discussed include:

- "Configuring E-Mail Notifications" on page 71
- "SSL Support" on page 81
- "DSN-less Connection" on page 86

Configuring E-Mail Notifications

An email is sent to notify users when a task (such as approving a content block or submitting a form) was performed or needs to be performed. This section explains the steps needed to use Microsoft's SMTP service to enable e-mail notification in Ektron CMS300.

CDOSYS

To process email, **Ektron CMS300** uses the CDOSYS model. Using the Simple Mail Transport Protocol (SMTP) and the Network News Transfer Protocol (NNTP) standards, CDOSYS enables applications based on Windows XP, Windows 2000, or Windows 2003 to efficiently route e-mail and USENET-style news posts across multiple platforms.

CDOSYS, the successor to CDONTS, is as easy to use as CDONTS but is more powerful by letting authors create and view sophisticated emails using html and data sources.

NOTE If the SMTP Server does not find CDOSYS installed on the system that is processing email, it looks for CDONTS and tries to use that as a mail server protocol.

Set up SMTP Server

For CDOSYS to work, set up the SMTP server on your local system (to which you installed **Ektron CMS300**) or a remote system that will send and receive emails.

NOTE To access an SMTP server on a local or remote system, consult the system administrator who manages email in your organization. This administrator may not be the same as the Ektron CMS300 administrator.

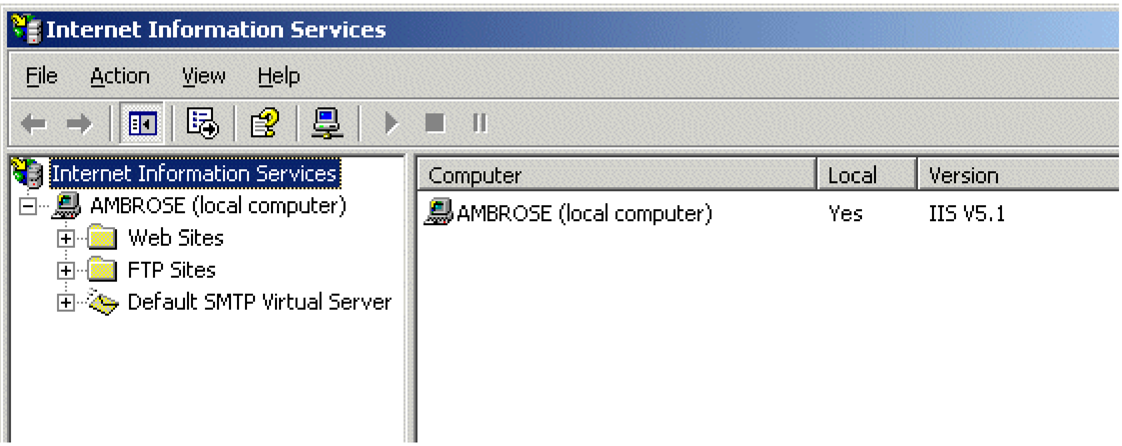
After the SMTP server is set up, configure it as described in "Verification for Relay" on page 72.

Verification for Relay

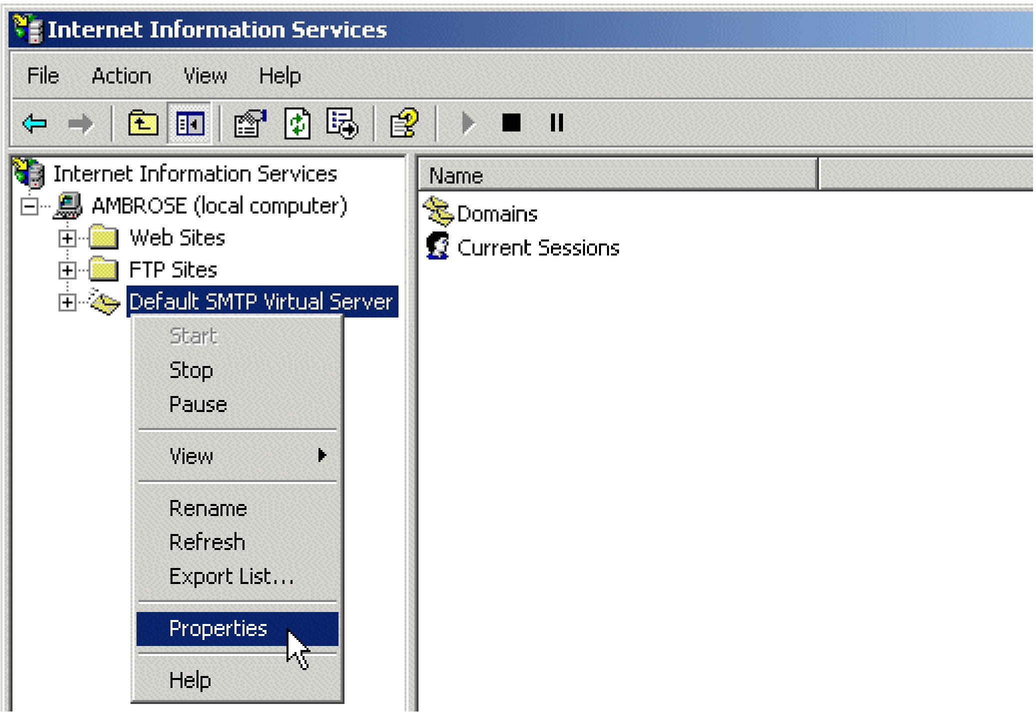
To verify that your Ektron CMS300 Web server's IP address supports relay through your SMTP server, follow these steps.

NOTE The WWW and SMTP components of IIS must be installed on the Web server to which Ektron CMS300 is installed.

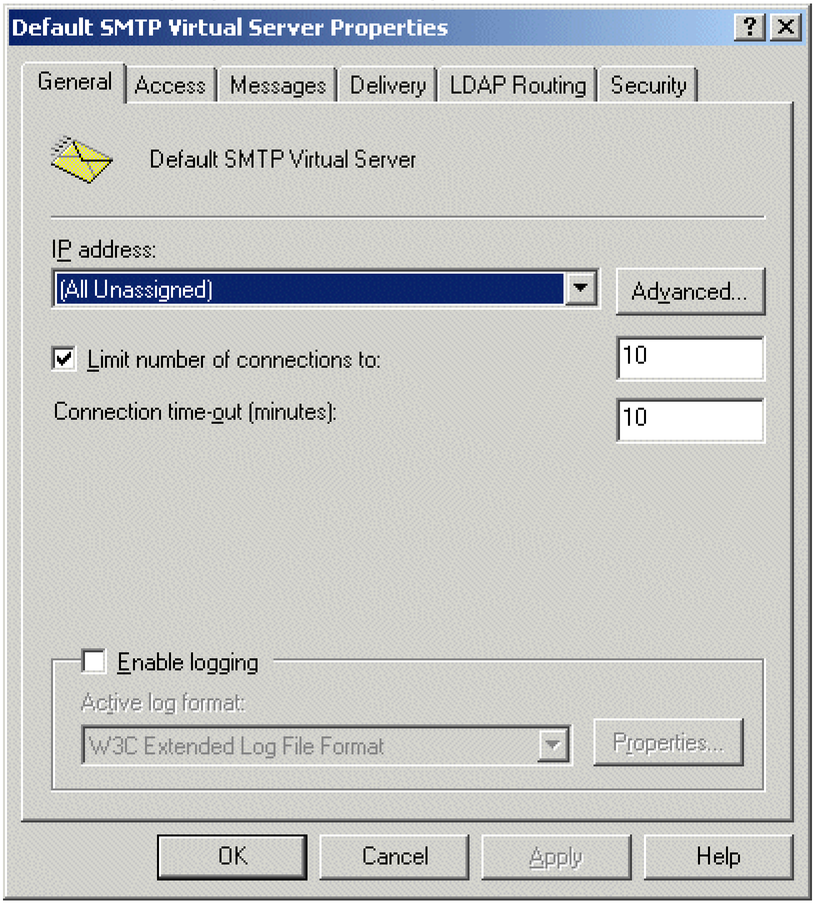
1. On your SMTP server, access your Internet Services Manager in the Administrative Tools.



2. In the IIS Management Console, select the SMTP virtual server, and then click **Properties** on the Action menu.

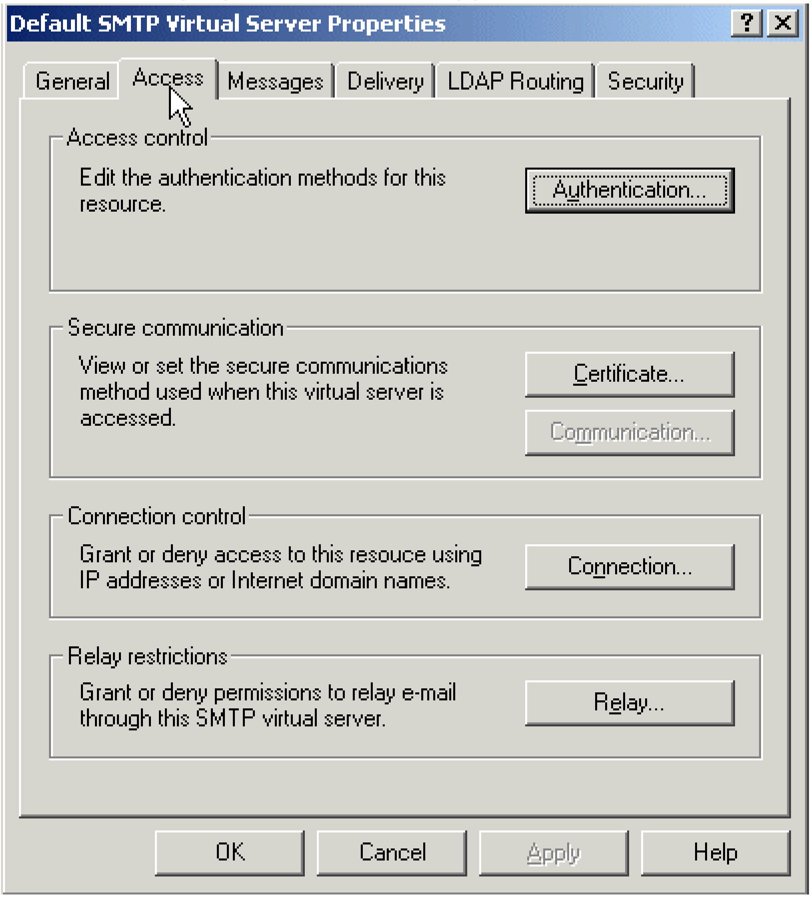

Internet Information Services
File
Action
View
Help
Internet Information Services
AMBROSE (local computer)
Web Sites
FTP Sites
Default SMTP Virtual Server
Start
Stop
Pause
View
Rename
Refresh
Export List...
Properties
Help
Name
Domains
Current Sessions

3. The SMTP properties window opens.



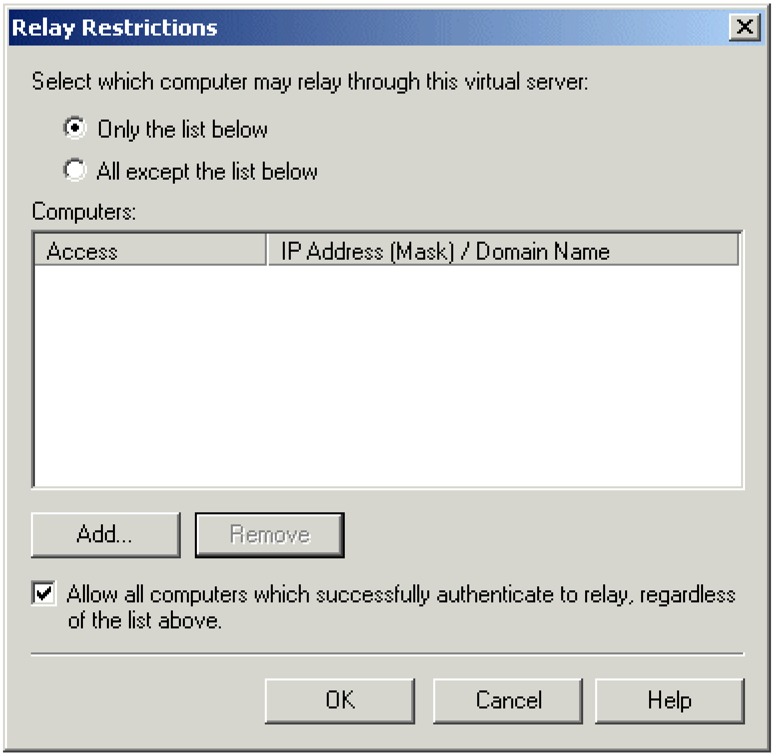
4. Click the **Access** tab.

5. The access properties windows appears.



6. In the Relay Restrictions section, click the **Relay** button.

7. The Relay Restrictions window opens. Set or remove relay restrictions.



NOTE For more information, see "Setting or Removing Relay Restrictions from a Virtual Server" from this Web page: http://www.microsoft.com/windows2000/en/advanced/help/moc04_57.htm

Customizing Ektron CMS300 to Work with CDOSYS

Before using CDOSYS with SMTP to process email, make the following changes to Setup.XXX file.

NOTE If your server platform is not ASP, Ektron recommends making the same changes to setup.asp after changing the setup file for your platform (for example, setup.cfm for ColdFusion).

1. Open webroot/`CMS300sample/CMS300scripts/setup.xxx` for editing.
2. Navigate to the section that says

```
' CDOSYS required for use of SMTP. Can be local or remote.
```

```
SMTPServer = "localhost

SMTPPort = 25

SMTPUser = ""

SMTPPass = ""
```

3. Using the following table, complete the information in the setup file.

Specify	See this section
SMTP Server name	"SMTPServer" on page 77
SMTP Port number	"SMTPPort" on page 78
SMTP username	"SMTPUser" on page 78
SMTP password	"SMTPPass" on page 78

SMTPServer

Find out how the SMTP server is set up in your work environment. There are two ways to set it up.

- **Locally** - To set up the SMTP server on your local system, install IIS on your local system. See your System Administrator for details.

  A local SMTP server can be any of these:

  ```
  SMTPServer= “localhost”
  SMTPServer= “127.0.0.1”
  SMTPServer= “myname”
  ```

- **Remotely** - You set up SMTP server on a remote system. See your System Administrator for details.

  The SMTP server on a remote system can be something like this:

  ```
  SMTPServer= “smtp.yourserver.com”
  SMTP Sever= “yourserver.com”
  ```

SMTPPort

When setting up a mail server, you specify a port number used to retrieve email. In most cases, it is 25. If that is not the case, see your System Administrator for details.

For example: `SMTPPort = 25`

SMTPUser

The username used by the SMTP server to send and receive emails. You do not need a username when using a local SMTP server. However, when using a remote system for accessing email, you must provide an authenticated username before sending or receiving email. Often, the username is an email address, such as `SMTPUser = “yourname@companyname.com”.`

SMTPPass

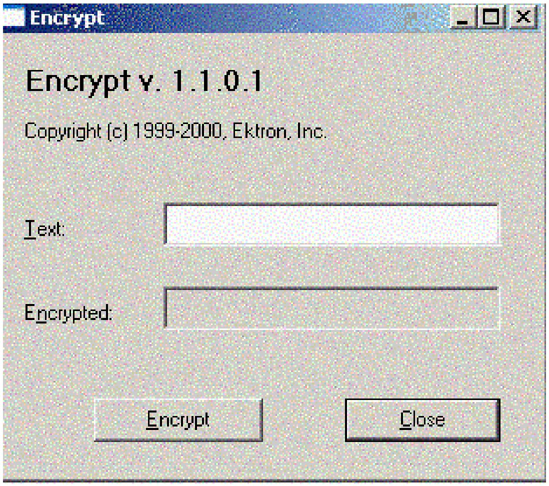
A password is set up to allow the SMTP server to process email. By default, **Ektron CMS300** only accepts the password in an encrypted form.

To encrypt the password, Ektron provides a utility called **EncryptEmailPassword.exe**, which resides in the `C:\Program files\Ektron\CMS300\Utilities` folder.

Using the Encrypt Email Password Utility

To use the EncryptEmailPassword.exe utility, follow these steps.

1. Run EncryptEmailPassword.exe.
2. The Encrypt utility window appears.



3. In the **Text** field, enter your SMTP password.
4. Click the **Encrypt** button.
5. The tool displays an encrypted password in the **Encrypted** field.
6. Copy the encrypted password and paste it within the quotes of the `SMTPPass = ""` setting in the setup file.
7. Save and close the setup file.

NOTE After changing your platform's setup file as described below, make the same changes to the setup.asp file.

Allowing HTML in eMail

To enable **Ektron CMS300** to use HTML in the body of email, modify the setup.xxx file for each client. Within the setup file, find the line that begins with `SMTPServer =` and enter the name of your SMTP mail server. For example:

```
SMTPServer = "ekt-eng.intra.ektron.com"
```

WARNING! Localhost does not work.

This modification identifies the SMTP mail server, even if it is on your PC.

This change is needed for proper operation of both Instant email and Task notifications.

Error Messages

When submitting a form or a content block in an approval process, if you get an error message listed below, it is generated by the SMTP server on which you set up the mail system, *not* by **Ektron CMS300**.

- **The Transport failed to connect to the server. [CBR SendMail R1] [CBR R65] [DIO R 36]**
- **The server rejected one or more recipient addresses. The server response was: 550 5.7.1 Unable to replay for yourname@company.com [CBR SendMail R1] [CBR R1] [DIO R36]**

What's Next?

After you set up the mail server, you can begin using **Ektron CMS300**. For e-mail notification to work properly in Ektron CMS300, the following criteria must be met.

- Valid system email address is provided
- Email notification is enabled in the **configuration>setup** screen
- Valid user email address is provided
- User email notification is enabled

For information about setting these in Ektron CMS300, refer to the **Ektron CMS300** Administrator Manual.

SSL Support

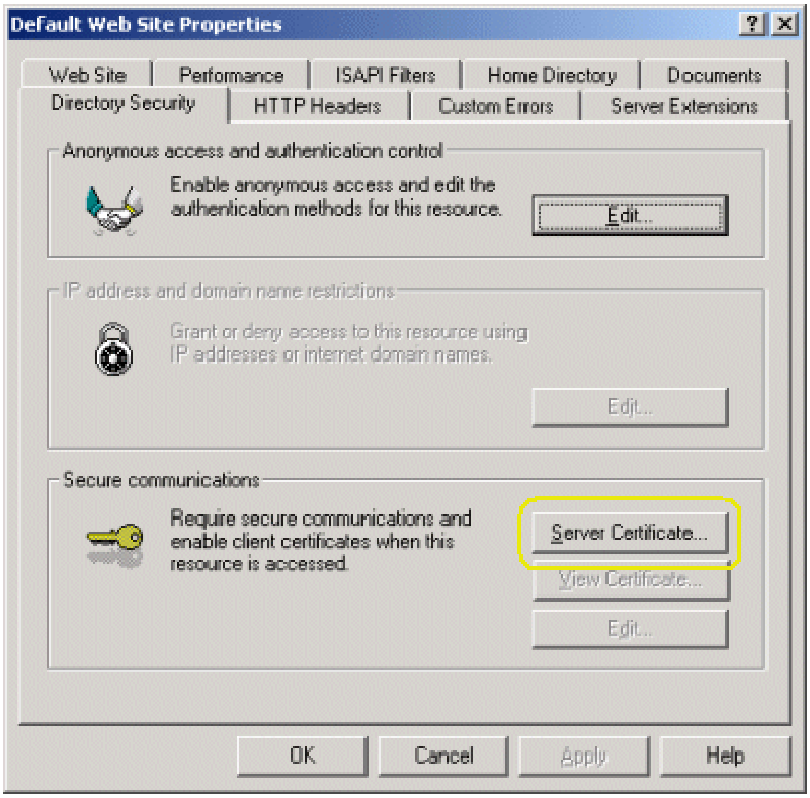
In Ektron CMS300, you can use SSL to encrypt the transmission of the username and password to the server during login.

When you set up the SSL certificate, and configure Ektron CMS300 to use it, the login page is launched in a Secure Socket Layer. This section explains how to set up SSL for Ektron CMS300.

Setting Up the Certificate

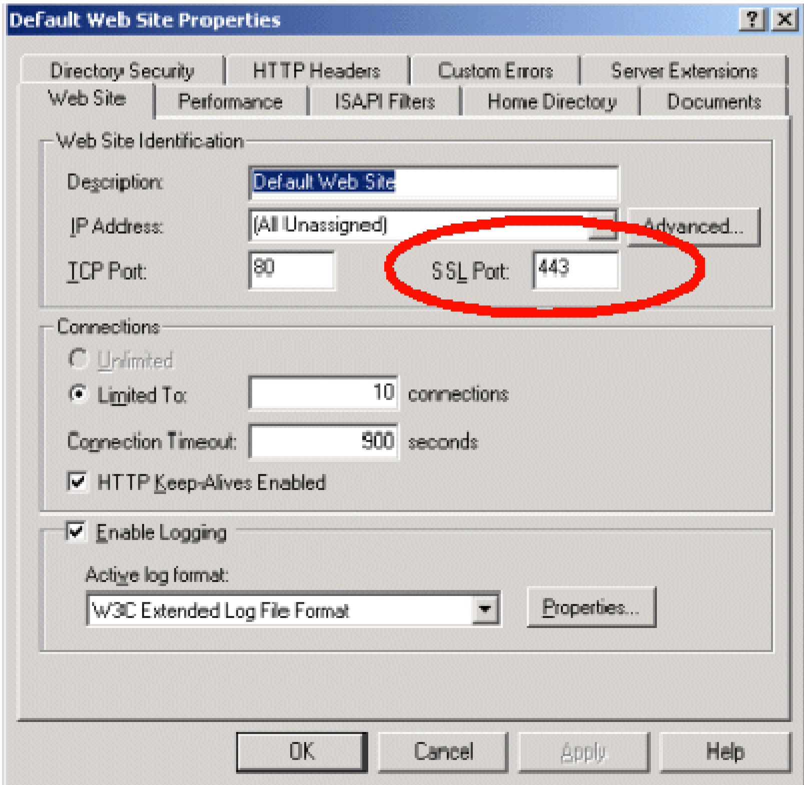
If your Web server does not have a certificate installed, you need to install one. To do so, follow these steps.

1. Access the Internet Information Server Administrator Console on your Web server.
2. Navigate to the computer and Web site to which Ektron CMS300 is installed.
3. Right click the Web site.
4. Click **Properties**.
5. Click the **Directory Security** tab.



6. In the Secure communications area, click the **Server Certificate** button.

7. Use the wizard to set up a certificate for your Web site.
8. Click the **Web Site** tab at the top of the Properties window.



9. Set the **SSL Port** that the Web server will use.
10. Click **OK**.

Having installed the certificate to the Web server, you can now configure Ektron CMS300 to use it.

Updating Ektron CMS300

To update Ektron CMS300 for SSL support, follow these steps.

NOTE After changing your platform's setup file as described below, make the same changes to the setup.asp file.

1. Open webroot/`CMS300sample/CMS300scripts/setup.xxx`. Choose the file extension that corresponds to your server platform. For example, setup.cfm for ColdFusion.
2. Find the line that starts with `Use SSL`.
3. Make the following changes to the file:

- UseSSL= **true**
- SSL_Port = **443** (unless you specified another SSL port)

4. Save and close the file.
5. You are set up to use the SSL support for Ektron CMS300.

WARNING! If `UseSSL` is set to **True**, but the certificate is *not* installed to the Web Server, you cannot log in to Ektron CMS300.

DSN-less Connection

In addition to using an ODBC connection for a standard database connection, Ektron CMS300 lets you to create a DSN-less connection using OLE DB. If you are planning on using OLE DB, you have two options:

- Use a UDL file
- Use an OLE DB provider string

This section explains both options.

Before You Begin

Before you can access the Ektron CMS300 database via OLE DB, you must know

- The type of data you want to access
- The server that stores the data
- The database that stores the data

Creating a UDL File

Whether you are using a Provider string or a UDL file, you can use the UDL wizard to create the file or string. Once Ektron CMS300 is installed, you are ready to begin.

Windows 98/ME/NT

1. Right click the Desktop.
2. Select **New**.
3. Select **Microsoft Data Link** to create a .udl file.

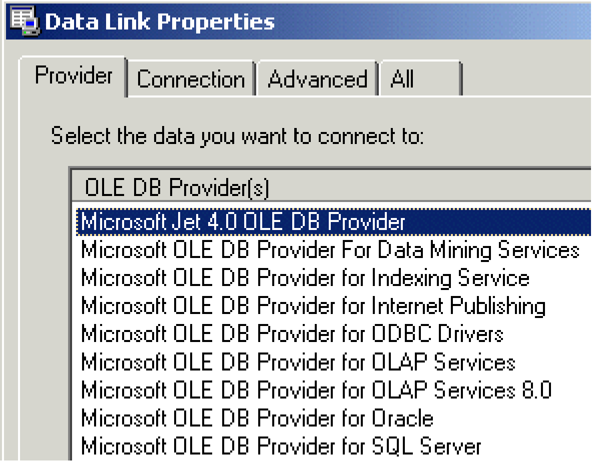
Windows 2000

1. Open **Windows Explorer** or **My Computer**.
2. Select the folder in which you want to save the .UDL file.
3. On the File menu, click **New** then click **Text Document**.
4. Right click the text file you created in step 3, then click **Rename**. Type the new file name using a **.udl** file extension. Press **Enter**. For example: *MyUDLfile.UDL*
5. You may get a warning that changing the file extension may cause files to become unusable. This is fine. Click **OK**.

Configuring The UDL File

After you create the UDL file, configure it to use the proper database and settings.

1. Double click the UDL file to bring up the Data Link Properties Dialog Box.
2. When the Data Link Properties dialog opens, click the **Provider** tab



3. Select the driver you want to use.
4. Click **Next >>** to move to the **Connection** tab.
5. Enter the connection properties.

NOTE Each driver requires different settings. All drivers require a user name and password.

6. Click **Test Connection** to verify your connection is working correctly. Change accordingly if you get an error.
7. Select the **Advanced** tab only if you require advanced settings.
8. When done, click the **OK** button to save and close the UDL file.

Now that you have created and configured a UDL file, you have two options:

- "Configuring Ektron CMS300 for the UDL File" on page 88
- "Configuring Ektron CMS300 for the Provider String" on page 89

Configuring Ektron CMS300 for the UDL File

After you create and configure the UDL file, follow these steps to access that file.

1. Using Windows Explorer, navigate to the directory to which Ektron CMS300 for ASP was installed. By default, the directory is `webroot\CMS300Sample`.
2. Save the UDL file under the CMS300Sample directory.
3. Open the file(s):
   - CMS300sample/CMS300scripts/setup.asp
   - CMS300sample/CMS300scripts/setup.aspx
   - CMS300sample/CMS300scripts/setup.php
   - CMS300sample/CMS300scripts/setup.cfm
4. At the line where it says `DSN="CMS300Sample_Access"`, change this to DSN="Filename=" & *<Path To UDL File>* & "\" & *UDLFileName* & ".UDL;"

   An example of this is below.

```
DSN = "File name=C:\inetpub\wwwroot\CMS300Sample\MyUDLFile.udl"
```

NOTE If your server platform is not ASP, Ektron recommends making the same changes to setup.asp after changing the setup file for your platform (for example, setup.cfm for ColdFusion).

Configuring Ektron CMS300 for the Provider String

Converting UDL File to a Provider String

After creating the UDL file, you can convert the information into a string that can be used in Ektron CMS300.

1. Right click the UDL file you created earlier.
2. Click **Rename** from the list of options.
3. Rename the file MyUDLFile**.txt**.
4. You may get a warning explaining that changing file extensions may cause files to become unusable. This is fine, click **OK**.
5. Double click the file. Something like the following appears.

```
[oledb]

;Everything after this line is an OLE DB initstring

Provider=Microsoft.Jet.OLEDB.4.0;DataSource=C:\Inetpub\wwwroot\CMS300Samp
le\database\CMS300Sample_Access.mdb;Persist Security Info=False
```

6. The following line is the connection string from the file:

```
Provider=Microsoft.Jet.OLEDB.4.0;DataSource=C:\Inetpub\wwwroot\CMS300Samp
le\database\CMS300Sample_Access.mdb;Persist Security Info=False
```

   This is used when configuring Ektron CMS300.

Configuring Ektron CMS300 to use the Provider String

With the provider string, you can configure Ektron CMS300 to use it.

1. Using Windows Explorer, navigate to the directory to which Ektron CMS300 was installed. By default, the directory is `webroot\CMS300Sample`.
2. Save the.txt file under the CMS300Sample directory.
3. Open the file(s):
   - CMS300sample/CMS300scripts/setup.asp
   - CMS300sample/CMS300scripts/setup.aspx
   - CMS300sample/CMS300scripts/setup.php
   - CMS300sample/CMS300scripts/setup.cfm

4. At the line that says `DSN="CMS300_v47_Access`", change this to `DSN="Provider= <string>".`

   An example of this may be

```
DSN = "Provider=Microsoft.Jet.OLEDB.4.0;DataSource=C:\Inetpub\wwwroot\
CMS300Sample\database\CMS300_v47_Access.mdb;Persist Security Info=False"
```

NOTE If your server platform is not ASP, Ektron recommends making the same changes to setup.asp after changing the setup file for your platform (for example, setup.cfm for ColdFusion).

Customizing Ektron CMS300

The following chapter contains information about customizing Ektron CMS300. The following topics are explained.

- ”Language SDK” on page 91
- ”Customizing Automatic email” on page 91
- ”Branding Ektron CMS300” on page 96

NOTE Another type of customization involves enabling support for multiple languages. This is documented in the Ektron CMS300 Administrator manual section Multi-Language Support > Working with non-English Content > Enabling Support for Multiple Language Content.

Language SDK

Ektron CMS300 includes a unique tool for translating its screens and messages to over 120 languages. After translating the text strings, you make the language active on the Web site. This actions translates all English strings to the selected language.

To learn more about using **Ektron CMS300**’s Language Software Development Kit (SDK), see “Language SDK” in the **Ektron CMS300** Administrator’s Manual.

Customizing Automatic email

Ektron CMS300 can send email notification to users, informing them that actions have either taken place or are requested of them. For example, a content contributor receives an email that his content was published to a Web site.

These emails are stored in and received from the app_messages table in the database. In that table, each email consists of one string for the subject and one for the body. Ektron CMS300 does not currently support HTML emails, however the messages are fully customizable.

The body of an email often includes variables, which are between the @ symbols. Ektron CMS300 replaces these variables with specific information for that instance of the email. For example, **@appContentTitle@** in the following sentence is replaced with the email's title.

Before	The content "**@appContentTitle@**" was deleted.
After	The content "Home Page Content" was deleted.

These emails can be customized. The variables can be taken out or moved around. Text can be added, rewritten, or reorganized.

See Also: "Variables" on page 93

Each message is called in the presentation layer by its message title.

Carriage Return/Line Feeds are represented by the variable **@appCRLF@**. These move the text down one line. For example.

Before	The content was approved.**@appCRLF@**Thank you!
After	The content was approved. Thank you!

Using the Language SDK to Customize Email

Ektron CMS300 provides an SDK to convert Ektron CMS300 to different languages. The SDK provides a means for creating versions of English strings in different languages. This SDK can also be used to change English email notification messages. By default, the language SDK files are located in `C:\Program Files\Ektron\CMS300\utilities\language_SDK`. The files are:

- lang.asp
- lang_englishdisplay.asp
- lang_entry.asp

- langfill.htm
- lang_top.asp

Copy these files into the CMS300 sample folder.

WARNING! Remember to remove these files from the Web site when you are done.

To translate the message variables to a language of your choice, follow these steps.

1. Browse to `http://www.YourSite.com/CMS300Sample/lang.asp`.
2. From the dropdown box at the top of the screen, choose **English (US)**.
3. The left frame displays all messages in the database.
4. Click the title of the email message you want to translate.
5. The right frame displays an input box, which displays the English message.
6. In this box, translate the message into the desired language.
7. Click the Update button.

NOTE All Ektron CMS300 messages can be updated here, not only email.

To learn more about using **Ektron CMS300**'s Language Software Development Kit (SDK), see "Language SDK" in the **Ektron CMS300** Administrator's Manual.

Variables

The following table lists variables you can use in email messages. When the email is sent, the description replaces the variable.

Variable	Inserts
@appCRLF@	A carriage return
@appContentTitle@	Title of content block
@appDeletionDateTime@	Date and time the content will be deleted from Web site
@appChangeDateTime@	Date and time changes will be updated on Web site

Variable	Inserts
@appDeclinerFirstName@	First name of user who declined content block
@appDeclinerLastName@	Last name of user who declined content block
@appSubmitterFirstName@	First name of user who submitted content block
@appSubmitterLastName@	Last name of user who submitted content block
@appFolderPath@	Location of content block in folder tree in Ektron CMS300 Workarea
@appContentLink@	Link to content block on Web site Note: You must be logged in to see changes
@appSubmitterDateTime@	Date and time content block was submitted
@appApprovalList@	Current approval list content block must pass through
@AppComment@	Comments for content block

List of Ektron CMS300 Emails

Notify Approval Process Complete

There are four emails for notifying users that the approval process is complete.

Deletion of Content Approved

Message Title: email subject: content deletion approved.

Message Text: Deletion of content has been approved.

Message Title: email body: content deletion approved.

Message Text: The deletion of the content "**@appContentTitle@**" has been approved. The content deletion will occur on: **@appDeletionDateTime@**.

Immediate Deletion of Content

Message Title: email subject: content has been deleted.

Message Text: Content has been deleted.

Message Title: email body: content has been deleted.

Message Text: The deletion of the content "**@appContentTitle@**" has been approved. The content was deleted immediately.

Approved Content Awaiting Go Live Date

Message Title: email subject: content changes approved.

Message Text: Content changes have been approved.

Message Title: email body: content changes approved.

Message Text: The changes to the content "**@appContentTitle@**" have been approved. The content changes will occur on: **@appChangeDateTime@**.

Approved Content Published Immediately

Message Title: email subject: content has been changed.

Message Text: Content changes have been made.

Message Title: email body: content has been changed.

Message Text: The changes to the content "**@appContentTitle@**" have been approved. The content changes went live immediately.

Decline Approval Request

Message Title: email subject: approval request declined.

Message Text: Content approval request declined.

Message Title: email body: approval request declined.

Message Text: Your submitted approval request for the content "**@appContentTitle@**" has been declined by "**@appDeclinerFirstName@ @appDeclinerLastName@**".

Send Approval Message

Message Title: email subject: request for approval.

Message Text: Request for content approval.

Message Title: email body: request for approval.

Message Text: The content "**@appContentTitle@**" has been submitted for your approval by "**@appSubmitterFirstName@ @appSubmitterLastName@**".**@appCRLF@@appCRLF@**To locate the content, the folder path in your workarea is: **@appFolderPath@.@appCRLF@@appCRLF@**The following link will take you to the submitted content block on the Web site: **@appContentLink@**.**@appCRLF@@appCRLF@**Please Note: You must login and select the preview icon to view the changes.**@appCRLF@@appCRLF@**The content was submitted for approval on: **@appSubmittedDateTime@.@appCRLF@@appCRLF@**Approvals: **@appApprovalList@@appCRLF@@appCRLF@**Comment: **@appComment@.**

Branding Ektron CMS300

Ektron CMS300 can be branded by a Web Developer. Through the use of a style sheet and replacing Ektron CMS300's default graphics, the application can take on a different look that is fully customizable. Developers can incorporate a company logo, institute company colors, and control the look and feel of the application to create a personalized, web-based, content management solution.

Style Sheet

Ektron CMS300's style sheet, global.css, is located in the **/**`csslib` folder under the `CMS300scripts` directory.

Using widely accepted style sheet classes and class attributes, you can modify the application, including colors, spacing, fonts, etc. Also, if you later upgrade or re-install **Ektron CMS300**, you can reuse this file and retain your changes.

Class Explanation

General Classes

Class	Description
.titlebar	Located at the top of every page in the application, this class is used for page explanations or location explanation. While navigating through Ektron CMS300, this page header or titlebar tells the user where they are (for example, Viewing content in content.asp).
.titlebar-error	Very similar to titlebar, this class is used to display error messages.
.input-box-text	In front of every input box is text explaining its purpose. This class controls that text.
.title-header	This class is used under the titlebar when information is going to be listed. This is used to control the column headers.
.info	Any important information that should stand out gets the info class. An example of this class can be seen in the content page when showing the attributes of the content block.
.info-header	Very similar to the info class. This is used for information that should stand out but starts a new section on a page. An example is the word “metadata” or “summary” on the content block properties page.
.toolbar	This class controls the background of the toolbar. NOTE: Do not change this class unless you are changing all icons.
.appname	Under the application logo are the words **Content Management**. This class controls the look of these words. This class should match the titlebar class to maintain consistency.

Calendar Classes

Class	Controls
.cal-link	Text used for the days of the week
.cal-header	Table rows, cells and links. The top row of the calendar is controlled by the TR. The TD version controls the text defining the active month. The Anchor class controls the month before and after. Also, cells that aren't used in the month receive their color from this class.
.cal-header2	The color used behind the days of the week.
.cal-day-link	The active (that is, selected) day.
.cal-day-link2	All days in the month that are not active.
.cal-submit	The buttons at the bottom of the calendar.

Workarea Classes

Class	Controls
.workarea	The background color for the workarea.

History Classes

Class	Description
.history-list	This class is used for two attributes. The TD controls the active date or the version that is presently published. The Anchor class is for the other versions of the content block.

Login Classes

Class	Controls
.login	The background color of the login and logout screen.

Folder Control Classes

Class	Controls
.folder	The font attributes of the folder control. NOTE: The font size cannot be controlled by the style sheet. It is set by the browser.

Library Classes

Class	Controls
.library	The background color of the three panels in the library.

Images

Application Images

To change the look **Ektron CMS300** via a logo, you must change two images.

- **workarea_logo.gif** - the logo of the application. It presently displays the Ektron CMS300 logo. It resides in the `\cms300scripts\images\application` directory.

  By changing this image, the application can be branded to display any other graphic or logo. You must use the same size attributes of 155 pixels wide by 77 pixels high. Alternate size attributes will cause the application to look wrong.

- **navigation_edit.gif**. This also resides in the application folder. This image is used for the left bar in the edit content, edit metadata, edit summary, and add content work areas. This image can also be changed but must retain the same size attributes of 128 pixels wide by 500 pixels high.

A third image, **workarea_back.gif,** makes up the blue/gray background at the top of the workarea. The size attributes are 50 pixels wide by 77 pixels high. This image cannot be less than 50 pixels wide as Netscape and FireFox will not repeat it correctly.

Language Images

Several language specific Images are used at the top of the workarea. They reside in the language folders and always start with the word “workarea” and end with “_top.”

These images are 467 pixels wide by 77 pixels high. Their width can change but the height cannot.

There are approximately six images in each language folder. an Adobe Photoshop file, workarea_top.psd, can be found under `\cms300scripts\images\English` folder. You can modify these images as needed.

Moving Content from Staging to Production Server

Overview

Before **Ektron CMS300**, HTML files were deployed to a Web site in a three-stage process.

1. An author updates content on a staging server, which has a copy of the Web site.
2. A reviewer checks and possibly modifies the content.
3. The approved content is moved to a production server, which hosts the live Web site.

An Ektron Content Management System (CMS) provides a *virtual staging server*, which lets authors work directly on a production server yet prevents site visitors from viewing modifications until they are approved.

Here's how it works. An author edits one or more content blocks and submits them for approval. Authorized reviewers preview the changes and decide to publish or reject them. Reviewers can also edit the content then publish. All of this can occur on a single server, which acts as a virtual staging and a production server.

Ektron CMS300 also supports the traditional model of separate staging and production servers. This section describes options for managing servers and suggests best practices for a successful deployment.

Best Practice

Ektron's suggested best practice is a combination approach, using both a virtual and a physical staging server.

- Use a *virtual staging server* for the majority of your Web updates. Ektron takes this approach with its site, `www.ektron.com`.

  Most of the time, authoring occurs on the production server, which acts as a virtual staging server. The CMS workflow controls how content is updated to live site, so content will only go live when it's ready.

- When the Web site is undergoing is a significant architectural change, use a *physical staging server*. An example of such a change would be one or more new templates. For more information, see "Managing an Architectural Change" on page 102

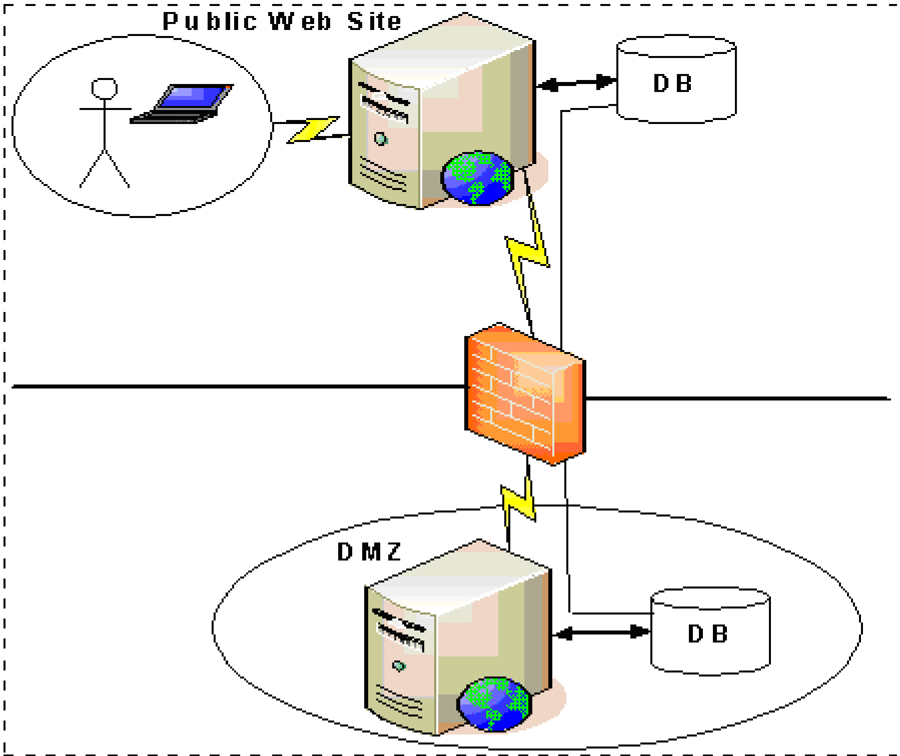
Managing an Architectural Change

Sometimes, the changes to your site are so substantial that the use of separate staging and production servers is warranted. Examples would be the release of new templates, or a redesign of the site.

When making such a change, follow these guidelines.

1. Copy the staging server content to the production server.
2. Disable authoring on the production server. At this point, changes are permitted on the staging server only.
3. Test the new architecture on the staging server. Modify as needed until you are satisfied with the results.
4. Move the updated files from the staging to the production server. For more information on moving files from the staging to the production server, see "Deploying Separate Staging and Production Servers" on page 103
5. Enable authoring on the production server.

Deploying Separate Staging and Production Servers



Ektron CMS300 can support multiple servers. For example, as illustrated above, you can have a staging server inside the DMZ, and a production server outside the DMZ to host the public Web site.

Several methods are available for moving information between servers.

- ”Basic Deployment” on page 104
- ”SQL Replication and CMS Load Balancing” on page 104
- ”Deploying with MS Application Center” on page 104

Basic Deployment

This scheme provides the most rudimentary methods for transferring data from a staging to a production server.

To move the database, back it up on the staging server and restore it on the production server.

To move the non-database files (library assets, .dlls, etc.), use FTP to transfer from the staging to the production server.

SQL Replication and CMS Load Balancing

To move the database, use database replication techniques to copy changes from the staging to the production server.

To move the non-database files from the staging to the production server, enable load balancing support in the CMS. When used properly, load balancing is an extremely efficient and time saving tool for your Ektron CMS300 driven Web site. Instead of uploading an image or file on each Web server that makes up your Web site, you only need to upload once. The load balancing feature replicates the image or file in each directory specified by Ektron CMS300. For more information, see the “Load Balancing” chapter of the **Ektron CMS300** Administrator Manual.

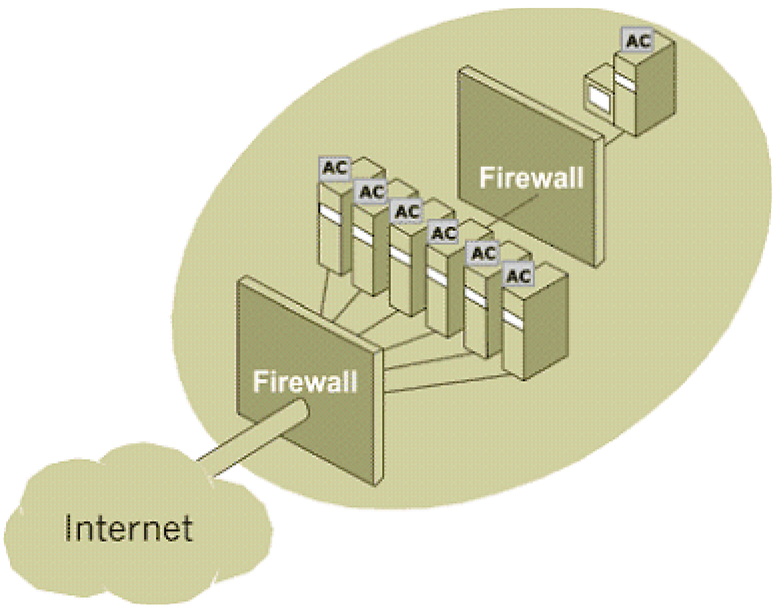
Deploying with MS Application Center

Application Center 2000 is Microsoft's deployment and management tool for high-availability Web applications built on the Microsoft Windows® 2000 and Windows Server™ 2003 operating systems. Application Center 2000 makes managing groups of servers as simple as managing a single computer. It was designed to replicate content from one server to many.

You can move Ektron CMS files, templates, assets (uploaded images & files), DLLs, registry entries, and even DSNs from one server to another using Microsoft's Application Center. Use SQL Server to move the database content. This strategy lets you move a staging version to a production server with a click of a button.

Application Center 2000 divides Web site content and code into *applications* that can be updated independently. These applications can consist of any combination of HTML and ASP files, COM+ components, .NET components, Windows registry settings, and Internet Information Services (IIS) settings. Each server in the cluster hosts a copy of the application, which Application Center keeps synchronized.

Microsoft Application Center 2000 is deployed on each server in a cluster. In a typical development environment, Application Center is also deployed to a staging server that is not a member of the cluster. This staging server acts as the drop-off point for Web content and application developers. With Application Center, you can move content and configuration settings from the staging server to the cluster with an easy, point-and-click interface.



Application Center can deploy content to foreign clusters, so that network administrators can easily move content and applications from a staging server to a production cluster of multiple servers. The staging server does not need to be a member of the production cluster. For more information, see "Deploying Ektron CMS300 via MS Application Center" on page 117.

Migrating Your Site to Ektron CMS300

Overview

This chapter explains the steps needed to migrate your Web site to a site using Ektron CMS300. This chapter answers the following questions:

- What do I need to copy to my Web site?
- How do I set up and deploy my templates?

This chapter assumes you installed Ektron CMS300 and have read the Ektron CMS300 Administrator Manual so that you have an understanding of basic concepts, some of which are mentioned here.

Initial Steps

The following section describes actions you need to perform before migrating your Web site.

Installation

Ektron CMS300 requires a physical installation of the product. If you do not have physical access to the machine, someone with access to the machine must run the install.

NOTE For additional information about installing Ektron CMS300, see "Installing Ektron CMS300" on page 30.

The back end of Ektron CMS300 consists of COM objects and a layer of ASP. The COM objects must be registered on the system. Fortunately, the install does this.

If you do not have physical access to the machine, have someone with access run the install or manually register the COM objects.

Verify Installation

After you install Ektron CMS300, verify that it is properly installed by using the sample site. By default, the sample site is located at the following address on the machine to which Ektron CMS300 is installed:

http://localhost/CMS300Sample/index.asp

If you can browse the sample site, and it is working properly, CMS is properly installed.

> **Best Practices**
> Ektron recommends keeping a working version of the sample site. This can be used to help you debug problems later on. For instance, if you begin to encounter errors on your site, you can refer to the sample site to see if those same errors occur. If they do, that may indicate a problem with the installation. If they do not, an external factor is causing the problem.

Setting up Your New Site

This section explains tasks that you need to perform when setting up your Ektron CMS300 site.

What to Copy to Your Site

First, you need the application core files, which represent the display layer for the application. These files help the workarea, library and content functions operate properly. The files are kept in the `CMS300Sample/CMS300Scripts` directory.

Copy the `/CMS300Scripts` folder into your site's folder.

NOTE If you are using ColdFusion, copy the **CMS300Sample/Application.cfm** file as well. If you already have an application.cfm in your site, just copy the include line from our application.cfm and put it in yours. This include line points to the setup.cfm in the scripts folder.

Setting up the Database

Since all content is stored in a database, you need to create one. Ektron CMS300 supports the following database types:

- Microsoft Access
- Microsoft SQL (7.0 and greater)
- MySQL
- Oracle (9i)

The installation creates a sample Access database and the scripts needed to create tables in the other databases. Additional information about creating databases for Ektron CMS300 is found in "Ektron CMS300 Databases" on page 48.

> **Best Practices**
>
> If you plan on using Ektron CMS300 in an Internet environment or large Intranet, it is *strongly* recommend that you use MS SQL as your database. MS-SQL is more secure and robust than Access and is not subject to data corruption as Access is. MySQL and Oracle would work fine as well.

The installation includes a database mover to help you move content from one database type to another. For instance, if you begin development in MS Access and now want to use an MS SQL database, the database mover moves information between the databases.

If you want to use a DSN-less connection instead of ODBC, refer to "DSN-less Connection" on page 86.

Modifying Application Parameters

After you install and create your Ektron CMS300 database, you need to modify the application parameters.These settings are found in the setup file that corresponds to your scripting environment. For instance, if you are using ASP, modify setup.asp; for ColdFusion, modify setup.cfm. These files are located in the `/CMS300Scripts` folder.

NOTE If your server platform is not ASP, Ektron recommends making the same changes to setup.asp after changing the setup file for your platform (for example, setup.cfm for ColdFusion).

Edit that file and modify the following settings

Setting	Type in...
DSN	The datasource name you created for your database.
dbtype	The type of database you are using. Note: When using an Oracle database, the DBType=”Oracle”
dbusername/ dbpassword	The username and password, if your database requires one.
OracleSvr	Oracle service information.
SitePath	The relative path from web root to the scripts folder.

NOTE If you are using SSL, the settings you need to modify are explained in ”SSL Support” on page 81.

Creating a Login Page

Now that everything is set up, you can create a login page. You can either copy the one from the sample site or create your own. The easiest way to create a login page is to use the Dreamweaver/ UltraDev extension supplied in the installation. That extension lets you add the login tag through the WYSIWYG interface.

(See “Dreamweaver Extension Support” in the Ektron CMS300 Developer’s Reference Manual for additional information.)

If you do not have Dreamweaver/UltraDev, a list of content tags can be found in the Ektron CMS300 Developer’s Reference Manual.

Logging In

To log into your Ektron CMS300 Web site, perform the following steps:

1. Browse to the login page you created and click the login button.
2. A login dialog box prompts for a username and password.
3. Enter the default username, **admin**, and password, **admin**, and click **Login**.
4. You are logged into Ektron CMS300

NOTE If you get a message that the application is locked, log in using the built-in account. The username and password is **builtin/builtin**. You get this message if your license key is invalid or hasn't been entered yet.

Modifying Configuration Settings

After logging in to the Ektron CMS300 Web site, access the Workarea by clicking the Workarea button. From there, you can modify the configuration settings.

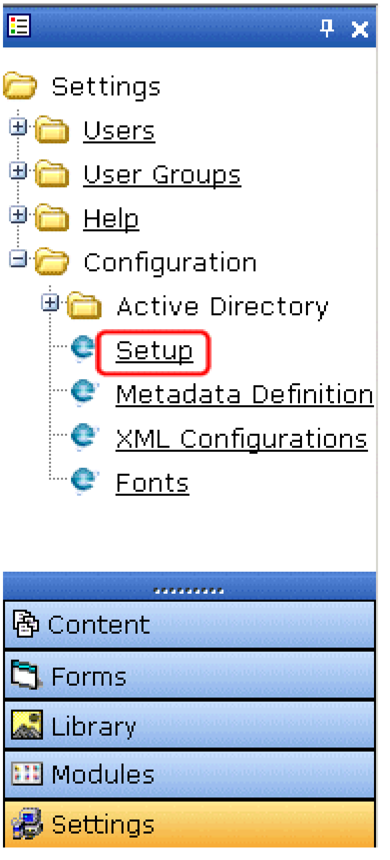
Setting up Active Directory

If plan to use Active Directory, configure this now. The settings for Active Directory can be found under the configuration folder.

Refer to "Active Directory Integration" in the Ektron CMS300 Administrator Manual for further information.

Modifying the Setup Screen

The Ektron CMS300 setup section is located under the Configuration folder.



The setup section allows you to configure items such as your license key, style sheet support, max content sizes and default language. To learn more about modifying the setup screen, see the **Ektron CMS300** Administrator manual section “Introduction to Ektron CMS300” > “Modifying the Application Setup Screen.”

Setting up Meta Data

Ektron CMS300 includes extensive metadata support. Metadata definitions are in the Configuration folder in the workarea. You can have as many metadata definitions as needed. If your Web site supports multiple languages, you need to set up metadata for each supported language.

To learn more about working with metadata, see the **Ektron CMS300** Administrator manual section “Managing Content” > “Metadata.”

Setting up XML Configurations (Ektron CMS300 only)

You can also set up your XML configurations. The XML files (such as schemas and XSL transforms) are created outside of Ektron CMS300, using tools such as XML Spy. These XML configurations are then associated with content blocks and content folders.

To learn more about setting up XML configurations, see the **Ektron CMS300** Administrator manual section “Special Features” > “Managing XML.”

Creating Ektron CMS300 Users

If you are not using the Active Directory support, you need to manually add users. The number of allowed users is determined by your license key. For instance, if you purchased a 10-user license, you can only enter 10 users in the system.

NOTE If you exceed the licensed amount, you may get locked out.

To learn more about setting up users, see the **Ektron CMS300** Administrator manual section “Managing Users & User Groups.”

Creating User Groups

Every user must belong to a group. When you first add a user, he/she is automatically added to the Everyone group. You can create more user groups to suit your needs. There is no limit to the number of user groups.

You might group users by function (for example, all marketing users in a marketing group) or by permission type (for example, all editors in an editors group, and all publishers in a publishers group).

To learn more about setting up user groups, see the **Ektron CMS300** Administrator manual section “Managing Users & User Groups.”

Configuring Content Folders

After creating users and user groups, create folders to organize content blocks, and assign permissions and workflow to the content in them. You can create as many folders as you want, and each folder level can go as deep as you want.

> **Best Practices**
>
> It is best to keep your folder structure simple so it is easy for your users to navigate.
>
> The folder structure should make sense to the users who will navigate it. Maybe you'll have 6 or so top level folders, and each folder may go 4 or so deep.
>
> This folder structure is replicated under the library folder.

As you create a folder, assign a default template and style sheet. The default template is used when a new content block is created and Ektron CMS300 creates a Quicklink that points to the new content block. If you do not provide a default template, it is inherited from the parent folder.

You can also add the permissions and approval process as you create the folder structure. Permissions can be given to a particular user or a user group. The same goes for the approval process.

> **Best Practices**
>
> Limit permissions to the Everyone group, because every user has permission to that content. Similarly, the Everyone group should probably not have approval permissions, because that means that everyone can publish content.

To learn more about setting up folders, see the **Ektron CMS300** Administrator manual section "Managing Content Folders."

Creating Your Templates

Now you can create your templates. Templates contain the "look and feel" of the site. Masthead, navigation, footer graphics, and content blocks are all part of the template.

The easiest way to create templates is to use Dreamweaver/ UltraDev. The installation includes a custom extension that lets you add Ektron CMS300 custom tags through the WYSIWYG interface. If you do not have Dreamweaver/UltraDev, a list of tags can be found in the Developer's Manual. Refer to "Dreamweaver Extension Support" in the Ektron CMS300 Developer Reference Manual for additional information.

Guidelines for Creating a Template

- Begin the template file with an include statement that references `site_scripts_path.asp`, the file that calls custom Ektron functions and allows the page to function properly.
- If you are not using Dreamweaver, create a simple file that corresponds to your Web Server platform. For example, contact-ektron.php. Place it in the folder that holds your Web site files.
- A list of functions is available in the **Ektron CMS300** Developer Manual.
- Add as many content functions as you want to a template. However, you can only insert one dynamic tag per template.

Here is an example of a simple page (no headers or footers) that calls a static content block whose id is 1.

```
<!-- #include file="site_scripts_path.asp" -->

<html>

    <head>

          <title> Login Page </title>

    </head>

    <body>

      <tr>

        <td>

          <% ecmContentBlock(1) %>

        </td>

      </tr>
```

```
    </body>

</html>
```

You can embellish and build up your templates based on this model.

> **Best Practices**
>
> Since dynamic templates have URL parameters to them, it is best to make each landing page and other important pages static tags. This makes it easier for you to remember if you need to provide that link to someone. For instance, each main landing page off your main navigation could use a static tag. Then, as you go deeper into that section, those pages use a dynamic tag.

Migrating/Creating Content

At this point, you can begin to create/migrate your content. If you are migrating content from an existing site, add a new content block in a content folder, and cut and paste the content into the Ektron CMS300 editor.

NOTE Images and files must be uploaded and inserted into the content separately.

Deployment

Deployment from development to production is as simple as moving the files over. To properly deploy your new Ektron CMS300 Web site, perform the following steps.

1. Register the Ektron CMS300 COM objects on your production machine.

NOTE If you performed the installation program on your production server, the objects are registered automatically.

2. Copy all assets (templates, images, files, etc.) from your development box to your production machine.

3. Move the database.

   You can either

- point your data source on the production machine to the same database you were using

or

- make a copy of the database, move it to your production box and make a data source to that

Setting Up a Multilingual Web Site

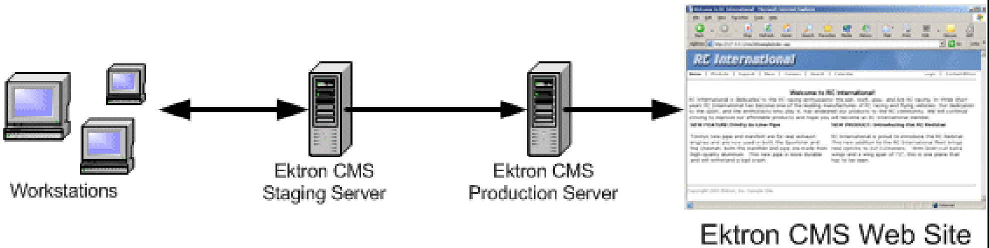
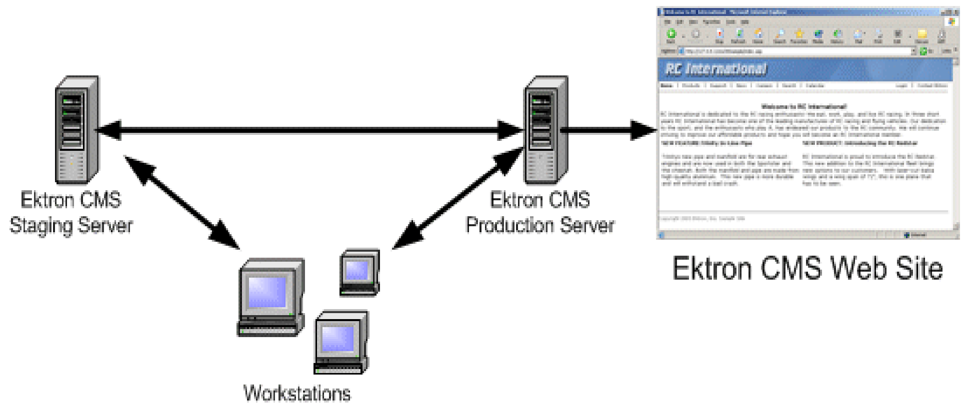
Beginning with Release 4.7, **Ektron CMS300** supports content blocks in several languages. To learn what is involved in converting your site to support several languages, see the **Ektron CMS300** Administrator manual section “Multi-Language Support” > “Working with Multi-Language Content” > “Setting Up a Multi-Language Web Site.”

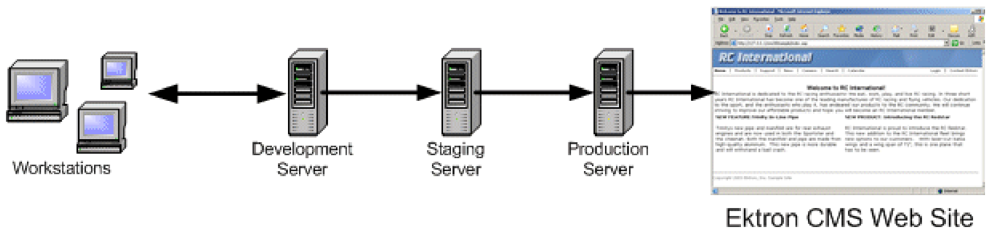
Deploying Ektron CMS300 via MS Application Center

Overview

By default, Ektron CMS300 is installed directly on a production server, and a virtual staging server manages changes to the Web site's content and assets. This model works for most users, but other methods can be used for staging.

Three major uses of staging are listed below.

Description	**Flowchart**
A staging to production model. No changes are made on the production server.	
A staging to production model. Changes are made to both servers then merged.	

Description	Flowchart
A development to staging to production model.	

This chapter explains how to deploy Ektron CMS300 in different models.

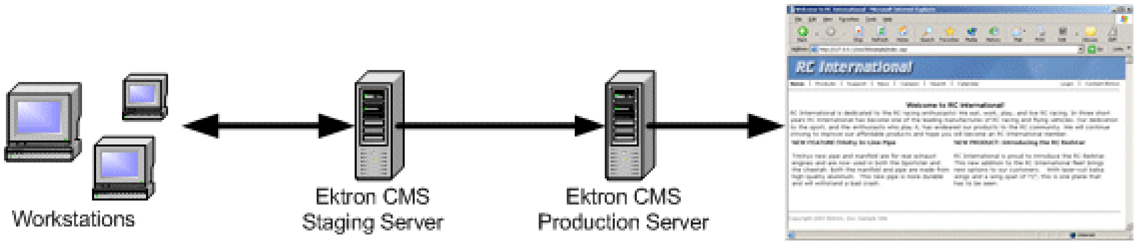
What is Deployment?

Deployment means moving the following from one server to another using Microsoft's Application Center:

- application files
- templates
- assets (that is, uploaded images and files)
- registry entries
- DSNs

Then, a SQL server can move the database content.

This model requires at least two servers: a staging server, and a production server that publishes files and data to the live Web site. Below is an example of this model.



In this example, Ektron CMS300 users changes content and files on the staging server. When desired, the necessary files are deployed using MS Application Center, and the data stored in the database is synchronized, using MS SQL Server, to the production server to be viewed by visitors.

Other Configurations

Several staging servers could be used to further stage Web site content. Reverse publishing may also be used to make a staging server match the production server.

Audience

Since the deployment model relies heavily on Microsoft Application Center and Microsoft SQL Server, you should have some knowledge of them. Although the basic steps needed to configure the deployment model are explained in this chapter, prior experience with these applications helps you make better decisions.

Requirements

The requirements include:

- Ektron CMS300
- Windows 2000 Server or Higher
- Microsoft SQL Server
- Microsoft Application Center

Prerequisites

Before you can perform the configuration, complete these tasks.

1. Obtain two similar server machines with the following configurations:
   - Pentium-compatible 400 MHz or higher processors
   - 256 MB Ram (minimum)

NOTE The more differences between the two machines (for example, RAM, speed, brand, etc.), the greater the chance problems may occur.

2. Install Windows 2000+ (or higher) Server operating system on both machines.
3. Enable IIS on both servers.
4. Install MS-SQL server on both servers.

NOTE Be sure the security is configured properly by using either Windows or SQL Server authentication. Refer to your MS-SQL documentation for more information.

5. Install Microsoft Application Center on both servers.

Once the prerequisites are met, you can configure staging and production servers to deploy Ektron CMS300.

Deployment Model Configuration

The following section explains how to configure servers for Ektron CMS300 deployment.

Configuration Overview

Here is an overview of the steps for configuring deployment.

1. Install Ektron CMS300 on the staging server.
2. Set up an MS-SQL database for Ektron CMS300.
3. Configure Application Center on the staging server.
4. Configure Application Center on the production server.
5. Deploy the Files.
6. Configure MS-SQL databases.

7. Synchronize the Databases.

Installing Ektron CMS300 on the Staging Server

First, install Ektron CMS300 on the staging server. (For more information, see ”Installing Ektron CMS300” on page 30.) During the installation, you have the option of creating an MS-SQL database.

Setting Up an MS-SQL Database for Ektron CMS300

To create an MS-SQL database, follow these steps.

1. Create an empty MS-SQL database.
2. Run the Ektron CMS300 SQL script against the database to create the necessary tables.
3. Move content to the new database.
4. For more details on this procedure, see the readme.txt file in `C:\Program Files\Ektron\CMS300\Database`.

Modifying web.config

After completing the above steps, update your web.config file to reflect the changes. Below is a list of changes to be made.

Line	Value
ek_dbDatabase	Replace the current DBType with **SQL**
ek_dbUsername	If required, specify the username needed to connect to the DSN.
ek_dbPassword	If required, specify the password for the username given.

Configuring Staging Server’s Application Center

After you install Ektron CMS300 and it functions properly with the MS-SQL database, configure Application Center on the staging server. To do so, follow these steps:

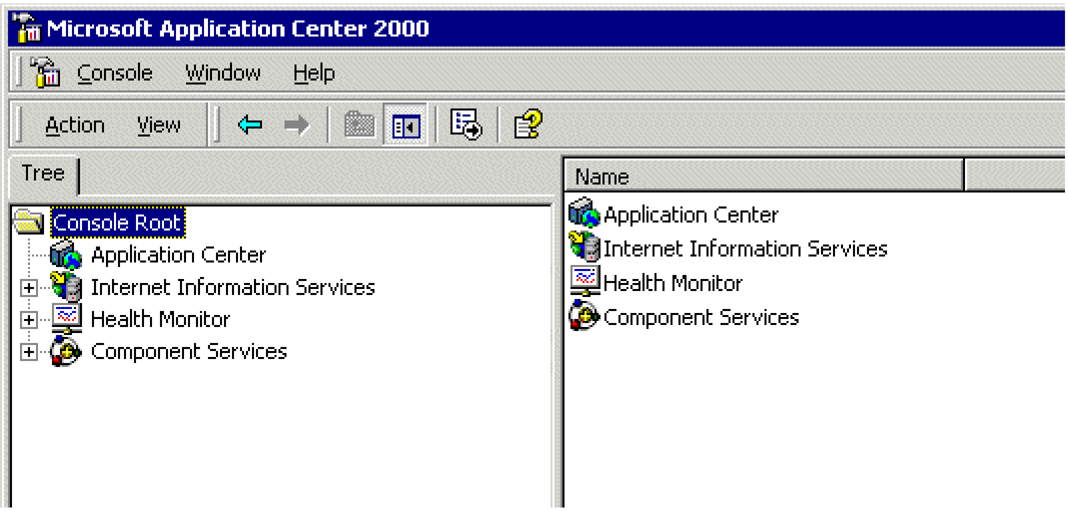
1. Connect to the staging server via Application Center.
2. Create a new cluster including the staging server.
3. Configure application settings on the staging server.
4. Add the production server to the cluster.
5. Push all files from the staging server to the production server.

The following sections explain these actions.

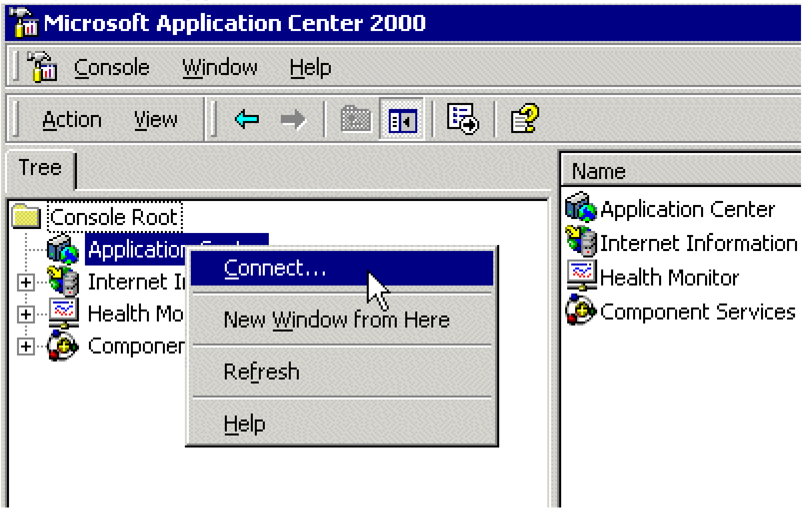
Connecting to the Staging Server's Application Center

To connect to Application Center on the staging server, follow these steps.

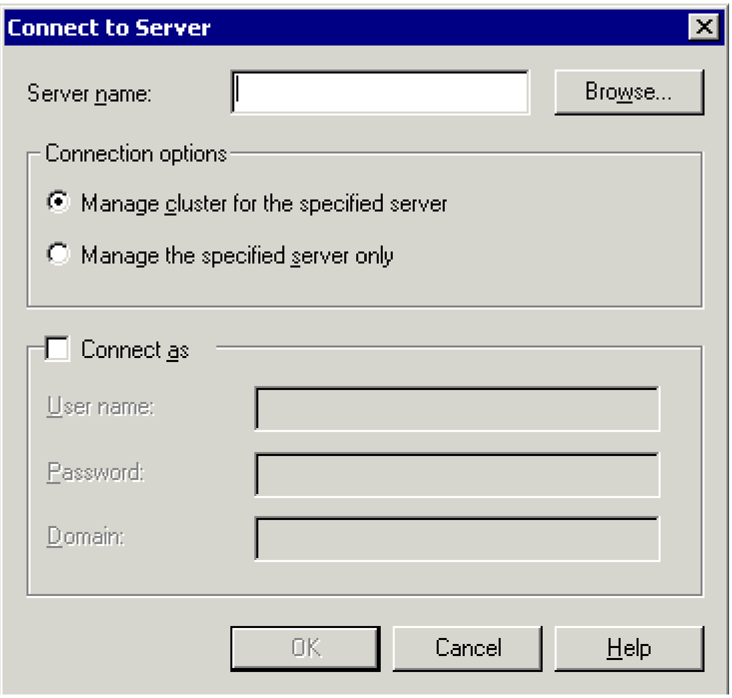
1. On the staging server, open Application Center.
2. The Application Center snap-in appears.



3. Right click **Application Center** and click **Connect...**



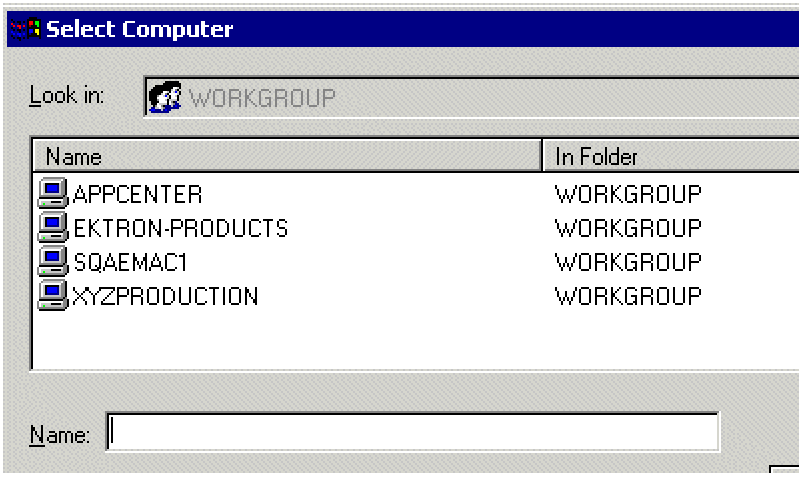
4. The Connect to Server dialog box appears.



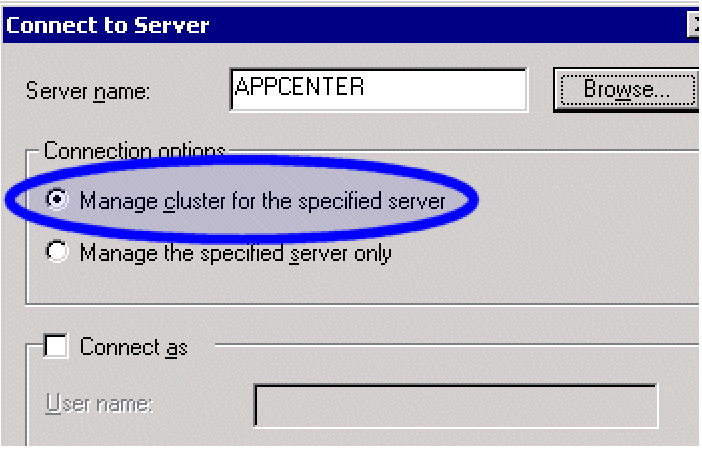
5. Click **Browse** to locate the server you want to connect to.

NOTE If you know the name of the server, you can type it into the Sever name field.

6. The Select Computer screen appears with a list of available servers.

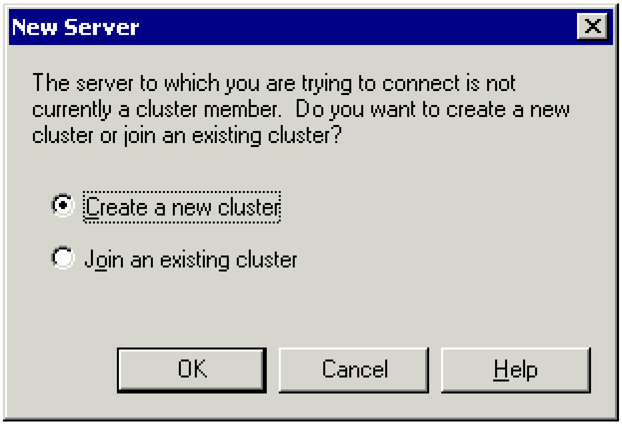


7. Select the Ektron CMS300 staging server, then click **OK**.
8. The select computer screen closes, and the Connect to Server screen contains the selected server's name.
9. Choose **Manage cluster for the specified server**.



10. If needed, check the **Connect As** box and enter the proper information.
11. Click **OK** to submit the information and attempt to connect to Application Center.

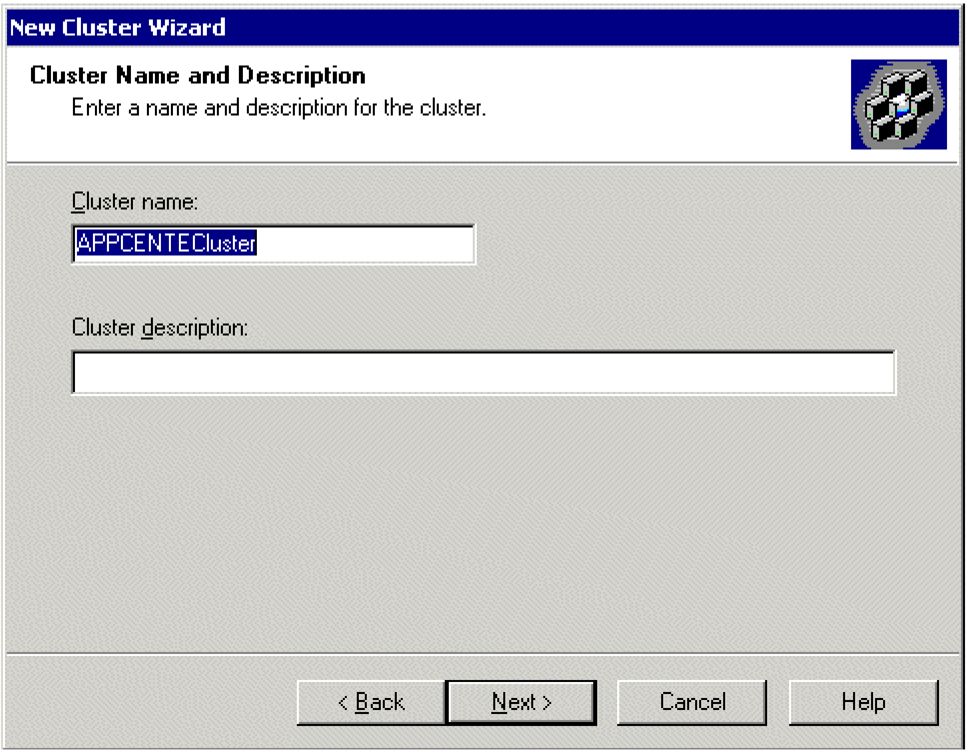
12. If this is the first time you are connecting to the server, the New Server dialog box appears. Otherwise, proceed to step 15.



13. Choose **Create a new cluster** then click **OK.**
14. The New Cluster Wizard opens.

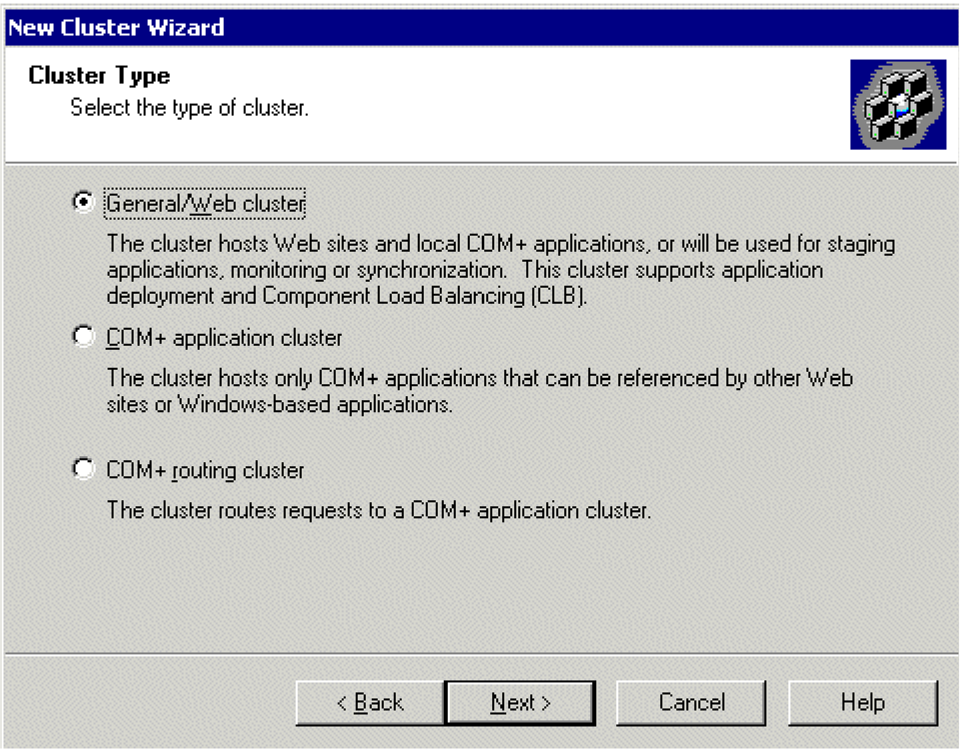
15. Click **Next**.

16. The wizard analyzes the server configuration and displays the Choose Name and Description screen.



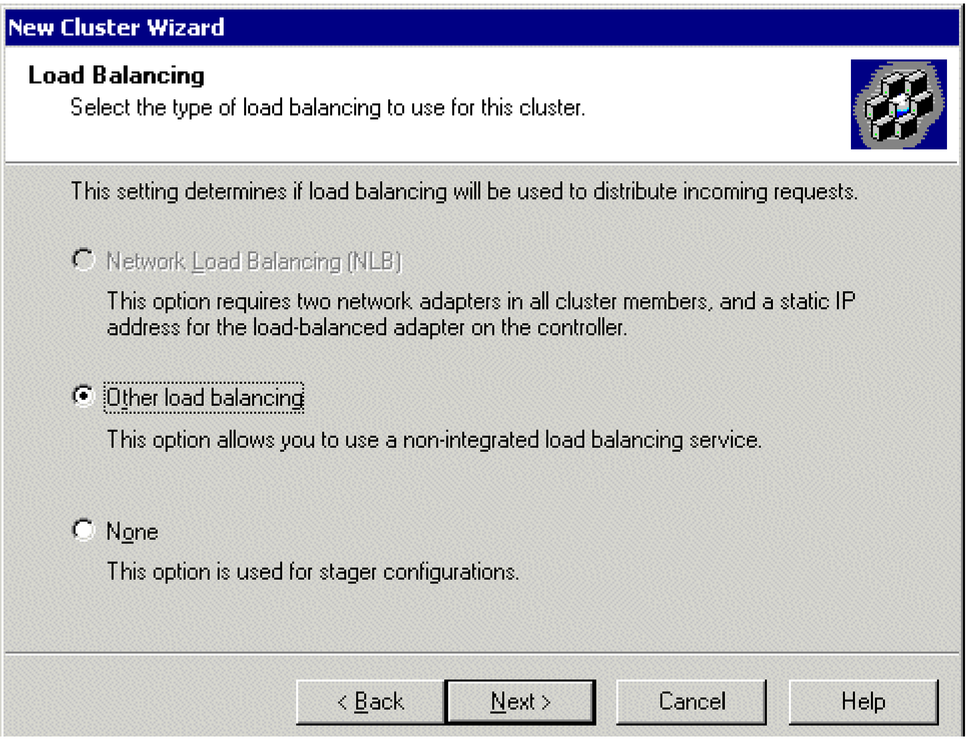
17. Give the new cluster a name and description, then click **Next**.

18. The Cluster Type screen appears.



19. Select **General/Web cluster** then click **Next**.

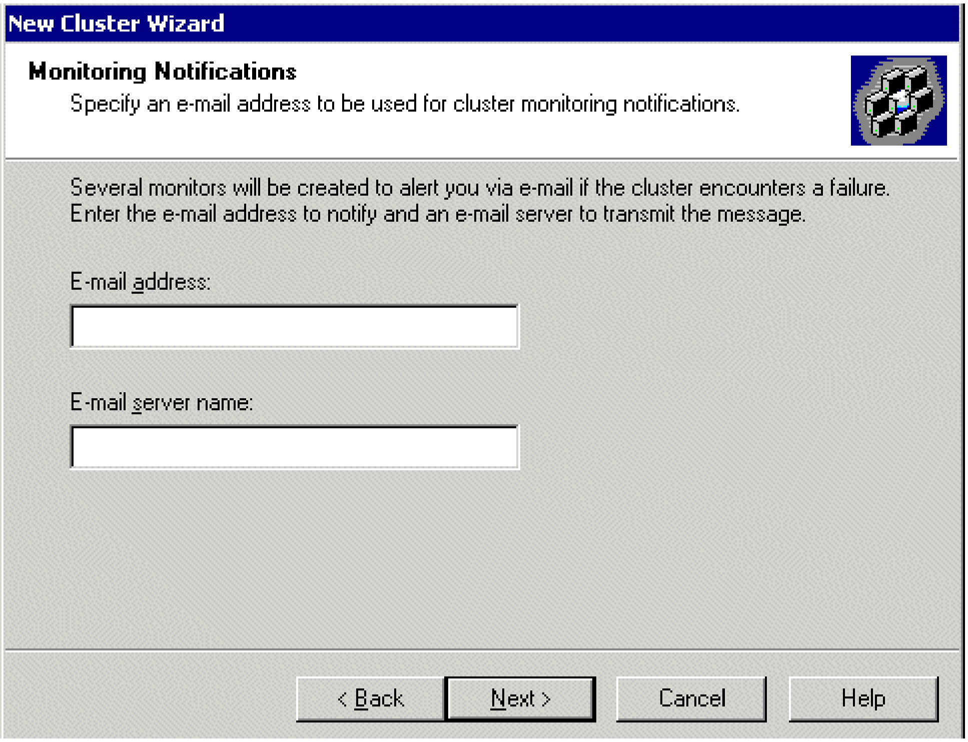
20. The Load Balancing screen appears.



21. Since load balancing is not required for the configuration, choose **None** and click **Next**.

NOTE If you are familiar with Load Balancing and Application Center, then you may choose another option.

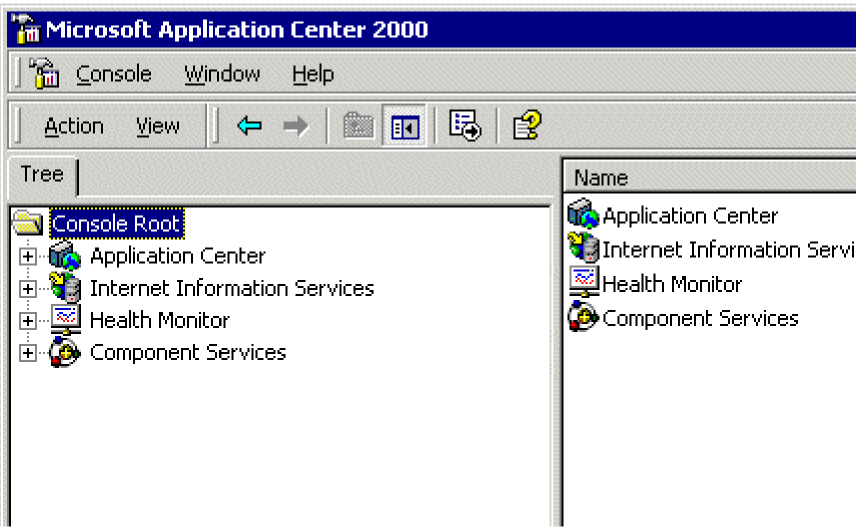
22. The Monitoring Notifications screen appears.



23. Enter a valid e-mail address and server name, then click **Next**.
24. The Completing the New Cluster Wizard screen appears.

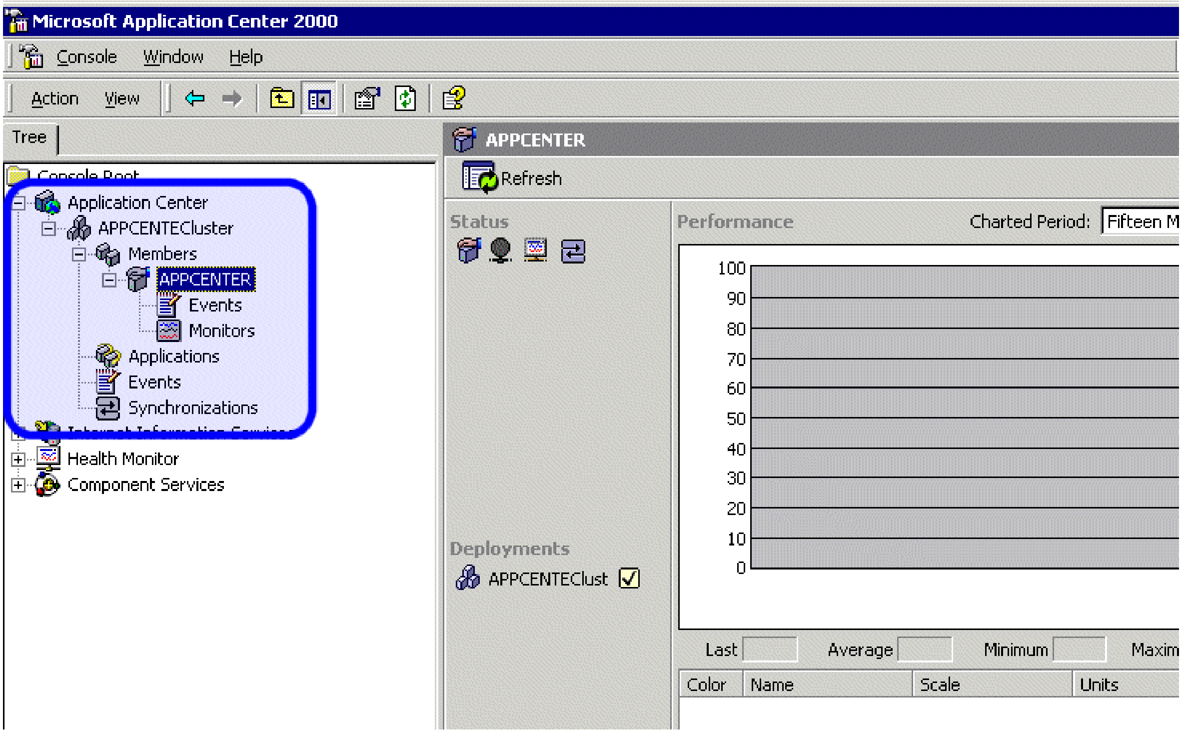
25. Click **Finish** to complete the wizard and connect to the Application Center.

26. The Application Center snap-in appears.



NOTE If you cannot connect, make sure all information is correct.

27. After expanding the Application Center tree, you should see a cluster with one member, the staging server.

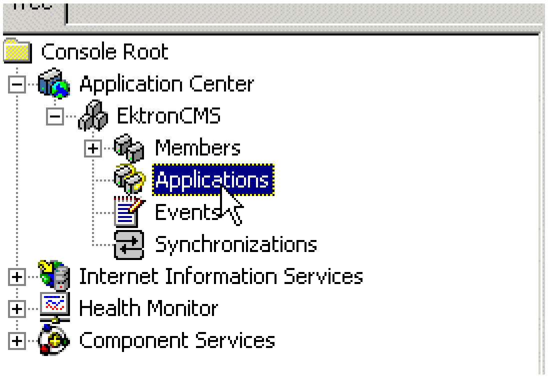


Now that you have connected to Application Center on the staging server, and created a cluster, you can configure the application settings for the cluster.

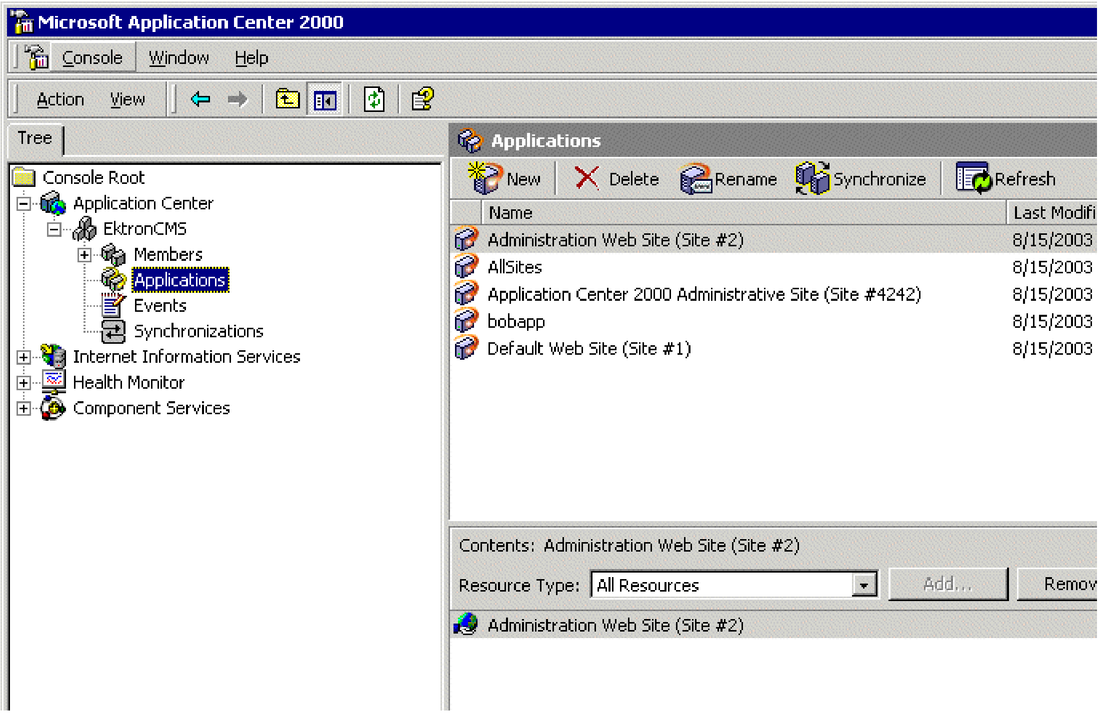
Configuring the Application Settings for the Cluster

To add Ektron CMS300 application information to the cluster, follow these steps.

1. Connect to the cluster you created in ”Connecting to the Staging Server’s Application Center” on page 122.
2. Click **Applications** in the cluster tree.

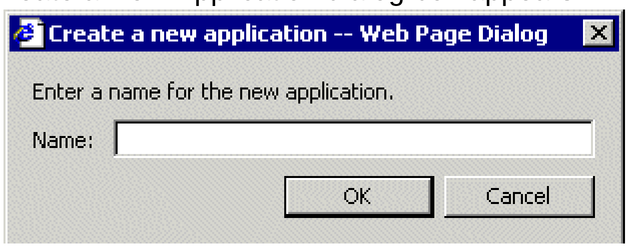


3. The applications page appears on the right side of the snap-in.



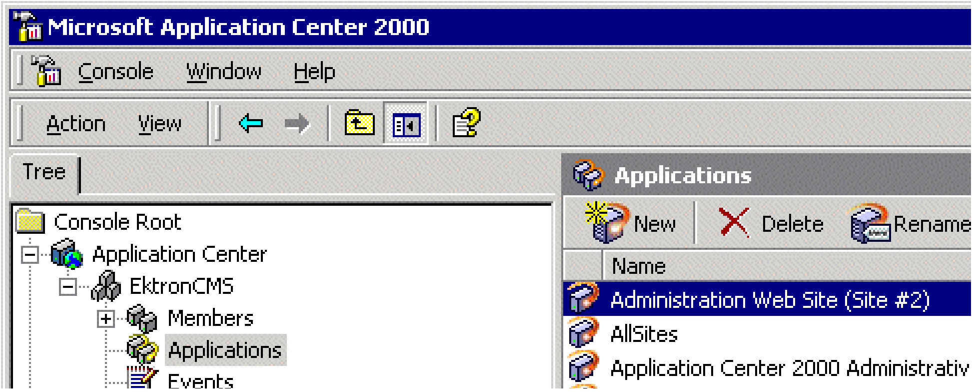
4. Click New () in the toolbar at the top of the applications section.

5. The Create a New Application dialog box appears.



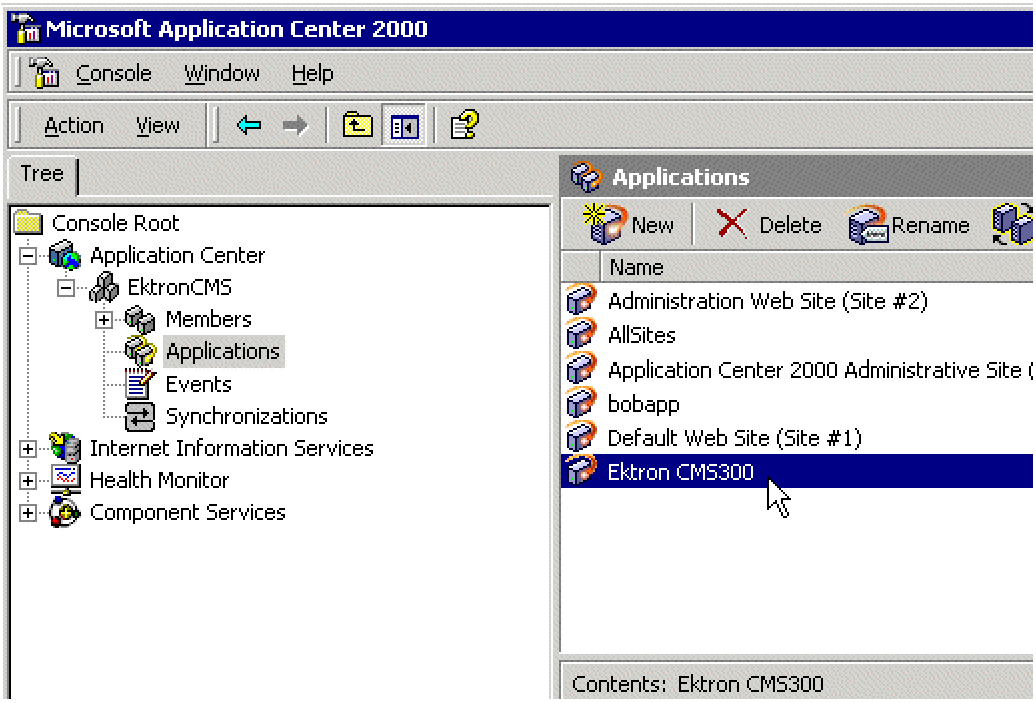
6. Enter a name for the new application in the displayed field and click **OK.**

7. The dialog box closes, and the applications list is updated with the new application.



Now that the application is added, you must add resources to it.

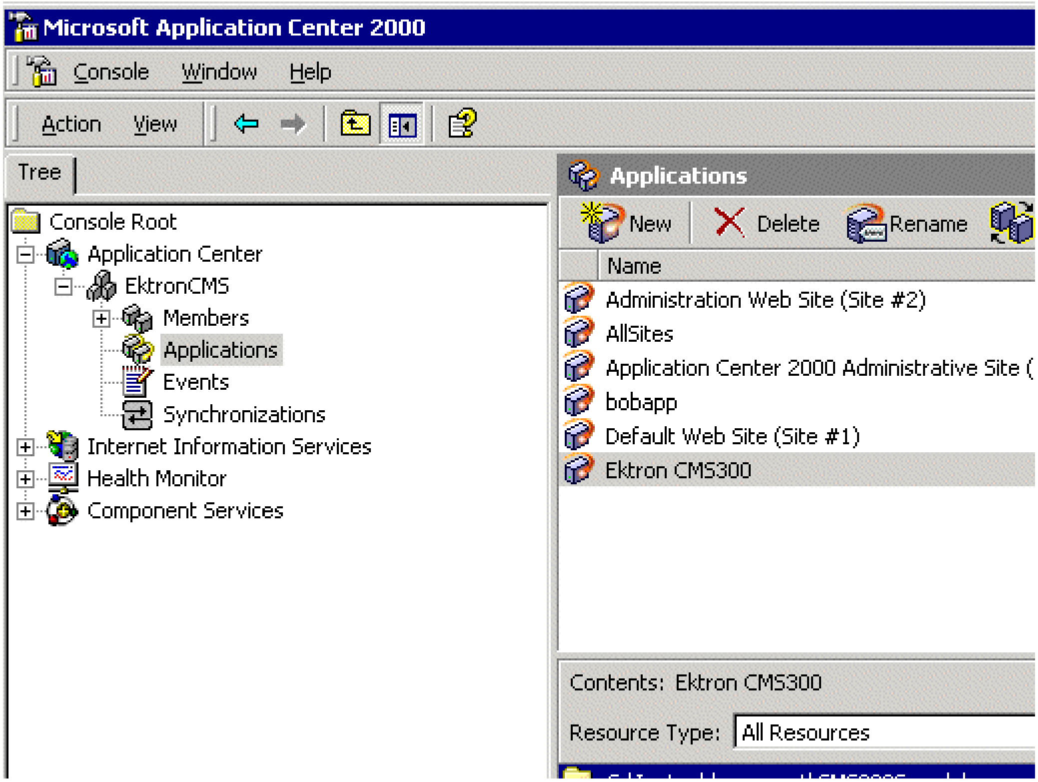
8. Click the Ektron CMS application that you created.
9. A list of resources assigned to the application appear in the lower right pane.



10. Use the following table to help you assign necessary resources to the application:

Resource Type	Folder Path	Description
Registry Keys	HKEY_LOCAL_MACHINE\SOFTWARE\Ektron	Registry keys for Ektron CMS300 to function properly.
File System Paths	C:\Inetpub\wwwroot\CMS300Sample\	Location of your Ektron CMS300 Web site.
File System Paths	C:\Program Files\Ektron\CMS300	Location of the necessary components for Ektron CMS300.

Displayed here is the result of adding these resources to the application.

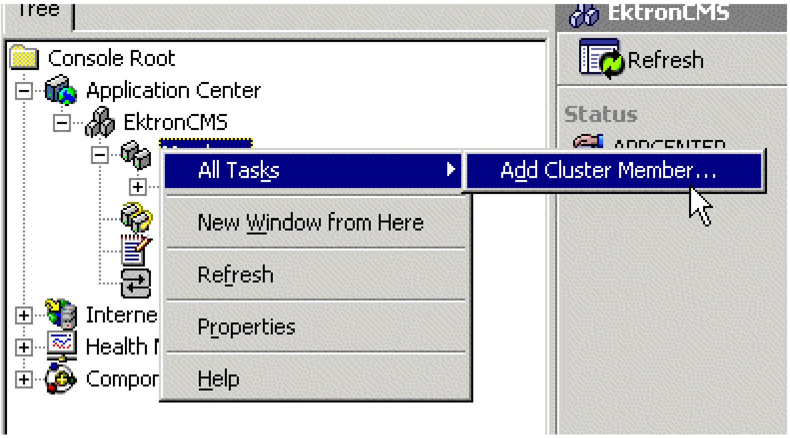


NOTE You can also add Registry keys, etc. here. The three resources listed above are *required*.

Adding the Production Server to the Cluster

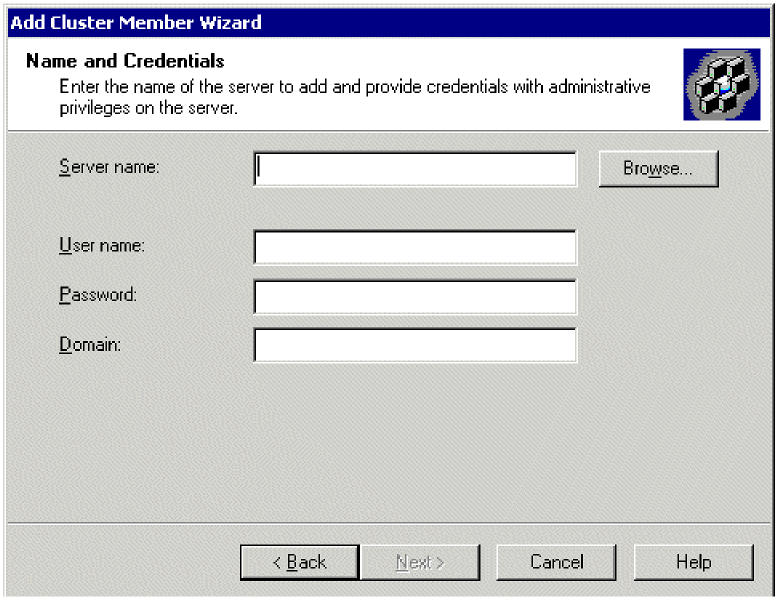
The next step in configuring Application Center on your staging server is to add the production server to the cluster. To do so, follow these steps.

1. Connect to the cluster you created in "Connecting to the Staging Server's Application Center" on page 122.
2. Right click **Members** in the cluster tree.
3. Click **All Tasks > Add Cluster Member**.



4. The Add Cluster Member Wizard opens. Click **Next** to proceed.

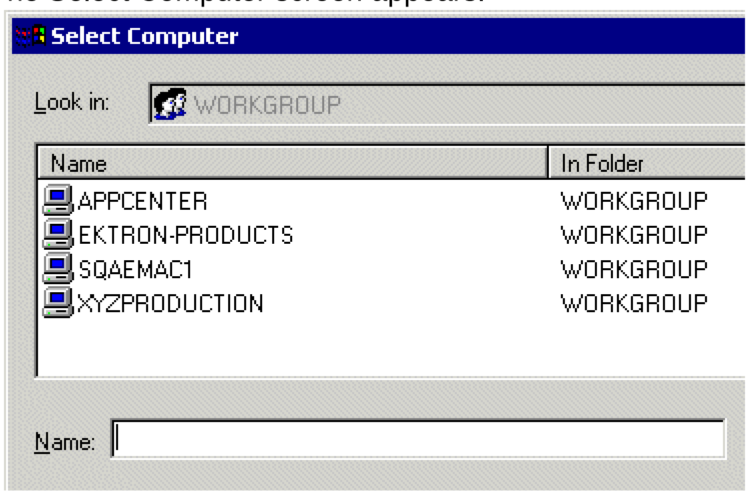
5. The Name and Credentials screen appears.



6. Click **Browse** to locate the server to add to the cluster.

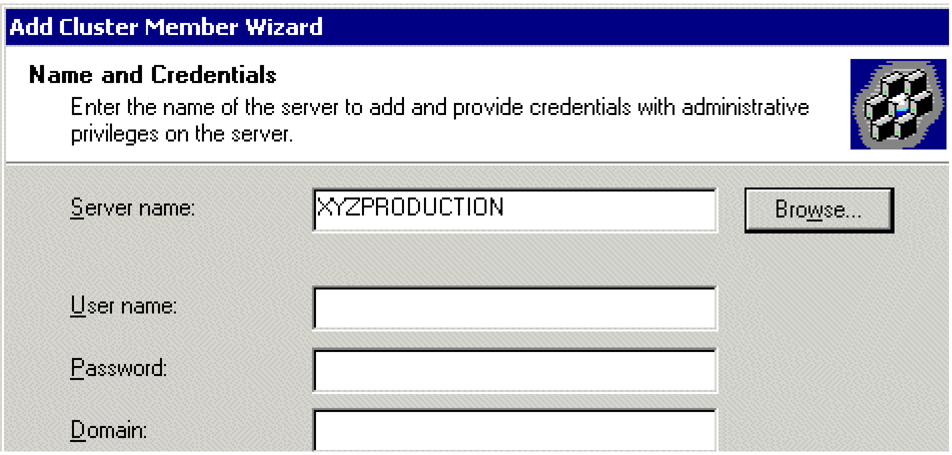
NOTE If you know the name of the server you want to connect to, enter the name of the server in the field and skip this step.

7. The Select Computer screen appears.



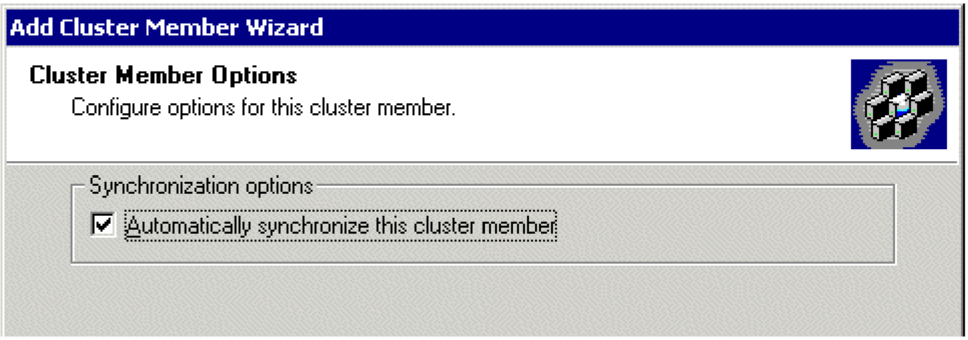
8. Select the Ektron CMS300 **Production Server** from the list of available servers, then click **OK.**

9. The select computer window closes, and the Name and Credentials screen appears with the selected computer in the Server Name field.



10. Enter the required information needed to successfully connect to the server then click **Next.**

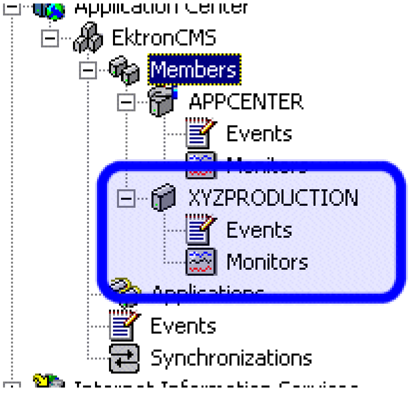
11. Application Center analyzes the server configuration, and then displays the Cluster Member Options screen.



12. Leave the default and click **Next.**

13. The Completing the Add Cluster Member Wizard page appears.

14. Click **Finish** to complete the wizard and add the server to the cluster. The server is now a member of the cluster.



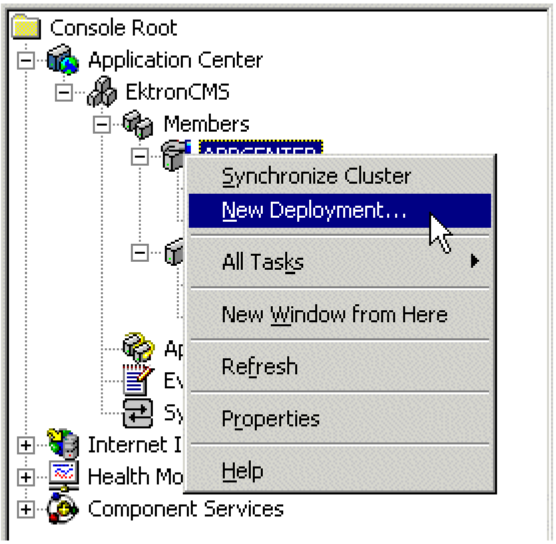
Now that the cluster is complete, you can now “push” files from the staging server to the production server.

Deploying the Files

Once the cluster has been configured properly, you can deploy Ektron CMS300 from the staging server to the production server.

To create a new deployment, follow these steps,

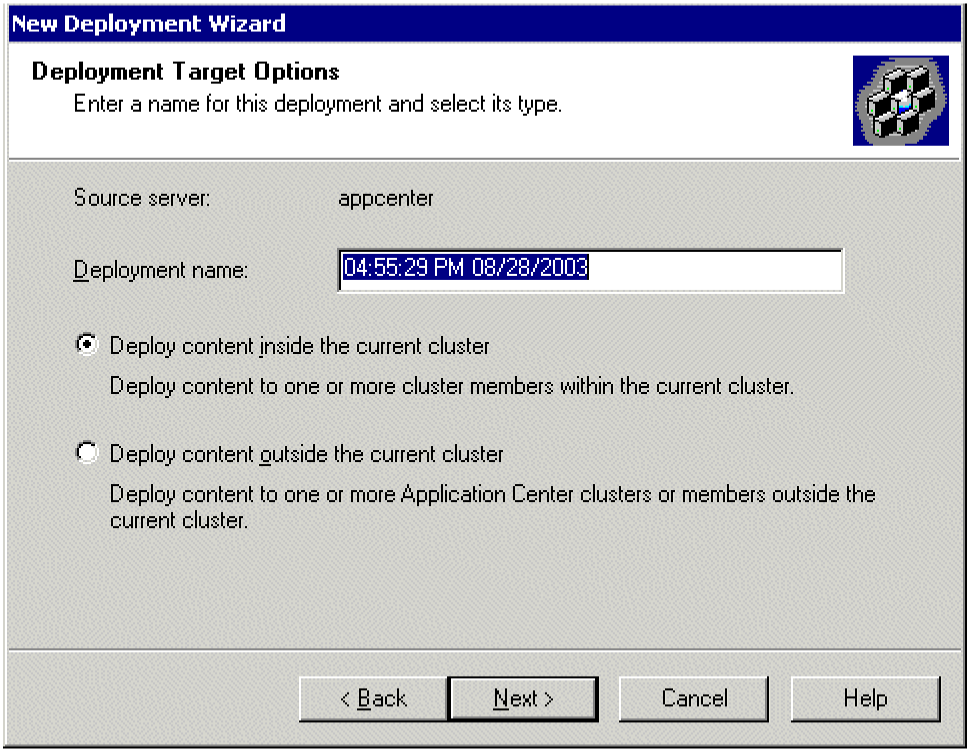
1. Connect to the cluster you created in "Connecting to the Staging Server's Application Center" on page 122.
2. Right click the cluster member acting as the cluster controller (which is the staging server) and click **New Deployment...**



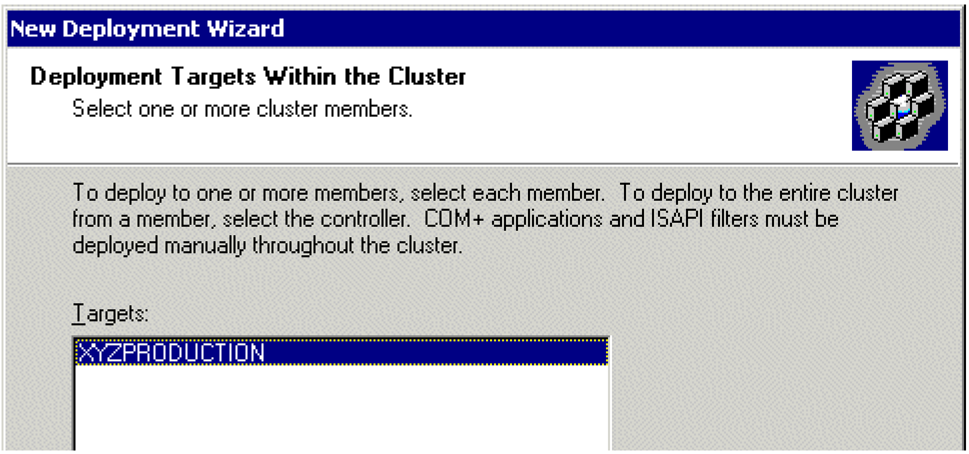
3. The New Deployment Wizard opens.

4. Click **Next** to proceed.

5. The Deployment Target Options screen appears.

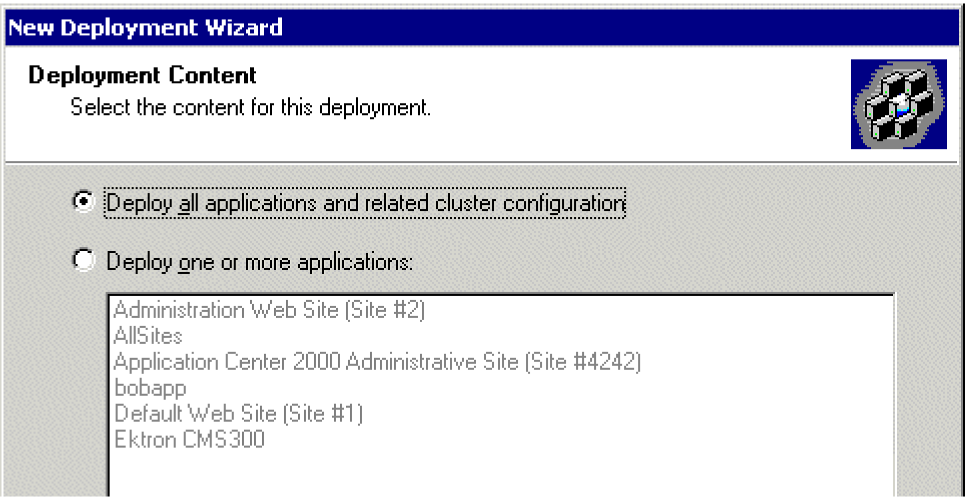


6. Enter a name for the deployment, or leave the default, choose the **Deploy content inside the current cluster** option, then click **Next**.
7. The Deployment Targets Within the Cluster screen appears.



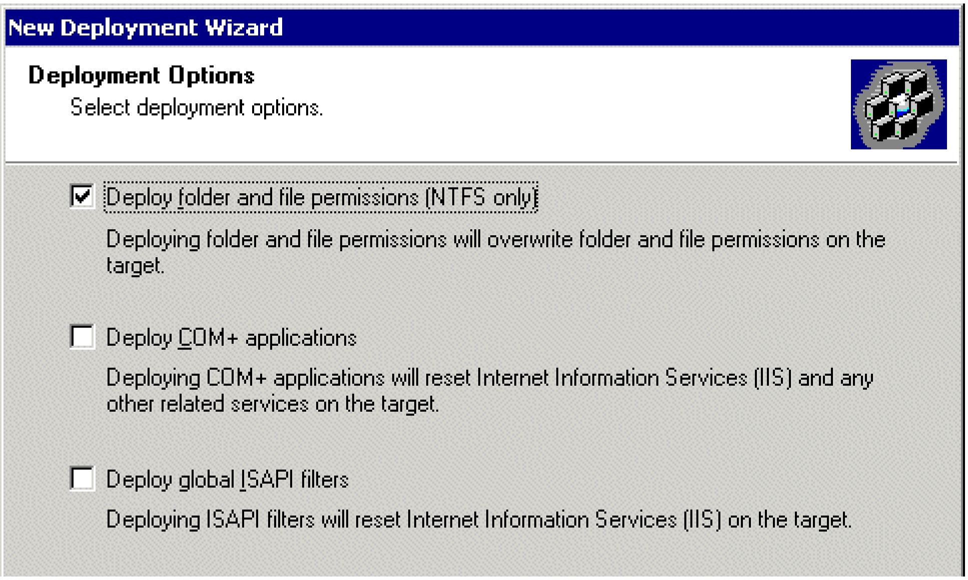
8. Select the targets to which to deploy the content, then click **Next**.

9. The Deployment Content page appears.



10. Either choose to **deploy All Applications** or choose the **One or More** option and select the Ektron CMS300 application from the list. Then click **Next**.

11. The Deployment Options screen appears.



12. Check off **Deploy Folder and File Permissions (NTFS Only)**, then click **Next.**

NOTE If desired, you can choose other options. However you must choose the first one.

13. The Completing the New Deployment Wizard screen appears.

14. Click **Finish** to complete the new deployment wizard.

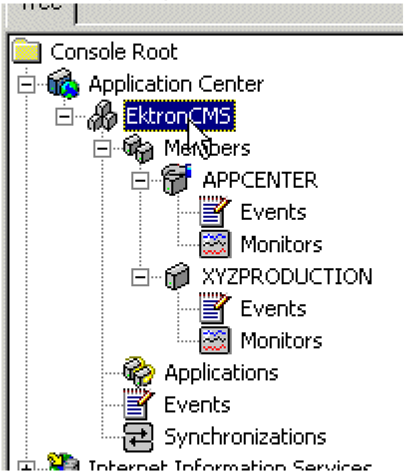
After you complete this initial deployment, all necessary files, registry keys, and DSNs have been copied to the production server in our cluster.

Viewing The Results

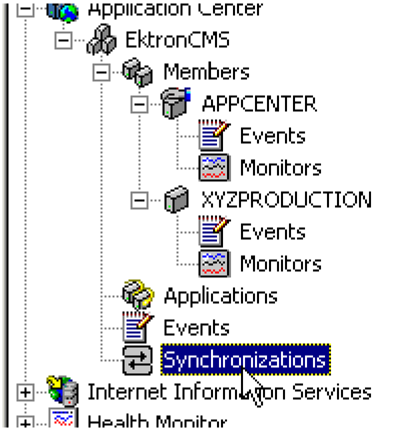
Each time an event occurs, a log is created in the Synchronizations section of Application Center.

To view the results of the initial deployment, follow these steps.

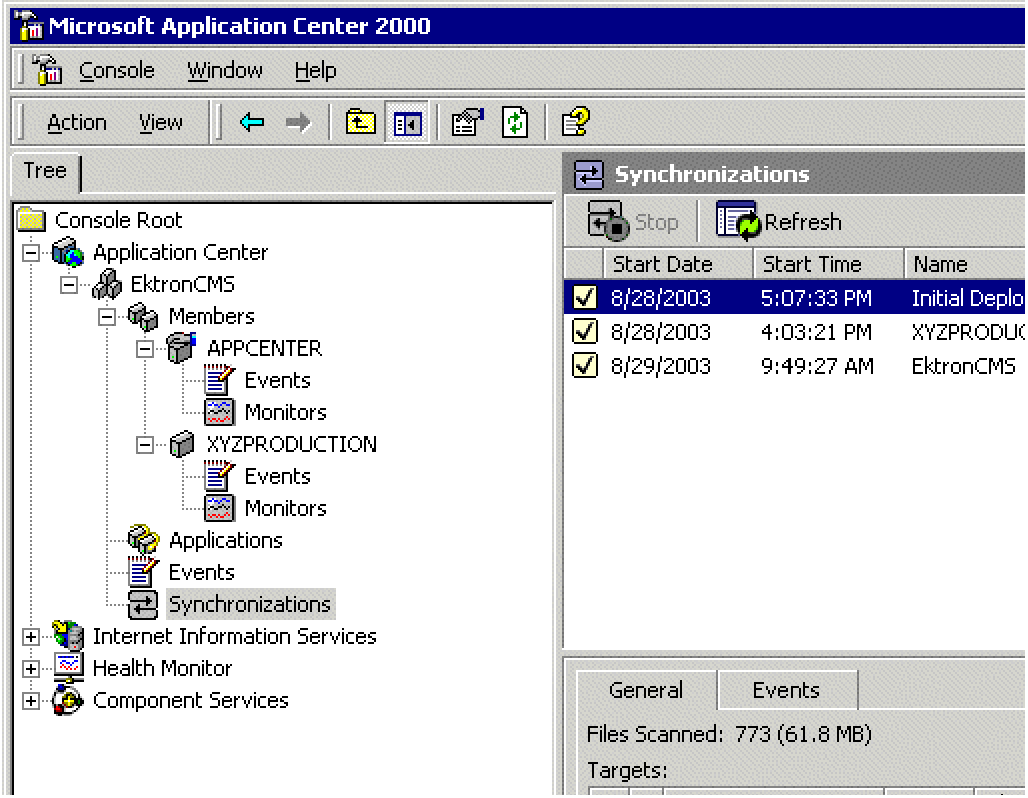
1. Connect to the cluster you performed the initial deployment on.



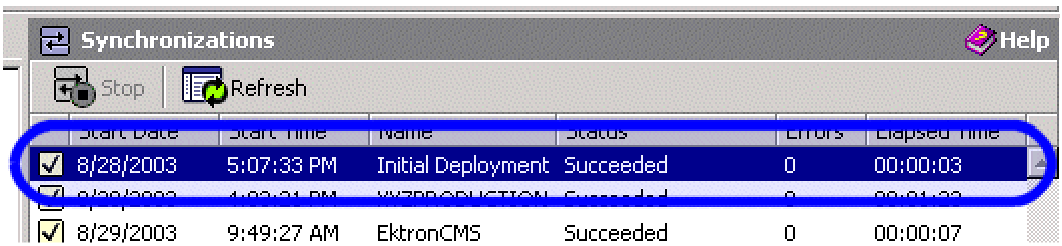
2. Click **Synchronizations** on the cluster tree.



3. The synchronization information appears on the right side of the screen.



4. The most recent record shows that the initial deployment task completed successfully.



Configuring the Production Server

Now that the staging server has been configured, and the initial deployment performed, you must perform these tasks to the Production server in the cluster:

- Create a blank MS-SQL database for Ektron CMS300
- Create a DSN for MS-SQL database

The following sections explain how to perform these tasks.

Before You Configure the Production Server

Before you configure the production server, be sure the following directories have been copied over during the initial deployment:

- `C:\Inetpub\wwwroot\CMS300Sample`
- `C:\Program Files\Ektron\CMS300`

Creating Blank MS-SQL Database

A blank MS-SQL database for Ektron CMS300 needs to be created on the production server. When the deployment configuration is complete, this database has a pull subscription to the database on the staging server.

For information about creating a blank database on the production server, follow the steps in "Creating An Empty SQL Database" on page 50. In step 4, choose **Minimal**.

NOTE The database name does not have to match the database name of the staging server.

Configuring MS-SQL Database

The last step in setting up the deployment model is to configure the MS-SQL databases on the staging and production servers. In our model, the staging server's database publishes content to which the production server will subscribe.

To configure an MS-SQL database, follow these steps.

1. Register the production MS-SQL in the MS-SQL Enterprise Manager on the staging server (optional).

NOTE While this step is not required, it is recommended to make managing the databases easier.

2. Configure the staging server's database to be a publication database.
3. Configure the production server's database to subscribe to the staging server's database.

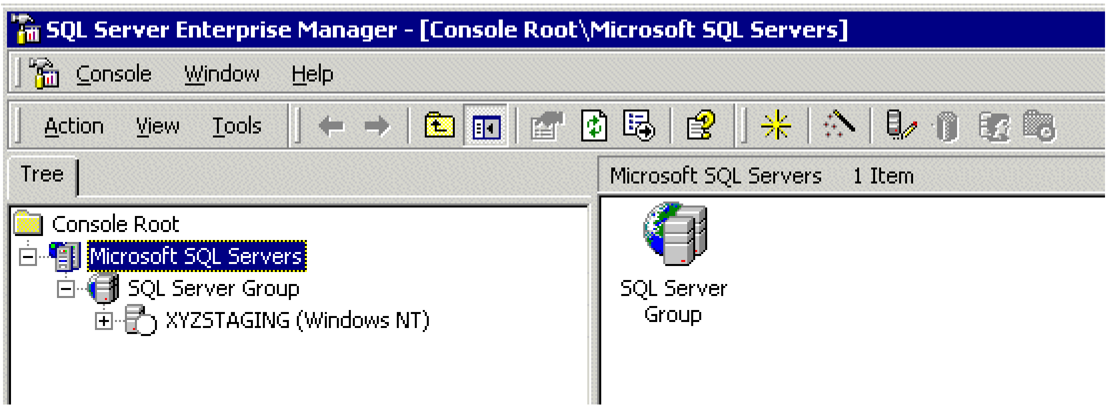
4. Perform an initial synchronization.

These steps are explained in the following sections.

Registering Production Server's MS-SQL Server

By registering the production server's MS-SQL server in the staging server's MS-SQL Enterprise Manager, you can perform tasks on both services from one area instead of accessing both machines. To do so, follow these steps.

1. On the staging server, access the MS-SQL Enterprise manager.

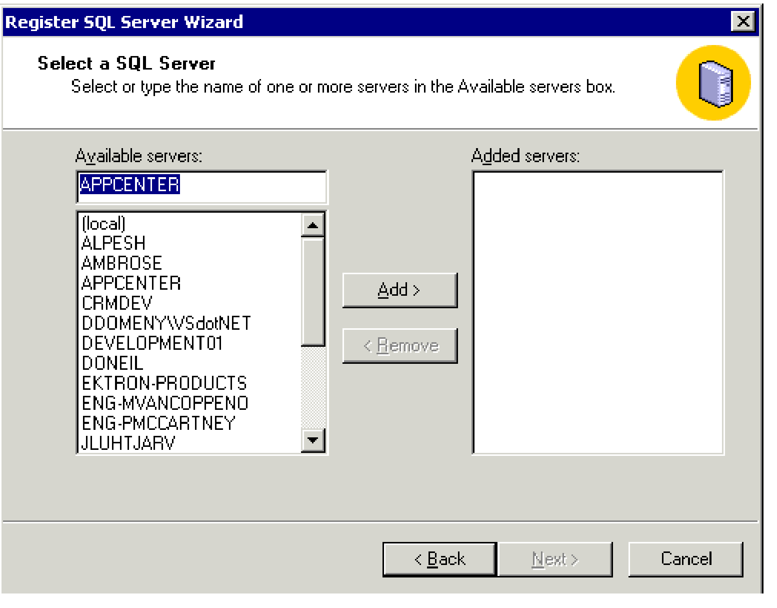


2. Right click **SQL Server Group** and click **New SQL Server Registration**.

3. The Register SQL Server Wizard opens.

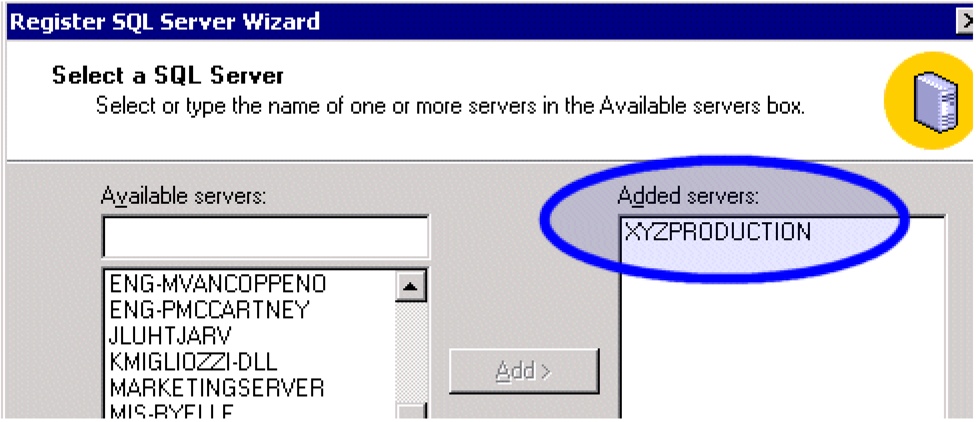
4. Click **Next**.

5. The Select SQL Server screen appears.

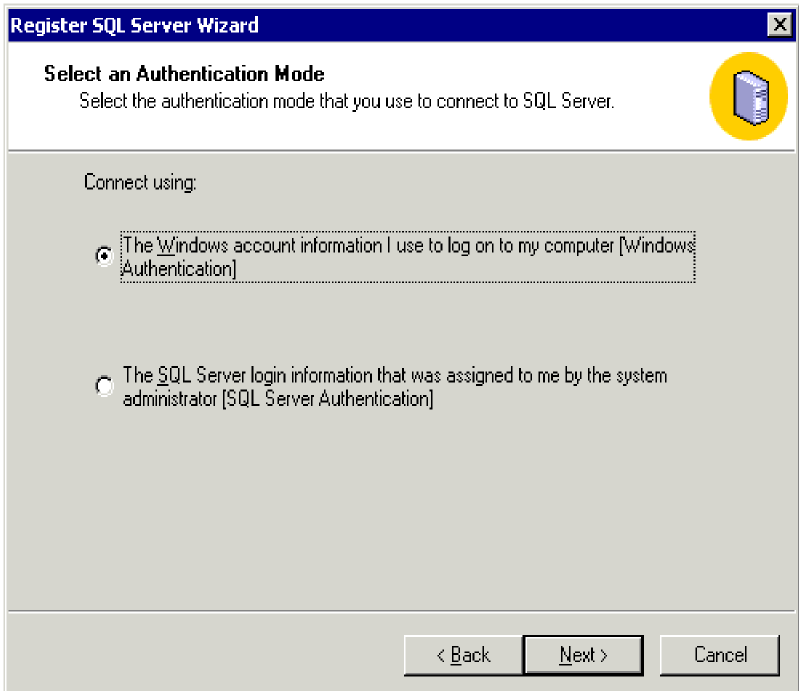


6. From the Available Servers list, select the production server. Then click **Add.**

7. The production server appears in the **Added Servers** column.



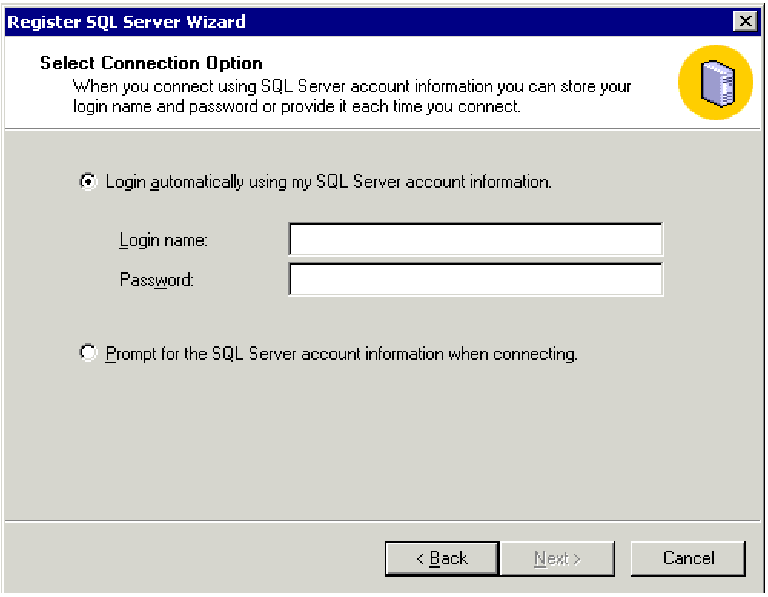
8. Click **Next**.
9. The Select Authentication Mode screen appears.



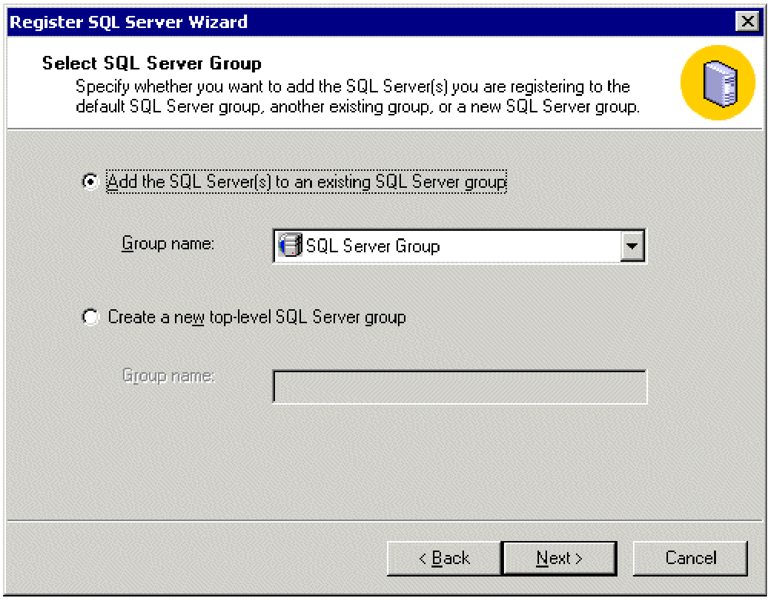
10. Choose the authentication mode you want to use. Then click **Next**.

NOTE This example uses SQL Server authentication. If you chose Windows Authentication, skip to step 14.

11. The Select Connection Option screen appears.



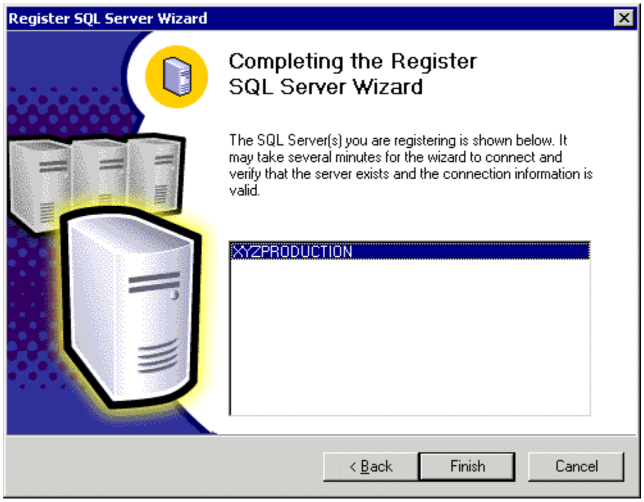
12. Choose the type of connection you want. Then, click **Next**.
13. The Select SQL Group screen appears.



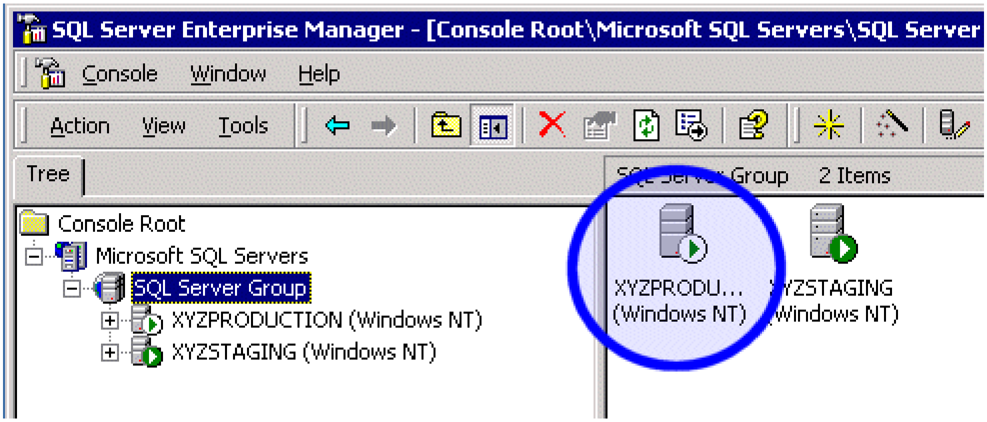
14. Choose the SQL Server group, or add a new one you want to register the new SQL server to. Then click **Next.**

NOTE This example adds the new SQL server to the default SQL Server group.

15. The Completing the Register SQL Server WIzard screen appears.



16. Click **Finish**.
17. The SQL Server is registered and a confirmation message appears.
18. Click **Close**.
19. The confirmation closes, and the new SQL Server is registered to the SQL Enterprise Manager



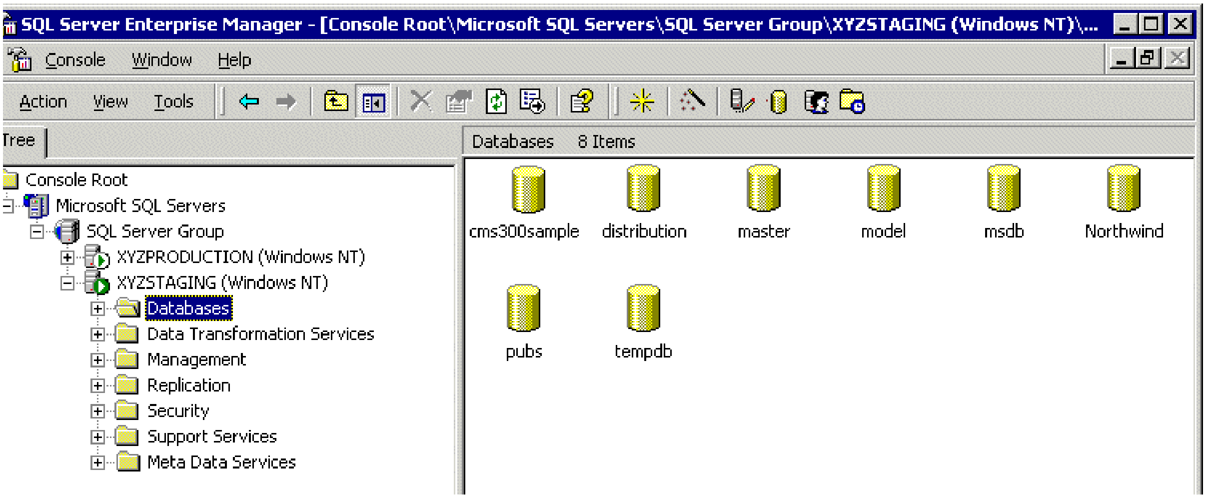
Now that the production server is registered, we can configure the two databases.

Configuring the Staging Server's Database

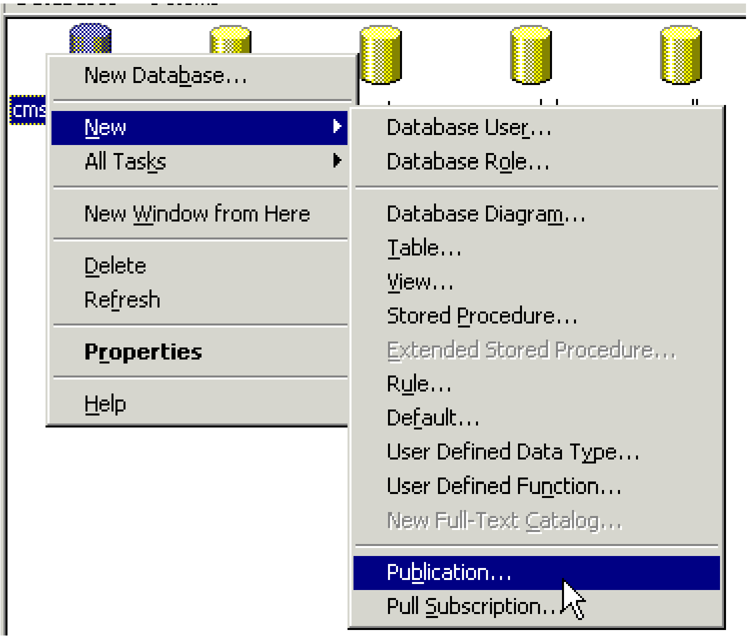
The staging server's database publishes all content in the Ektron CMS300 Web site. The production server's database pulls data from that database and stores it as well.

To configure the staging server's database to publish the data, follow these steps.

1. In the SQL Enterprise Manager on the staging server, connect to the staging server's SQL server and access the Databases folder.



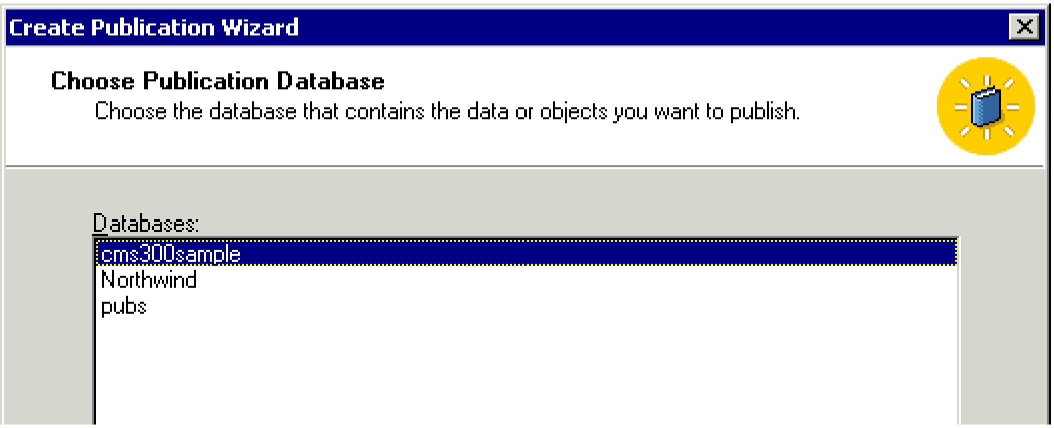
2. Right click the **CMS300Sample** database and click **New > Publication...**



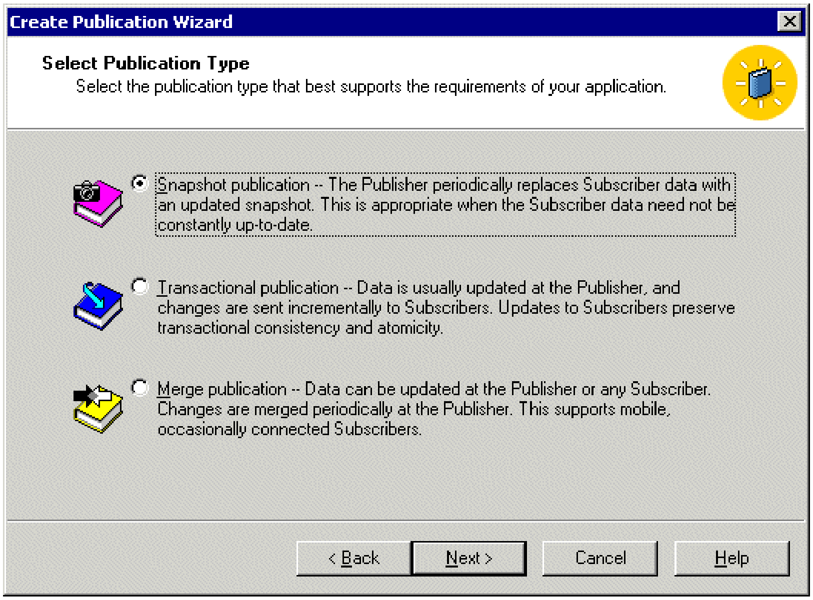
3. The Create Publication Wizard opens.

4. Click **Next** to begin.

5. The Choose Publication Database screen appears.

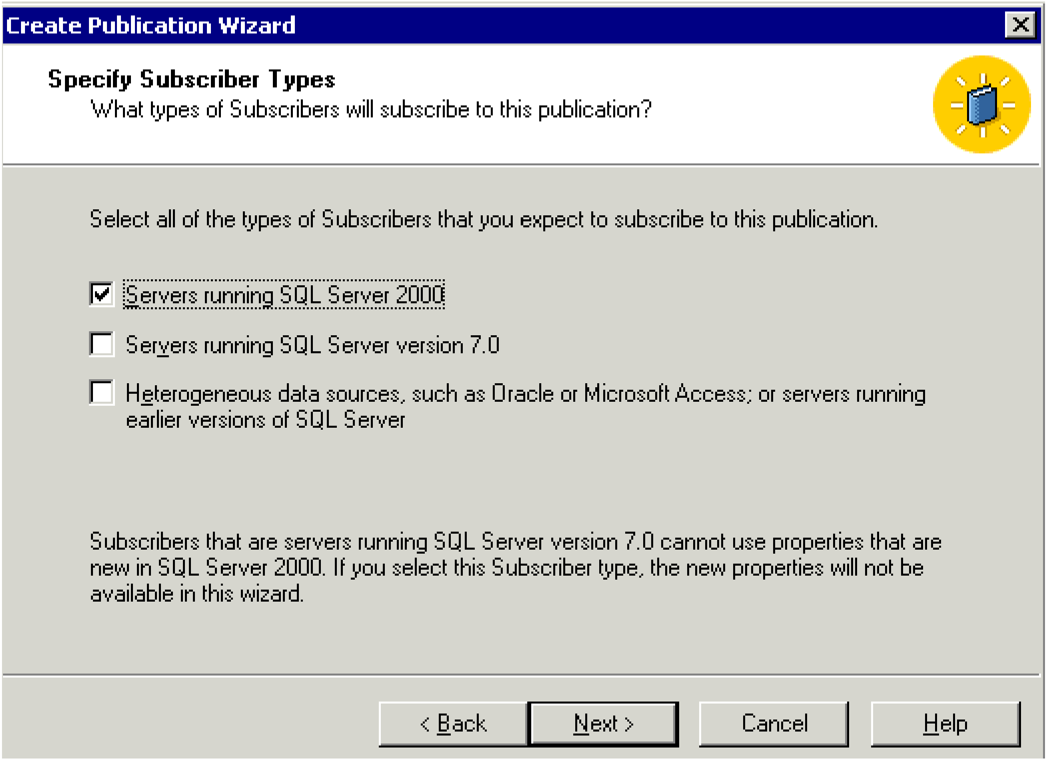


6. Choose the Ektron CMS300 database and click **Next.**
7. The Select Publication Type screen appears.



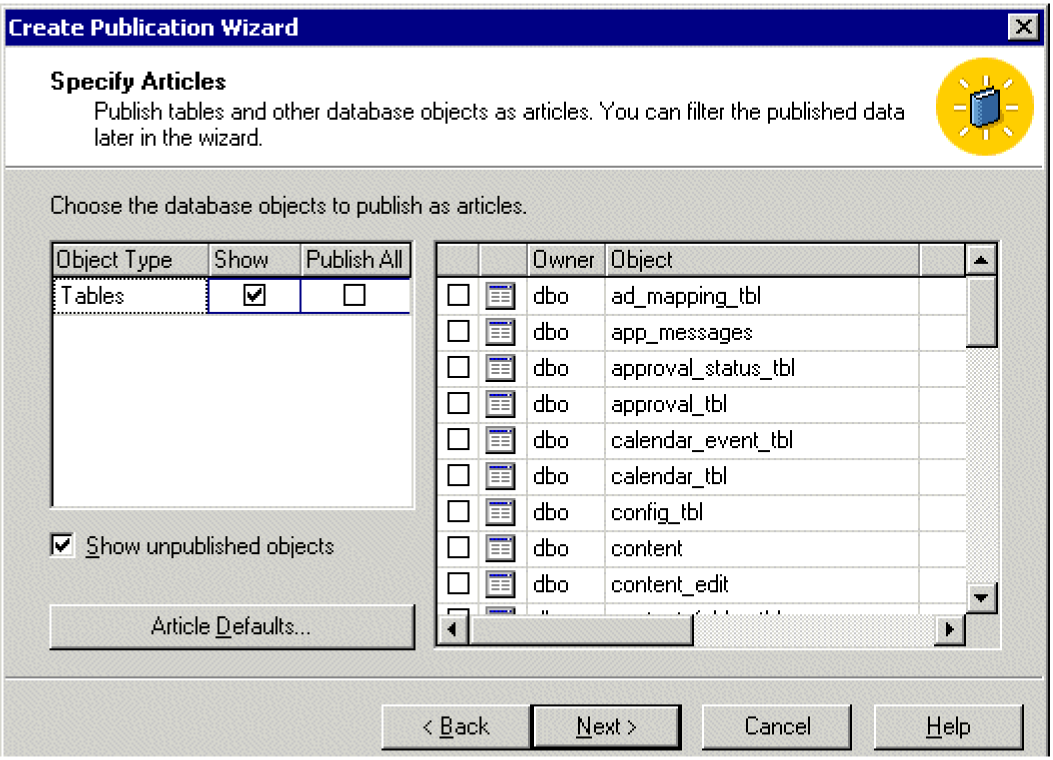
8. Choose **Snapshot Publication** then click **Next**.

9. The Specify Subscriber Types screen appears.



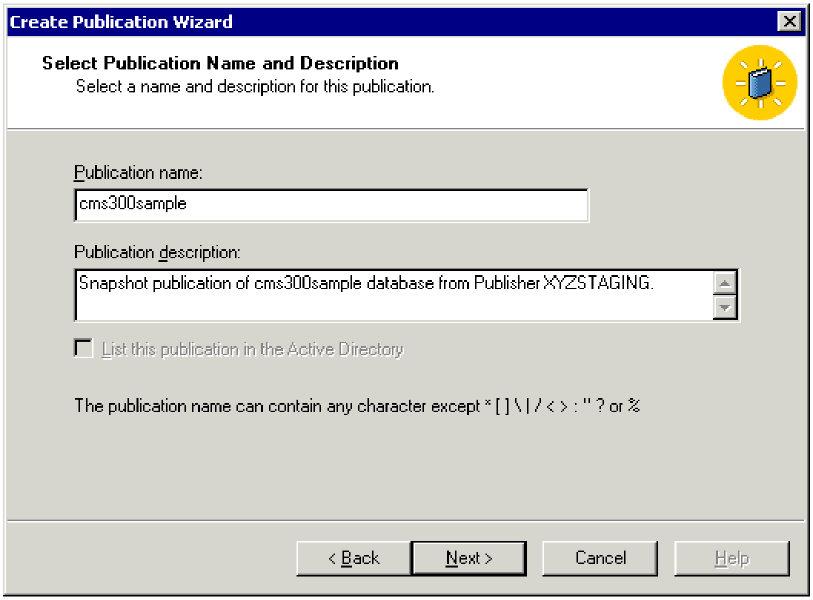
10. Check the box next to the version of MS-SQL that the production server is running and click **Next**.

11. The Specify Articles screen appears. Check the **Publish All** option.

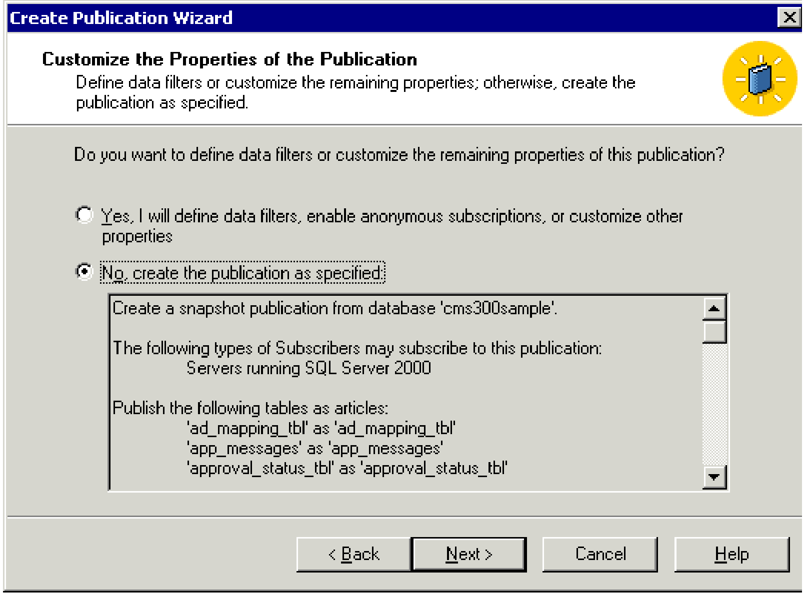


12. Click **Next** to continue.

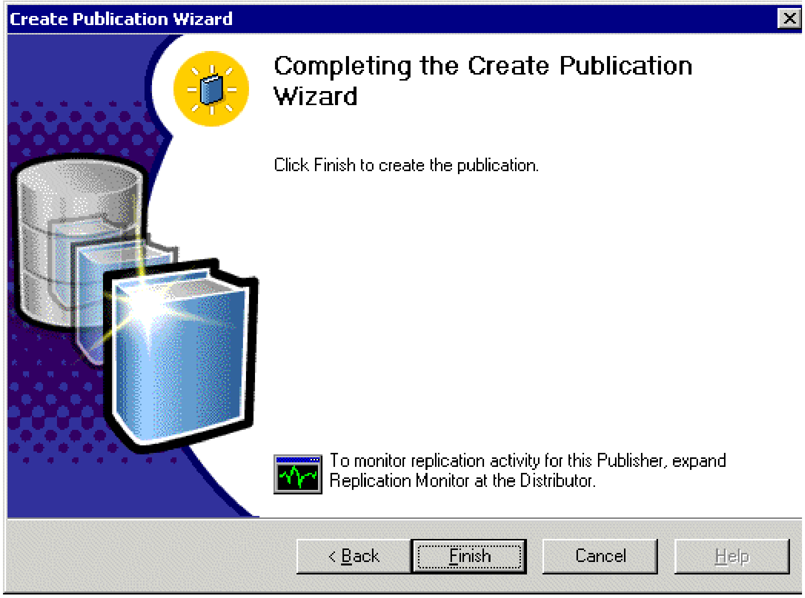
13. The Select Publication Name and Description page appears.



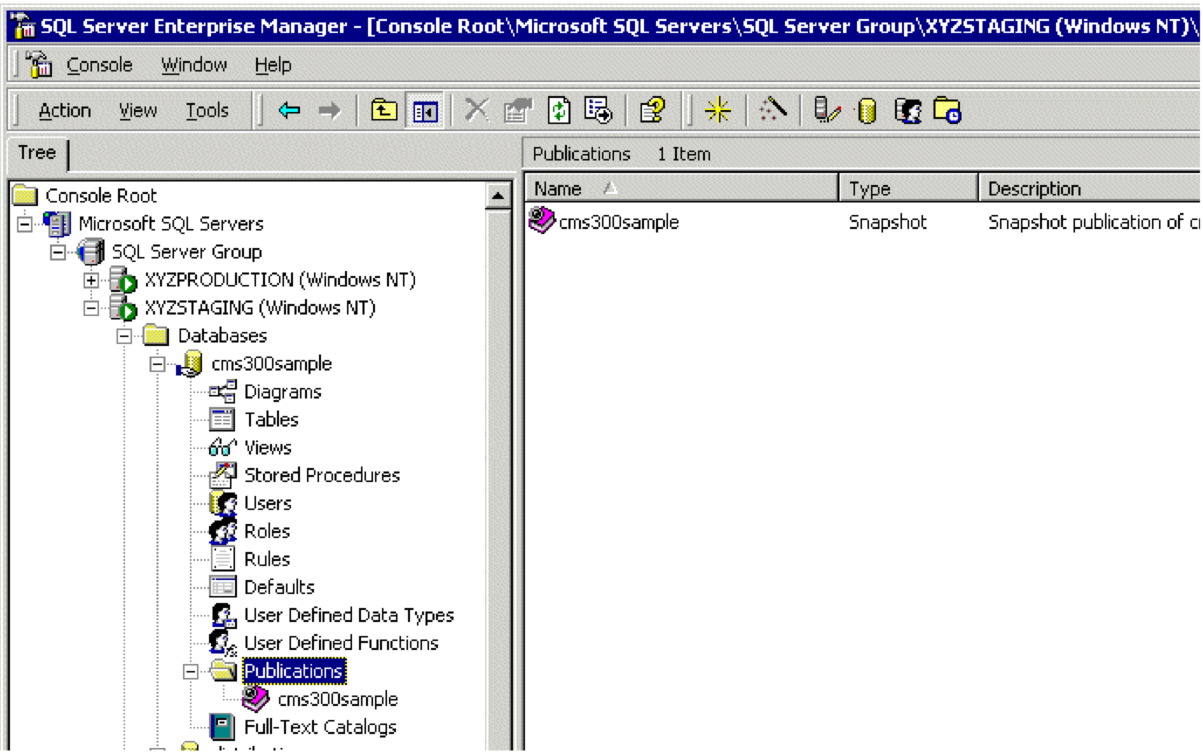
14. Enter a name and description for the publication, then click **Next**.
15. The Customize the Properties of the Publication screen appears.



16. Choose **No, Create the publication as specified** then click **Next.**
17. The Completing the Create Publication Wizard screen appears.



18. Click **Finish.**
19. A Publications folder is added to the database tree, and the new publication is added to it.

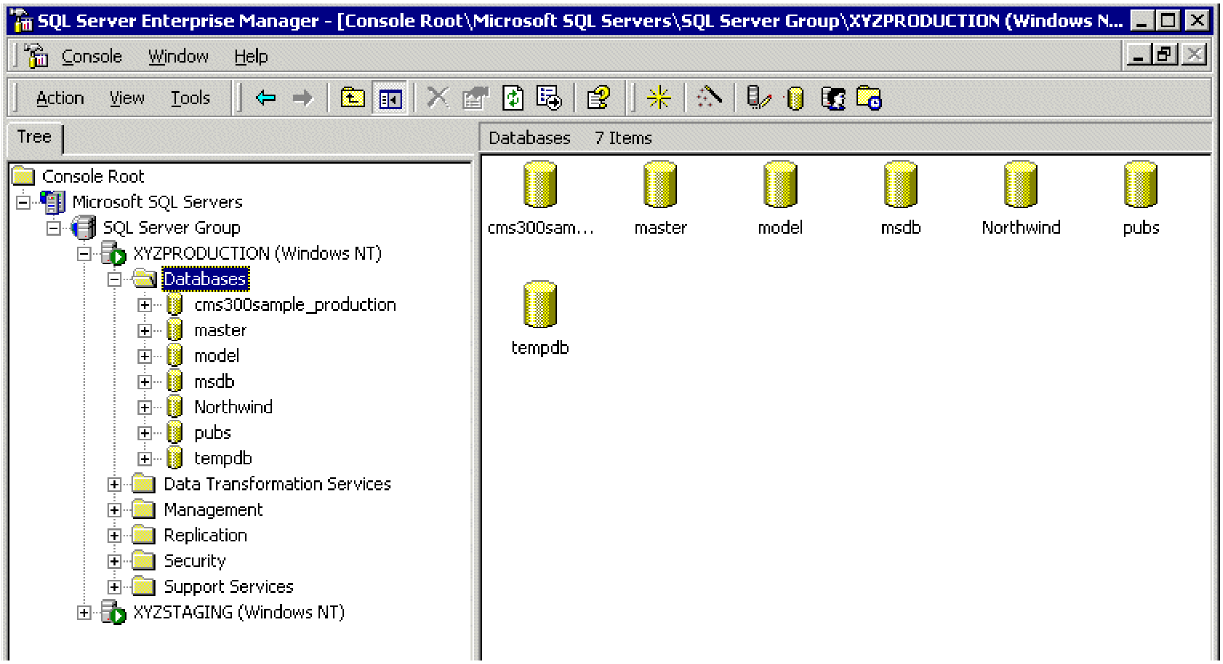


Now that the staging server's database is configured as a publication database, we can configure the production database to subscribe to it.

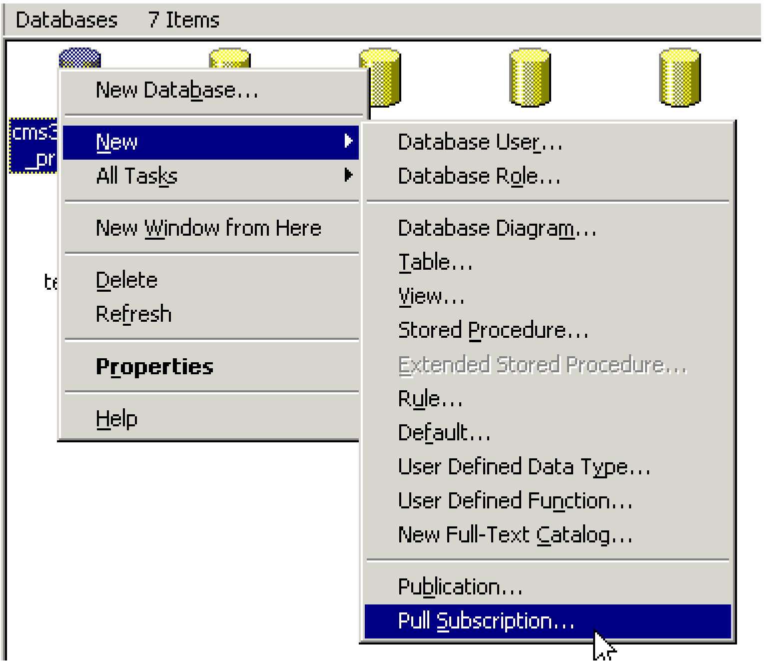
Configuring the Production Server's Database

To configure the production server's database to subscribe to the staging server's database, follow these steps.

1. On the staging server's SQL Server Manager, connect to the production server's SQL server and access the databases folder.

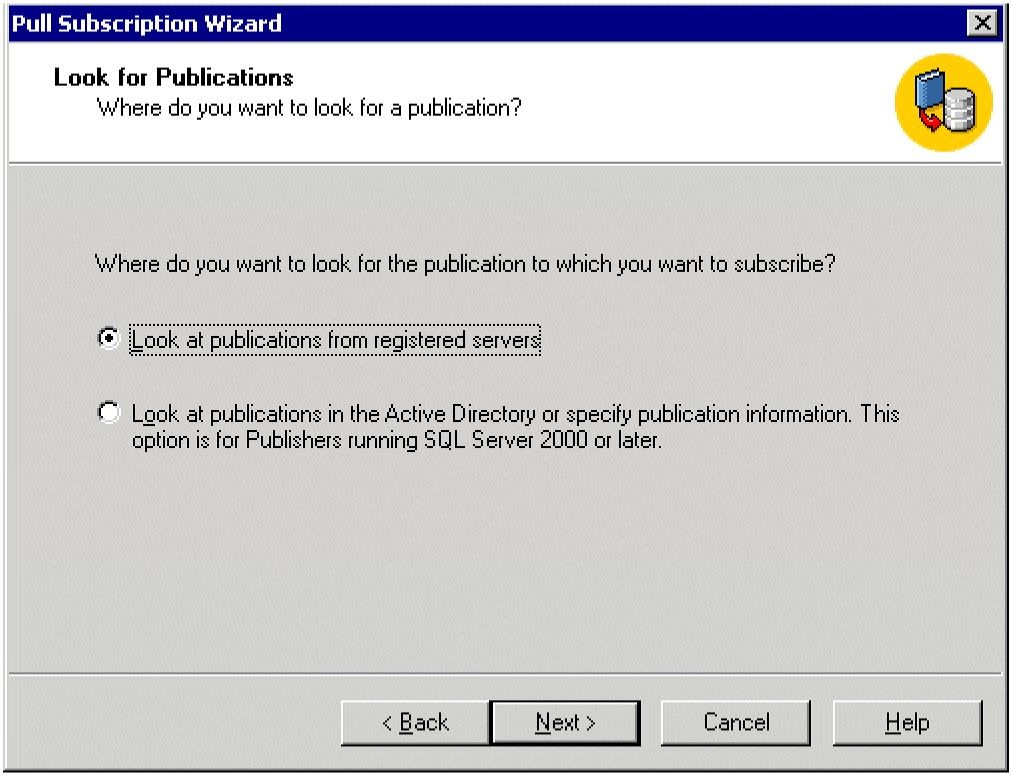


2. Right click the blank Ektron CMS300 database and click **New > Pull Subscription...**



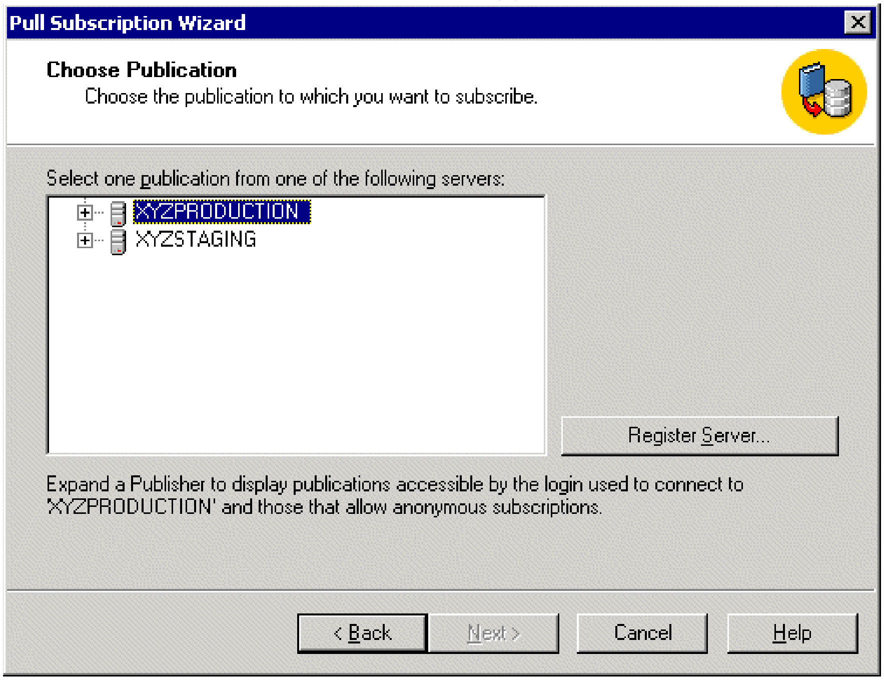
3. The Pull Subscription Wizard opens. Click **Next** to begin.

4. The Look for Publications screen appears.

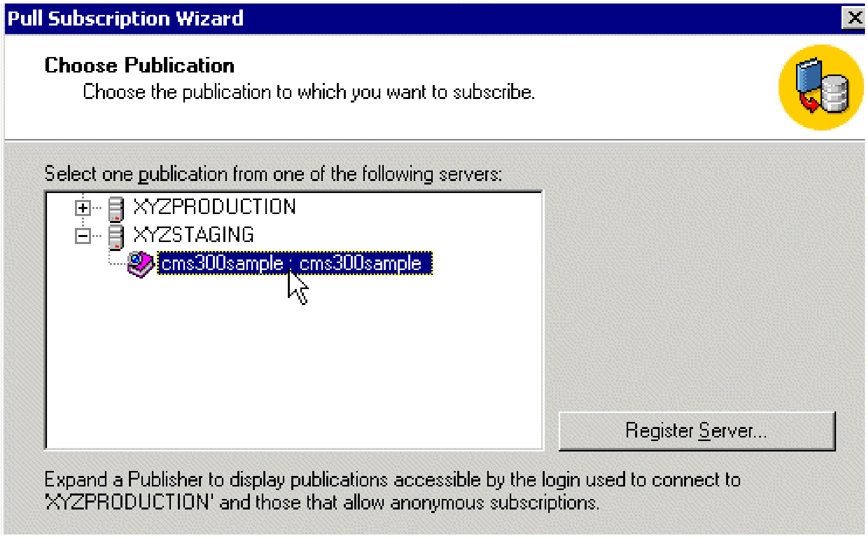


5. Choose **Look at publications from registered servers** and click **Next**.

6. The Choose Publication screen appears.



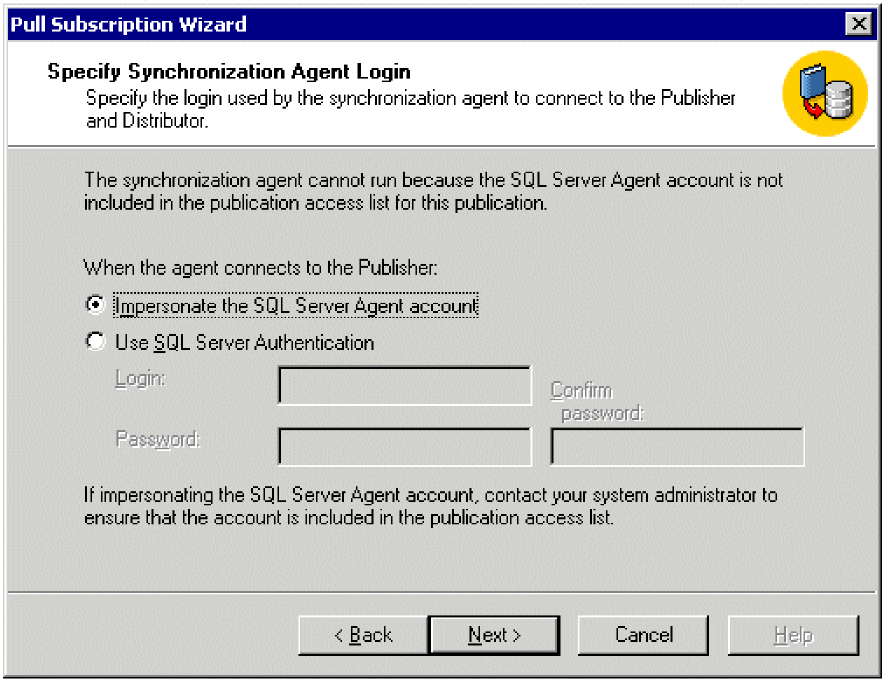
7. Expand the Staging Server's tree and select the Ektron CMS300 Publication that was created in "Configuring the Staging Server's Database" on page 151.



NOTE If the Ektron CMS300 publication does not appear under the staging server, make sure the publication was created properly.

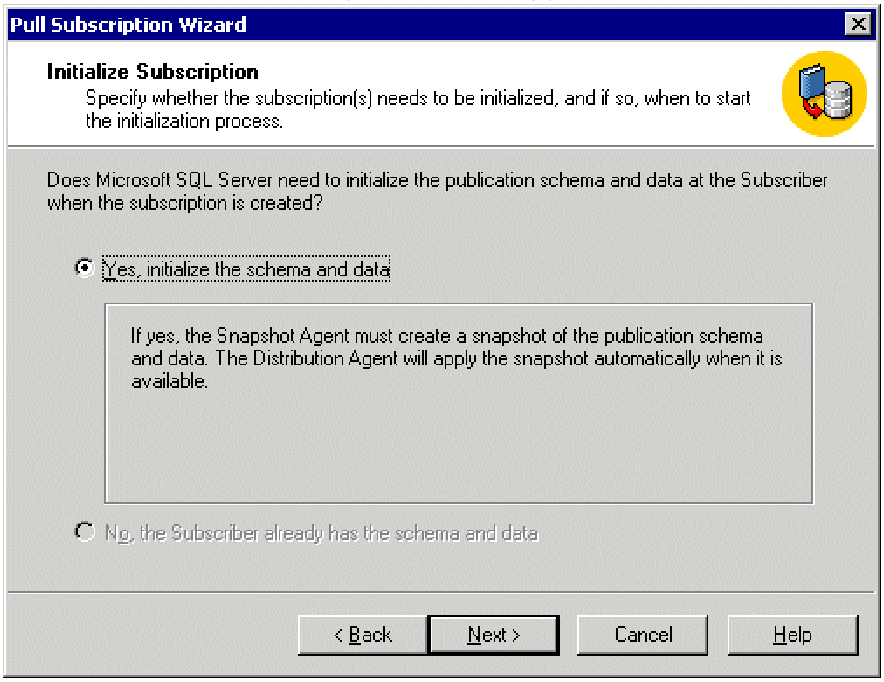
8. Click **Next** to continue.

9. The Specify Synchronization Agent Login screen appears.

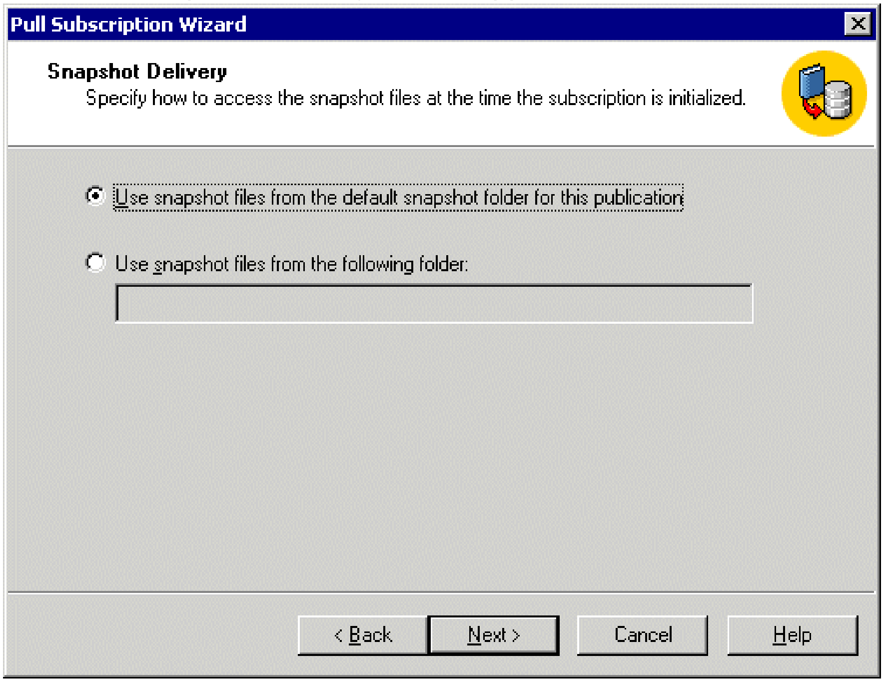


10. Choose which option you want to use to connect to the publisher. Then, click **Next**.

11. The Initialize Subscription screen appears.

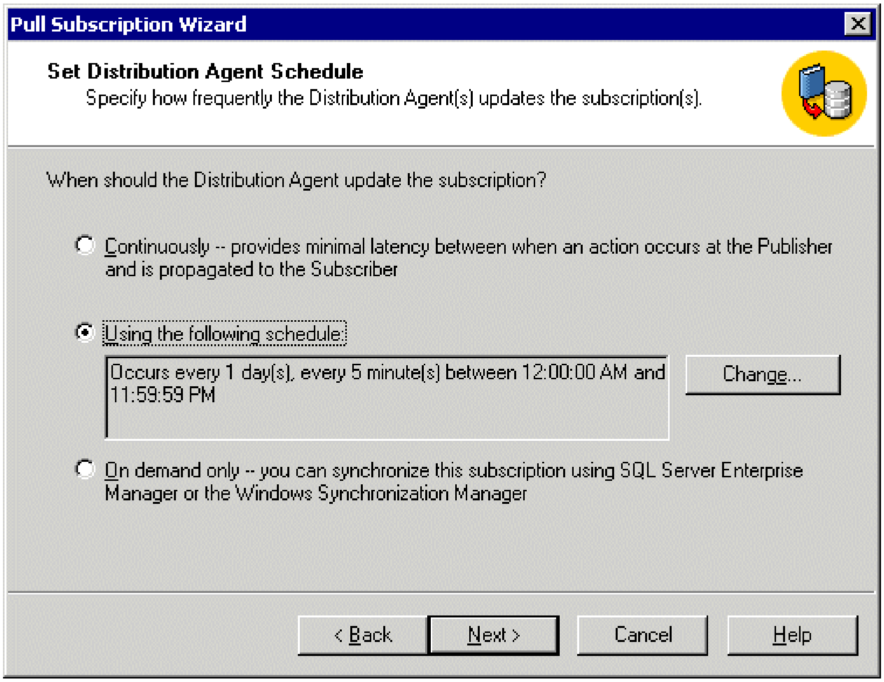


12. Choose **Yes, initialize the schema and data**, then click **Next.**
13. The Snapshot Delivery screen appears.



14. Choose **Use snapshot files from the default snapshot folder for this publication.** Then, click **Next**.

15. The Set Distribution Agent Schedule screen appears.



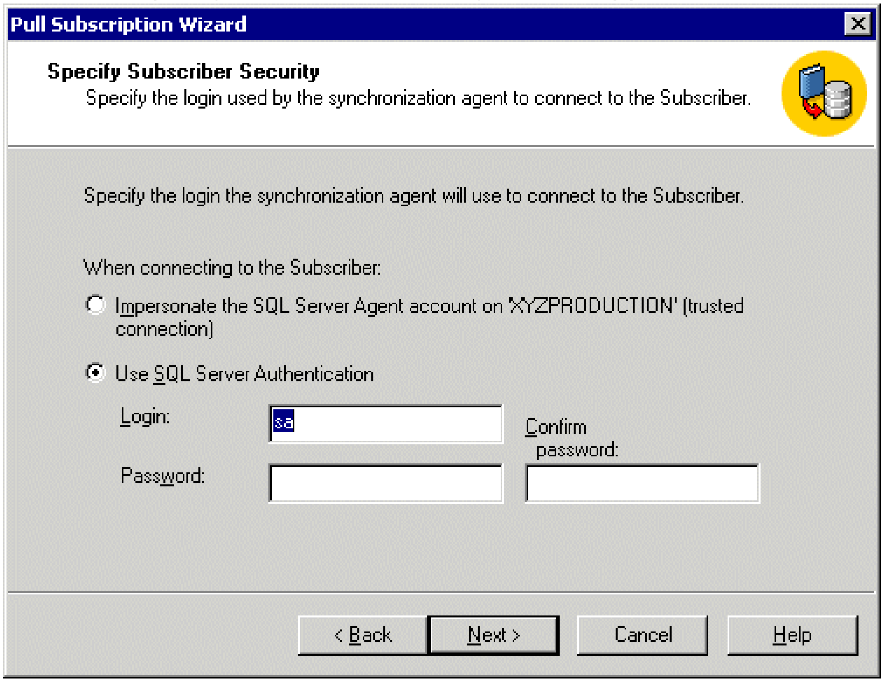
16. Choose an option using the following table for reference.

Option	Result
Continuously	Propagates data modifications between Publisher and Subscriber immediately.
Schedule	Runs the Distribution Agent hourly (default), or daily, weekly, or monthly. Choosing a frequency other than **Continuously** increases the latency between the Subscriber and Publisher.
On-Demand	Run the Distribution Agent only when specifically requested.

For demonstration purposes, we choose **On-Demand** so we can synchronize the databases with a click of a button

17. Click **Next** to continue.

18. The Specify Subscriber Security screen appears.

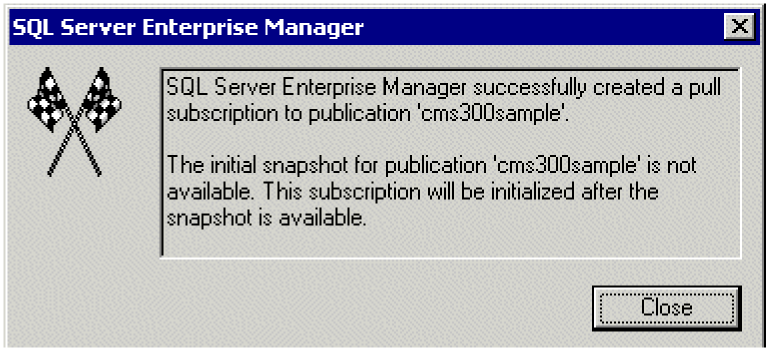


19. Specify the login used by the synchronization agent to the subscriber. Then, click **Next**.

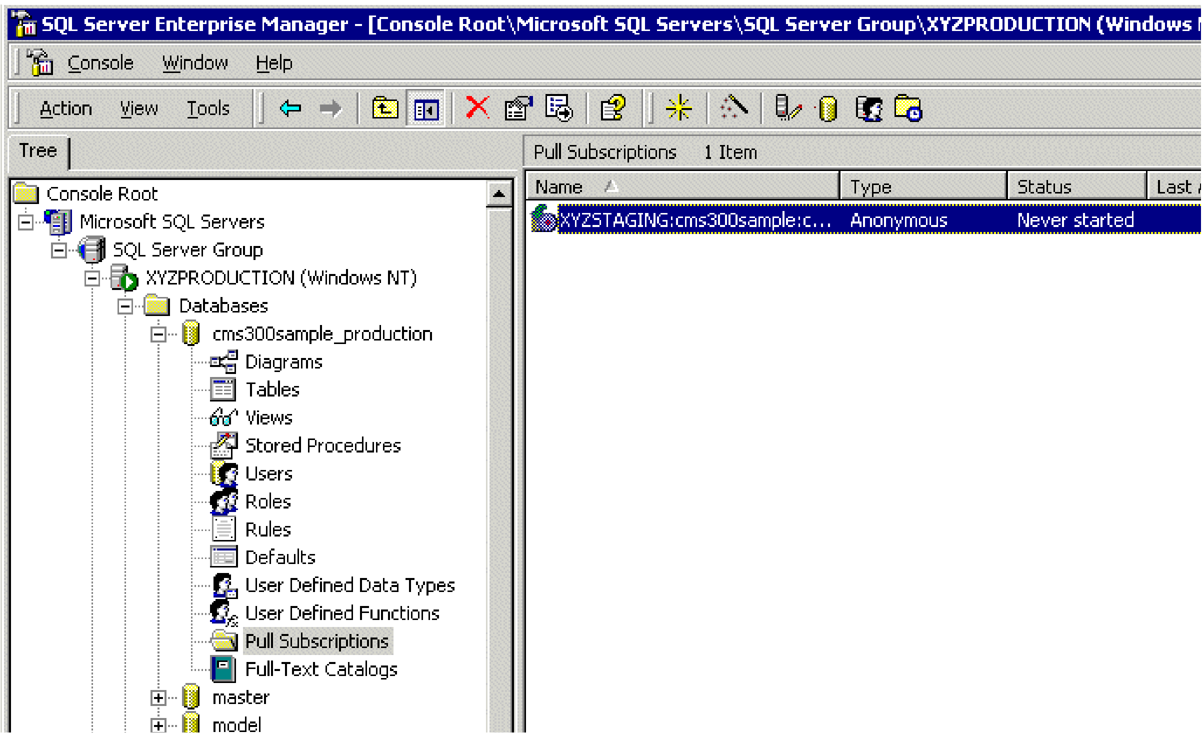
20. The Completing the Pull Subscription Wizard appears.

21. Click **Finish** to complete the wizard.

22. A message informs you that the pull subscription was created successfully.



23. Click **Close** to close the dialog box.
24. The box closes.
25. A Pull Subscription folder appears on the database's data tree with the new pull subscription added.



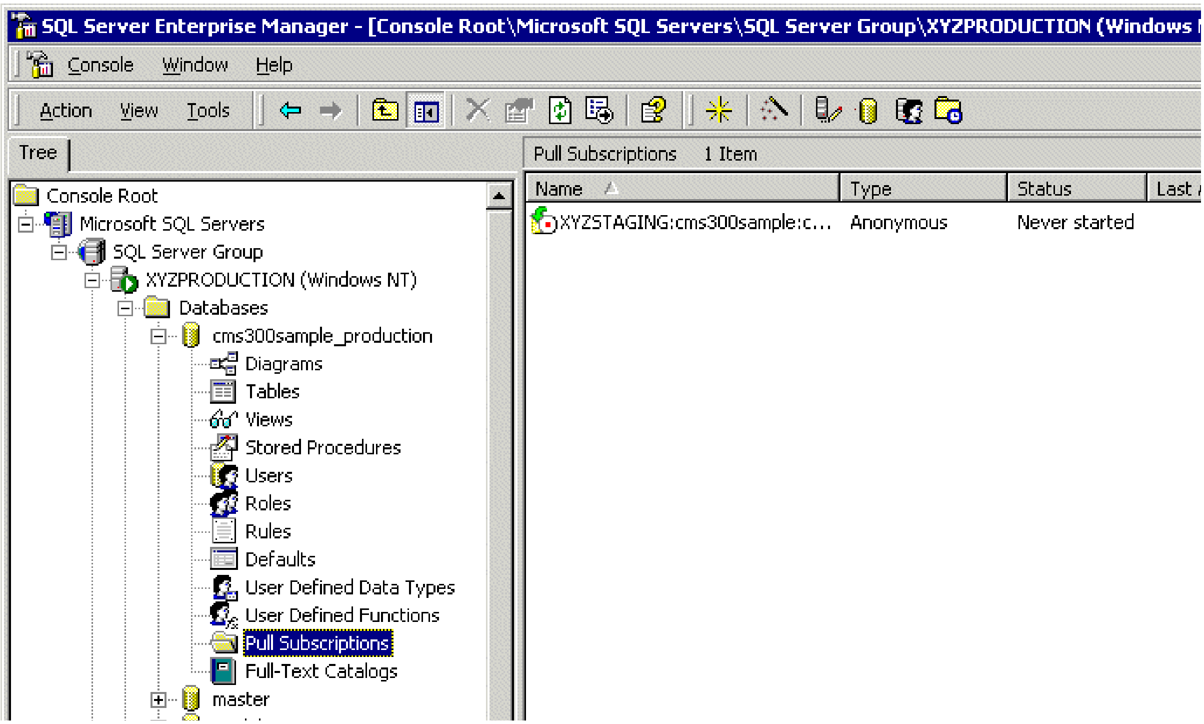
Now that the publication and subscription have been created, we can perform our initial synchronization for the databases.

Synchronizing the Databases

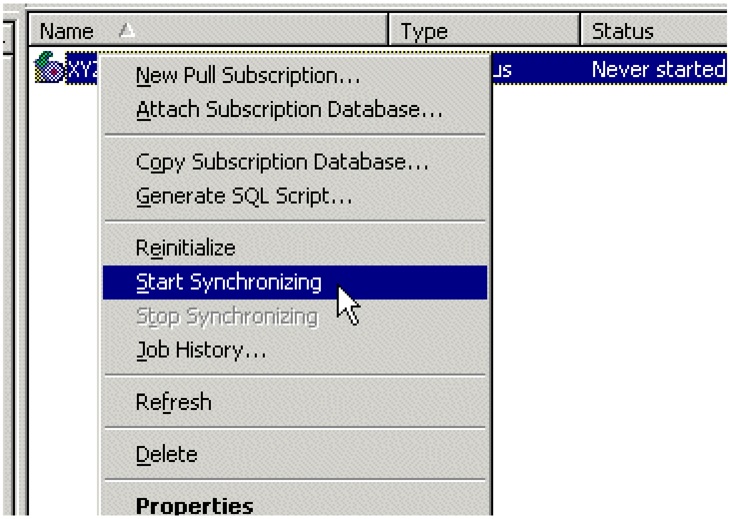
The initial synchronization moves all data from the publication database (staging server) to the subscribing database (production server).

To perform the initial synchronization, follow these steps.

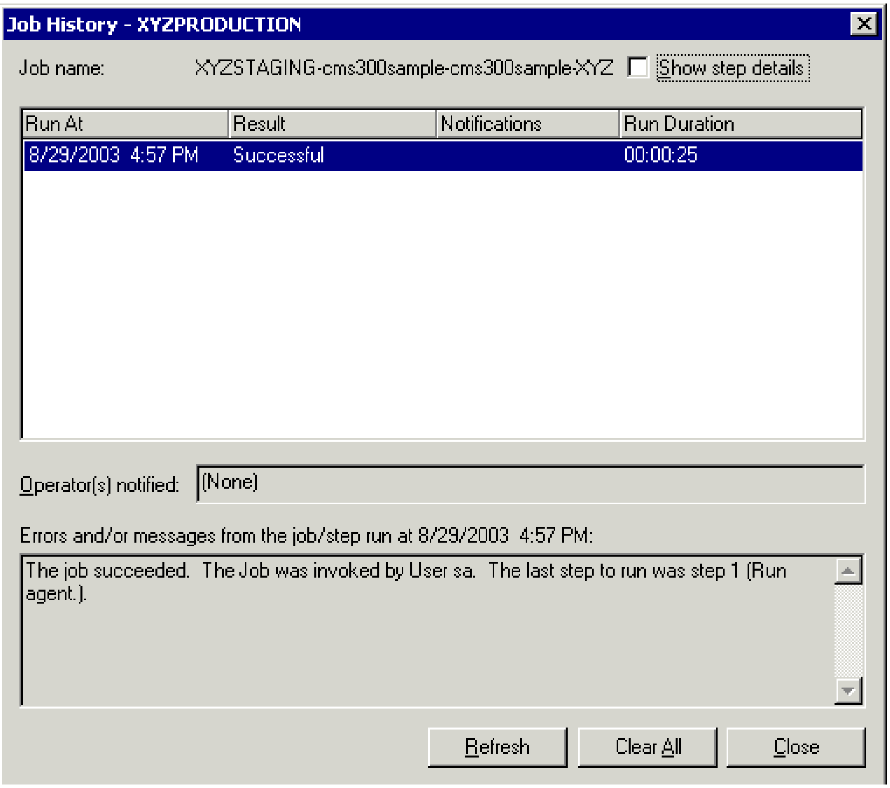
1. In SQL Enterprise manager, connect to the production server's database and locate the pull subscription that was created in "Configuring the Production Server's Database" on page 157.



2. Right click the pull subscription record and click **Start Synchronizing.**

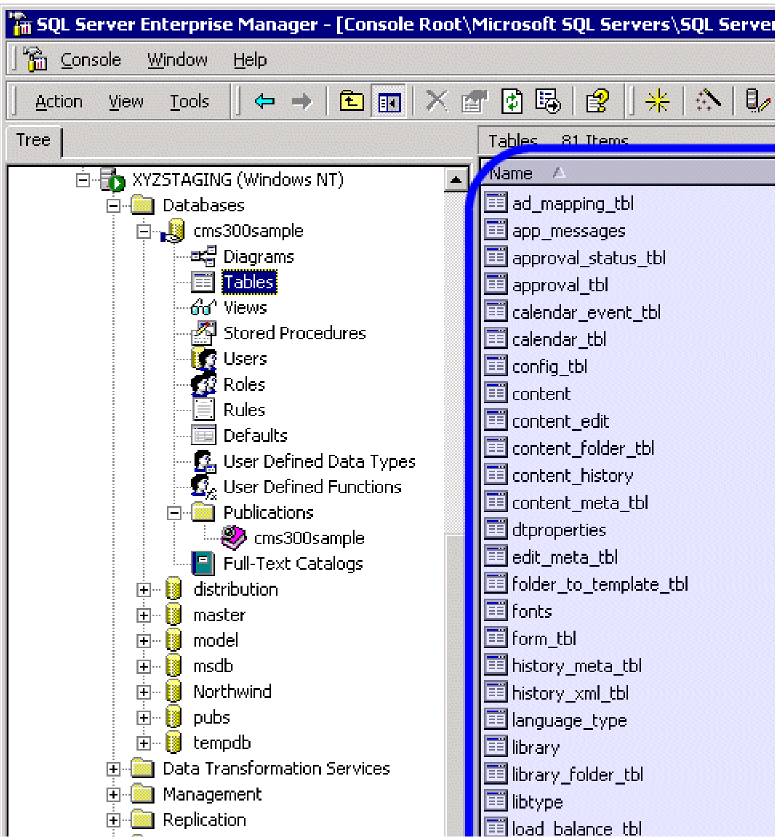


3. The synchronization is performed.
4. To view results of the initial synchronization, right click the pull subscription and click **Job History**.
5. The Job History dialog box appears.



NOTE If you receive a message other than a successful notification, re-check the settings and try again.

Also, the Ektron CMS300 tables from the staging server are included in the production database.



What's Next?

The deployment configuration is complete! The next section explains how to use it.

Using the Deployment Model

Now that the deployment model has been configured, you can easily make changes on your staging server and move the contents to the production server with a click of the mouse.

The following two tasks must be performed to use the deployment model.

Task...	Use...~	More Information...
Deploy Files	MS Application Center	”Deploying the Files” on page 138
Synchronize Databases	MS SQL Server	”Synchronizing the Databases” on page 166

Additional Information

Supporting Documents

You can find more detailed information about Ektron CMS300 in the following documents:

- Ektron CMS300 Administrator Manual
- Ektron CMS300 Developers Reference Manual
- Ektron CMS300 User Manual
- Ektron CMS300 Quick Start Manual

Support

If you are experiencing trouble with any aspect of Ektron CMS300, please contact the Ektron Support Team via our Web Site, or by e-mail:

support@ektron.com

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

Sales

For questions and answers about purchasing Ektron CMS300 from Ektron, contact the sales department by sending an e-mail to:

sales@ektron.com

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Ektron

Redefining Web Content Management

Ektron CMS300 Administrator Manual

Version 4.8, Revision 8

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What’s New in the 4.8 Release

- Tasks can now have categories and types. For more information, see ”Task Categories and Types” on page 251.
- A new advanced search screen provides more fields for finding information on the Web site. For more information, see ”Search Data” on page 65 and ”Search Content Folder” on page 39.

Summary Table of Contents

What's New in the 4.8 Release i

Introduction to Ektron CMS300....................................1
Getting Started 6
Modifying the Application Setup Screen 22

Managing Content Folders 31

Managing Content 40
Content Reports 62
Adding Content Programmatically.................................... 63
Search Data 65

Setting Permissions..77

Setting Approval Chains...84

Managing Library Items 92

Managing Users & User Groups 103
Private Content & Memberships...................................... 112

Using eWebEditPro 124

Managing XML 126

Using the Data Designer 149

Working with HTML Forms.......................................207

Ektron CMS300 Help 243

Font Manager..245

Managing Tasks..249

Collections...274

Menu Feature..276

Calendars...278

Multi-Language Support..291

Microsoft SharePoint Portal Server Integration 333

Web Services..371

Syndicating Web Content as RSS 372

JavaScript Syndication..373

Load Balancing 379

URL Aliasing..398

email Features 404

Searching Content on the Web Site 410

Active Directory Feature..413

Active Directory Integration 415

User Authentication Only Mode...................................... 447

Additional Information..451

Appendix A: List of Supported Languages 453

Detailed Table of Contents

What's New in the 4.8 Release i

Introduction to Ektron CMS300..1
About Ektron CMS300 1
Who Should Read This Documentation? 2
Online Learning Center 2
Sample Site Used in this Document..2
Types of Users 2
Management of Content Blocks 3
Conventions of the Documentation 4
Getting Started 6
Menu.asp 6
The Sample Web Sites...7
Logging Into an Ektron CMS300 Web Site 8
Changing Images Used for Logging In and Out 8
Editing Content Within Ektron CMS300.....................................9
Accessing the Workarea 9
Closing the Workarea 11
Workarea Navigation 11
Recognizing Content Blocks 13
Meaning of Border Color 13
The Floating Toolbar.. 14
Returning to the Classic CMS Interface 14
Floating Toolbar Buttons.. 15
Content Block Status 16
Edit ().. 17
View Content Difference () 18
Approve ()... 19
View History () 20
Preview () 20
Workarea ()... 21
Logout () 21
Site Preview..21
Modifying the Application Setup Screen 22
Viewing Application Setup Information 22
Updating Setup Information...23
Enabling WebImageFX 26
Enabling CMS to Create File System Folders 26
BuiltIn User..28

Editor Options 28

Managing Content Folders 31
Accessing the Content Folder 31
Folder Properties 33
Accessing the Folder Properties Screen 34
Folder Properties Toolbar 35
Editing Folder Properties 35
Purge History 37
Adding Subfolders 38
Deleting Folders 39
Search Content Folder 39

Managing Content 40
Creating/Updating Templates 40
Adding Content 41
Adding HTML Content 41
Adding XML Content 44
Forming URLs For Ektron CMS300 Documents 47
The Template 47
The Content Block Variable 48
The Language Identifier 48
Viewing Content 48
Content Toolbar Buttons 50
Editing Content 51
Moving Content 53
Before You Move a Content Block 53
What is Moved? 53
Moving a Content Block 54
Moving Several Content Blocks at Once 54
Viewing and Restoring Historical Versions of Content 55
Purging Historical Versions of Content Blocks 56
Scheduling Content 56
Deleting a Content Block 56
Content History 58
Content Block Permissions 59
Content Block Approvals 59
Link Checking 60
Assigning Tasks to a Content Block 60
Content Properties 60
Content Reports 62
Adding Content Programmatically 63
Search Data 65
Overview of Creating Searchable Property Type Metadata 67

Adding a Search Data Definition 68
Viewing Search Data Definitions 74
Editing a Data Search Definition 74
Deleting a Search Data Definition 75
Adding Search Data to a Content Block 76

Setting Permissions 77
Inheritance 78
Standard & Advanced Permissions 79
Setting Permissions for a Content Folder 80
Adding a User or User Group to the Permissions Table 81
Editing User or User Group Permissions.. 82
Deleting Users or User Groups from the Permissions Table 82
Setting Permissions for a Content Block 83

Setting Approval Chains 84
Examples of Approval Chains 85
Inheritance and the Approval Chain 85
Creating an Approval Chain for a Content Folder 85
Viewing a Folder's Approval Chain.. 85
Adding Approvers 87
Editing the Approval Order 87
Deleting Approvers 88
Editing an Approval Chain For a Content Block.................... 89
Viewing an Approval Chain For a Content Block............................ 89
The Approval Method 90

Managing Library Items 92
Library Folders and Permissions 92
Folder Properties 93
Accessing the Library Properties Screen 93
Editing Library Properties 95
Performing Actions on Library Items.................................... 96
Deleting Library Items.. 97
Load Balancing 98
Accessing Library Load Balancing Screen 98
Adding a New Load Balancing Folder 99
Editing a Library Load Balance Path 100
Deleting a Library Load Balance Path 101
If You Have an Ektron WebImageFX License Key................ 101

Managing Users & User Groups 103
Accessing the Users and User Groups Folders 103
Managing Users 104

Viewing a User 106
Editing a User 107
Deleting a User 107
Removing Users from User Groups 108
Managing User Groups 108
Assigning Users To User Groups 108
Viewing the Users in a User Group 109
Editing a User Group 110
Deleting a User Group 110
Removing Users from User Groups 111
Private Content & Memberships 112
Private Content 112
Memberships 115
Accessing the Membership Module Folder 116
Membership Users 116
Adding Membership Users 116
Adding Membership Users to a Membership User Group 117
Setting Permissions on Private Content for Membership Users 117
Viewing Membership User Information 117
Editing Membership Users 117
Deleting Membership Users 118
Membership User Groups 119
Adding Membership User Groups 119
Viewing Membership Users in a Membership User Group 119
Adding Membership Users to a Membership User Group 120
Setting Permissions on Private Content for Membership User Groups 120
Editing Membership User Group Name 120
Deleting User from Membership User Group 121
Deleting Membership User Groups 121
Assigning Permissions for Memberships 121
Troubleshooting Problems with Membership Users and Groups 123

Using eWebEditPro 124
Prompting the User to Save Upon Closing Browser 124

Managing XML 126
Before You Manage XML Configurations 127
The XML Configuration Toolbar 127
Accessing XML Configurations 128
Adding a New XML Configuration 129
Adding an XML Configuration Using the Data Designer 129
Adding an XML Configuration Using External XML Files 131
XML File Verification 133

Assigning XML Configurations 134
Inheriting an XML Configuration 134
Assigning a Different XML Configuration 135
Assigning an XML Configuration to a Content Block 135
Viewing XML Configurations 136
Editor Information 140
Validation Information 141
Display Information 142
Editing XML Configurations 143
Editing Data Design Packages 143
Editing an XML Configuration Created with External Files 145
Creating XML Configurations Based on Existing Configurations 145
Viewing Data Designer XSLTs 146
Deleting XML Configurations 147

Using the Data Designer 149
Introduction 149
Differences in eWebEditPro+XML 150
Design Mode vs. Data Entry Mode 151
Designing a Screen 152
Inserting a Field Type 153
Deleting a Field from the Screen 154
Sample Screen Design 155
Data Designer Field Types 161
Group Box () 161
Checkbox () 165
Plain Text() 167
Rich Area () 172
Choices () 174
Select List () 178
Calculated Field () 181
Calendar Field () 191
Image Only Field () 194
File Link Field () 196
Fields that Appear on Several Dialogs 199
Custom Validation 202

Working with HTML Forms 207
Overview of Form Processing 209
The Structure of Form Data 209
Form Folders and Content Blocks 210
Mailto or Database Form 211
Form Permissions 212
Preparing the Server to Send email 213

Accessing the Forms Folder 213
Form Module Toolbar 214
Creating a New Form..216
Letting the User Override email Values 217
Creating a Form's Content Block 218
Inserting Form Elements 219
Implementing a Form on a Web Page 225
Sending Data as XML 226
XML email Structure 228
Form Validation 233
Steps for Applying Validation Rules to a Form Field...................... 233
Viewing Form Reports..236
Exporting Form Reports 237
Viewing Form Information..238
Viewing a Form's Properties.. 238
Viewing a Form's Content Block Properties 240
Editing a Form...240
Deleting a Form...241

Ektron CMS300 Help 243

Font Manager...245
Adding Fonts...245
Viewing Fonts..246
Edit Fonts 247
Delete Fonts 247

Managing Tasks..249
The Tasks Folder...250
Task Permissions..250
Task Categories and Types 251
View Categorization Screen 252
Automatic Creation of Tasks Associated with Content Blocks . 261
Enabling Automatic Task Creation... 261
How Automatic Task Creation Works 262
Task States 263
User Assigned versus System Assigned States 263
Progression of Task States 264
Task View Options 266
Determining Which Tasks a User Can View 269
Email Notification 270
Archiving a Task 271
Deleting a Task...272

Purging a Task 273

Collections 274
Collection Permissions 275

Menu Feature 276

Calendars 278
Calendar Toolbar Buttons 278
Calendar Permissions 280
Cell Properties 280
Adding a New Calendar 281
Display Weekends 283
Editing Calendars 284
Deleting Calendars 285
Calendar Style Sheet 285
Style Sheet Architecture 286
Including Style Sheet on Web Page 287
Calendar Event Types 287
Enabling Event Types 288
Viewing Event Types 288
Adding Event Types 288
Editing the Event Type Name 289
Deleting Event Types 289
Assigning an Event Type to an Event 290
Displaying Calendars on Web Pages 290

Multi-Language Support 291
Translating Screens and System Messages 291
The Language Translation Tool 292
Before You Begin 292
Accessing the Translator 292
Selecting a Language 293
String Icons 294
Translating Strings 294
Images 296
Working with Multi-Language Content 296
Enabling/Disabling Support for Multiple Language Content 298
Viewing Your Site in Another Language 299
Determining Which Languages are Available 300
The Default Language 302
Disabling a Language 302
Creating a New Content Block 303
Translating a Content Block 304

Using the Language Xport Feature 309
Creating the XLIFF or XHTML File 310
Submitting Translation Files to Service Agency 319
Multi-Language Approval Chains 320
Working with Tasks in a Multi-Language System 321
Working with Collections in a Multi-Language System 321
Working with Menus in a Multi-Language System......................... 321
Creating an External Link to a Page of Foreign Content 322
Setting Up a Multilingual Web Site 322
Creating Web Pages that Support Several Languages 324
Resolving Conversion Issues 326
Set the Language of Spell Checking 331
Character Encoding 331

Microsoft SharePoint Portal Server Integration 333
Prerequisites.. 333
Configuring Your SharePoint Portal Server 334
What's Next? 338
Installation Troubleshooting.. 338
Updating Web.config Manually 339
Microsoft SharePoint Portal Server Overview........................ 342
SharePoint Portal Web Page Layout 342
What is a Web Part?.. 343
Web Part Zones.. 344
SharePoint Server Permissions.. 345
Personal vs. Shared View 345
Ektron CMS300 Web Parts 346
Modifying Web Parts 349
Managing Ektron CMS300 Web Parts... 350

Web Services 371

Syndicating Web Content as RSS 372

JavaScript Syndication..373
What is Syndication? 373
Syndication Example... 373
Hosting & Syndication 376

Load Balancing 379
Why Do I Need Load Balancing?.. 379
How Do I Configure Load Balancing?..................................... 379
Ektron CMS300 on Two Machines.. 380
Setting Up Multiple Ektron CMS300 Web Sites............................. 380

Setting Up Virtual Directories 381
Setting Up Ektron CMS300 Load Balancing.................................. 390
What Now? 393
Ektron CMS300 on Three Machines 393
What Now? 397

URL Aliasing 398

Automatic URL Aliasing 398
Working with the ISAPI Filter 399
Enabling Automatic URL Aliasing.. 400
Activating/Deactivating the Aliasing Feature 400
Effect of Activating Automatic URL Aliasing 401
Adding a Base Reference to a Template 402

email Features 404

Configuring SMTP Server 404
Automatic eMail Notification 404
Instant eMail 405
Conditions for Instant eMail 407
Where Instant email is Available 408
Modifying Instant eMail.. 408

Searching Content on the Web Site 410

Search Options 411

Active Directory Feature..413

Active Directory Integration 415
How Information is Transferred from AD to Ektron CMS300 415
Which Information is Transferred from AD to Ektron CMS300 .. 416
Logging into a System that Uses AD Integration 418
Associating User Information in AD with Ektron CMS300 ... 418
Adding User Information from AD to Ektron CMS300 419
When Integration is First Enabled 420
After Integration is Enabled 421
Editing User Information in Ektron CMS300................................ 421
Deleting Users 421
Replacing a User 422
User Groups 422
Copying User Groups from AD to Ektron CMS300....................... 423
Associating a User's AD Group Information with Ektron CMS300 424
Mapping the Administrator Group... 426

User Belongs to AD Group that Does Not Exist in Ektron CMS300 427
User Belongs to Ektron CMS300 Group that Does Not Exist in AD 427
Removing Users from a Group 428
Adding User Groups 428
Adding a User to a Group 428
Replacing a User Group 428
Deleting a User Group 428
The Screens of the Active Directory Feature 429
The Active Directory Setup Screen 429
The Active Directory Status Screen 434
The View Users Screen 438
The View User Groups Screen 440
Setup Guidelines 443
Disabling AD Integration 445
User Authentication Only Mode.. 447
How Information is Transferred from Active Directory to Ektron CMS300 447
Which Information is Transferred from Active Directory to CMS300 447
Logging In 447
Adding User Information from AD to Ektron CMS300 447
Changing the User Login Name in AD 448
Editing User Information in Ektron CMS300 448
Deleting Users 448
Replacing a User 448
User Groups 449
The Screens of the Active Directory Feature in User Authentication Mode 449
Setup Guidelines 449
Disabling AD Authentication 450

Additional Information 451

Appendix A: List of Supported Languages 453

Introduction to Ektron CMS300

Thank you for purchasing Ektron CMS300, the best and most affordable solution for Web content management. We welcome you to use Ektron CMS300 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 CMS300, the tasks of maintaining your site and updating content blocks 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.

About Ektron CMS300

Ektron CMS300 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. **Ektron CMS300** shares similar features, functionality, and business benefits with CMS400.NET, our native .NET solution. It streamlines site management, automates workflow processes, and supports collaboration. **Ektron CMS300** 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 CMS300 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 CMS300 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 CMS300 Web Training, go to http://www.ektron.com/training/cms300training/.

Sample Site Used in this Document

This documentation uses the sample ASP Web site installed with Ektron CMS300 to explain and demonstrate functionality in a Ektron CMS300 controlled Web site.

NOTE All functionality is independent of the Web Server. Therefore, Ektron CMS300 for ColdFusion, PHP, and ASP.Net function in the same way as the ASP version.

Types of Users

Ektron CMS300 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 CMS300 users are:

User	Job
Developer	Builds templates
Administrator	Sets up the site, adds users and user groups, sets permissions, and maintains the library

User	Job
Content Contributor	Maintains Web site by adding, modifying, and publishing content blocks.

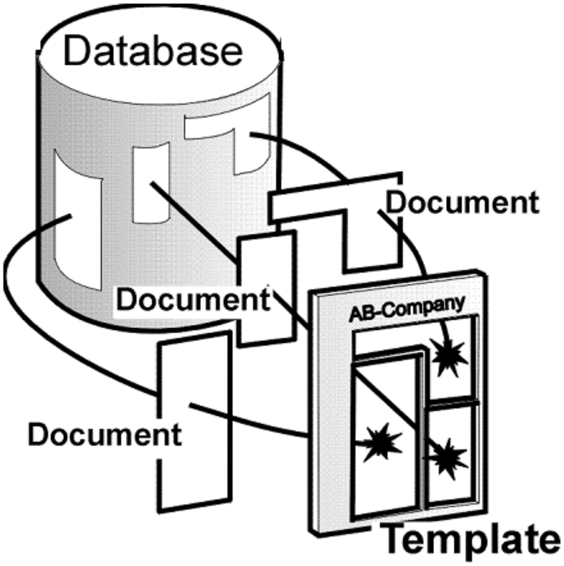
You assign privileges to Ektron CMS300 users based on the actions for which they are responsible. Each user may be assigned any or all types of privileges. Users without administrative permissions are known as content contributors.

This document describes features and actions available to a user with administrative privileges. Information about Ektron CMS300's editing and publishing features may be found in the Ektron CMS300 User Documentation.

Management of Content Blocks

The Ektron CMS300 content manager uses database technology to store, build, and retrieve Web page content blocks. The placement of the content blocks on a Web page is determined by templates, which you can build with external tools. Ektron extends both Dreamweaver and VisualStudio to support the template design process. (*See Also:* "Dreamweaver Extension Support" in the **Ektron CMS300** Developer's Manual.)

Templates can be thought of as mechanical layouts of your Web pages. They incorporate powerful custom functions that Ektron CMS300 uses to manage your content blocks. Each content block is assigned a unique ID. Ektron CMS300 uses the ID to retrieve a content block from the database.



Because Web pages can share the same layout, it is useful to determine which types of content blocks will use a template. Templates files are kept outside the database and correspond to your server environment. For example, for ASP, the template file extensions are .asp, for ColdFusion, .CFM, etc. 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 CMS300, and create a new content block that uses the new template. You can even modify the layout of an existing template, reincorporate it, and the content blocks automatically flow into and adjust 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.

Convention	Explanation
`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.
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.

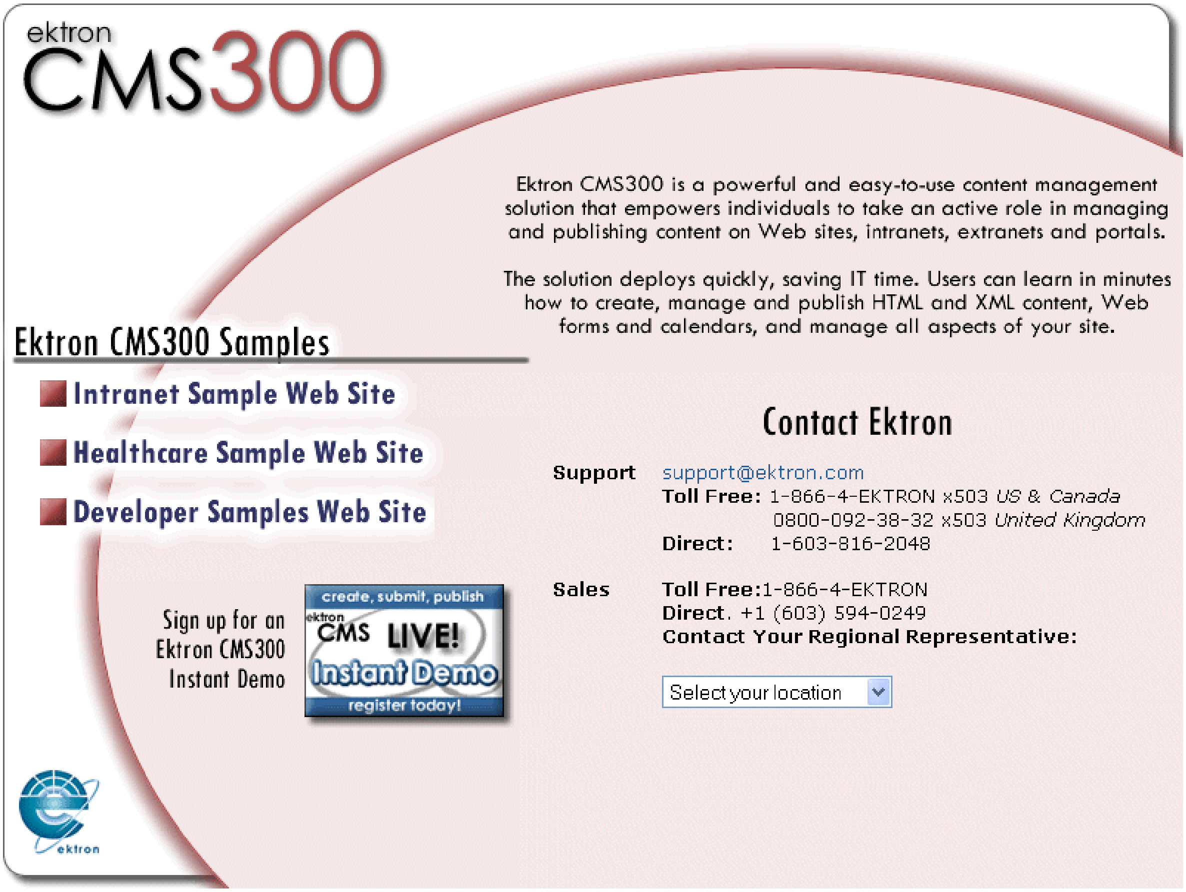
Getting Started

Now that you have installed Ektron CMS300, what's next? This chapter explains several resources supplied by Ektron to help get your Ektron CMS300 Web site up and running.

Menu.asp

When installed, Ektron CMS300 creates an HTML Web page, Menu.asp, that serves as a site map to Ektron CMS300. The menu provides helpful links to the product as well as to the Ektron CMS300 sample Web sites.

Here is the Ektron CMS300 menu.



This page is installed to the Ektron CMS300 root directory on your Web server. By default, this is the path to this Web page:

```
http://[YourWebServer]/CMS300sample/menu.asp
```

Where `[YourWebServer]` is the URL to the Web server to which Ektron CMS300 is installed.

The Sample Web Sites

Ektron CMS300 provides several sample Web sites to help familiarize you with the product. Containing pages rich with text and images, the sample sites exemplify a working Ektron CMS300 Web site. The database contains users, user groups, and content that illustrate the features and concepts of Ektron CMS300.

Several sample sites can be installed during installation. Each site has a different theme. Here are the names and themes of each sample site.

Name	Theme	URL
RC International	Developer oriented	`/CMS300Sample/index.asp`
Intranet	Company intranet	`/CMS300sample/intranet/index.asp`
Health care	Medical	`/CMS300Sample/CenturyMedicalServices/index.asp`

NOTE The person installing Ektron CMS300 determines which sample sites are installed. Contact that person to learn which sample sites are available.

Logging Into an Ektron CMS300 Web Site

See “Logging In and Out” in the **Ektron CMS300** User Manual.

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.

Editing Content Within Ektron CMS300

Ektron is the recognized leader of in-context editing. This means that the Web site is the primary user interface for a business user.

From the Web site, the user can navigate to any page and, as long as he has permission, perform all system activities, such as edit content, add content, report on forms, view calendars, etc.

Accessing the Workarea

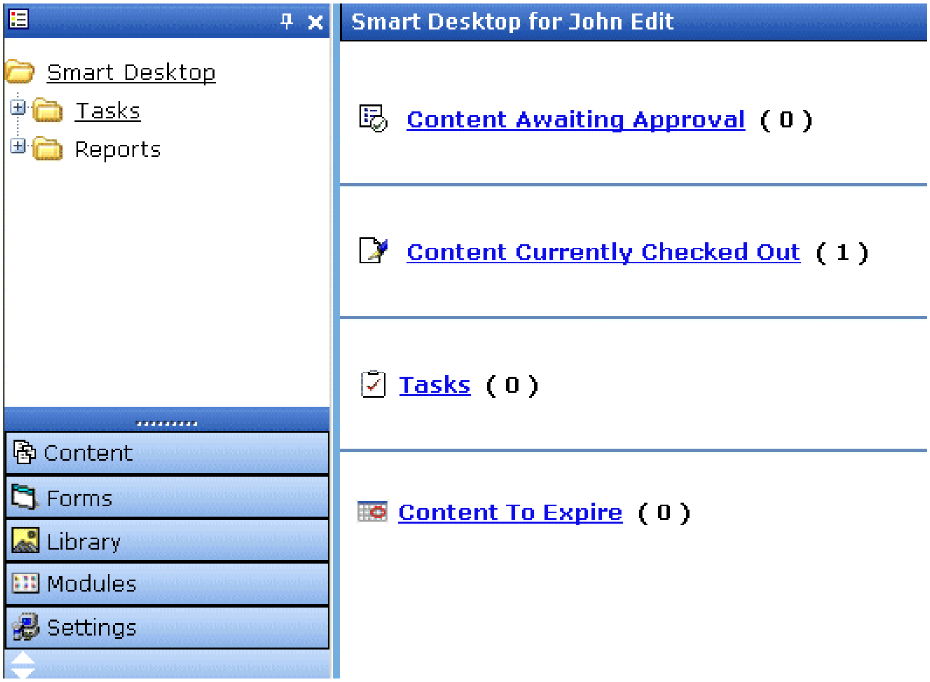
Once logged into Ektron CMS300 as an administrator, you can edit content by navigating to the page (like a business user) or access the Workarea. From there, you can perform all system activities, such as configuring and viewing every setting of Ektron CMS300. To access the Workarea, follow these steps.

1. Log in to your Web site, as described in "Logging Into an Ektron CMS300 Web Site" on page 8.

2. Click the Workarea button (

) on a login page or a **Workarea** toolbar button ().

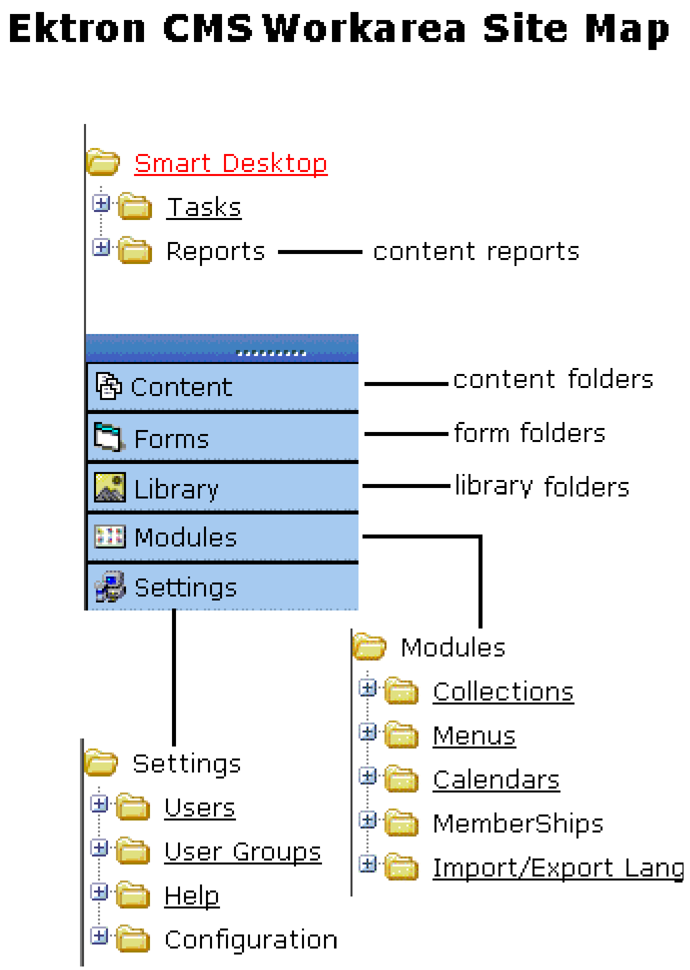
The Workarea has a Windows Explorer-like interface.



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 25

The following graphic illustrates the location of **Ektron CMS300**'s major components in relation to the Smart Desktop display.



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 CMS300 view of your Web site but do not exit Ektron CMS300.

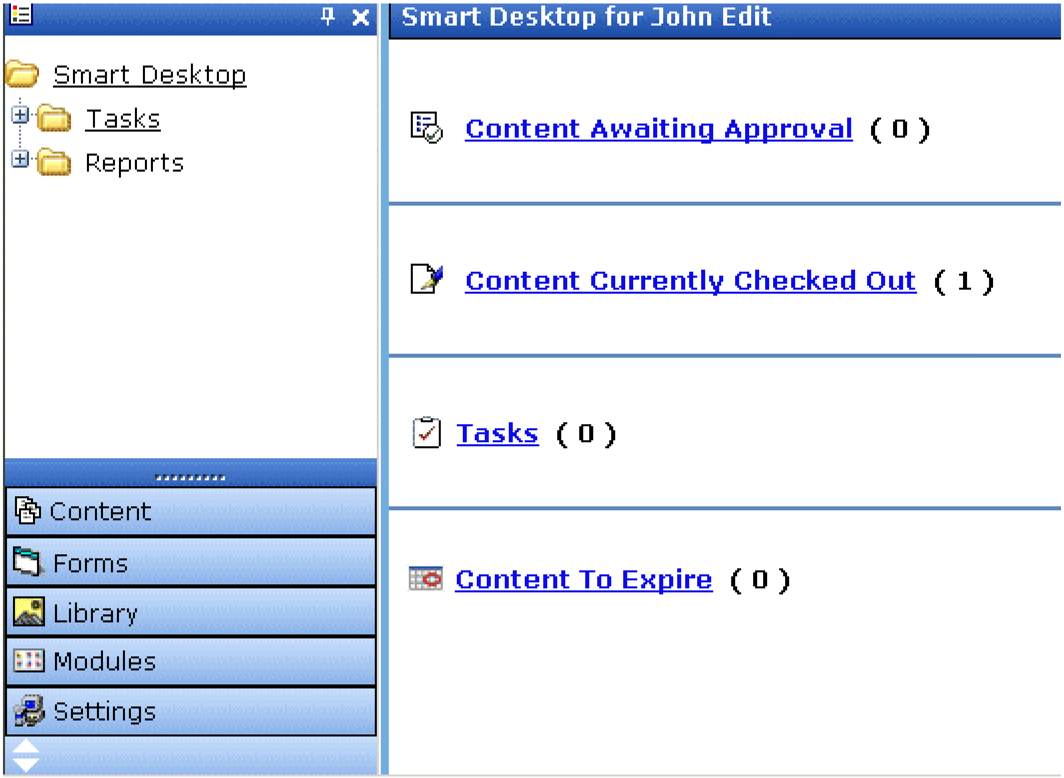
Workarea Navigation

The **Ektron CMS300** 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 62)

NOTE Each category in the right frame is followed by a number indicating how many content blocks are in that status. **Content to Expire** lists how many content block 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.



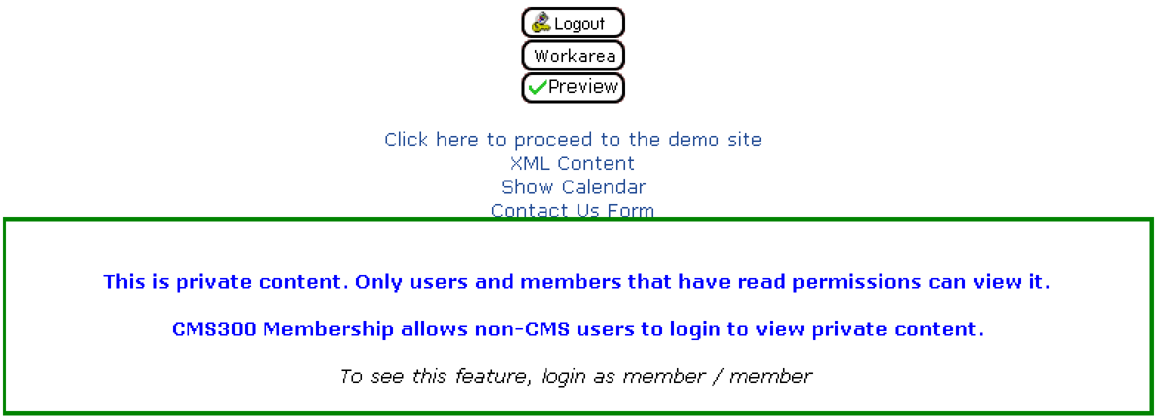
To learn more about the Workarea, see the section of the **Ektron CMS300** User Manual titled "Understanding the Smart Desktop."

Recognizing Content Blocks

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 14

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 CMS300 User Manual. "Site Preview" on page 11.



Each surrounded area is a content block 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 a content block's border is visible, you can *right click* the mouse to display a floating toolbar (an example in the green box below).

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 block, while another displays previous versions of it. The toolbar buttons change depending on the content block's status or your permissions for the content block.

Each button is described in "Floating Toolbar Buttons" on page 15.

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 the setup file corresponding to your server platform.

Platform	Setup file
asp	setup.asp
aspx(.NET)	setup.asp
ColdFusion	setup.cfm
PHP	setup.php

2. Find the variable `sUserMenuType`.
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

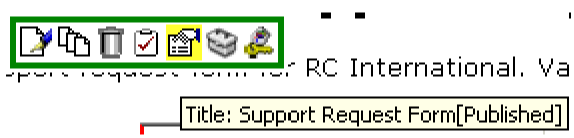
The following table describes buttons you might see on the floating toolbar. The buttons can vary depending on the status of the content block, your permissions, etc.

Toolbar Button	Name	Description	More Information
	Add	Appears if you selected a language and the content block is not available in that language. Use this button to copy existing content into a new content block and translate it to the new language.	”Translating a Content Block” on page 304
	Approve	Approve or decline request for content block to be published or deleted.	”Approve ()” on page 19
	Assign Task	Assign a task related to this content block.	”Managing Tasks” on page 249
	Delete	Opens content block’s View Content screen. From here, you can view important information about the content block and perform all actions on it.	

Toolbar Button	Name	Description	More Information
	Edit	Checks out content block to be edited by you.	”Edit ()” on page 17
	Logout	Log out of the Ektron CMS300 view of the Web site.	”Logout ()” on page 21
	Preview	Preview content block before it is published.	”Preview ()” on page 20
	Properties	Opens content block’s View Content screen. From here, you can view information about content block and perform all actions on it.	”Content Block Status” on page 16; ”Managing Content” on page 40
	View Content Difference	Displays differences between historical version and published versions of content block.	”View Content Difference ()” on page 18
	View History	Displays historical versions of content block. You can also restore older version if needed.	”View History ()” on page 20
	Workarea	Opens the Workarea. From here, you can perform all actions.	”Workarea ()” on page 21

Content Block Status

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



Below are the content block 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 84
M	yellow	**Marked For Deletion**	Requested for deletion
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 block 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 block is deleted.

For more information about

- content block statuses, see Appendix A of the **Ektron CMS300** User Manual
- content block activities, see "Managing Content" on page 40

Edit ()

Ektron CMS300 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 a content block, it cannot be checked out or edited by other users until you check it in.

To edit a content block, follow these steps.

1. Log in to Ektron CMS300, as described in ”Logging Into an Ektron CMS300 Web Site” on page 8.
2. Browse to a content block 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 search data
   - Submit the content for approval
   - Publish a content block to the Web site
   - Access the Library

For more information, see ”Editing Content” on page 51.

View Content Difference ( )

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

Using Ektron CMS300’s content comparison utility, eWebDiff, you can see the changes made to the selected content block.

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

1. Log in to Ektron CMS300.
2. Browse through your Web site until you find a content block 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 a Content Block" on page 86 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 a content block 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 block, an Approve button ( ) appears in the toolbar.

To approve a submitted content block, follow these steps.

1. Browse to a content block that is submitted and awaiting your approval.
2. 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 block in and makes it available for editing by all users with permissions

NOTE If the content block 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

View History ( )

Each time a content block is checked in or published, a snapshot is made of it and stored in Ektron CMS300.You can access and view historical versions of a content block.

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

1. Log in to Ektron CMS300, as described in "Logging Into an Ektron CMS300 Web Site" on page 8.
2. Find the content block 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 58 for more information about viewing, comparing, and restoring historical versions.

Preview ( )

If a content block'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 a staged content block, follow these steps.

1. Log in to Ektron CMS300, as described in "Logging Into an Ektron CMS300 Web Site" on page 8.
2. Browse through your Ektron CMS300 Web site until you find the content block you want to preview.

NOTE Content blocks 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 block viewable in the template.

Workarea ( )

The Workarea is the centralized location of all Ektron CMS300 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 CMS300, as described in ”Logging Into an Ektron CMS300 Web Site” on page 8.
2. Navigate to any page that has an Ektron CMS300 content block 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.

Logout ( )

This button logs you out of Ektron CMS300.

Site Preview

To learn about Site Preview mode, see “Logging In and Out” > “Site Preview” in the **Ektron CMS300** User manual.

Modifying the Application Setup Screen

In the setup section of the configuration folder, you can enter or edit information for the Ektron CMS300 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 CMS300 Web site.

Viewing Application Setup Information

To view Ektron CMS300 setup information, follow these steps.

1. Access the Workarea. *See Also:* "Accessing the Workarea" on page 9
2. Click the **Settings** folder button in the left frame.
3. Expand the folder tree, and click the **Configurations** folder.
4. Click the **Setup** folder.
5. 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 22.
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 26 for more information.
Default Application Language	Select a default language for Ektron CMS300. **How a User's Application Language Affects His Use of Ektron CMS300** This user's language determines the screens and messages that appear within **Ektron CMS300**. **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 DefaultContentLanguage variable in setup.asp. For more information on that variable, see "The Default Language" on page 302.
Maximum Content Size	In bytes, limit the size of each content block by specifying a maximum size. If a user's changes to a content block result in exceeding this limit, the user is told to reduce the size of the content before he can save it.
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.
System email Address	Enter a valid email address into this field. This will be the address in the From field in the notification emails.

Field	Description
Enable Application Mail Messages	Check the box to enable email notification for the entire CMS. Un-checking this box disables email notification regardless of whether individual users have their email enabled.
Publish as PDF	Check the box to allow folder properties to be set for PDF generation. When a checked, PDF generation is available for individual folders. PDF generation for each folder is defined in the folder properties section. *See Also:* ”Editing Folder Properties” on page 35 Note: This property appears when Ektron DMS400 v1.1 or later is installed. For more information, see Ektron DMS400 Manual > Ektron DMS400 Administration > PDF Generation.
Enable CMS to create file system folders for library assets	Check the box if you want to create physical folders on your file system machine that match the Ektron CMS300 library folder tree. *See Also:* ”Enabling CMS to Create File System Folders” on page 26
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**. *See Also:* ”BuiltIn User” on page 28
Editor Options	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 28

Work Page Size

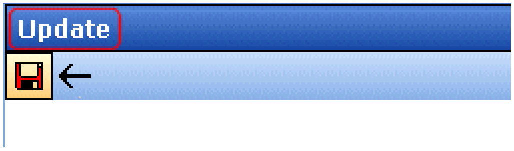
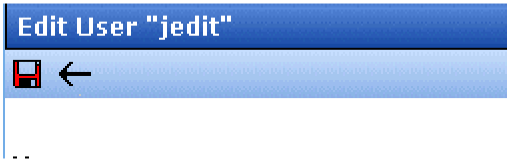
The following fields change the

- default editor screen size
- 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 to 4.7 or higher.

You can also force these values on all users, removing their ability to personalize them.

Field	Description
Width	If desired, change the width of the screen in which **Ektron CMS300** 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.

Field	Description
Height	If desired, you can change the height of the screen in which **Ektron CMS300** 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.
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 11 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 block specified at the **Landing Page after login** field.

Field	Description
Force preferences to all users	To force these settings on all **Ektron CMS300** 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.

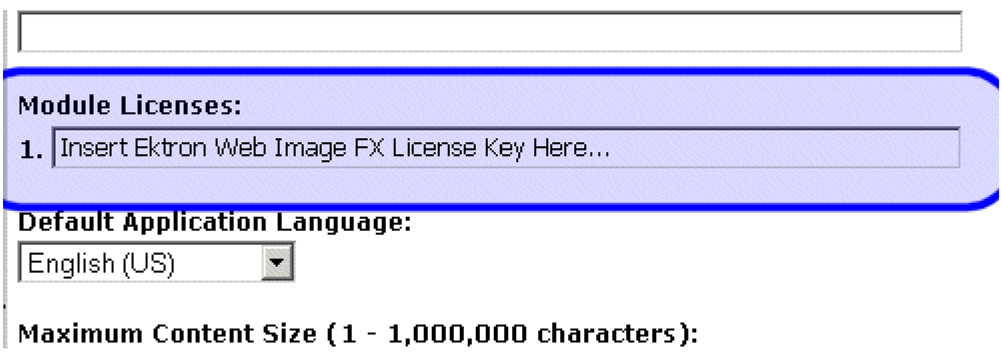
4. Make the necessary changes.
5. Click the Update button ( ).

Enabling WebImageFX

When purchasing Ektron CMS300, 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 CMS300, you should have received an email with a license key for WebImageFX as well.

To enable WebImageFX within Ektron CMS300, from the application setup page, insert the WebImageFX license key in the **Module License** field.

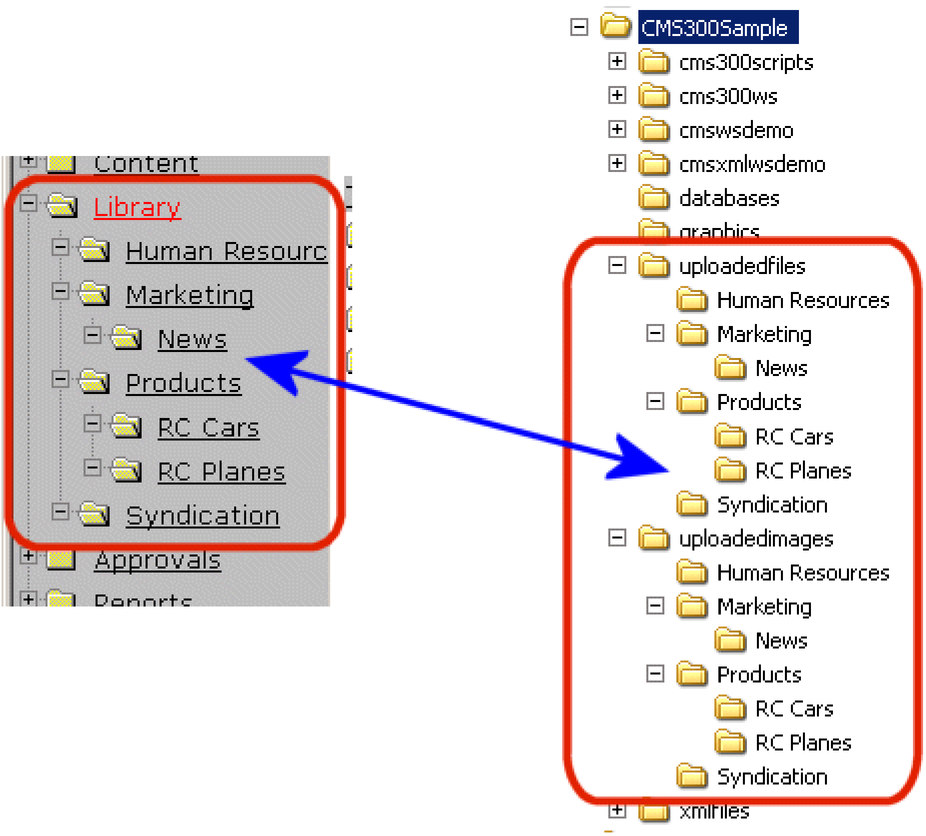


Enabling CMS to Create File System Folders

If this option is enabled, each time a new content/library folder is created in Ektron CMS300, 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 CMS Folder Tree	File Server Folder Tree



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 CMS300 setup screen. The builtin user's primary function is to be an emergency user if you cannot log in to your Ektron CMS300 Web site as the normal administrator.

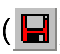
NOTE The builtin user can log in to Ektron CMS300 whether or not Active Directory is enabled.

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.

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 23.
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 ().

Editor Options

Style sheets greatly reduce the source code (and thereby the size of) a content block. 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.

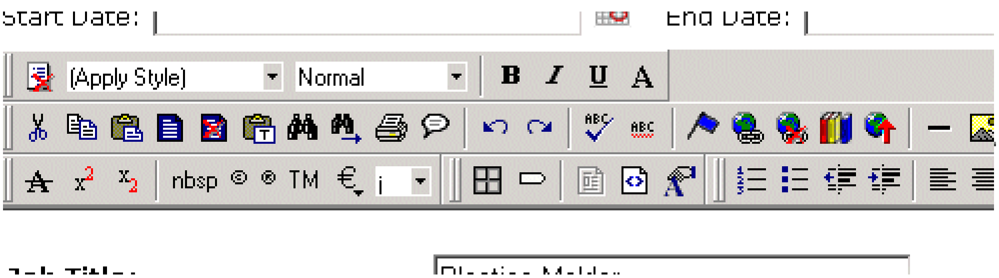
Editor Option	Description
Enable Font Buttons	This option displays the following font-related buttons on the editor toolbar: • Font Face • Font Size • Font Color • Font Background Color *See Also:* "Enable Font Buttons" on page 30 Note: If **Remove Styles** is checked (see below), all inline styles added to the content are removed when the HTML is cleaned.
Disable Font Buttons	This option removes the buttons specified above. If you choose this option but want to let users apply font related attributes to text, set up a style sheet for the content folder to which the content block belongs. *See Also:* "Disable Font Buttons" on page 30
Remove Styles/ Do not Remove Styles	If **Remove Styles** is checked, all inline styles added to the content are removed when the HTML is cleaned. Note: Ektron recommends removing inline styles. It gets rid of inline styles added to content pasted from Microsoft Word.
Preserve MS-Word Styles (only available if you choose **Do not Remove Styles**)	When content from MS Word is cut and pasted into the editor, the editor, by default, removes some MS Word styles. Preserving MS Word styles prevents the editor from removing them. 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.

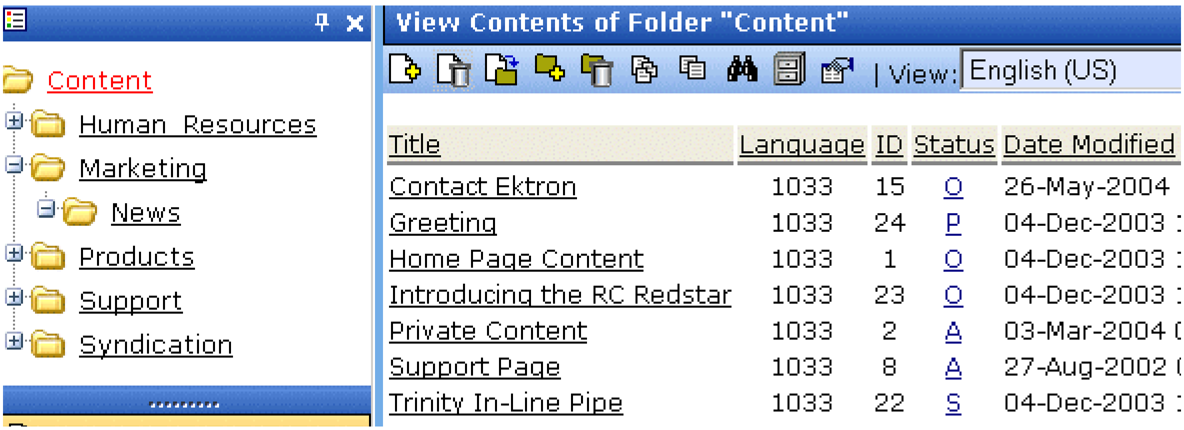
Disable Font Buttons

Here is the editor with the font buttons disabled.



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 blocks. Below is the content folder.



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

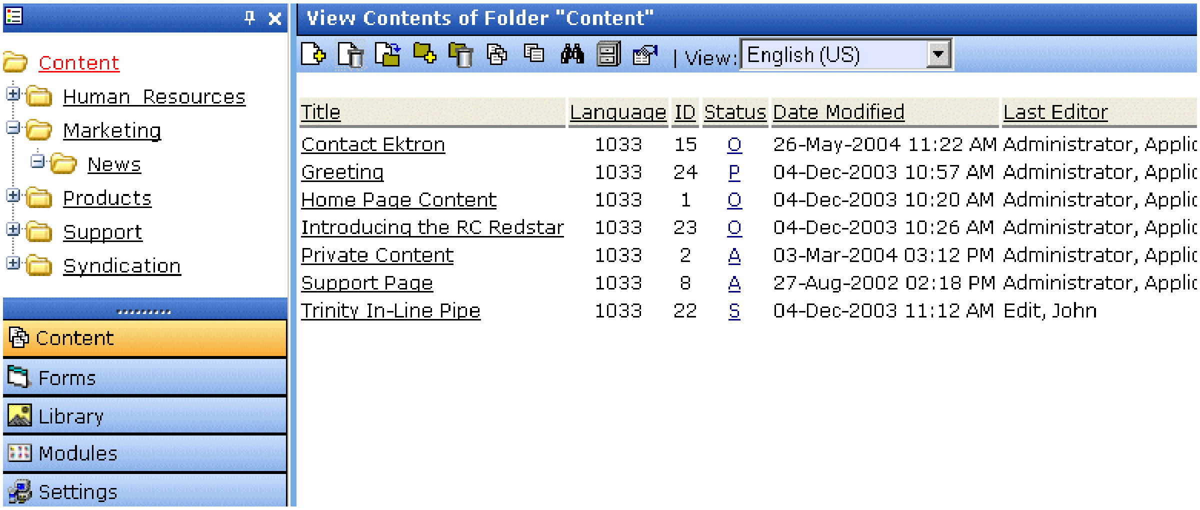
This chapter includes the following information:

- ”Accessing the Content Folder” on page 31
- ”Folder Properties” on page 33
- ”Purge History” on page 37
- ”Adding Subfolders” on page 38
- ”Deleting Folders” on page 39
- ”Search Content Folder” on page 39

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 blocks in the root content folder appear in the main section of the Workarea, and the content folder expands to display the subfolders.



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

Field	Description
Title	The name given to the content block by the creator.
Language	The content block’s language. *See Also:* ”Working with Multi-Language Content” on page 296
ID	The number Ektron CMS300 assigns to the content block. It is used to retrieve the content from the database.
Status	The content block’s status. *See Also:* ”Content Block Status” on page 16
Date Modified	The most recent date that the content block was added, edited, or published.
Last Editor	The last user who accessed the content block.

Additionally, each folder has the following toolbar buttons.

Button	Name	Description	More Information
	Add Content	Open the editor and create a new content block in the current folder.	"Adding Content" on page 41
	Delete Content	Delete several content blocks at once.	"Deleting a Content Block" on page 56
	Move Content	Move content blocks to another folder.	"Moving Content" on page 53
	Add Folder	Create a subfolder below the current folder.	"Adding Subfolders" on page 38
	Delete Folder	Delete the current folder. Note: You cannot delete the parent folder, **Content**.	"Deleting Folders" on page 39
	Collections	Add, edit, or delete a collection from the folder.	"Collections" on page 274
	Search	Search through content in the Workarea.	"Search Content Folder" on page 39
	Archived content	Displays content that passed its scheduled End Date and whose archive option is either **Archive and remove from site** or **Archive and remain on Site**	See the **Ektron CMS300** User manual section "Scheduling Content to Begin and End" > Setting Archive Options
	Properties	View properties of current folder. In the properties window, you can set permissions, approvals, etc.	"Folder Properties" on page 33

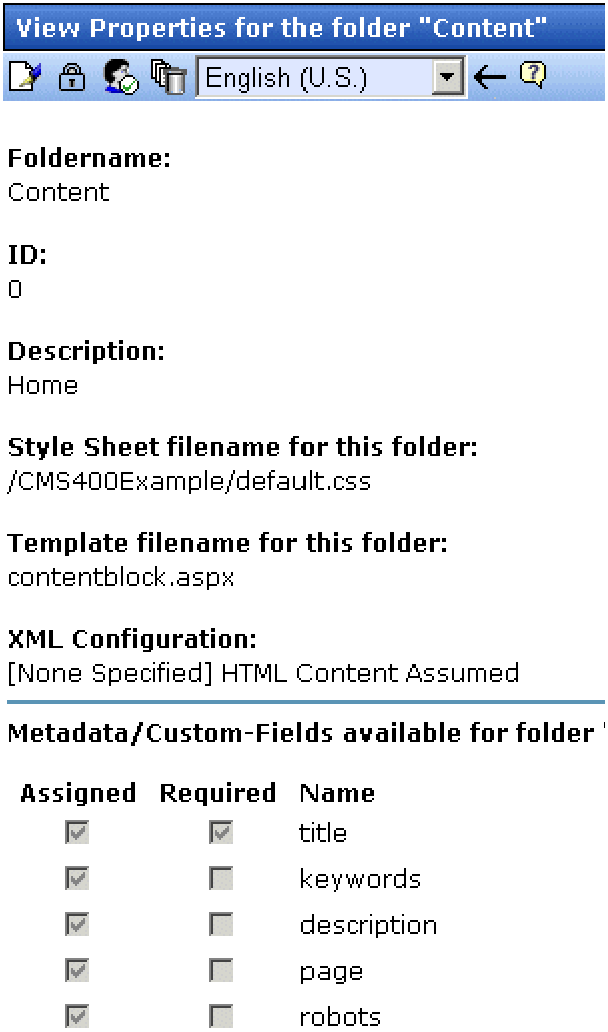
Folder Properties

The folder properties screen lets you set permissions and approvals for a folder.

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. The folder's contents appear.
3. Click the Properties () button.
4. The folder's View Properties screen appears.



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 35
	Permissions	Access the folder’s permissions table	”Setting Permissions” on page 77
	Modify Preapproval Group	Select or change the preapproval group for tasks	”Automatic Creation of Tasks Associated with Content Blocks” on page 261
	Approvals	Access the folder’s approvals table	”Setting Approval Chains” on page 84
	Purge History	Access the folder’s purge history table	”Purge History” on page 37
	Back	Go to previous screen	

Editing Folder Properties

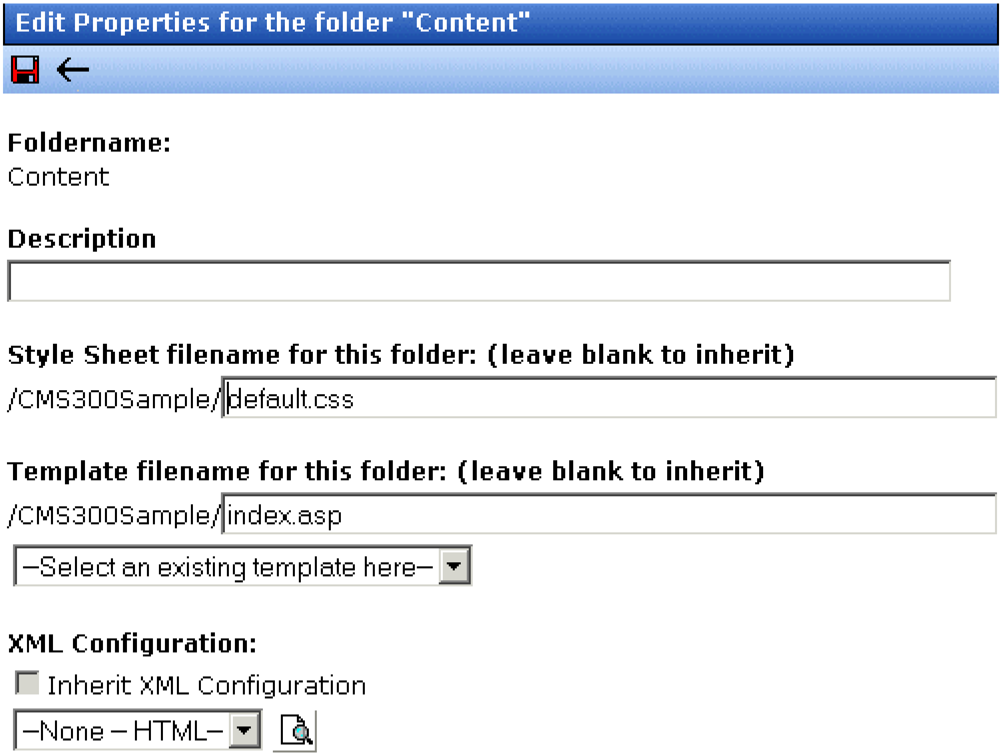
A content folder’s properties consist of

- name
- description
- style sheet
- template
- XML configuration
- Metadata

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 34.

2. Click the Edit button ().
3. The Edit Properties screen for the content folder is displayed.



4. Make the necessary changes to the content folder's properties. Use the following table to assist you.

Fields on the Edit Content Folder Screen

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

Field	Description
Style Sheet filename for this folder: (leave blank to inherit)	Specify a style sheet that defines the styles of the content blocks tin to 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 new template for the content folder. Or, leave this field blank to inherit the template from the parent content folder. Content blocks in this folder will appear on your Web site within the template you choose.
XML Configuration	Choose the XML configuration to assign to the content folder from the drop down list, or check off the inherit box to inherit the XML configuration from the parent content folder. *See Also:* "Assigning XML Configurations" on page 134
Should Office documents added to this folder be published as PDF?	Specify if Office documents in this folder are published to the Web as PDF files. This property appears when the **Publish as PDF** property is checked in Settings > Configuration > Setup. *See Also:* "Updating Setup Information" on page 23 Note: This property appears when Ektron DMS400 v1.1 or later is installed. For more information, see Ektron DMS400 Manual > Ektron DMS400 Administration > PDF Generation.

5. Click the Update button ( ).

Purge History

The Purge History option lets you delete historical versions of content blocks 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 blocks

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 34.
2. Click the Purge History button ( ).
3. The Purge History screen appears.
4. Use the following table to modify the Purge History options.

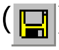
Field	Description	Required?
Select Date	Specify a date to limit the number of historical versions to purge. When specified, only historical versions with a date before this date are purged.	Yes
Recursive	Purges historical records for content in this folder's subfolders.	No
Purge versions marked as Published	Purges published versions of content blocks 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 CMS300 executes the purge and displays a confirmation when complete.

Adding Subfolders

To further organize content on your Web site, create subfolders to store related content blocks. 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 the Add Folder button ( ).
3. The Add a Subfolder to Folder screen is displayed.
4. Enter the required information in the fields. See "Fields on the Edit Content Folder Screen" on page 36.

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 35.

Deleting Folders

You can delete obsolete folders from the Ektron CMS300 Web site.

CAUTION! Deleting a content folder permanently deletes the content blocks 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

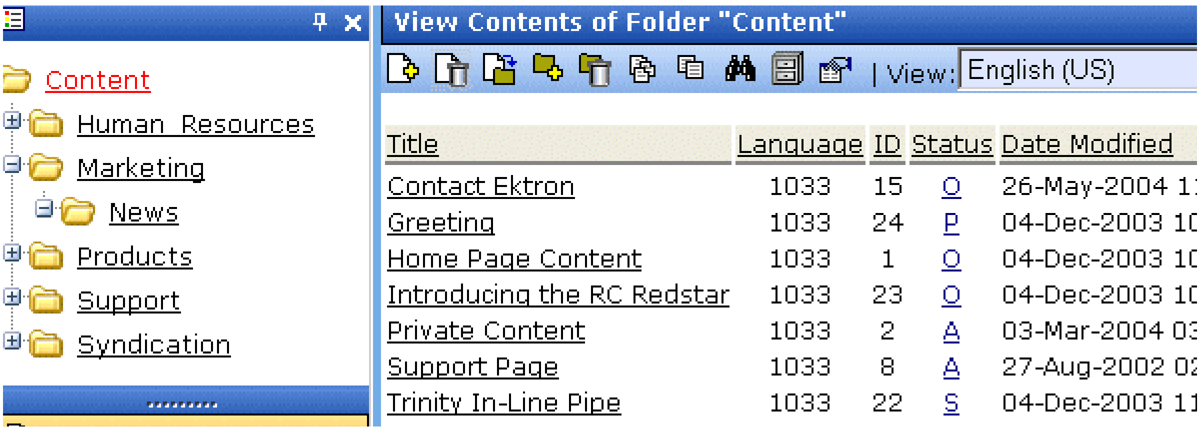
You can search a folder to locate content within your Web site. Use this feature to find a content block when you know the text that needs to be updated but are unsure of its folder or where it is on the Web site.

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 CMS300**, see the following section of the **Ektron CMS300** User Manual "Working with Folders and Content Blocks" > "Search Content Folder."

Managing Content

When you enter the Content folder in Ektron CMS300 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 blocks. Below is an example of the Content folder.

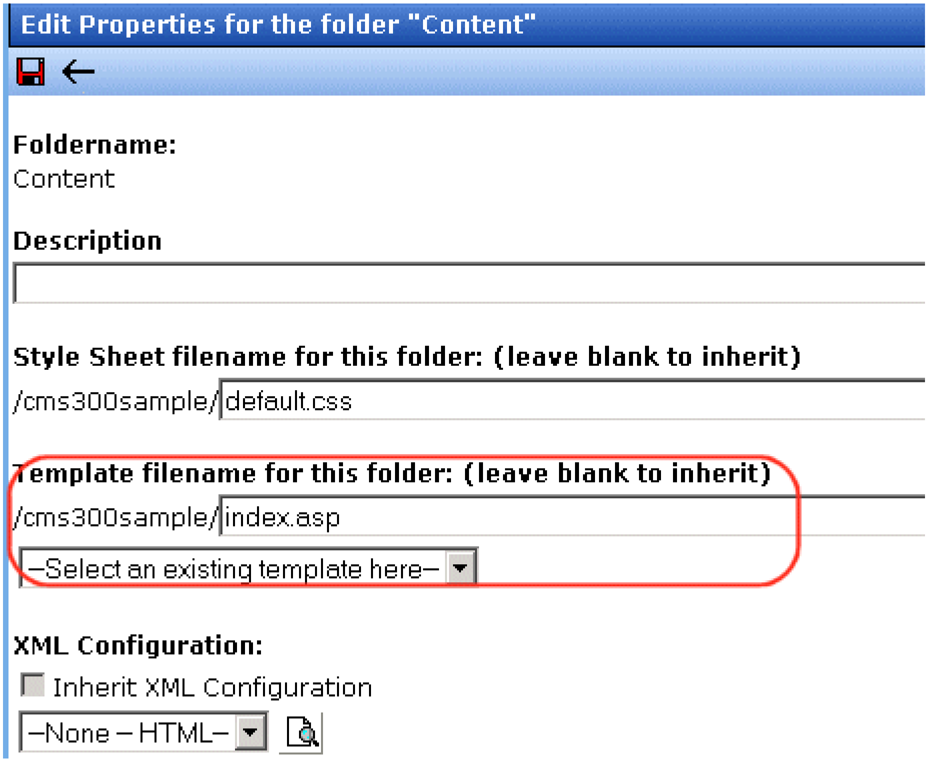


This chapter explains how to add, edit, publish, and delete content blocks. Permissions and Approvals are explained in later chapters.

Creating/Updating Templates

During the setup of your **Ektron CMS300** Web site, templates were created for your Web pages. A template typically includes page headers and footers as well as placeholders for content blocks, forms, summaries, calendars, collections, or other page elements.

You specify a content block's template in its folder. The folder can have a unique template or inherit a template from its parent folder. The following illustration specifies where to identify a template in the Folder Properties screen.



Creating templates is explained in the **Ektron CMS300** Setup Manual section “Migrating Your Site to Ektron CMS300” > “Creating Your Templates.”

Adding Content

There are two types of content folders: HTML and XML. An XML folder has an XML configuration assigned to it. If a folder does not, the content folder creates HTML content blocks.

See Also: ”Creating a New Content Block” on page 303; ”Translating a Content Block” on page 304

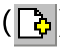
Adding HTML Content

As an administrator, you can add content to the Ektron CMS300 Web site by creating new content blocks. To add HTML content, follow these steps.

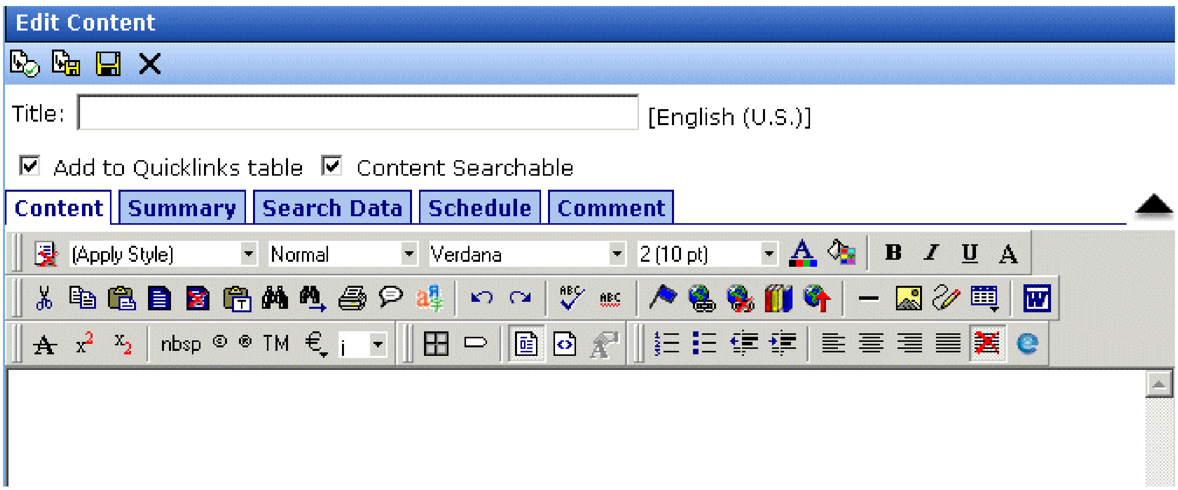
1. In your Workarea, browse to the content folder where you want to create the new content block.

NOTE When selecting the folder, keep in mind the permissions that are set on it and which users have permissions for it.

2. Select the language of the new content block from the language drop-down. *See Also:* "Working with Multi-Language Content" on page 296

3. Click the Add Content button ().

4. The Add Content window opens.



5. Create content in the editor using the following table.

Field	Description
Title	Enter a title for the content block.
Add to Quicklinks Table	Check this box if you want to save a Quicklink to this content block when you save it. If you uncheck this box, **Ektron CMS300** does not create a Quicklink for this content block.

Field	Description
Content Searchable	Check this box if you want this content block to be included in an external search of your CMS Web site. If you uncheck this box, **Ektron CMS300** excludes the content block when a search is performed. *See Also:* ”Searching Content on the Web Site” on page 410
Body Text	Insert content that will be viewed on the Web site.

NOTE For additional information about using the editor supplied with Ektron CMS300, see “Using eWebEditPro” in the Ektron CMS300 User Manual.

6. After you enter the content, you have the following options.

Button or Tab	Description
Summary	Edit the summary for content block. *See Also:* “Adding a Content Block Summary” in the **Ektron CMS300** User manual ”Adding a Content Block Summary” on page 63 Note: You can restrict a summary’s length in the configuration setup screen.
Searchable Properties	Edit the searchable properties for content block. *See Also:* ”Search Data” on page 65
Schedule	Assign start or end dates, or both, for when content is published to Web site. *See Also:* ”Scheduling Content to Begin and End” on page 56
Comment	Enter history comment to indicate changes made to content.
 Submit	Submit content block into approval process.
 Publish	Publish content to Web site. Note: If a content block has any active tasks, a comments window pops up. You can insert comments to describe how approving or declining the content affects the task. Note: Only the last approver in the approval chain sees this button.

Button or Tab	Description
 Check In	Save and check-in content. Clicking this button does not submit the content into the approval process, but rather lets other users change it.
 Save	Save the content without submitting it into the approval process. If a user clicks save and then closes the editor, other users cannot edit the content.
 Decline	This button appears if you are the next approver in the approval list. Click it to decline the changes made to the content. Note: If a content block has any active tasks, a comments window pops up. You can insert comments to describe how approving or declining the content affects the task.
 Cancel	Close the editor without saving changes.

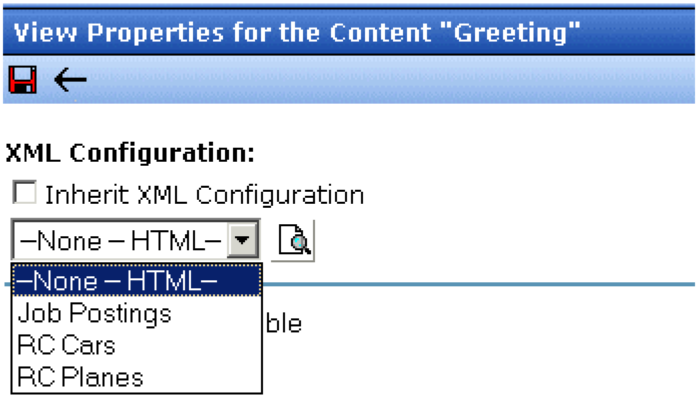
Adding XML Content

If an XML configuration is assigned to a content folder or block, users can create XML content within it.

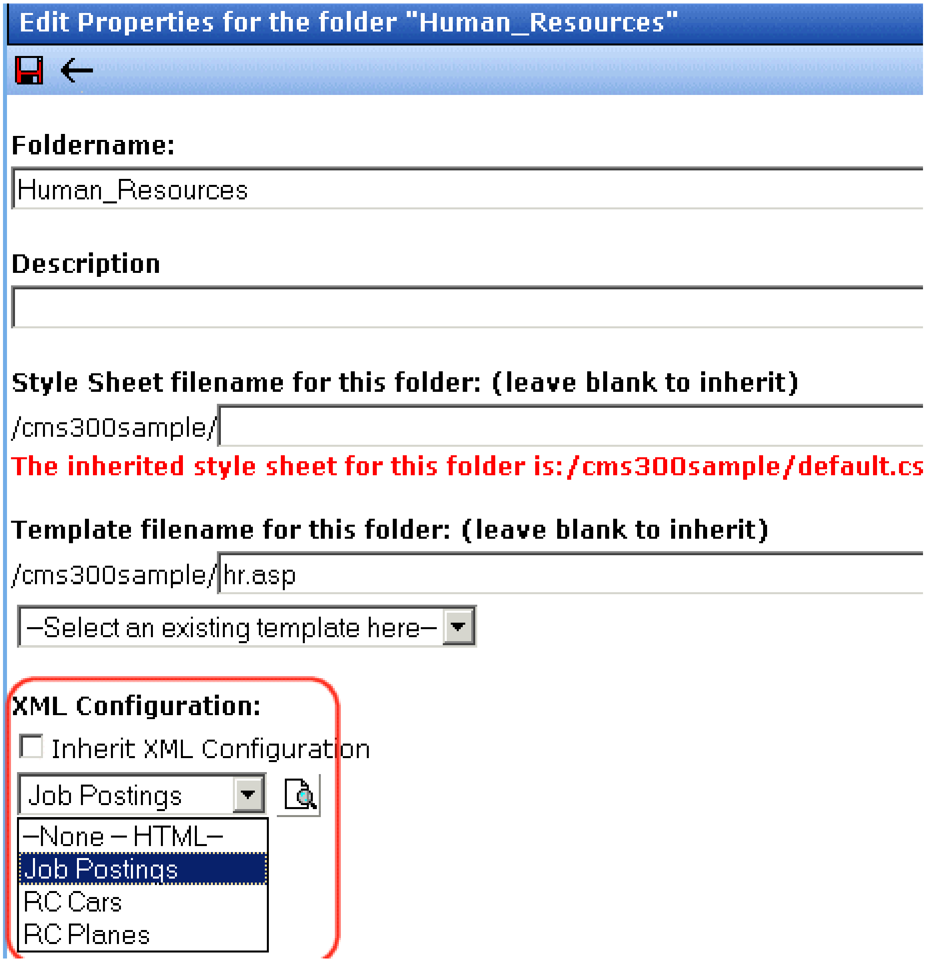
Assigning an XML Configuration

You can assign an XML configuration to an individual content block or its parent folder. Similarly, a folder (other than the root content folder) can have a unique XML configuration or inherit one from the parent folder. *See Also:* ”Assigning XML Configurations” on page 134

XML Configuration on Content Block Properties Screen



XML Configuration on Folder Properties Screen



Adding an XML Content Block

To add an XML content block, follow these steps.

1. In your Workarea, browse to an XML content folder where you want to create the new XML content block. (For more information, see ”Assigning an XML Configuration” on page 44.)

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.

2. Follow the steps described in ”Adding HTML Content” on page 41.

NOTE Depending on the XML configuration assigned to the content block, the default XML may appear differently.

If a content block has an XML configuration, it is used to format the screen display. When an XML content block is published and a site visitor completes the XML screen, the user's input is saved as XML. For more information, see ”Managing XML” on page 126.

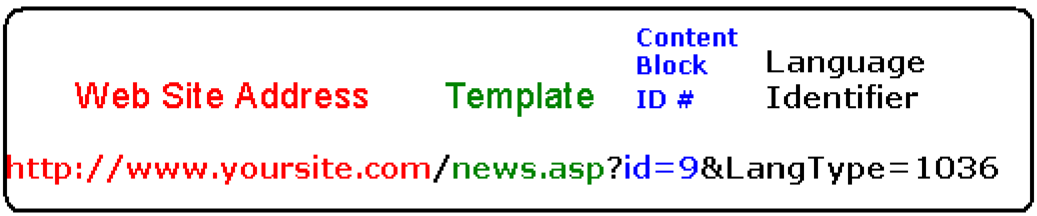
Forming URLs For Ektron CMS300 Documents

Whenever a content block is created, **Ektron CMS300** generates a Quicklink, which is a unique identifier of that content block. *See Also:* **Ektron CMS300** User Manual > “Library Folder” > “Quicklinks and Forms.”

A Quicklink for an Ektron CMS300 content block has these elements:

- Site address
- Template file name
- Content block ID number
- Language identifier

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



The Template

The default template URL is the address of the default template file in the Web server's file system. By itself, the template URL would retrieve 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.

The Content Block Variable

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

Content block variable	Example	Description
ID=n	`http:// www.yourEktronwebsite.com / index.asp?ID=1`	ID selects a single document to display. This variable would be used for a template of the single document template type. The value corresponds to the content block's id value.

The above variable's name is based on the templates included in the Ektron CMS300'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.

To learn more, see "Multi-Language Support" on page 291.

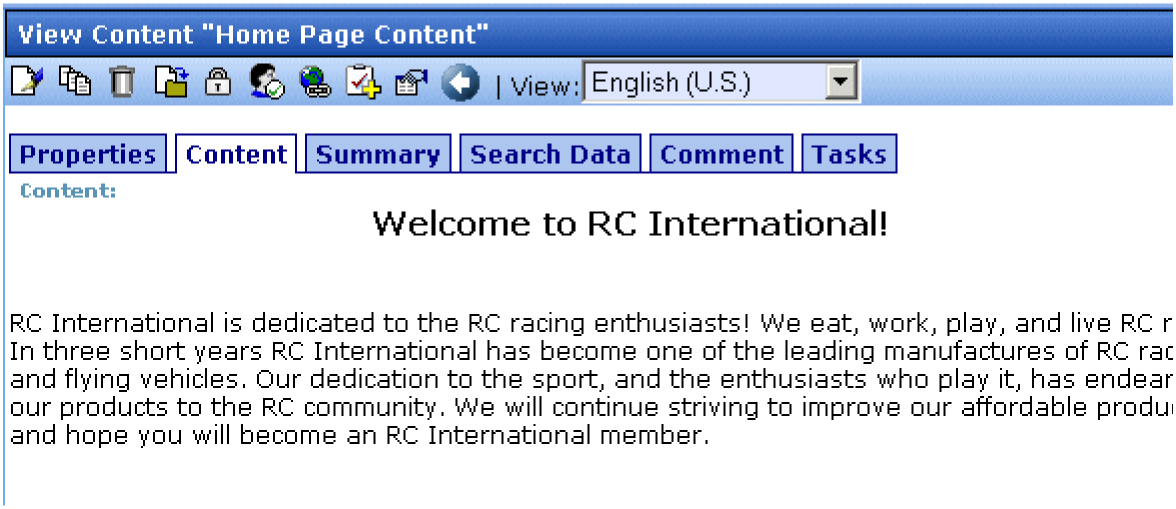
Viewing Content

You can preview all content blocks that have been created in your Ektron CMS300 Web site. Previewing lets you see the content, summaries, and other information about the content block.

Navigating to a **Ektron CMS300** content block is similar to navigating to a file using Windows Explorer. The window has two frames. The left frame contains the top level folders. You drill down through the folders until you find the desired content block.

To view a content block in Ektron CMS300, follow these steps.

1. Navigate to the content folder that contains the content block you want to view. A list of content blocks that belong to that folder is displayed.
2. Select the language of the content blocks you want to view.
3. Click the content block you want to view.
4. The View Content screen is displayed.



The Properties tab is described below.

Information on the Properties Screen

The content properties screen displays the following information about the selected content block.

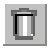
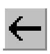
Field	Description
Content Title	Title assigned to content block
Content ID	Content ID # assigned to content block
Status	The content block's status. *See Also:* "Content Block Status" on page 16
Last User to Edit	Last user to edit this content block.

Field	Description
Last Edit Date	Date and time when content block was last edited.
Start Date	Date and time when content block will go live on the Web site.
End Date	Date and time when the content's "action on end date" is triggered. This may include being removed from the Web site. For more information, see the **Ektron CMS300** User Manual section "Scheduling Content to Begin and End" > "Setting Archive Options." "Setting Archive Options" on page 61
Date Created	Date and time when this content block was created.
Approval Method	The approval method used for this content block. *See Also:* "The Approval Method" on page 90
Approvals	Approval chain for this content block. *See Also:* "Setting Approval Chains" on page 84
XML Configuration	The XML configuration assigned to the content block or inherited from the content folder. If no XML configuration is assigned, Ektron CMS300 assumes the content is HTML. *See Also:* "Assigning an XML Configuration" on page 44
Path	The folder path for the content block.
Content Searchable	Whether or not the content block is searchable. *See Also:* "Searching Content on the Web Site" on page 410

Content Toolbar Buttons

The following table displays the toolbar buttons that can appear. Depending on the status of the content block, some toolbar buttons may not appear.

Button	Name	Function	More Information
	Edit	Check out content block to change it.	"Editing Content" on page 51
	History	View previous version of content block; restore if desired.	"Content History" on page 58

Button	Name	Function	More Information
	Delete	Submit a request to other approvers in approval chain to delete content. If you are last or only approver, the content is deleted immediately.	
	Move Content	Move content block to another folder.	"Moving Content" on page 53
	Permissions	Assign permissions to content block. By default, permissions are inherited from parent folder.	"Setting Permissions" on page 77
	Approvals	Set up an approval chain for a content block. By default, approvals are inherited from parent folder.	"Setting Approval Chains" on page 84
	Link Search	Find content blocks with a link to displayed content block.	"Link Checking" on page 60
	Add Task	Assign to a user a task about the content block.	"Managing Tasks" on page 220
	Edit Properties	Change XML configuration assigned and whether content is searchable.	"Content Properties" on page 60
	Back	Go to previous window.	
View (language)	View	If you can view content blocks in more than one language, select a language from the drop down list.	
Add -select language-	**Add -select language-**	Lets you copy current content block into new block and translate it to selected language.	"Translating a Content Block" on page 304

Editing Content

You can edit a content block in any of the following statuses:

- published
- checked in

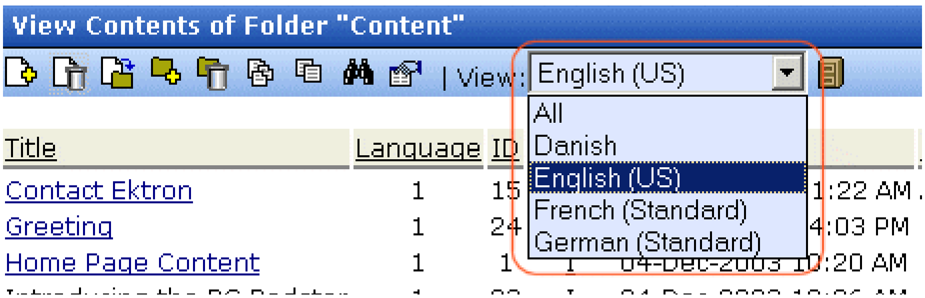
- checked out by you
- submitted for your approval

Ektron CMS300 has two types of content blocks.

- HTML content blocks - no XML configuration assigned to content's folder
- XML content blocks - XML configuration assigned to content's folder

To edit a content block, follow these steps.

1. Navigate to the content folder that contains the content block you want to edit. A list of content blocks that belong to that folder is displayed.
2. Select the language of the content block you want to edit.



3. Click the content block you want to edit.
4. Click the Edit button ().
5. The Edit Content window opens.
6. Make the necessary changes to the content block. Refer to "Adding HTML Content" on page 41 or "Adding XML Content" on page 44 for details about the information you can change.

When completed, choose a workflow option at the top of the window.

Moving Content

You can move a content block from any content folder to any other folder. This section explains how.

Who Can Move a Content Block?

Only members of the Administrators user group can move content blocks.

Which Content Blocks Can Be Moved?

Only a content block with a status of Approved (Published) can be moved. This included expired content. If a content block's status is not published, you must wait for it to reach that status before moving it.

Before You Move a Content Block

Since content is either HTML or XML, you may encounter several scenarios when moving a content block. The following table explains each scenario.

Content to be moved	Destination Folder	Issues?
HTML	HTML Only	None
	XML Content Folder	Content does not use XML configuration applied to content folder. If desired, this needs to be set in the content block properties section.
XML (inherited from parent)	HTML Only	Content inherits properties of the destination folder. Can be changed on the folder or content block levels.
	XML Content Folder	
XML (not inherited from parent)	HTML Only	Content keeps assigned XML configuration. Can be changed on the folder or content block levels.
	XML Content Folder	

What is Moved?

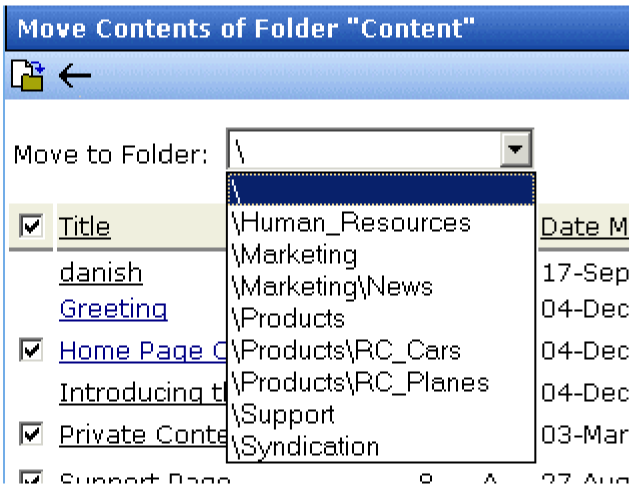
When a content block is moved, it inherits permissions and workflows from the destination folder. Also, the Quicklink for the content block is moved in the library to the destination folder.

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 CMS300** User Manual section "Updating Default Template for Multiple Quicklinks."

Moving a Content Block

To move a content block to another folder, follow these steps.

1. Access the View Content screen for the content block you want to move, as described in "Viewing Content" on page 48.
2. Click the Move Content button ( ).
3. The Move Content screen is displayed.
4. From the drop down list, choose the content folder into which to move the content.



5. Click the Move Content button ( ).
6. A confirmation message is displayed.
7. Click **OK** to continue.
8. The content block is moved to the specified content folder, and the destination folder is displayed with the content block that was moved.

Moving Several Content Blocks at Once

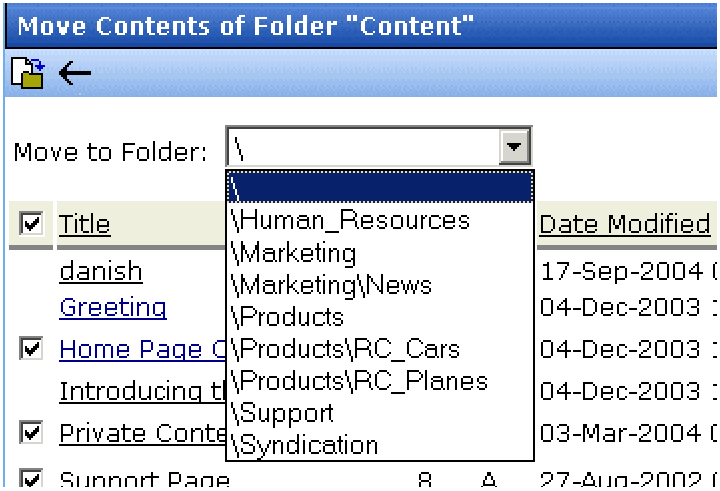
To move multiple content blocks at once, follow these steps.

NOTE Only published and expired content blocks can be moved.

1. Navigate to the content folder that contains the content blocks you want to move.
2. Click the Move Content button ( ).
3. The Move Contents of Folder screen is displayed.
4. Check the boxes next to the content blocks that you want to move.

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

5. Choose the content folder to move the selected content blocks to from the drop down list.



6. Click the Move Content button ( ) to move the selected content blocks.
7. A confirmation message is displayed.
8. Click **OK**.
9. The content blocks move to the destination folder.

Viewing and Restoring Historical Versions of Content

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

For more information, see the Viewing and Restoring Previous Content Blocks section of the **Ektron CMS300** User Manual.

Purging Historical Versions of Content Blocks

See ”Purge History” on page 37.

Scheduling Content

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

For more information, see “Scheduling Content to Begin and End” in the **Ektron CMS300** User Manual.

Deleting a Content Block

The Delete command lets you permanently delete obsolete content blocks from your Web site. You can only delete a content block if its status is Approved.

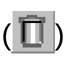
Like publishing, a deleted content block must go through the approval chain before it is removed. If you are the last approver in the approval chain, the content block is deleted immediately. *See Also:* ”Approving/Declining Content Blocks” on page 75

You can delete a single content block or several content blocks in a folder. Both procedures are explained below.

Deleting a Single Content Block

To delete one content block, follow these steps.

1. Access the View Content screen for the content block you want to delete, as described in ”Viewing Content” on page 48.

2. Click the Delete button ().

3. The following message appears.

4. Click **OK** to delete the content block.

Deleting Several Content Blocks in a Folder

On the View Content Folder screen, you can delete several content blocks at one time. To do so, follow these steps.

1. Access the content folder that contains the content blocks you want to delete.
2. Click the Delete Content button ( ).
3. The Delete Contents of Folder screen is displayed.
4. Check the boxes next to the content blocks that you want to delete.

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

5. Click the Delete Content button ( ).
6. A confirmation message is displayed.
7. Click **OK** to continue.

Checking for Broken Quicklinks

The Check Links button ( ) locates all content blocks that include a Quicklink to the displayed content block. This feature is useful when deleting a content block, because it informs you of every content block that will include a “dead” link after you delete the selected content. You should then edit those content blocks and remove or change the obsolete Quicklinks.

To use the link checker, follow these steps.

1. Access the View Content page for the content block whose links you want check, as described in "Viewing Content" on page 48.
2. Click the Check Links button ( ).
3. A page lists each content block that links to the current content block.

Click the title to access the View Content page for the selected content block. From there, you can remove or change the Quicklink.

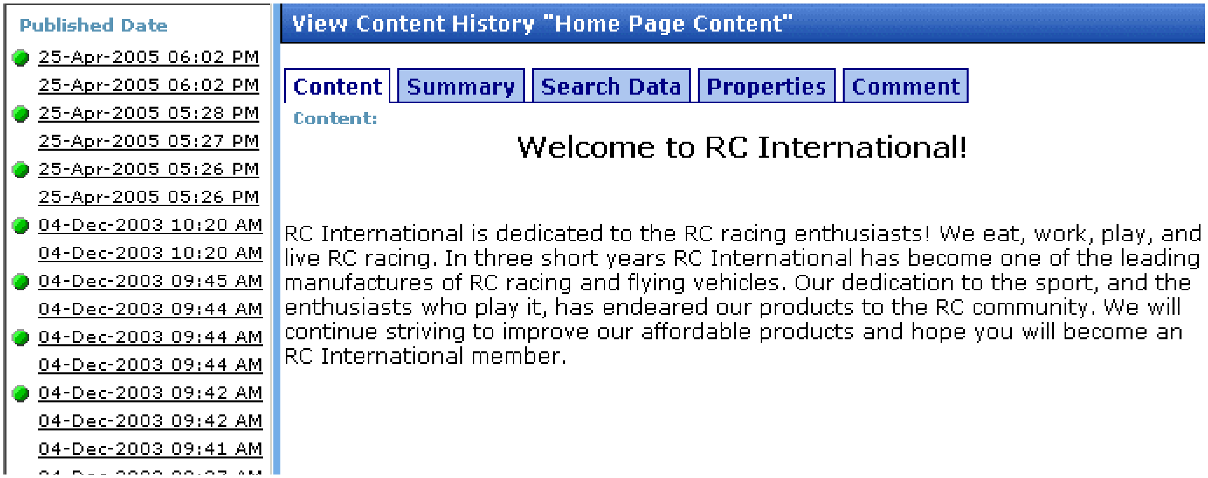
Content History

Whenever a new version of a content block is published or checked in, the previous version is stored. Old versions of a content block may be viewed on the View History screen and, if desired, restored to the Web site.

Accessing the View History Window

To access the View History window, follow these steps.

1. Access the View Content screen for the content block you want to view the history of, as described in "Viewing Content" on page 48.
2. Click the View History button ( ).
3. The Content History screen opens.



Managing Historical Version

For information about managing historical versions of content including:

- Viewing historical versions
- Comparing versions
- Restoring historical version

see the **Ektron CMS300** user manual section “Viewing and Restoring Previous Content Blocks.”

Content Block Permissions

See ”Setting Permissions” on page 77.

Content Block Approvals

See ”Setting Approval Chains” on page 84.

Link Checking

The link checker button allows you to locate all content blocks that have a link to the displayed content block. This feature is very useful if you decide to delete a content block. You can use this to remove those links, which will no longer work after the deletion.

To display all content blocks that link to the selected content block, follow these steps.

1. Access the View Content screen for the content block you want to execute the link checker for, as described in ”Viewing Content” on page 48.
2. Click the Check Links button ().
3. A search results screen displays each content block that has a link to the current content block.
4. Click the content title to access the View Content screen for the selected content block and perform the necessary actions on the content.

Assigning Tasks to a Content Block

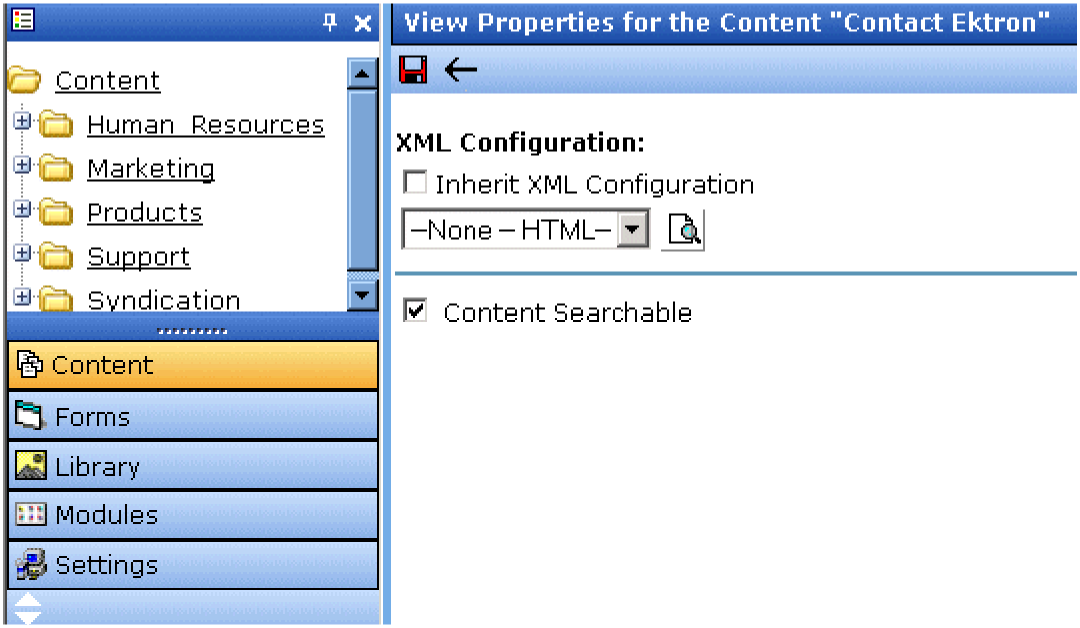
See the **Ektron CMS300** Users Manual > “Managing Tasks” > “Creating Tasks via a Content Block”.

Content Properties

The content properties screen shows which XML configuration, if any, is applied to the content block, and 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 block whose properties you want to view, as described in ”Viewing Content” on page 48.
2. Click the Properties button ().

3. The View Properties for the Content screen appears.



4. Make any necessary changes. For more information, see
   - "Assigning XML Configurations" on page 134
   - "Content Searchable" on page 43

5. Click the Update button ( ).

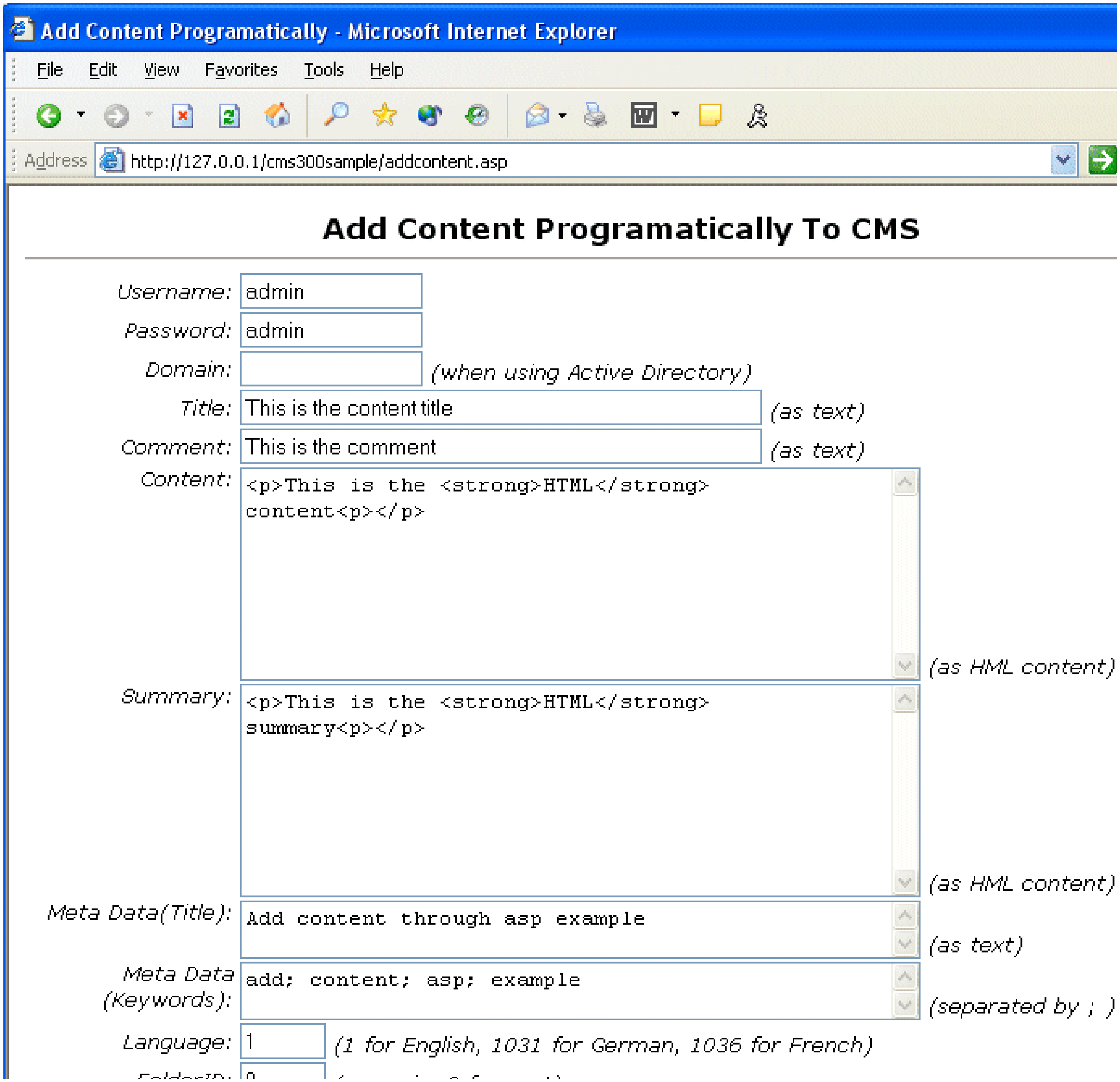
NOTE If you click the Properties button for a content block that is displayed on a Web page, the View Content screen opens in the Workarea window.

Content Reports

The Reports folder contains various content reports. For information about them, see the Content Workflow Reports section of the **Ektron CMS300** 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.



Your Web site developer can customize this form to better suit your needs. See the Ektron CMS300 Developer Manual for additional information.

Search Data

Two kinds of search data can be added to **Ektron CMS300** content

- Search data that resides in the source code of a Web page. Examples include the title and meta tags. This data helps search engines find your Web page (illustrated below).

NOTE To learn how to display on your Web site the search data that resides in the source code, see the Ektron CMS400.NET Developer Manual section “Custom Functions (for your server platform)” > “Metadata Function”>“MetaData Server Control” and “MetaDataList Server Control”.

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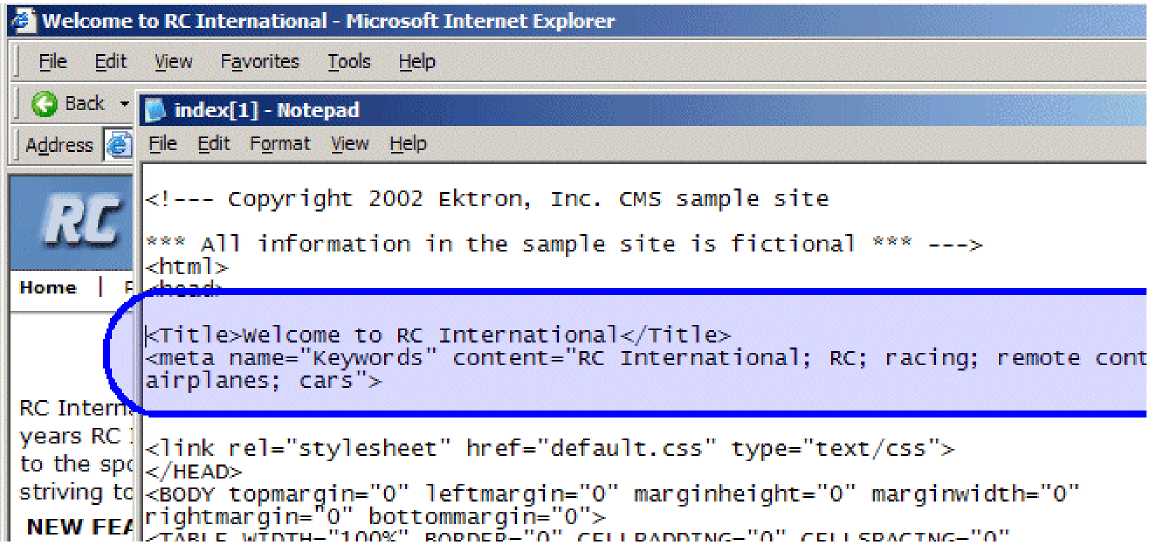
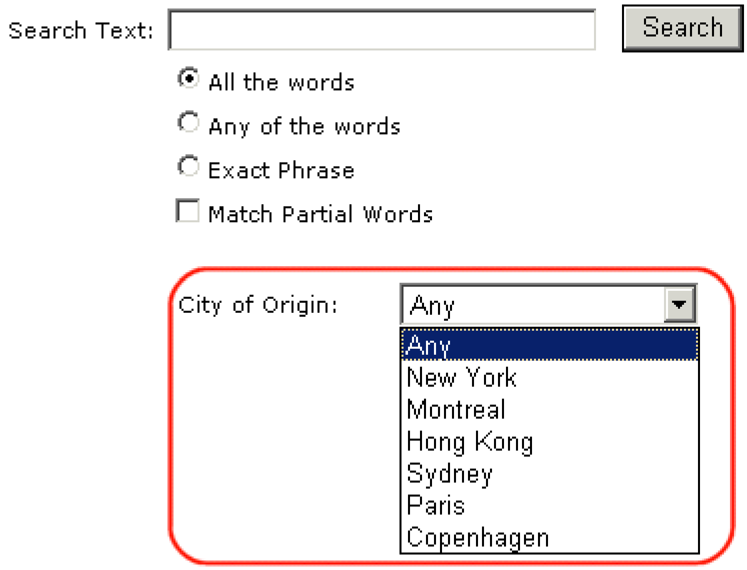
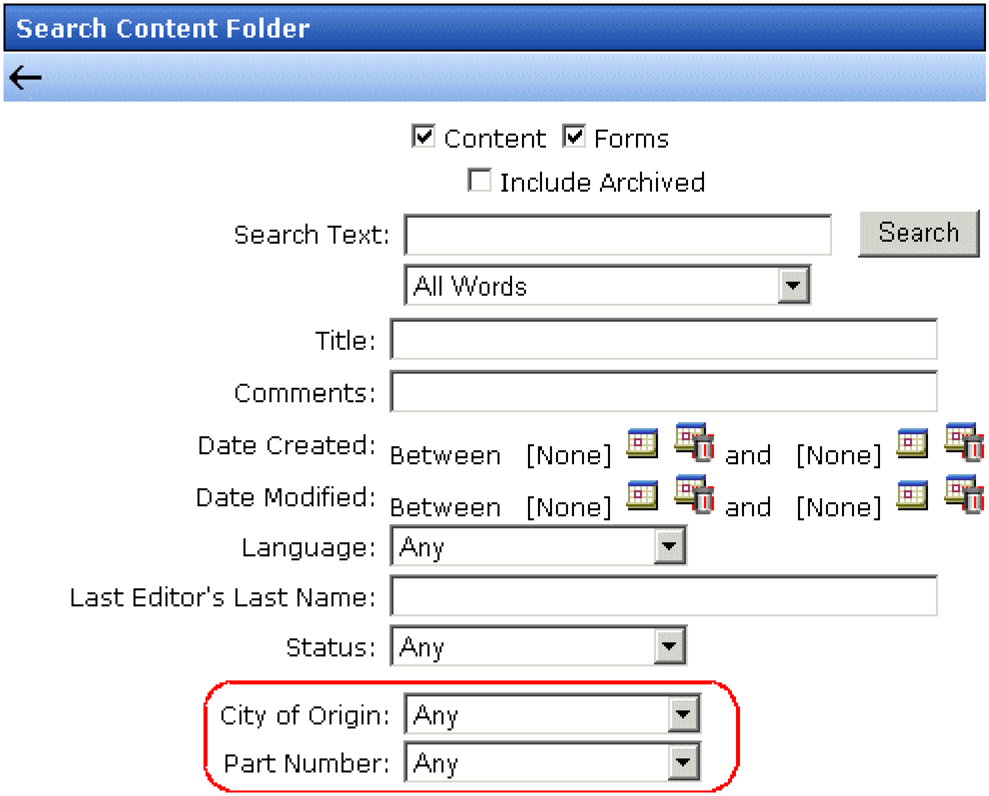


- Search data that appears on your Web site’s search page, below the standard search fields. This type of metadata, known as “searchable property,“ helps site visitors find content on your Web site (illustrated below).



These search criteria also appear when a user clicks the search button ( ) on the View Contents of Folder and Search Library Folder screens. See illustration below.



Overview of Creating Searchable Property Type Metadata

Use the Metadata Definitions screen to define search data.If your site supports multiple languages, you create search data definitions for each supported language.

Finally, while creating or updating content, the user can insert 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.

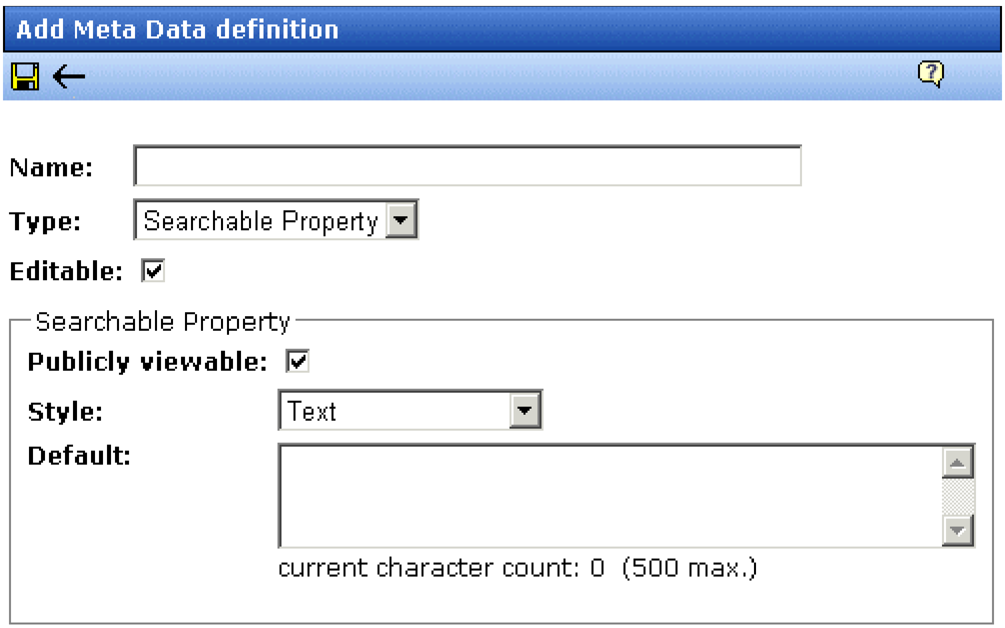
These features are explained in more detail in the following sections.

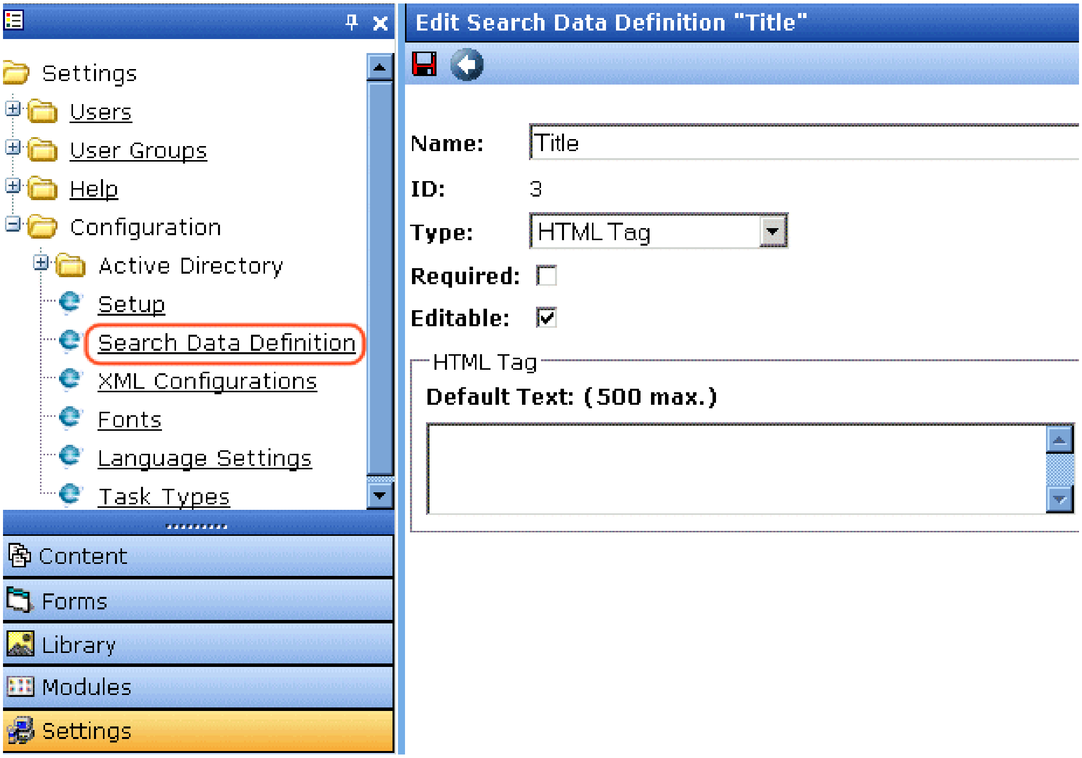
- ”Adding a Search Data Definition” on page 68

- "Viewing Search Data Definitions" on page 74
- "Editing a Data Search Definition" on page 74
- "Deleting a Search Data Definition" on page 75
- "Adding Search Data to a Content Block" on page 76

Adding a Search Data Definition

Use the Add Search Data Properties screen to define search data (such as keywords and title). You can define as many instances of search data as you wish, but each type must be unique.





To define one instance of search data, 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 **Search Data Definition** folder.
4. The View Search Data Definitions screen appears.
5. Select the language for the search data you are about to define. This search data will only be available to content blocks in this language.
6. Click the Add Search Data definition button ().
7. The Add Search Data Definition screen appears. Using the following table, add the needed information.

Search Data Definition Fields

Field	Description
Name	Enter a name to identify this search data.
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 71 • an HTML tag (for example, `<title>`) - *See Also:* ”HTML Tag Additional Field” on page 70 • a Meta tag (`<meta>`) - *See Also:* ”Meta Tag Additional Fields” on page 70
Required	Check this box if you want to require the user creating or editing this search data’s content to enter searchable properties about it.
Editable	Check this box if you want to allow users to edit the contents of the search data when creating or editing the search data’s content. Uncheck this box if you want uniform search data for each content block that uses this search data.

HTML Tag Additional Field

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.

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 just one. If multiple values are allowed, the separator character delimits them.
Allow Selectable Text	Enter standard metadata that can be selected by users. Separate each option by the separator specified for the metadata definition.
Default Text	Enter default content for the metadata tag.

Searchable Additional Fields

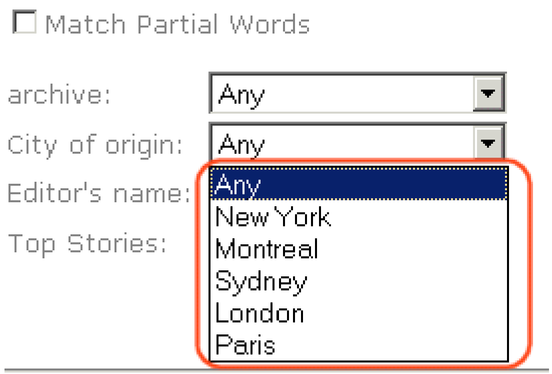
Field	Description
Publicly Viewable	Check this box to let site visitors use this field to search. If you check the box, the search field appears on your Web site's search screen and on the search screen within the **Ektron CMS300** Workarea. If you uncheck the box and the user is • not logged in, this search field does not appear on the site search screen. • logged in, the field appears there and on the Workarea's search screen

Field	Description
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 use to describe the data. • Text - The user can enter free text to describe the content. Later, anyone using the search can search on that text. • Number - The user must enter a number to describe the content. • Date - The user must enter 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 72. • 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 73.
Default	If desired, enter the most common response to this defintion. The default value is automatically applied to all existing content blocks to which this definition is assigned. The user can accept the default value or change it.

Select from a List

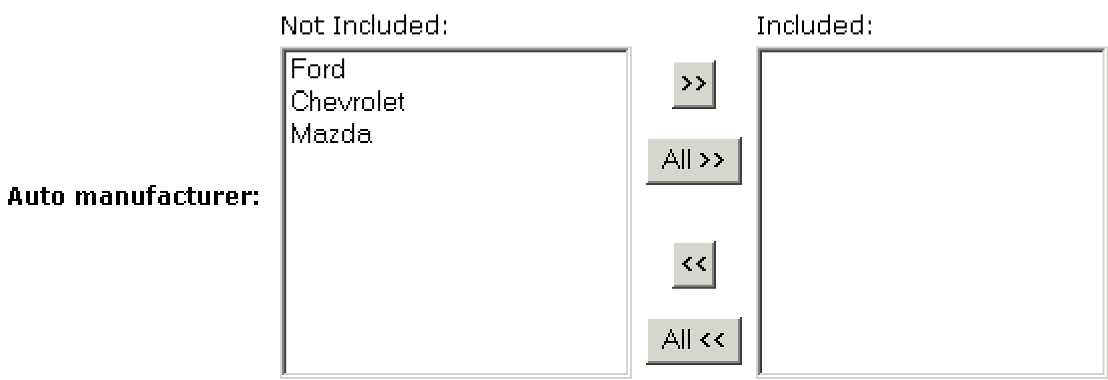
Appearance on Edit Content Screen > Metadata Tab

Appearance on Search Screen

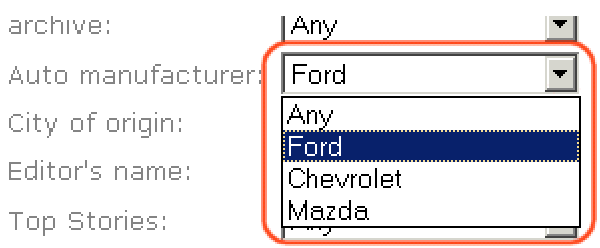


Multiple Selections

Appearance on Edit Content Screen > Metadata Tab



Appearance on Search Screen



Viewing Search Data Definitions

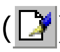
You may view any search data definition. To do so, follow these steps.

1. Navigate to the Search Data Definitions screen in the administrator Workarea, as described in ”Adding a Search Data Definition” on page 68.
2. Select a language from the drop-down list.
3. Click the Search Data definition you want to view.
4. The View Search Data Definition screen appears. From here, you can edit and delete this definition.

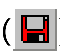
See Also: ”Search Data Definition Fields” on page 70

Editing a Data Search Definition

To edit a Search Datadefinition, follow these steps.

1. Access the View Search Data Definition screen whose definition you want to edit, as described in ”Viewing Search Data Definitions” on page 74.
2. Click the Edit button ().
3. The Edit Search Data Definition screen is displayed.
4. Make the necessary changes to the definition. See ”Search Data Definition Fields” on page 70.

See Also: ”Search Data Definition Fields” on page 70

5. Click the Update button ().

What Happens When a Search Data Definition is Edited?

After you edit a Search Data definition, Ektron CMS300 reviews all content blocks and updates all affected definitions. For example, if you changed the **Type** from HTML tag to Meta tag, the content blocks that use that definition change to something like this:

<Title>CMS300 Sample Web Site</Title>

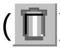
to

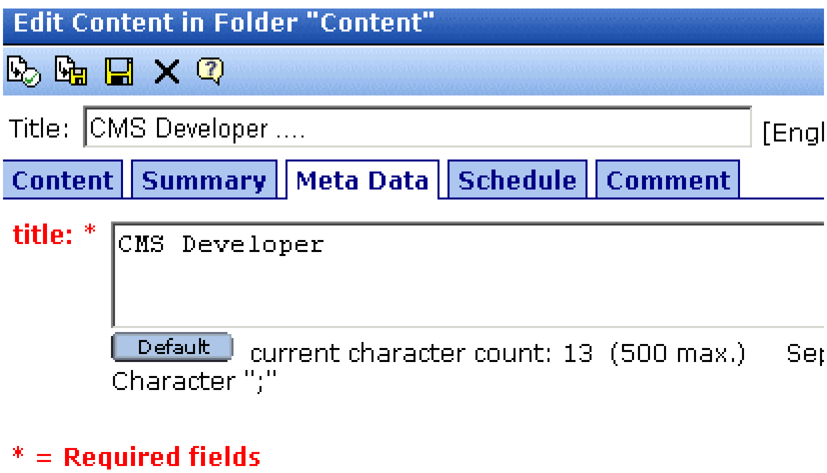
<meta name=”Title” content=”CMS300 Sample Web Site”>

Deleting a Search Data Definition

You can remove Search Data definitions that are no longer used from the Ektron CMS300 site. When you delete a definition, it is removed from every content block that uses it.

To delete a definition, follow these steps.

1. Access the View Search Data Definition screen for the definition, as described in ”Viewing Search Data Definitions” on page 74.
2. Click the Delete button ().
3. A confirmation message is displayed.
4. Click **OK**.
5. Another confirmation message is displayed.
6. Click **OK**.



Adding Search Data to a Content Block

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

Default search data are applied without user intervention. Instructions for adding search data are found in the Adding or Editing Search Data section of the **Ektron CMS300** User Manual.

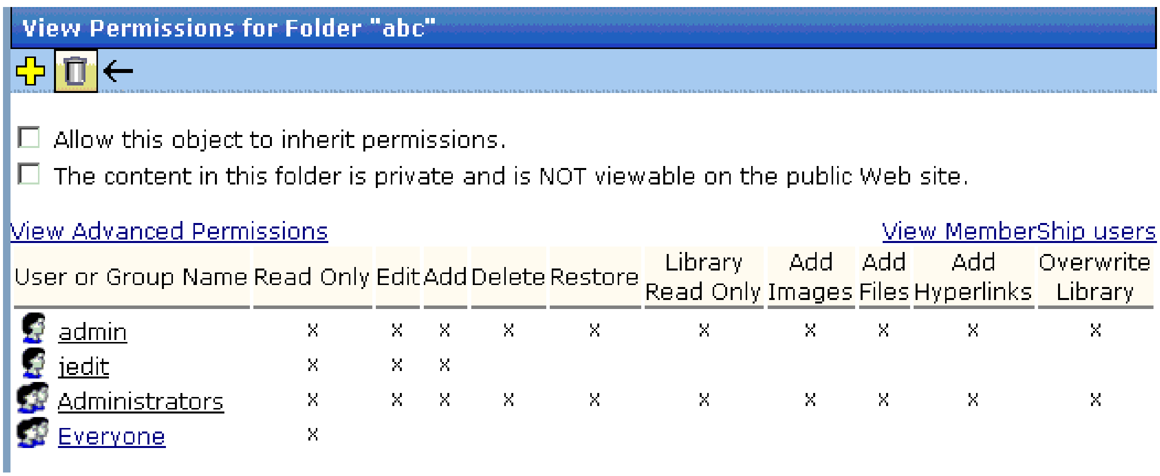
Setting Permissions

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 blocks.

You can set permissions for a content folder or a content block. If you assign permission to a content folder, it affects all of its subfolders unless you break inheritance for a subfolder.

Only Ektron CMS300 administrators can set permissions.

You manage permissions through the Permission Table (illustrated below). It appears when you click the Permission button ( ) from the folder's or content block's Properties window.



User 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
jedit	x	x	x							
Administrators	x	x	x	x	x	x	x	x	x	x
Everyone	x									

This chapter explains how to manage permissions through the following subtopics.

- "Inheritance" on page 78

- ”Standard & Advanced Permissions” on page 79
- ”Setting Permissions for a Content Folder” on page 80
- ”Setting Permissions for a Content Block” on page 83

Inheritance

By default, all content folders and blocks 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 80
- 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 block in your Workarea as described in ”Accessing the Permissions Table” on page 80.
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 block, follow these steps.

1. Access the Permissions Table as described in ”Accessing the Permissions Table” on page 80.
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.

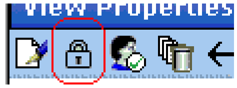
- Standard Permissions - basic functions
- Advanced Permissions - administrator level functions

The following table explains the permissions in Ektron CMS300.

Category	Permission	Allows user/user group to perform this action on content in selected folder
Standard	Read Only	View content
	Edit	Edit content blocks
	Add	Add content blocks
	Delete	Delete content blocks
	Restore	Restore old versions of content blocks
	Library Read Only	View items in the corresponding library folder *See Also:* "Managing Library Items" on page 92
	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 the corresponding library folder
Advanced	Collections	Manage collections *See Also:* "Collections" on page 274
	Add Folders	Add sub folders
	Edit Folders	Edit folder properties *See Also:* "Folder Properties" on page 33
	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.

Setting Permissions for a Content Folder

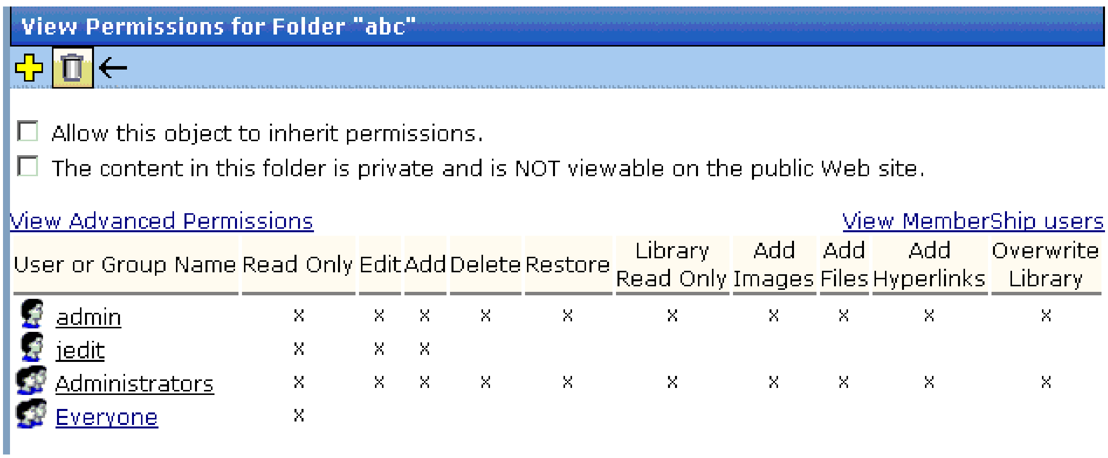
You can set permissions for any content folder and language from the Folder Properties screen. Here is the Permissions button on the Folder Properties screen.



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.



User 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
jedit	x	x	x							
Administrators	x	x	x	x	x	x	x	x	x	x
Everyone	x									

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 79
Add user or group to permission table	Click	”Adding a User or User Group to the Permissions Table” on page 81
Remove user or group from permission table	Click	”Deleting Users or User Groups from the Permissions Table” on page 82
View membership users	Click **View MemberShip users**	”Private Content & Memberships” on page 112
Have this folder inherit permissions from parent folder	Check box next to **Allow this object to inherit permissions**	”Inheritance” on page 78
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**	”Private Content” on page 112

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 78.

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: ”Private Content & Memberships” on page 112

1. Access the Permissions Table for the content folder or content block, as described in ”Accessing the Permissions Table” on page 80.

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 79 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 block, as described in "Accessing the Permissions Table" on page 80.
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 block, as described in "Accessing the Permissions Table" on page 80.
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 a Content Block

You can assign permissions to a single content block, overriding the default permissions inherited from the folder. To do so, follow these steps.

1. Access the content block 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 block that you can perform on a folder. These options are described in ”Actions You Can Perform from the Permissions Table” on page 80.

Setting Approval Chains

What is an Approval Chain?

An approval chain is a series of users or user groups who must approve a content block before it can be published on your Web site. When the last person in the chain approves a block, it goes live.

Also, if a user deletes a content block, before it can be removed from **Ektron CMS300**, 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 block. *See Also:* "Setting Permissions" on page 77

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 block as well as a language. *See Also:* "Multi-Language Approval Chains" on page 320

Finally, the Approval Method determines if a content block 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 85
- "Inheritance and the Approval Chain" on page 85
- "Creating an Approval Chain for a Content Folder" on page 85
- "Editing an Approval Chain For a Content Block" on page 89

• ”The Approval Method” on page 90

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 block or update of an existing block, 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 block or folder. In this case, every content block 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 block 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 78.

Creating an Approval Chain for a Content Folder

Before you can edit an approval chain, you first have to view it.

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 ().

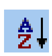
5. The approval chain appears in the lower section of the screen.

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 91*)*
- toolbar buttons for modifying the approval chain and method

Actions You can Perform from the Approvals Screen

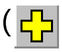
From this screen, you can perform these actions.

Action	Button	See this section for details
Add approvers		”Adding Approvers” on page 87
Remove approvers		”Deleting Approvers” on page 88
Change the order of users in the approval chain		”Editing the Approval Order” on page 87
Change the approval method		”Changing the Approval Method” on page 91

Action	Button	See this section for details
Change the language of the approval chain	**Approval Type** (language)	”Multi-Language Approval Chains” on page 320

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 85.
2. Select the language of the approval chain. The chain only applies to content blocks 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 81 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

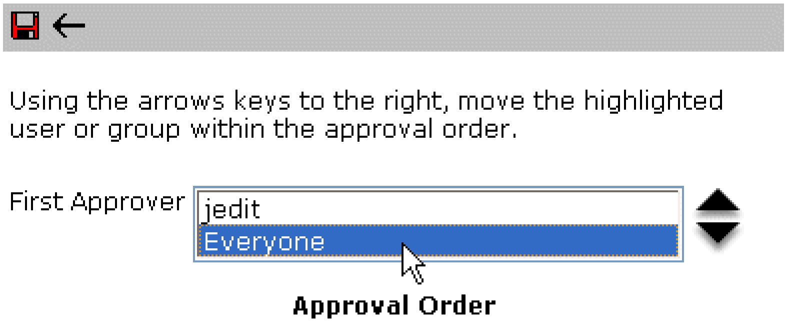
After you assign approvers to a folder, you may want to adjust the approval order. Place the user or group with final review at the end of the approval chain (that is, *the highest number*).

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 85.
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.



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 85.
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 a Content Block

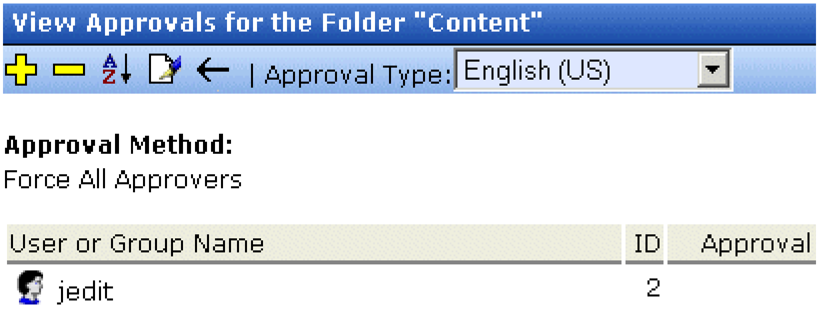
At times, you may need to change the approval chain for a specific content block. Use the Approvals button on the View Content screen to change a content block’s approval chain.

Viewing an Approval Chain For a Content Block

To view the approval chain for a content block, follow these steps.

1. Select the content block.
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 block's approvals table appears.



After viewing the block'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 86.

The Approval Method

The Approval Method determines if a content block 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

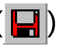
User or Group Name	Approval Order
Department Head	2
Webmaster	3

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 content block, follow these steps.

1. Access the approval table, as described in "Viewing a Folder's Approval Chain" on page 85.
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 ().

Managing Library Items

Before users can insert images and files into their content, they must be uploaded to the server that contains **Ektron CMS300**. 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 assume you are familiar with the Library Folder chapter of the **Ektron CMS300** User Manual. As a result, this chapter only provides information that is unique to administrators.

The following topics are covered in this chapter:

- "Library Folders and Permissions" on page 92
- "Folder Properties" on page 93
- "Load Balancing" on page 98
- "If You Have an Ektron WebImageFX License Key..." on page 101

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.

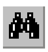
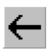
Items added to library folders are only accessible by users with permission to the corresponding content folder. If items are added to a library folders directly under the main Library folder, all users with at least Library Read-Only permissions can use those library items in their content block.

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 93
	Search	Ektron CMS300 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 93.
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 setup.xxx file. Note: You must create the directory in your Web root manually, before adding it in CMS300. *See Also:* **Ektron CMS300** Setup Manual section "Managing the setup.xxx 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 setup.xxx file. Note: You must create the directory in your Web root manually, before adding it in CMS300. *See Also:* **Ektron CMS300** Setup Manual section "Managing the setup.xxx 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 93.
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 setup.xxx file. Note: You must create the directory in your Web root manually, before adding it in CMS300. *See Also:* **Ektron CMS300** Setup Manual section "Managing the setup.xxx 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 setup.xxx file. Note: You must create the directory in your Web root manually, before adding it in CMS300. *See Also:* **Ektron CMS300** Setup Manual section "Managing the setup.xxx 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 CMS300 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 an user who is granted permission to do so. *See Also:* "Setting Permissions" on page 77

However, only members of the administrator group can delete a library item. *See Also:* "Deleting Library Items" on page 97

Deleting Library Items

You can delete obsolete items from the library. By deleting an item, you prevent users from adding it to their content. A deleted hyperlink, quicklink or form quicklink remains on your Web server, so any existing links to them are not broken.

On the other hand, if an item is a file or image, the delete window displays an additional prompt, **Remove from the server,** that lets you remove the item from the server. This feature is available to help reduce disk space taken up by these files. Before removing an image or file from your server, you should review all content blocks with links to it and remove or update the link.

To delete an item from the library, follow these steps.

1. Access the View Library Item screen for the item you want to delete.
2. Click the Delete button ( ).
3. The Delete Library Item screen is displayed.
4. If appropriate, check the box next to **Remove from the server** (see above).
5. Click the Delete button ( ).

Load Balancing

This section explains how to create load balancing paths in Ektron CMS300. For further information about the steps needed to set up load balancing outside of Ektron CMS300, see "Load Balancing" on page 379.

Definition

Load balance is used for two important reasons:

- Provides the redundancy for the Web site - if one server fails, a second server handles all requests
- Balances requests to the server - distributes the load request across two or more machines

In both cases, the client (browser) is not aware that several servers are involved. All URLs point to a single Web site. The load balance software resolves them.

Load Balancing and Ektron CMS300

Ektron CMS300 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 CMS300 library, it must be replicated on all other servers in your load balancing model. To achieve this, Ektron CMS300 uploads the items to default upload directory and any other folder defined in the library.

Ektron CMS300 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 CMS300 Web site. In most cases, this is a virtual folder that points to a mounted hard drive (another server).

NOTE Refer to "Load Balancing" on page 379 for advanced 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.

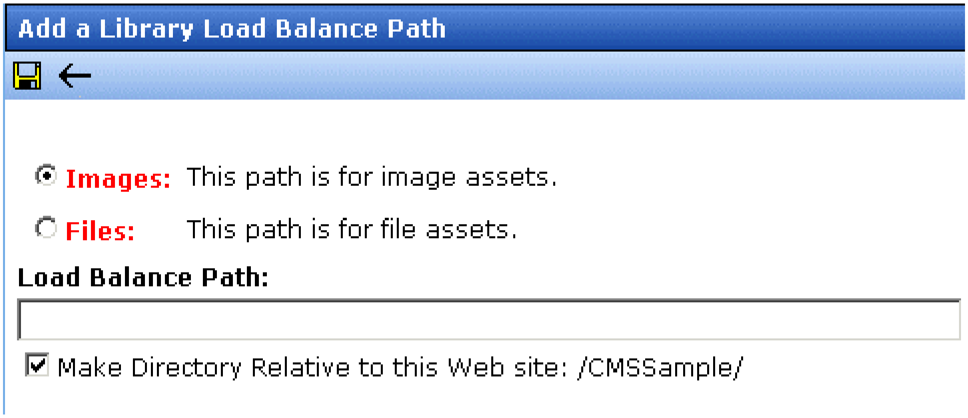
   The screen's columns are described in the following table.

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 CMS300 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

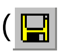
To add a new load balancing folder in the Ektron CMS300 library, follow these steps.

1. Access the view load balance settings screen, as described in "Accessing Library Load Balancing Screen" on page 98.
2. Click the Add button ( ) on View Library Load Balance Settings screen.
3. The Add a Library Load Balancing Path screen is displayed.



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 CMS300 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 98.
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 98.
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.

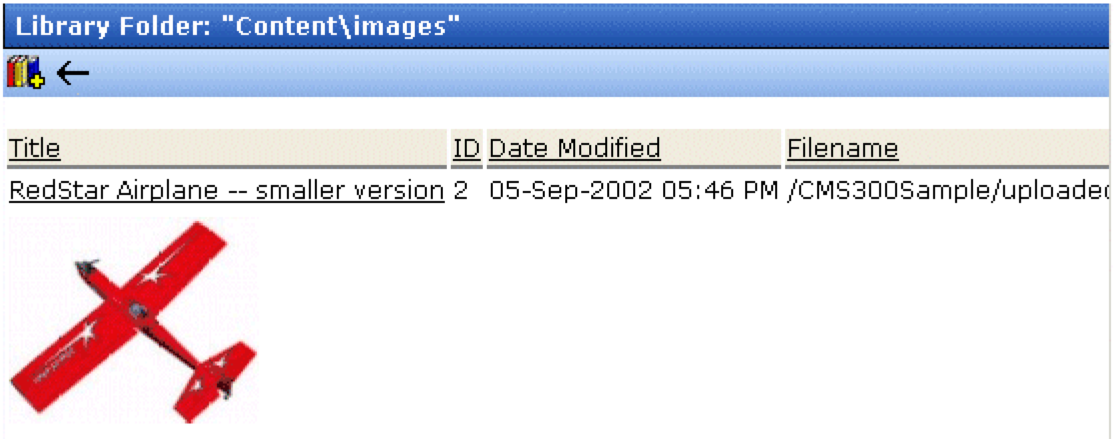
   A confirmation message is displayed.
6. Click **OK**.

If You Have an Ektron WebImageFX License Key...

If you purchased and inserted an Ektron WebImageFX license key into Ektron CMS300, 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 CMS300 Web site with an Ektron WebImageFX license key.



NOTE For information about acquiring an Ektron WebImageFX license key for Ektron CMS300, contact the Ektron Sales Department.

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 CMS300, you can add, edit, and delete users to and from the application through the Settings folder in the Workarea.

Every Ektron CMS300 user belongs to a User Group. User groups are used when creating permissions and approvals 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 413 to learn about user management functions. This chapter only applies to systems that do not use Active Directory Integration.

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 103
- "Creating a New User" on page 104
- "Viewing a User" on page 106
- "Assigning Users To User Groups" on page 108

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 CMS300, follow these steps.

1. Access the Workarea.
2. Click the **Settings** button in the lower left frame of the Workarea.

3. The folders tree under the Settings folder displays the folder hierarchy.
4. Click the **Users** folder from the folder tree.
5. A table of all Ektron CMS300 users is displayed.

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 CMS300, follow these steps.

1. Access the Workarea.
2. Click the **Settings** folder from the left frame of the Workarea window.
3. The folders tree under the Settings folder displays the folder hierarchy.
4. Click the **User Group** folder.
5. A list of all user groups is displayed.

From this screen, you can add, edit, and delete user groups. These procedures are explained in the next sections.

Managing Users

- ”Removing Users from User Groups” on page 108

Creating a New User

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 103.
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.
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 Password	Confirm the password by typing it again.
User Language	Select the language in which the user will view Ektron CMS300 screens and messages. The language also determines the default value whenever a drop-down list of languages appears within **Ektron CMS300**. 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 blocks. This field does not prevent a user from working with multiple language content blocks. *See Also:* "Multi-Language Support" on page 291 Note: If the selected language is not English, French or German, it is only supported after you download the **Ektron CMS300** Language Support Program from Ektron and translate the Web site.
Email Address	Enter the email address of the user.
Disable Email Notification	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 404. However, this field has no effect on the user's ability to receive instant email.

Field	Description
Work Page Size	See "Work Page Size" on page 24
Landing Page after login	See "Landing Page after login" on page 25
• User name • Create Task • Redirect Task • Delete Task	See "Task Permissions" on page 250

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 108.

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.

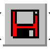
To view a user, follow these steps.

1. Access the user folder as described in "Accessing the User Folder" on page 103.
2. Click the **Username** of the user you want to view.
3. The View User Information screen is displayed.

From the View User screen, you can edit or delete users. These actions are described in the next sections.

Editing a User

When editing a user, you can change the username, first name, last name, password, user language, and email address. To edit a user, follow these steps.

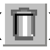
1. Access the view user screen of the user you want to edit as described in "Viewing a User" on page 106.
2. Click the **Username** of the user you want to edit.
3. The View User Information screen is displayed.
4. Click the Edit button ().
5. The Edit User screen is displayed.
6. Make the necessary changes to the user information.
7. Click the Update button ().

Deleting a User

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 106.
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

NOTE Removing a user from a user group does not delete the user from Ektron CMS300. 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 104.
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

Creating a New User Group

To create a new User Group in Ektron CMS300, follow these steps.

1. Access the User Groups folder in the administrator Workarea, as described in "Accessing the User Group Folder" on page 104.
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.

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.

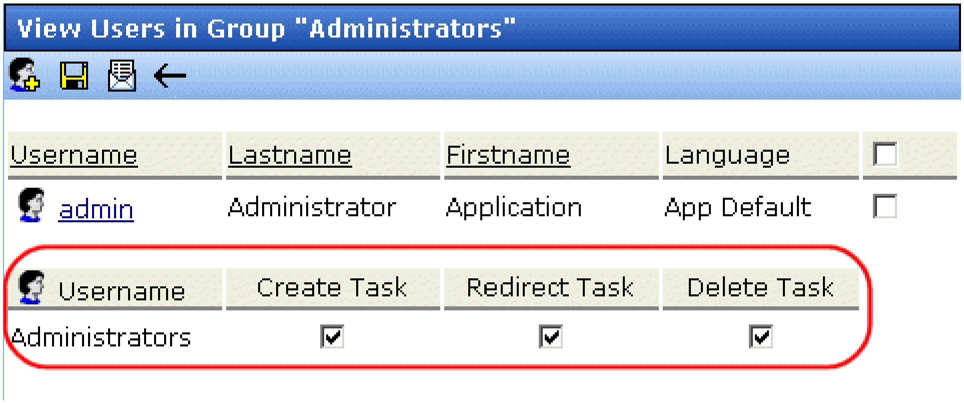
Viewing the Users in a User Group

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 104.
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 assign to the group members task permissions by checking the boxes illustrated below. To learn about the task fields in the lower section of the screen, see ”Task Permissions” on page 250.

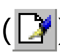
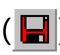


Editing a User Group

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.

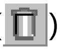
1. Access the View Users in Group screen for the user group you want to edit, as described in "Viewing the Users in a User Group" on page 109.
2. Click the User Group you want to edit.
3. The View Users In Group screen is displayed.
4. Click the Edit button ().
5. The Edit User Group screen is displayed.
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 The default Administrators and Everyone user groups cannot be deleted.

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 109.
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 CMS300 Web site.

Removing Users from User Groups

See ”Removing Users from User Groups” on page 108.

Private Content & Memberships

This section explains the concepts to understand and procedures to follow when working with membership users and groups through the following topics:

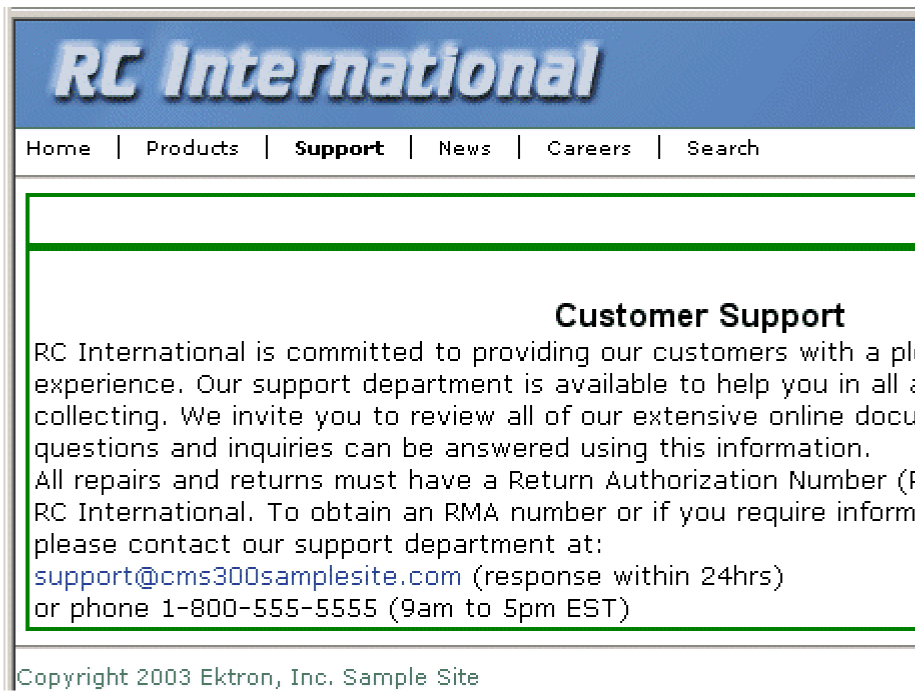
- ”Private Content” on page 112
- ”Memberships” on page 115
- ”Accessing the Membership Module Folder” on page 116
- ”Membership Users” on page 116
- ”Membership User Groups” on page 119
- ”Assigning Permissions for Memberships” on page 121

Private Content

Private content is stored in **Ektron CMS300** folders that are designated as private. Private content is only viewable by browsing the Web site while logged in by users who have *at least* Read-Only permissions for a content block or folder.

To help explain private content, the following table shows three scenarios and how the user's status affects the display of the content block.

Scenario	Web Page Display
Site visitor accesses a content block in a private folder	

<table>
<tr><th>Scenario</th><th>Web Page Display</th></tr>
<tr><td>Logged in user with read-only permissions accesses a content block in a private folder</td><td>
</td></tr>
<tr><td>Logged in user with more than read-only permissions accesses a content block in a private folder</td><td>
</td></tr>
</table>

Making a Folder Private

NOTE You can only set a content block to private when inheritance is broken.

To make a content folder private, follow these steps.

1. Access the permissions table for a content folder or content block in your Workarea, as described in "Setting Permissions" on page 77.
2. Check the box that says **This content in this folder is private and is NOT viewable on the public Web site**.
3. A confirmation message is displayed.
4. Click **OK**.

The content block or folder is now private.

Memberships

What are Membership Users or User Groups?

Users and user groups who can view private content after log in are given *membership* status. 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.

Membership groups are used to group similar membership users.
See Also: "Private Content" on page 112

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 CMS300-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 CMS300 and view the private content.

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 **Membership** folder to view its subfolders.

Folder Name	More Information
Users	”Membership Users” on page 116
User Groups	”Membership User Groups” on page 119

Membership Users

The following sections explain all actions that may be performed on membership users via the following topics.

- ”Adding Membership Users” on page 116
- ”Viewing Membership User Information” on page 117
- ”Editing Membership Users” on page 117
- ”Deleting Membership Users” on page 118
- ”Membership User Groups” on page 119

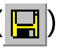
Adding Membership Users

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 116.
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.
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 120.

Setting Permissions on Private Content for Membership Users

See ”Assigning Permissions for Memberships” on page 121.

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 116.
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.

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 117.
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.
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 117.
2. Click the Delete button ( ).
3. A confirmation message is displayed.
4. Click **OK**.

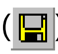
Membership User Groups

Membership user groups organize similar membership users, reducing the effort required to assign identical permissions to many users. The following section explains membership user group management via the following topics.

- ”Adding Membership User Groups” on page 119
- ”Viewing Membership Users in a Membership User Group” on page 119
- ”Adding Membership Users to a Membership User Group” on page 120
- ”Setting Permissions on Private Content for Membership User Groups” on page 120
- ”Editing Membership User Group Name” on page 120
- ”Deleting User from Membership User Group” on page 121
- ”Deleting Membership User Groups” on page 121

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 116.
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 119

Viewing Membership 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 116.
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 119

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 Membership Users in a Membership User Group" on page 119.
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 119

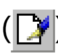
Setting Permissions on Private Content for Membership User Groups

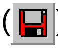
See "Assigning Permissions for Memberships" on page 121

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.

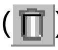
1. Access the View Membership User Group screen for the membership group you want to edit, as described in "Viewing Membership Users in a Membership User Group" on page 119.
2. Click the Edit button ().
3. The Edit User Group screen is displayed.
4. Change the membership group name.

5. Click the Update button ().

See Also: ”Membership User Groups” on page 119

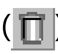
Deleting User from Membership User Group

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 Membership Users in a Membership User Group” on page 119.
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 Membership Users in a Membership User Group” on page 119.
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 block or content folder you want to assign membership permissions for.

For ...	See...
Content folders	”Setting Permissions for a Content Folder” on page 80
Content blocks	”Setting Permissions for a Content Block” on page 83

2. If necessary, break the inheritance for the content block or folder. *See Also:* ”Inheritance” on page 78
3. Set the content folder or block to **Private**. *See Also:* ”Private Content” on page 112
4. Click **View MemberShip Users** on the right end of the permissions table.
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.

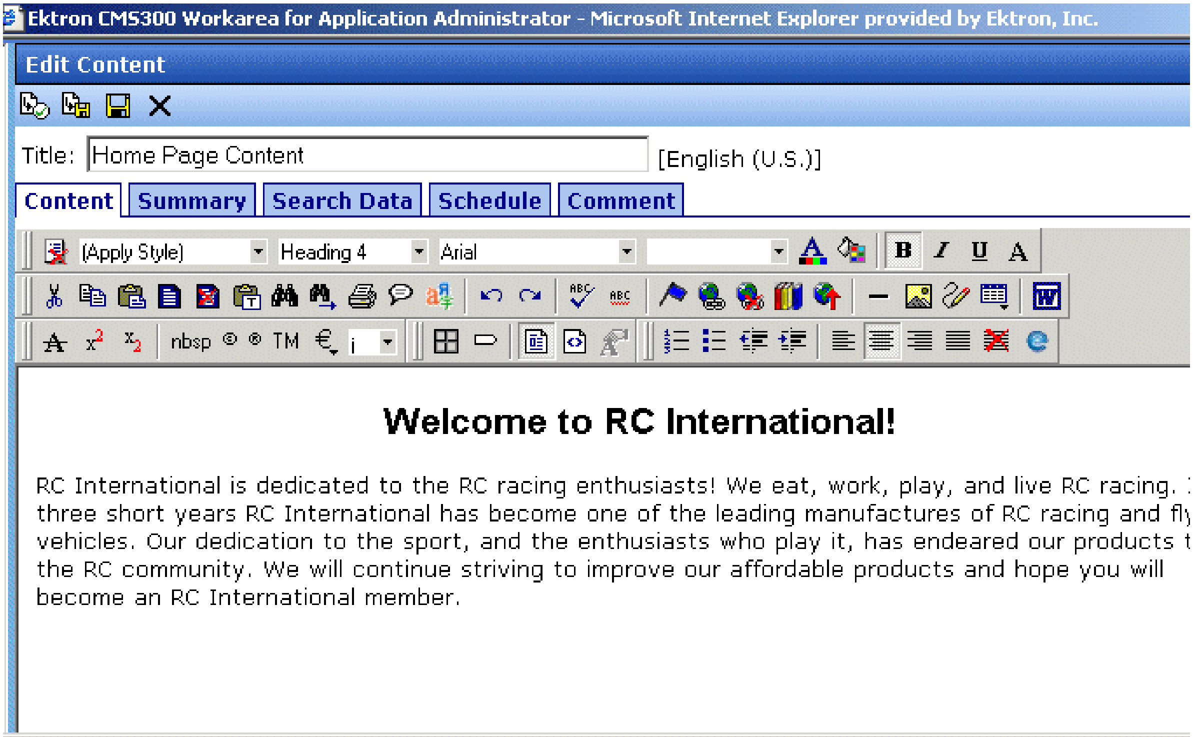
Troubleshooting Problems with Membership Users and Groups

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.

Using eWebEditPro

This is the editor supplied with Ektron CMS300, eWebEditPro+XML.



For more information about using the editor, please refer to the Ektron CMS300 User Manual.

Prompting the User to Save Upon Closing Browser

If a user is editing content and closes the editor's browser window, by default, the window closes and any unsaved changes are lost. You can change this behavior such that if a user closes a window, the following message appears.

As you can see, the user has the option to save changes or exit without saving. To enable the above message, follow these steps.

1. Open the setup.asp file, located in your Web site's `cms300scripts` folder.
2. Change the value of `eWebEditProPromptOnUnload` to **1**.
3. Save setup.asp.

Managing XML

Ektron CMS300 allows you to access the full power of XML by separating Web content from presentation. In addition to hiding the XML tags from users, Ektron CMS300 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 is managed using XML schema validation.

Using XML with Ektron CMS300 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

XML configurations are used in Ektron CMS300 to define the necessary files to display, save, and validate the content properly.

This section explains how to take advantage of Ektron CMS300's XML capabilities.

What's in This Chapter?

Here is what's covered in this chapter.

- "Before You Manage XML Configurations" on page 127
- "Adding a New XML Configuration" on page 129
- "Assigning XML Configurations" on page 134
- "Viewing XML Configurations" on page 136

- ”Editing XML Configurations” on page 143
- ”Editing Data Design Packages” on page 143
- ”Creating XML Configurations Based on Existing Configurations” on page 145
- ”Viewing Data Designer XSLTs” on page 146
- ”Deleting XML Configurations” on page 147

Before You Manage XML Configurations

Use the XML configuration feature to define each XML configuration that will be used in your Web site. Each configuration is assigned to a content folder or a content block and lets you specify how XML content appears in the editor, is validated, and is displayed in an output device.

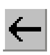
There are two ways to create an XML configuration.

- Using external XML files
- Using the WYSIWYG Data Designer

This section explains how to create and manage XML configurations using both methods.

The XML Configuration Toolbar

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

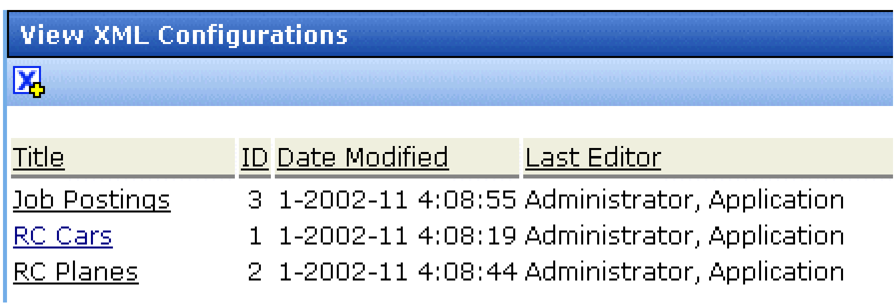
Button	Name	Description	More Information
	Add XML Configuration	Create a new XML configuration or create a new XML configuration based on the properties of an existing one.	”Adding a New XML Configuration” on page 129
	Back	Return to previous screen	
	Delete	Delete an XML configuration	”Deleting XML Configurations” on page 147

Button	Name	Description	More Information
	Edit	Edit an XML configuration created with external files	”Editing XML Configurations” on page 143
	Edit Data Design	Edit an XML configuration created with the Data Designer	”Editing Data Design Packages” on page 143
	Save	Save changes	
	Update	Save and update changes	
	View XSLT	Display the XSLT for an XML configuration	”Viewing Data Designer XSLTs” on page 146

Accessing XML Configurations

To access the XML Configuration section of the Workarea, follow these steps.

1. Access your Workarea, as described in ”Accessing the Workarea” on page 9.
2. In the folder tree on the left side of the Workarea, follow the path **Settings > Configuration > XML Configuration**.
3. The View XML Configurations screen is displayed.



From here, you can view, add, edit, and delete XML configurations.

- ”Managing XML” on page 126

Adding a New XML Configuration

When adding a new XML configuration, you have two options.

- Using the WYSIWYG Data Designer (recommended)
- Using external XML files (for example, XSLTs, schemas, etc.)

NOTE To create a new XML configuration by copying and editing an existing one, see "Creating XML Configurations Based on Existing Configurations" on page 145.

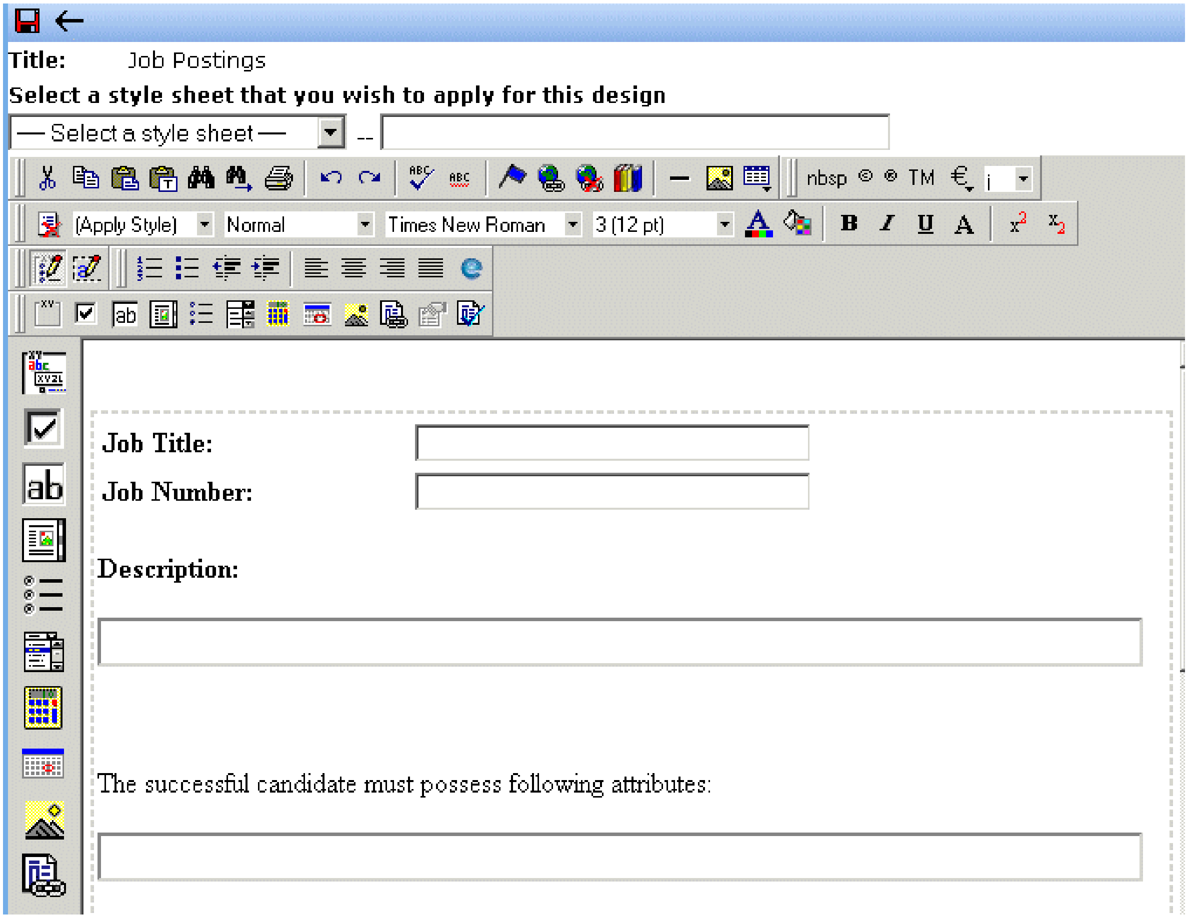
The following sections explain both methods.

Adding an XML Configuration Using the Data Designer

To add an XML configuration using the WYSIWYG Data Designer, follow these steps.

1. Access the XML Configurations screen, as described in "Accessing XML Configurations" on page 128.
2. Click the Add XML Configuration button ().
3. The Add XML Configuration screen is displayed.
4. Enter a **Title** for the XML configuration.
5. Click the Save button ().

6. The XML Configuration Data Designer screen appears.

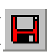


7. If desired, you may specify a style sheet for the XML configuration. Use the field on the right above the editor.

   To do so, either type the path and file name of the CSS file, or select an Ektron CMS300-registered style sheet from the drop down list.

8. Design your XSLT in the Data Designer.

   See "Using the Data Designer" on page 149 for information about creating XSLTs using the Data Designer.

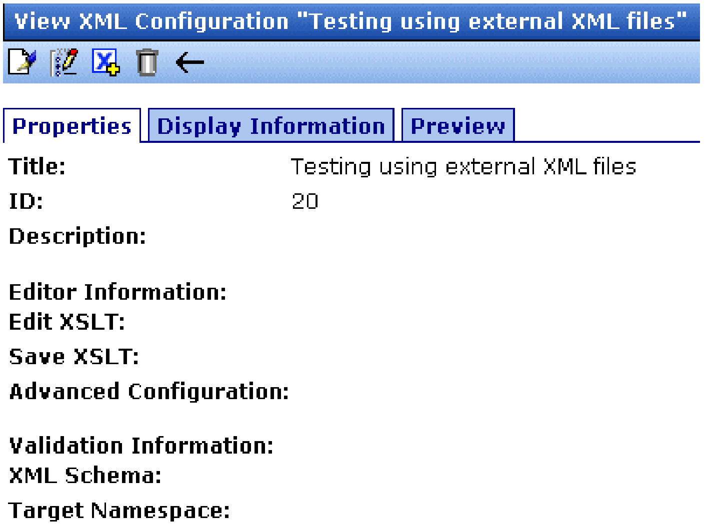
9. Click the Update button ().

You are ready to assign the XML configuration to a folder or content block. See "Assigning XML Configurations" on page 134 for more information.

Adding an XML Configuration Using External XML Files

To add an XML configuration using external XML files, follow these steps.

1. Access the XML Configurations screen, as described in "Accessing XML Configurations" on page 128.
2. Click the Add XML Configuration button ( ).
3. The Add XML Configuration screen is displayed.
4. Enter a **Title** for the XML configuration.
5. Click the Save button ( ).
6. The XML Configuration Data Designer screen is displayed.
7. Click the Back arrow ( ) to exit.
8. The View XML Configuration screen for the new XML configuration is displayed.



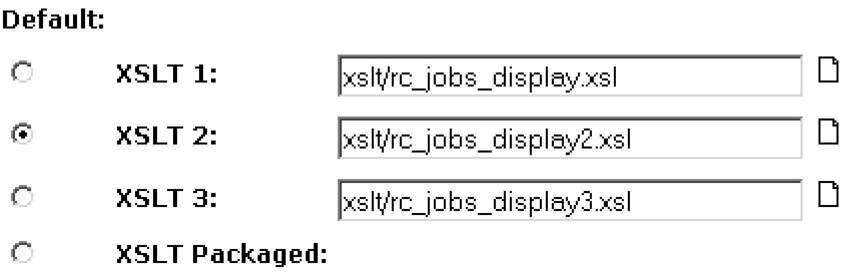
9. Click the Edit button ( ).
10. The Edit XML Configuration screen is displayed.
11. Enter the necessary information using the following table as a reference.

XML Configuration Fields

Section	Field	Description
Generic Information	Title	Name given to XML configuration.
	ID (display only)	ID number assigned when configuration is created.
	Description	Detailed description given to configuration by its creator or last editor.
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 an XML configuration 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.



13. Click the Save button ( ).

XML File Verification

A verification button ( ) appears to the right of some fields on the Add XML Configuration 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 XML Configurations

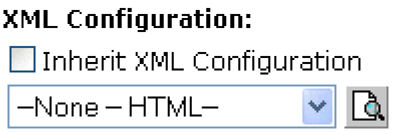
After you create an XML configuration, you can assign it to either a content block or a content folder. When assigned to a content folder, all content blocks in the folder use that configuration.

Where Can XML Configurations be Assigned?

An XML configuration can be assigned in three locations.

Location in Ektron CMS300	To assign an XML configuration to a	See Also
Edit Folder Properties screen	folder	”Folder Properties” on page 33
Add Subfolder screen	folder	”Adding Subfolders” on page 38
View Properties for Content screen	content block	”Content Properties” on page 60

Here is the **XML Configuration** field displayed in all locations.



In each location, the process of assigning an XML configuration is identical. An XML configuration can be inherited from the parent folder, or you can assign a different one at the folder level.

When assigning an XML configuration, you may choose one of the following options:

- ”Inheriting an XML Configuration” on page 134
- ”Assigning a Different XML Configuration” on page 135

If you assign no XML configuration, **Ektron CMS300** assumes the content is XHTML.

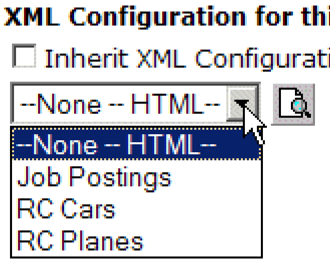
Inheriting an XML Configuration

Content blocks and folders can inherit XML configuration settings from their parent folders. To set inheritance, add a check to the **Inherit XML Configuration** check box.

Assigning a Different XML Configuration

To assign an XML configuration other than the one assigned to the parent folder, follow these steps.

1. Access the XML configuration setting form, as described in ”Where Can XML Configurations be Assigned?” on page 134.
2. If the **Inherit XML Configuration** box is checked, remove the check by clicking the box.
3. Open the drop-down list to display available XML configurations.



NOTE See ”Adding a New XML Configuration” on page 129 for more information about adding XML configurations.

4. Click the XML configuration you want to assign.

NOTE Choosing **None--HTML** indicates the content is strictly XHTML.

5. Click the Preview button ( ) to view the XML configuration.
6. The XML configuration appears.
7. Click ( ) to close the window.
8. The XML Configuration window closes, and you return to the Edit Properties window.
9. Click the Update button ( ).

The XML configuration is assigned to the content folder or block.

Assigning an XML Configuration to a Content Block

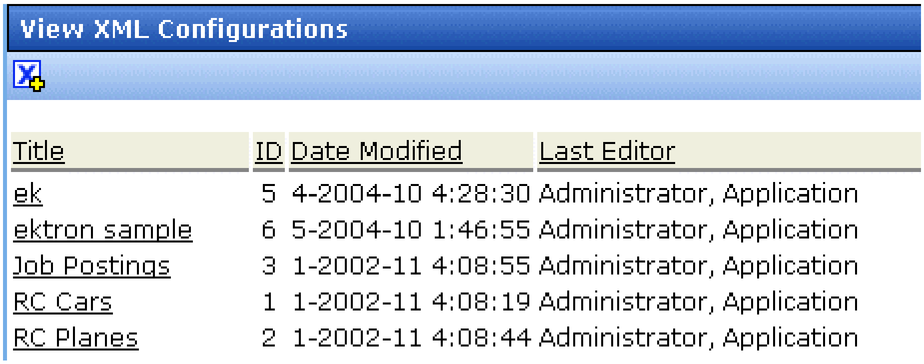
See ”Adding XML Content” on page 44

Viewing XML Configurations

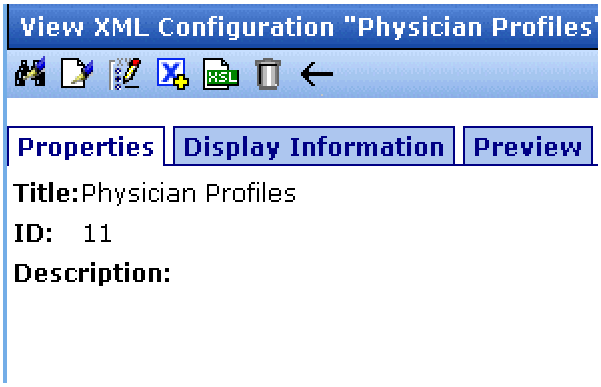
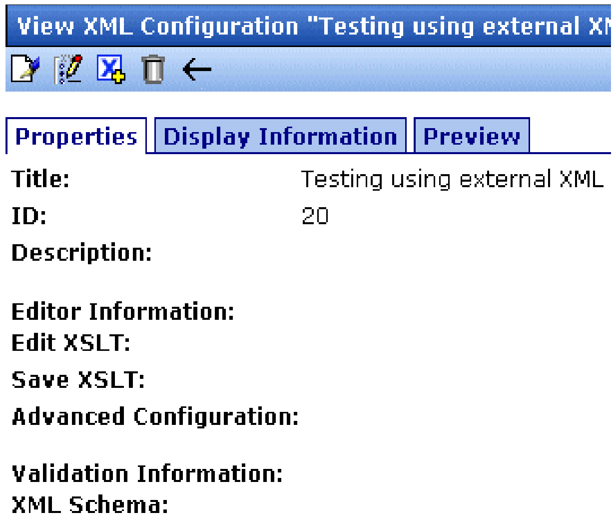
To view an XML configuration, follow these steps.

1. Access the View XML Configurations screen, as described in "Accessing XML Configurations" on page 128.
2. Click the configuration you want to view.

.



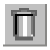
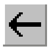
The View XML Configurations screen appears with a more detailed description of the configuration.

XML Configuration Created with...	
Data Designer	**External Files**
	

Each tab is explained below.

After viewing, you can perform the following actions on the XML configuration.

Button	Name	Description	More Information
	Edit	Edit an XML configuration	”Editing XML Configurations” on page 143
	Edit Data Design	Open the Data Designer	”Editing Data Design Packages” on page 143

Button	Name	Description	More Information
	Add XML Configuration	Create a new XML configuration or create a new XML configuration based on the properties of an existing one.	”Adding a New XML Configuration” on page 129
	View XSLT	Display the XSLT for an XML configuration	”Viewing Data Designer XSLTs” on page 146
	Delete	Delete an XML configuration	”Deleting XML Configurations” on page 147
	Back	Return to previous screen	
	View online help	View online help	”Accessing Online Help” on page 249

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<tr><th>Data Designer</th><th>External Files</th></tr>
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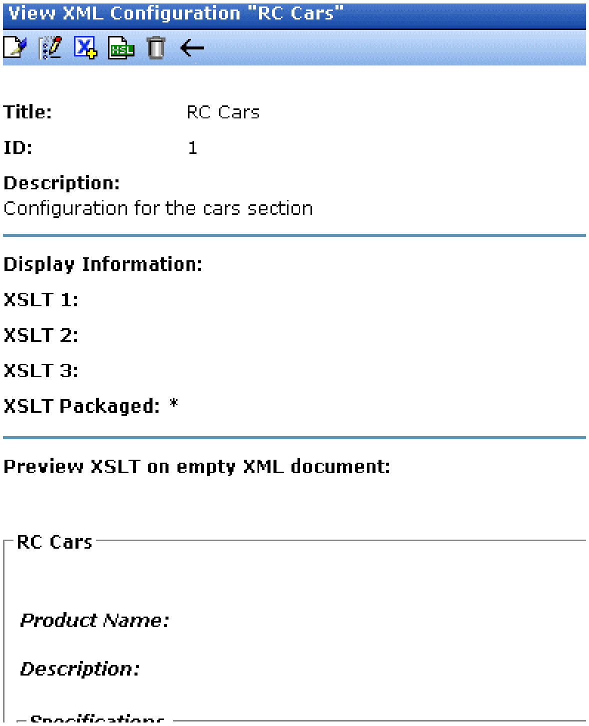
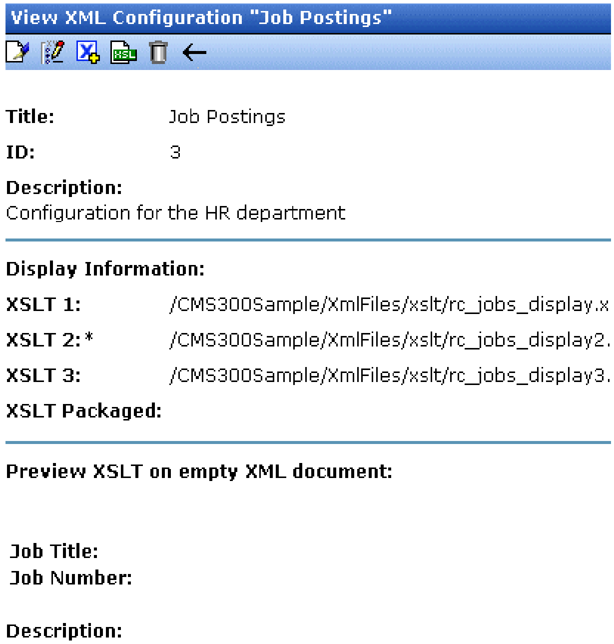


</td><td>


</td></tr>
</table>

<table>
<tr><th colspan="2">XML Configuration Created with...</th></tr>
<tr><th>Data Designer tabs</th><th>External files tabs</th></tr>
<tr><td>
• ”General Information” on page 139
• ”Data Design Package” on page 141
• ”Display Information” on page 142
</td><td>
• ”General Information” on page 139
• ”Editor Information” on page 140
• ”Validation Information” on page 141
• ”Display Information” on page 142
</td></tr>
</table>

General Information

Field	Description
Title	Name given to XML configuration.
ID	ID number assigned by Ektron CMS300 upon creation of the configuration.
Description	Detailed description of configuration given by creator or last editor.

If the XML configuration was created using external XML files (instead of the Data Designer), the following information also appears:

- ”Editor Information” on page 140
- ”Validation Information” on page 141

Editor Information

NOTE This section only appears if you do not use the Data Designer to create your XML configuration.

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. 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 XML configuration.

Content that is created and edited with Ektron CMS300 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 XML configuration will be assigned to.
Target Namespace	Specify the default namespace used for outgoing XML.

Data Design Package

The Data Design Package screen displays the XSLT applied to the editor when an XML content block is created. This is the XSLT that was created for the XML configuration.

Display Information

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 an XML configuration 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 XML configuration.

Editing XML Configurations

After creating an XML configuration, you can modify it when files defined in the configuration have changed.

Since there are two ways to create an XML configuration, there are two ways to edit one.

- ”Editing Data Design Packages” on page 143
- ”Editing an XML Configuration Created with External Files” on page 145

Editing Data Design Packages

After you create an XML configuration, you can modify it.

Before You Edit the Data Package!

Before editing an XML configuration 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.

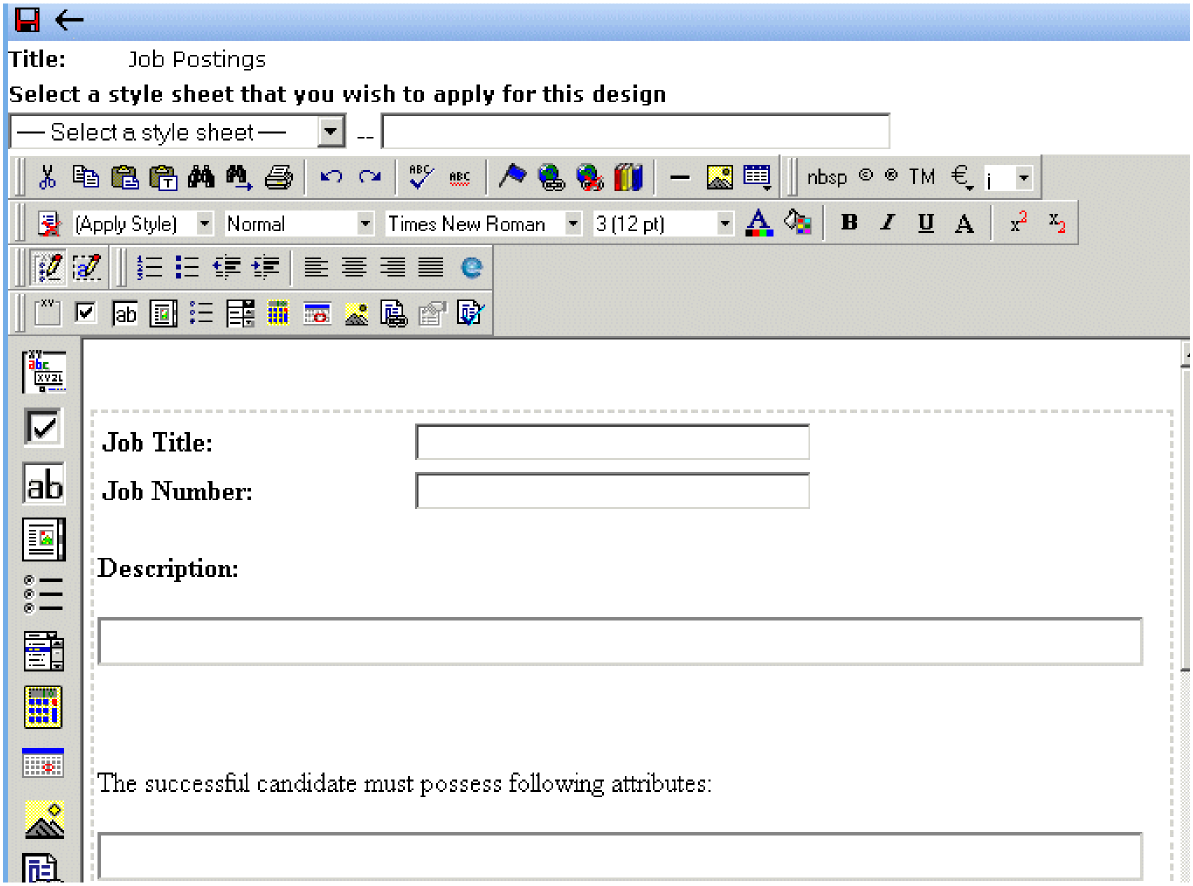
To ensure that information is not lost, use the Create New XML Configuration Based on Existing XML Configuration option on the view XML configuration screen. See ”Creating XML Configurations Based on Existing Configurations” on page 145 for more information.

Editing a Data Design Package

To edit a data design package, follow these steps.

1. Access the View XML Configurations screen, as described in ”Accessing XML Configurations” on page 128.

2. Click the XML configuration you want to edit.
3. The View XML Configuration 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.



6. Make the necessary changes to the Data Design package in the editor. See "Using the Data Designer" on page 149 for information about creating XSLTs using the Data Designer.
7. Click the Update button ( ).

Editing an XML Configuration Created with External Files

1. Access the View XML Configurations screen, as described in ”Accessing XML Configurations” on page 128.
2. Click the XML configuration you want to edit.
3. The View XML configuration screen is displayed.
4. Click the Edit button ( ).
5. The Edit XML Configuration screen is displayed.
6. Edit the necessary fields to update the XML configuration. See ”XML Configuration Fields” on page 132.
7. Click the Update button ( ).

Now, all content blocks and folders that use the XML configuration take their properties from the updated configuration.

See Also: ”XML File Verification” on page 133

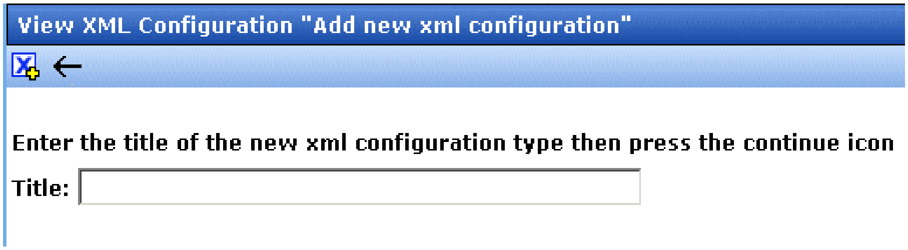
Creating XML Configurations Based on Existing Configurations

Whenever major changes must be made to an XML configuration, 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 XML configuration based on an existing one, follow these steps.

1. Access the View XML Configurations screen, as described in ”Accessing XML Configurations” on page 128.
2. Click the XML Configuration you want to view.
3. The View XML Configuration screen appears with a more detailed description of the configuration.
4. Click the Create New XML Configuration button ( ).

5. The Add XML Configuration screen is displayed.



6. Enter a **Title** for the new configuration.
7. Click the Add XML Configuration button ().
8. The View XML Configuration screen for the new XML configuration is displayed. From here, you can perform the necessary actions on the XML configuration.

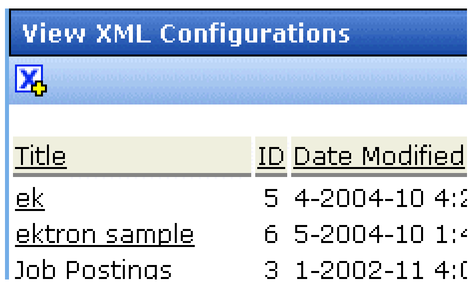
Viewing Data Designer XSLTs

When an XML configuration 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 an XML configuration, content is displayed using the default XSLT displayed in the View XSLT screen.

To view the XSLT for an XML configuration, follow these steps.

1. Access the View XML Configurations screen, as described in "Accessing XML Configurations" on page 128.
2. Click the XML configuration whose XSLT you want to view.



NOTE The XSLT only appears if the XML configuration was created using the Data Designer.

3. The View XML Configuration screen appears with a more detailed description of the configuration.

4. Click the View XSLT button ().

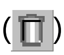
5. The View XSLT screen is displayed.


```
<?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="ye
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>
</td>
<td> <xsl:value-of select="/root/jobposting/job-title" />
</td>
```

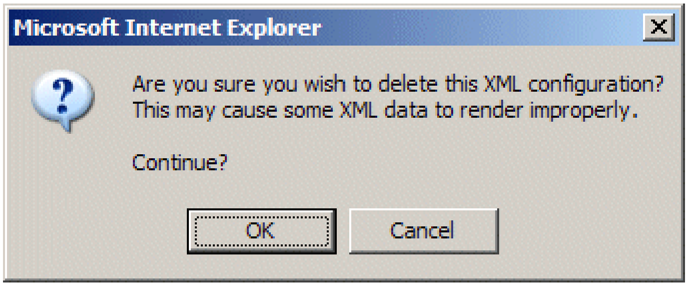
You can use this information to create your display XSLT.

Deleting XML Configurations

You can delete XML configurations that are no longer needed. To do so, follow these steps.

1. Access the View XML Configurations screen, as described in ”Accessing XML Configurations” on page 128.
2. Click the XML configuration you want to delete.
3. The View XML Configuration screen is displayed.
4. Click the Delete button ().

5. A confirmation message is displayed.



6. Click **OK**.

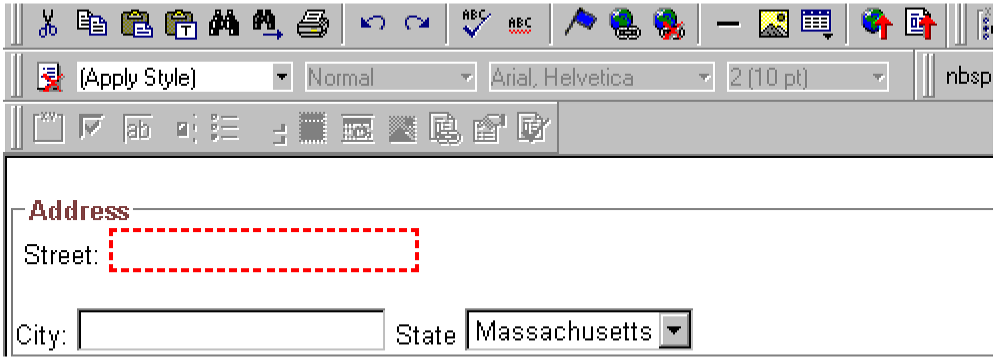
Using the Data Designer

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.



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 > eWebEditPro4 > Samples > ASP > Data Design > ASP Data Design Sample**.

This section explains how to use the Data Designer feature through the following topics.

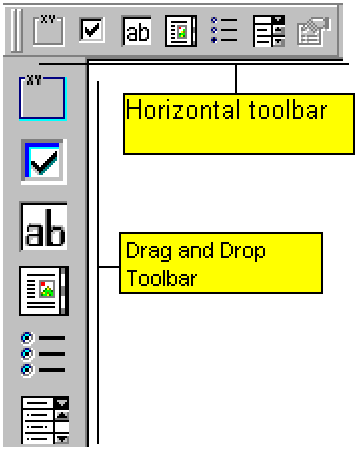
- "Differences in eWebEditPro+XML" on page 150
- "Design Mode vs. Data Entry Mode" on page 151
- "Designing a Screen" on page 152
- "Inserting a Field Type" on page 153
- "Sample Screen Design" on page 155
- "Data Designer Field Types" on page 161

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.

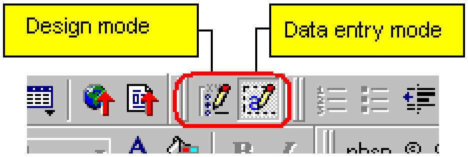


Both toolbars provide mostly the same buttons. The major difference between them is how you use the button to add a field to the screen. If you are using the *horizontal* toolbar, place the cursor where you want field, and click the toolbar button.

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 151.)



The Data Entry mode button lets you preview the screen being created.

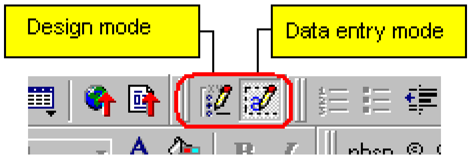
- several regular toolbar buttons are grayed out because they do not work with Data Designer

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.



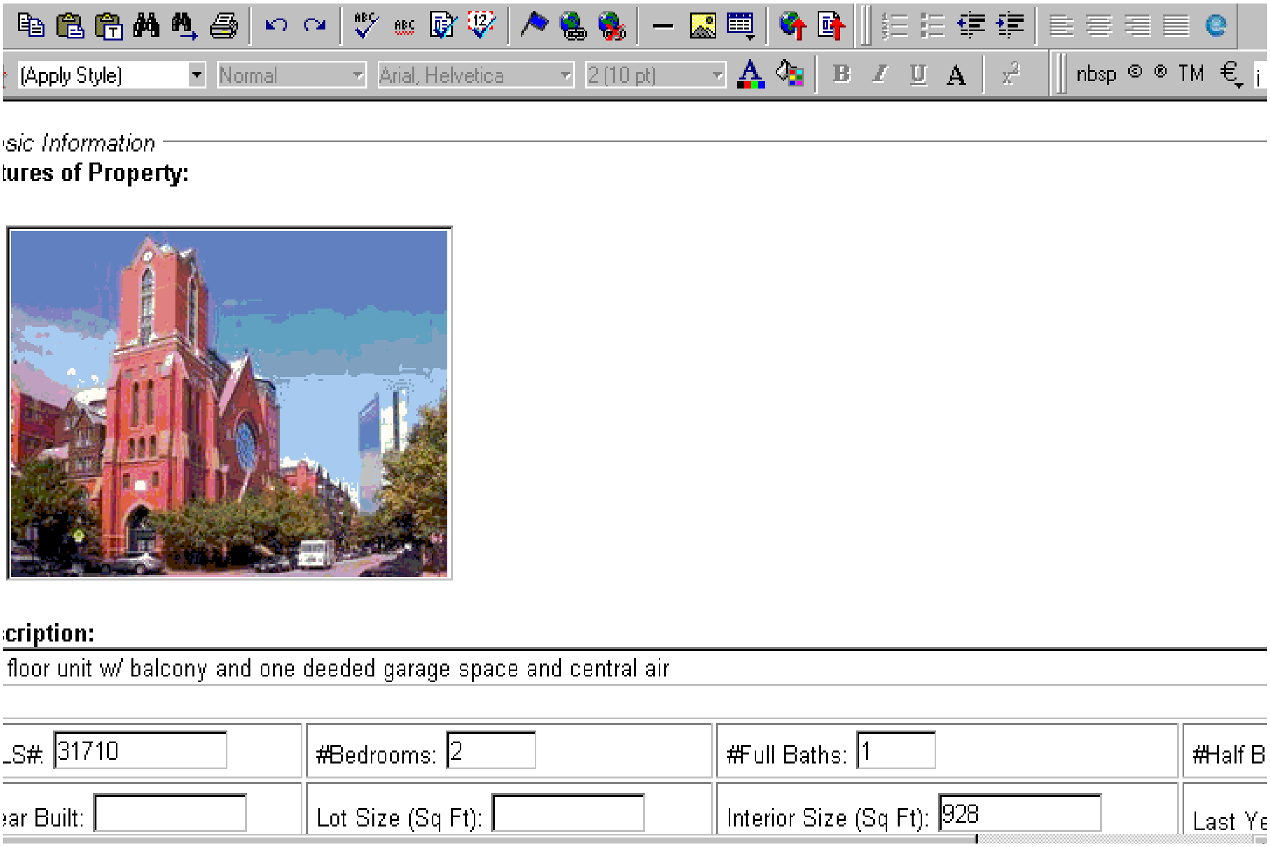
When you begin to create a data entry screen, you are in design mode. To test the screen as the user will see it, click the Data Entry button (). To switch back to Data Entry mode and modify the data entry screen, click the Data Designer button ().

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 153 explains the kind of field that each button represents.

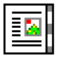
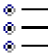
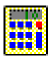
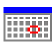
   You can also use **eWebEditPro+XML**'s rich formatting capabilities to design the screen. For example, you can format text, and use tables, images and hyperlinks to guide the user through the data entry process. Below is a sample screen created with the Data Designer.



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 161
Checkbox		User's response is either checked or unchecked	"Checkbox ()" on page 165

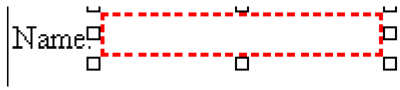
Field type	Icon	Description	For more information, see
Plain Text		Free text field; user cannot format text	”Plain Text()” on page 167
Rich Area		Free text field; user can format text using the editor	”Rich Area ()” on page 172
Choices		Several choices appear on screen. User checks appropriate boxes. All user choices are inserted as values within single XML tag.	”Choices ()” on page 174
List		Same as Choices except options appear in a drop-down box	”Select List ()” on page 178
Calculated		Performs calculations using other fields on the screen	”Calculated Field ()” on page 181
Calendar		Lets user insert a date by clicking a calendar	”Calendar Field ()” on page 191
Image Only		Lets user insert an image	”Image Only Field ()” on page 194
File Link		Lets user insert a link to a file, such as a PDF document	”File Link Field ()” on page 196
Field Properties		Lets you change the properties of any field. Select the field then click this button. 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.	

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.

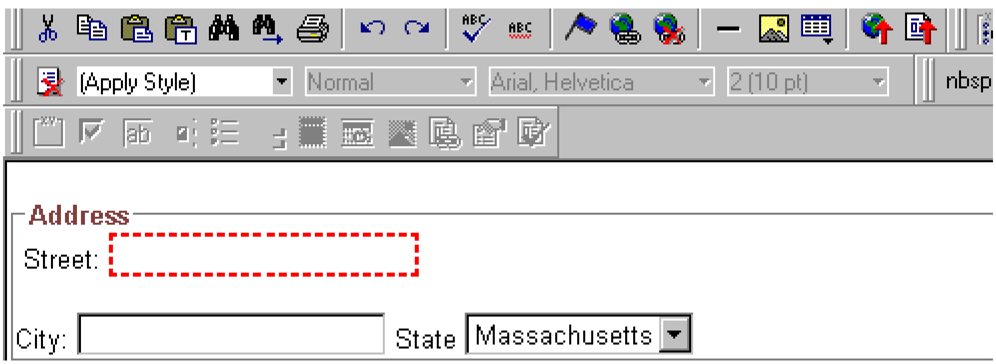


4. Click the cut icon ( ) to remove the field.

Usually, the field label is not deleted when you delete a field. To delete the label, use standard **eWebEditPro+XML** editing buttons.

Sample Screen Design

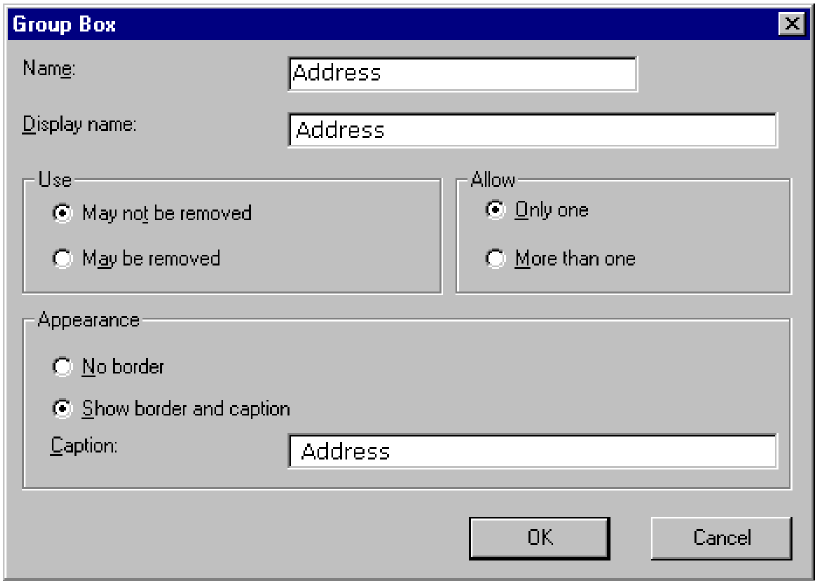
This section provides a brief overview of designing a screen, so that you can learn how the pieces fit together. Let's assume you want the screen to look like this.



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.

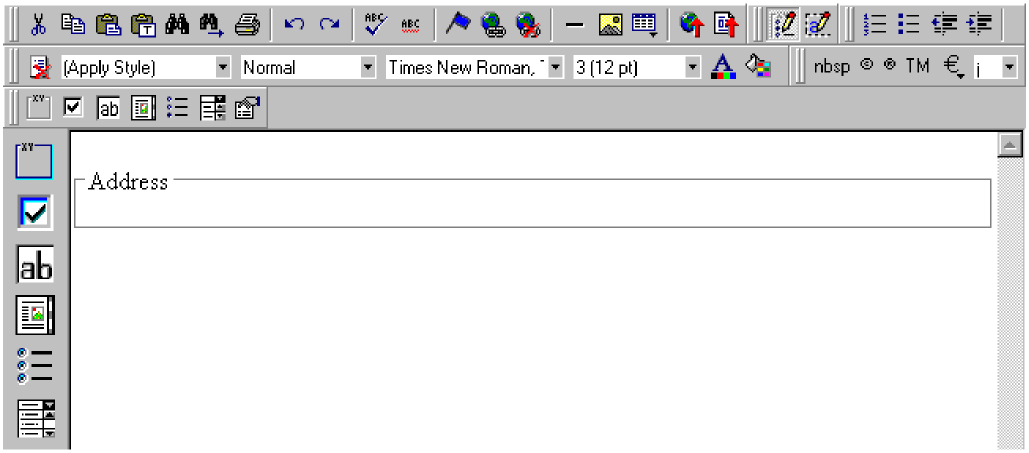
To create such a screen, follow these steps.

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.

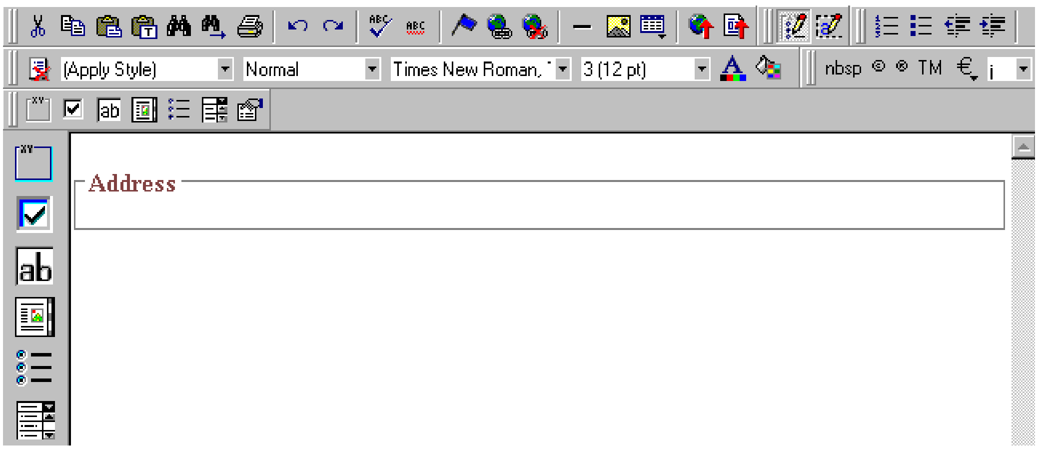


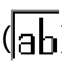
NOTE Later in the section, documentation is supplied for each field on the dialog box. Since this section is providing an overview, it does not delve into those details.

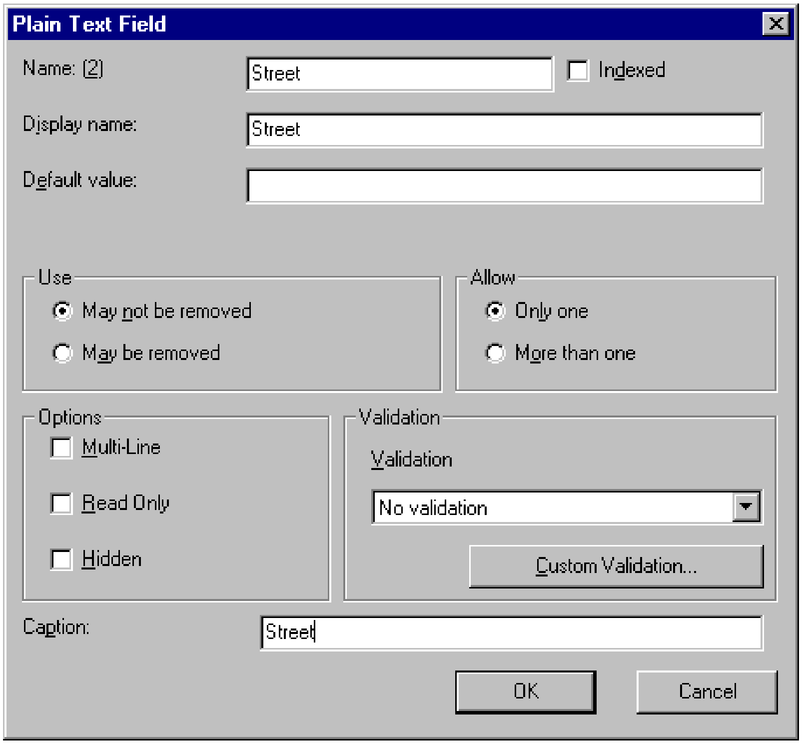
At this point, the screen looks like this.



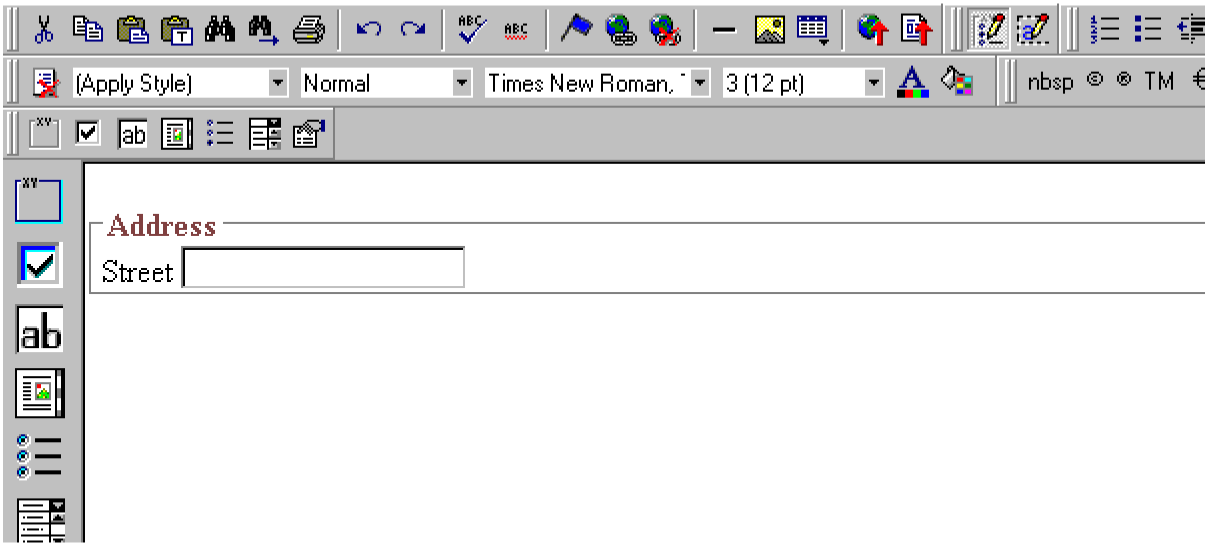
3. Select Address then apply bold and the custom color shown above. Now the screen looks like this.



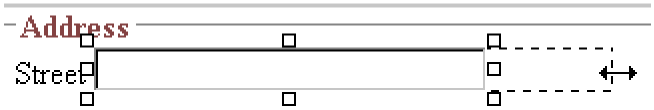
4. The next field, street, should let the user enter text. So, drag the plain text field icon () into the space below **Address**. Then, complete the dialog as shown below.



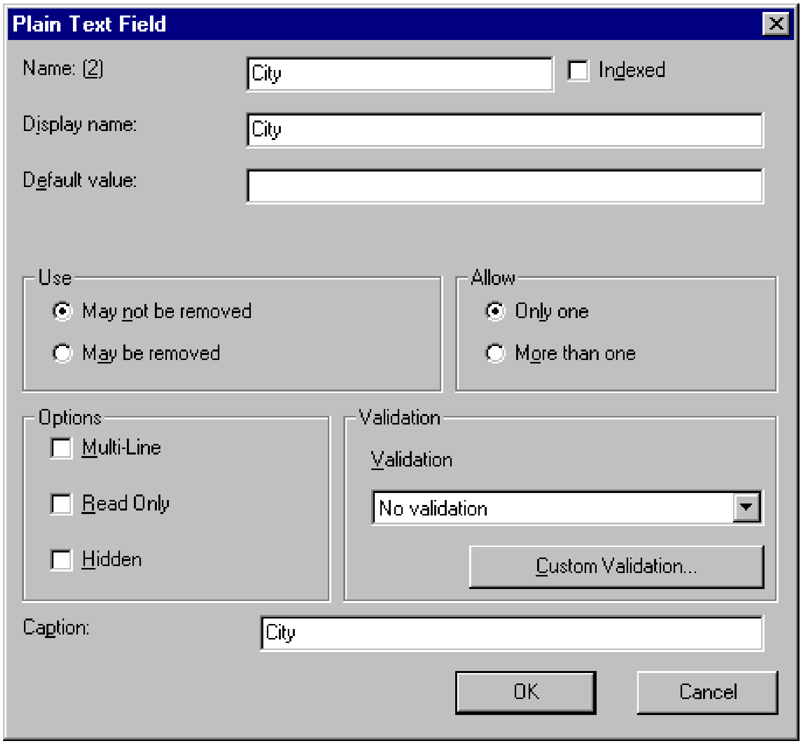
Now, the screen looks like this.



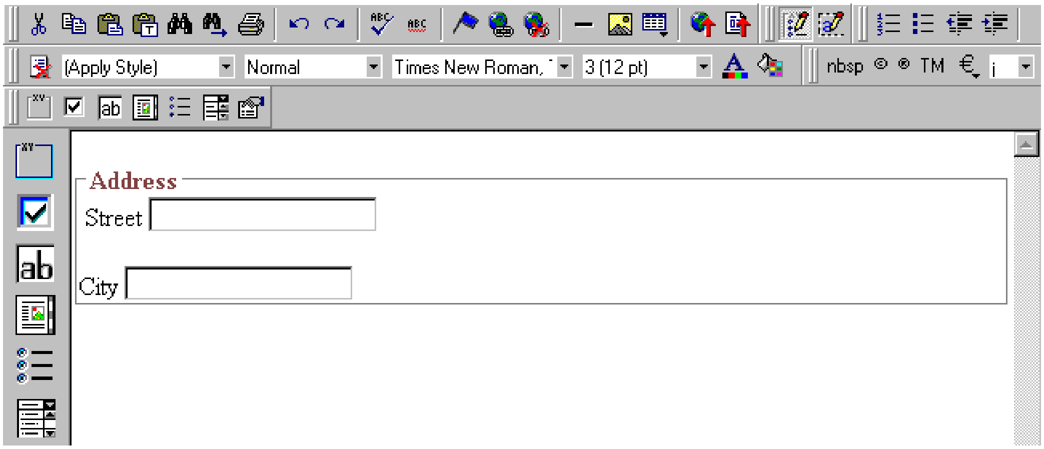
Note that the **Street** field is not wide enough. To widen it, click the field, move the cursor until you see a two-sided arrow, and drag the arrow to the right.



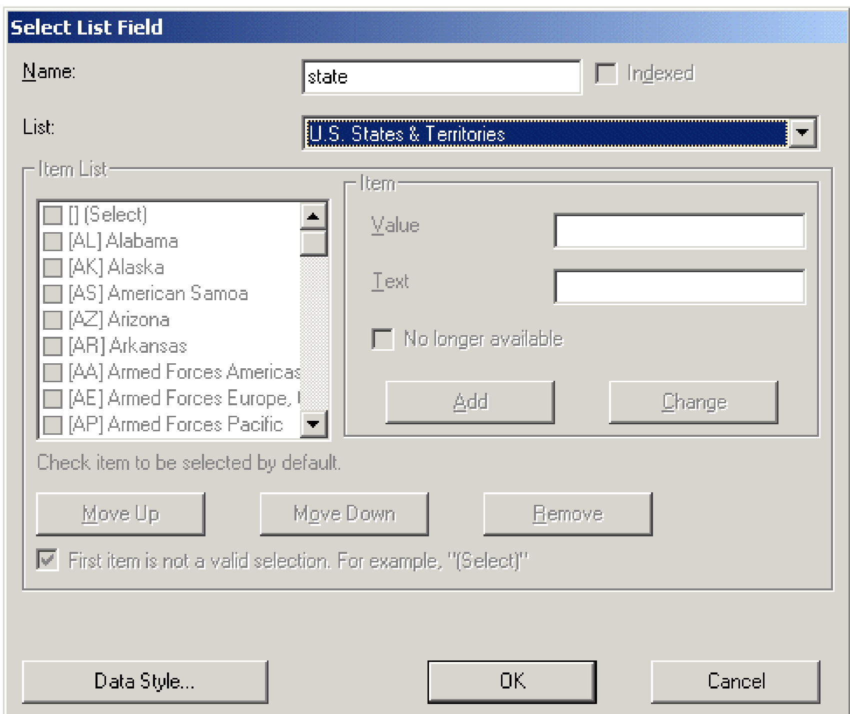
5. The next field, **City**, should also let the user enter text. Assume that you want **City** to appear in the line below **Street**. To make room for **City**, move the cursor to the end of the **Street** field and press <Enter> to create a new line. Next, drag the plain text field icon () into the line below **Street**. Then, complete the dialog as shown below.



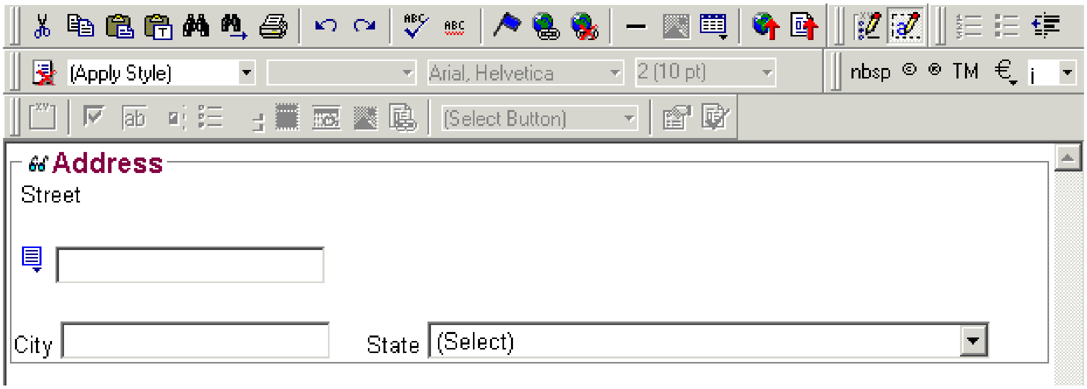
Now, the screen looks like this.



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.



Now, the screen looks like this.



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 should 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)

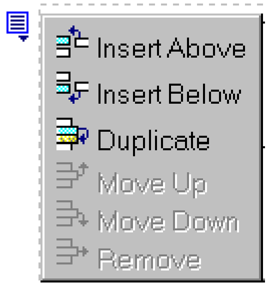
or

- place the cursor inside the box then select a field type button (if you are using the horizontal toolbar)

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.

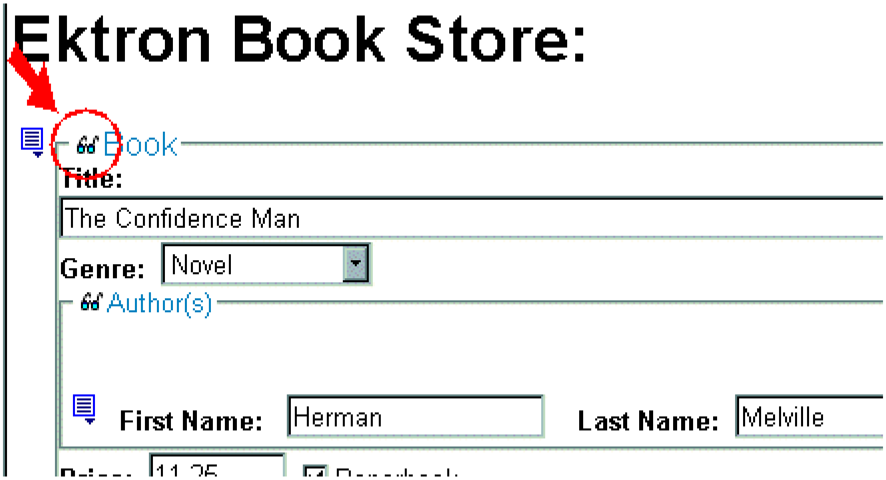
For example, if a screen collects several fields of information about each telephone call, the user could simply click the **Insert Below** button to insert a new group of fields, ready to collect information about the next call.



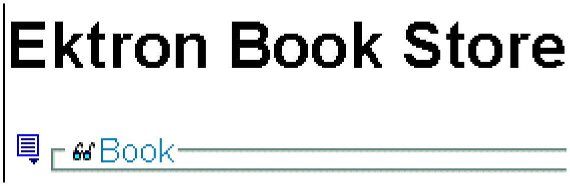
Another advantage of grouping fields is that you can suppress a group of irrelevant fields. For example, if a screen includes two groups of fields that collect information about hardcover and paperback books, and you are adding information about a hardcover book, you can collapse the paperback book questions because they are not relevant to your current task.

Use the eyeglass icon to expand or collapse the display of fields within a group.

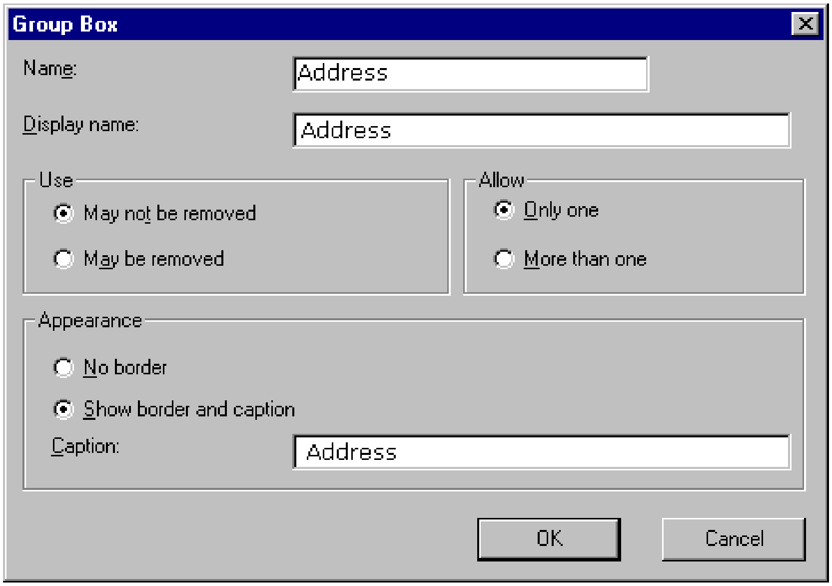
Expanded Group Field with glasses icon highlighted



Collapsed Group Field



Dialog Box



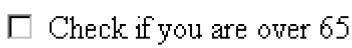
Fields on the Group Box Dialog

Field	Description
Name	Enter the name of this field. 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.
Display Name	Enter the text that appears when a user hovers the cursor over this field.
Use	See ”The Use Field” on page 199
Allow	See ”The Allow Field” on page 199

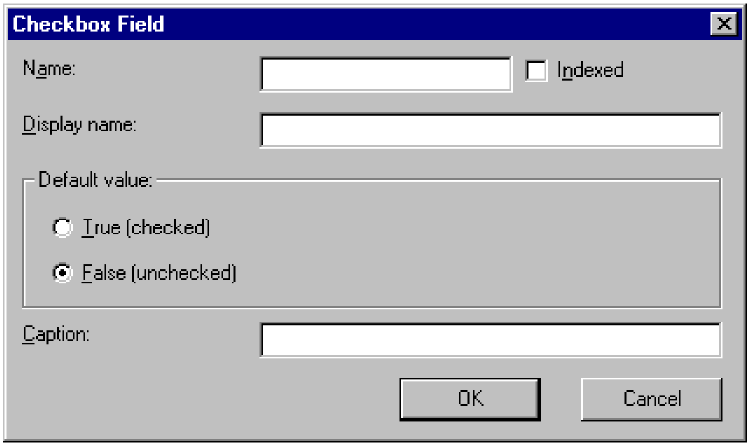
Field	**Description**
Appearance	Click **Show border and caption** if you want to surround the fields in this group with a box. You can also create a caption to appear in the top line of the box. Click **No border** if you do not want to surround the fields in this group with a box.
Caption	If desired, enter text to describe this group of fields on the data entry screen. For example  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 the Caption text within the editor.

Checkbox ()

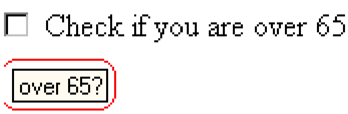
A Checkbox field is only one character wide and accepts one of two possible values: checked or unchecked. For example



Dialog Box



Fields on the Checkbox Dialog

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>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 164</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 not appear, depending on how your administrator set up your system.</td></tr>
<tr><td>Display name</td><td>Enter text that appears when a user hovers the cursor over this field (circled in red below).
</td></tr>
</table>

Field	Description
Default value	If you want this field to be checked when the screen first appears, click **True**. Otherwise, click **False**.
Caption	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, 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 Check Box 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.

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

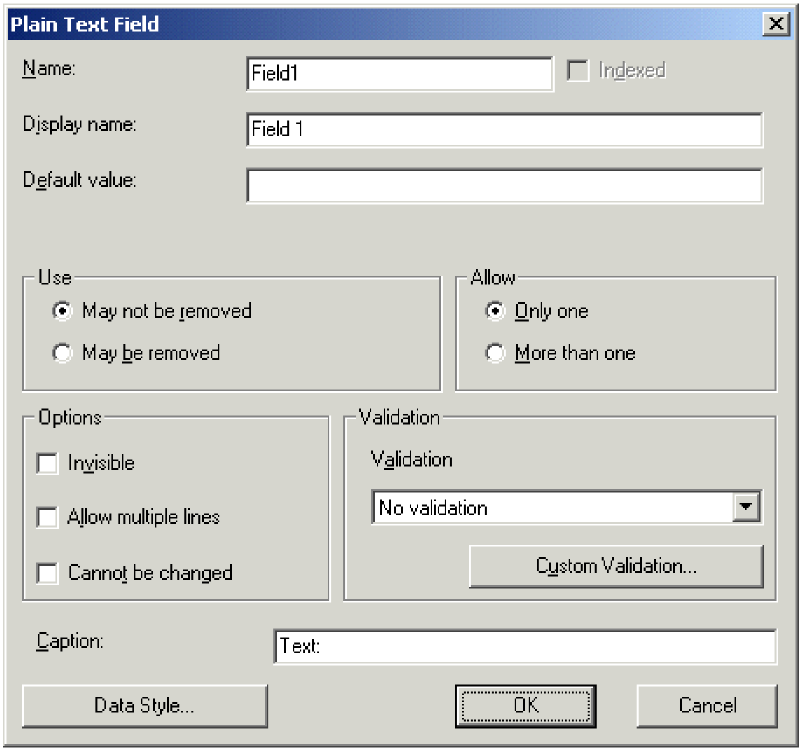
The following capabilities are available with a plain text field but not a rich area field.

- You can adjust the field’s width by dragging it. See ”Resizing a Plain Text Field” on page 172.
- 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



Fields on the Plain Text Dialog

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Name</td><td>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 164</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 not appear, depending on how your administrator set up your system.</td></tr>
<tr><td>Display name</td><td>Enter the text that appears when a user hovers the cursor over this field.</td></tr>
<tr><td>Default Value</td><td>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.</td></tr>
<tr><td>Use</td><td>See ”The Use Field” on page 199</td></tr>
<tr><td>Allow</td><td>See ”The Allow Field” on page 199</td></tr>
</table>

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. 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 user instructions for completing the screen.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Validation</td><td>
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 (,).

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.

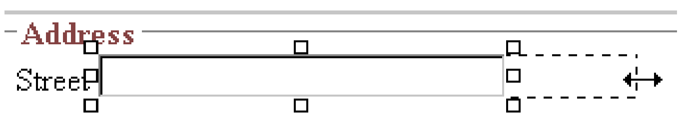
For more information, see ”Custom Validation” on page 202.
If you assign to this field any value other than No validation, the field is initially surrounded by red dashes in Data Entry mode. If the user’s response does not meet the validation criterion, the field remains surrounded by red dashes. The system administrator determines whether or not the user can save an invalid document.
</td></tr>
</table>

Field	Description
Caption	Enter text to describe this field on the data entry screen. It appears to the left of the field. After you insert this field, 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 Plain Text 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 200

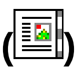
Resizing a Plain Text Field

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 field width as desired.

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 167

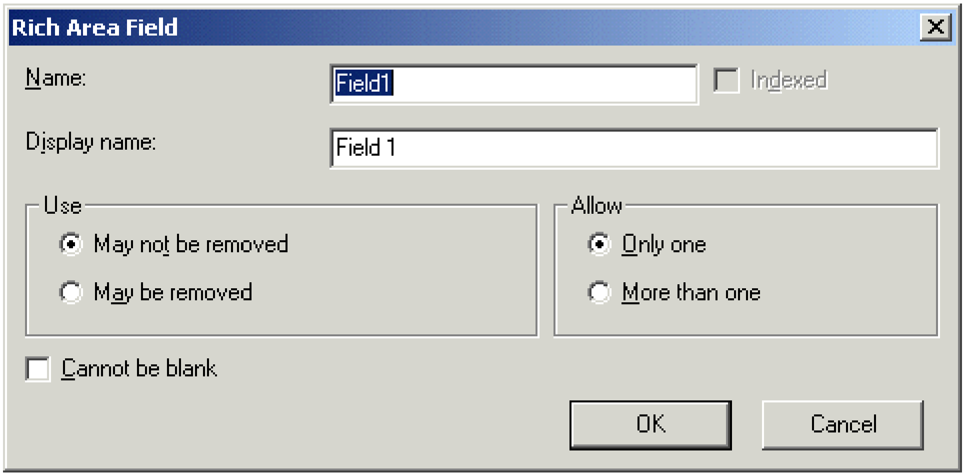
TIP! Unlike many other fields, the Rich Area dialog box does not prompt for a field caption. You can still enter text describing the field on the editor screen before or after you insert a Rich Area field.

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



Fields on the Rich Area Dialog

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>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 164</td></tr>
</table>

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 set up your system.
Display name	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 199
Allow	See "The Allow Field" on page 199
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 choices. For example, you could 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

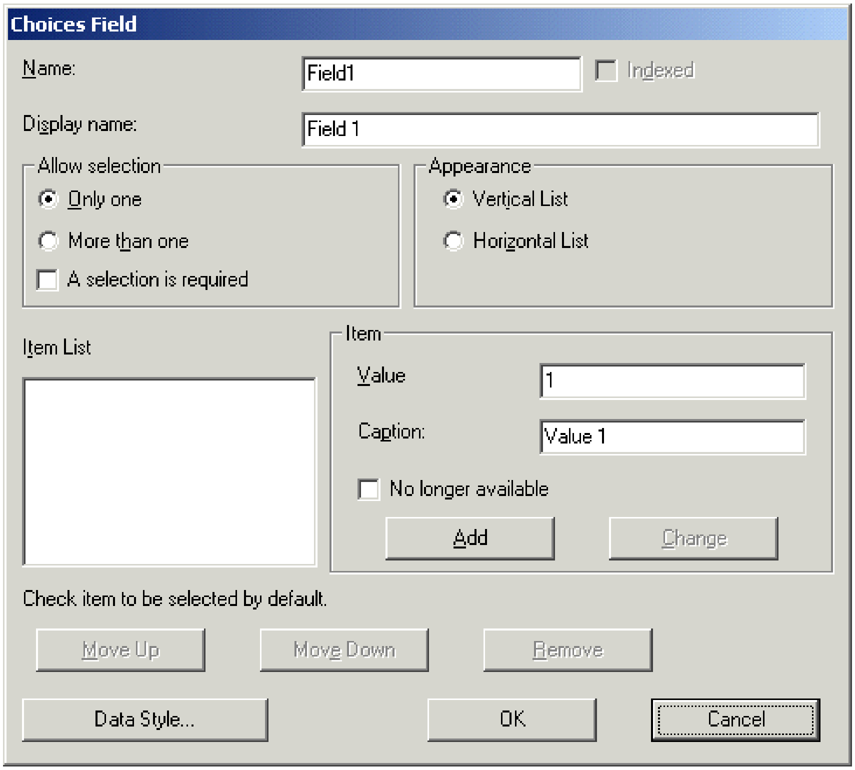
The following capabilities are available with a Choices field but not a Select List field.

- 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 must click the arrow to display all items and select one.

Dialog Box



Fields on the Choices Dialog

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Name</td><td>Enter the name of the field.

Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]\|`~) into this field.

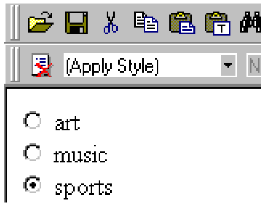
See Also: "The Name Field's Default Value" on page 164</td></tr>
<tr><td>Indexed</td><td>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.

The Indexed field may or may not appear, depending on how your administrator set up your system.</td></tr>
<tr><td>Display name</td><td>Enter the text that appears when a user hovers the cursor over this choice list.</td></tr>
<tr><td>Allow selection</td><td>Click More than one to allow the data entry user to 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 could only select one choice.

A selection is required - Check this box if the user must select at least one item in the list.</td></tr>
</table>

Field	Description
Appearance	Click **Vertical List** to arrange the choices vertically.  Click **Horizontal List** to arrange the choices horizontally. 
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 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. Note that if **Only One** is selected under **Allow selection** (above), only one item can be selected.
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.

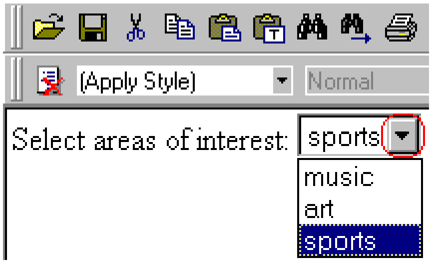
Field	Description
Caption	Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use **eWebEditPro+XML**'s formatting capabilities to modify its size, font, color, and other attributes. Note: The Caption field only appears on this dialog when you create the Choices 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.
No longer available	See "No longer available" on page 180
Data Style	See "The Data Style Field" on page 200

Select List ()

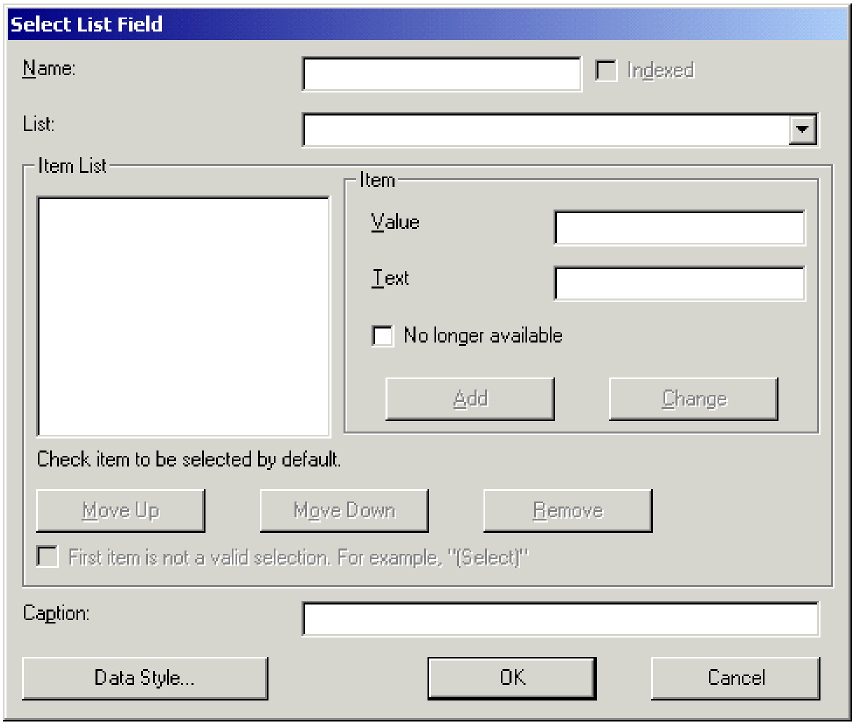
A Select List field is similar to a Choices field. The biggest difference is that the responses appear in a drop-down box instead of appearing separately. To see the choices, click the down arrow on the right side of the box (circled below).

See Also: "Choices Field vs. Select List Field" on page 174

For example:



Dialog Box

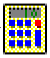


Fields on the Select List Field Dialog

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 164
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.
List	

Field	Description
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.
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 item. If checked, the only appears in data entry mode *if* a document already contained the item's 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.
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 200

Calculated Field ()

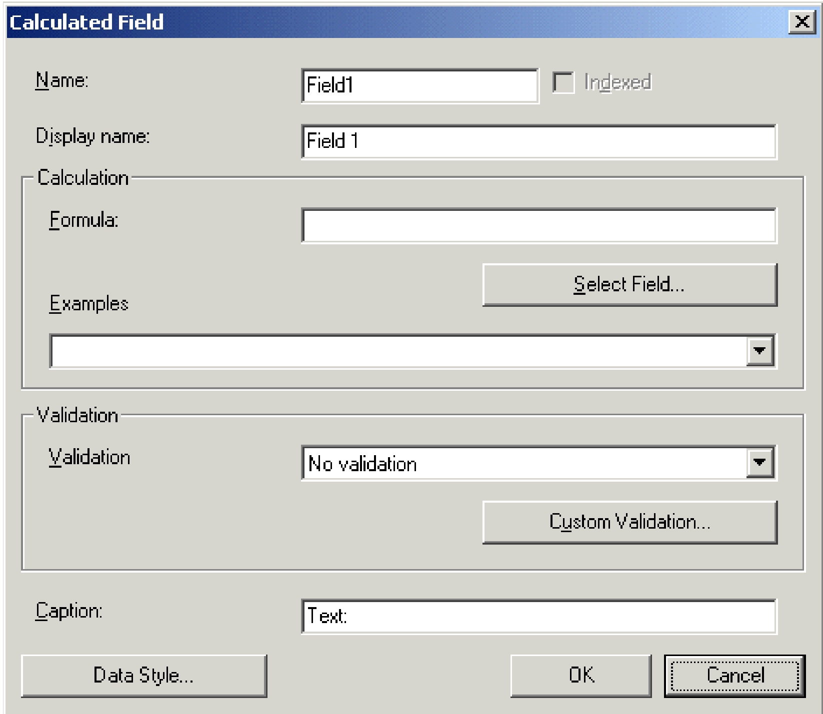
Use a calculated field to perform a calculation based on values in other fields. For example, if your screen collects mortgage information, you could create one field to collect the mortgage and interest payment and another to collect taxes and insurance. The calculated field could sum those two numbers 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



Fields on the Calculated Field Dialog

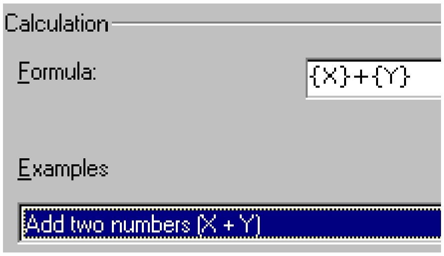
Field	Description
Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field. *See Also:* "The Name Field's Default Value" on page 164
Indexed	Check if you want to index this field. For more information, see "Indexing 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.
Display name	Enter the text that appears when a user hovers the cursor over this field.

Field	Description
Calculation	Use this area of the screen to define the calculation that this field will perform.
Formula	Enter the calculation that this field will perform. *See Also:* ”Using the Formula Field” on page 184
Select Field	Click this button to select a field to reference in the calculation. For more information, see ”Using the Formula Field” on page 184.
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. 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 186
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 • **Custom -** You can create custom validation. For more information, see ”Custom Validation” on page 202. 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.

Field	Description
Caption	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. Note: The Caption field only appears on this dialog when you create the Calculated 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 200

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 on **Examples Add two numbers (X+Y)**, **{X}+{Y}** appears in this field.



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.

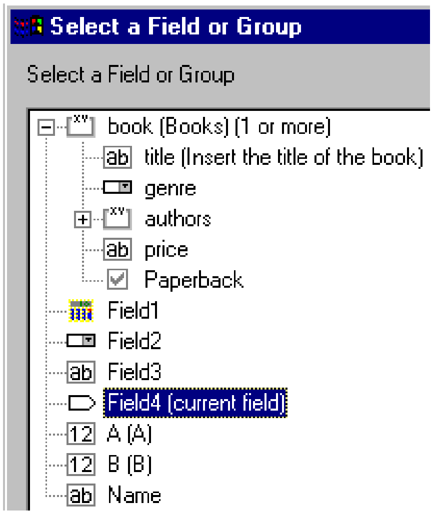
If a calculated field tries to perform a numerical calculation with a value that is blank or contains letters, `NaN` appears in the field. (`NaN` stands for "not a number.")

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.



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} <= {Y} ) + {Y} * number( {X} > {Y})`, you only need to replace the first occurrence it - **eWebEditPro+XML** will replace the 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).

Example Field Text	Example Field Formula	Description
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} > 0)*2-1)	The number regardless of the sign (negative or positive).
Minimum of two numbers	{X} * number({X} <= {Y}) + {Y} * number({X} > {Y})	The smaller of two field values.
Maximum of two numbers	{X} * number({X} >= {Y}) + {Y} * number({X} < {Y})	The larger of two field values.
Zero if subtraction is negative	({X} - {Y}) * number(({X} - {Y}) > 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
Round a decimal number	round({X})	Rounds the number to the nearest integer. For example, `round(3.14)`. The result is 3.

Example Field Text	Example Field Formula	Description
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

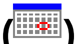
Total a list of numeric values	sum({X}[text()])	Total all values in a single repeating field. Here's an example.
		Plain Text Field properties
		Name: Miles
		Allow: more than one
		Validation: non-negative whole number
		XML Data
		`<root>`
		`  <Miles>89</Miles>`
		`  <Miles>12</Miles>`
		`  <Miles>23</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

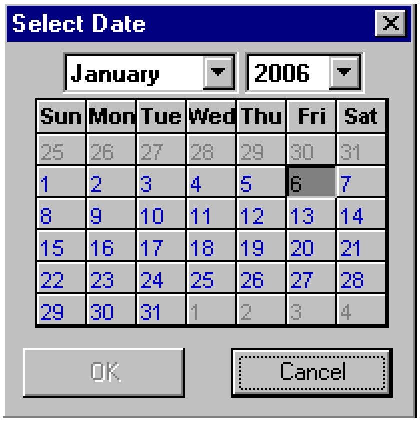
Average a list of numeric values	format-number(sum({X}[text()]) div count({X}),'0.###')	Calculate the average of all values in a single repeating field.
		To continue the example from the **Total a list of numeric values field** (above):
		Plain Text Field properties
		Name: Miles
		Allow: more than 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} ,'ABCDEFGHIJKLMNOPQRST UVWXYZ','abcdefghijklmnopqrs tuvwxyz')	Replace all uppercase characters with the lowercase version of that character
Uppercase text	translate({X} ,'abcdefghijklmnopqrstuvwxyz',' ABCDEFGHIJKLMNOPQRSTU VWXYZ')	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 ()

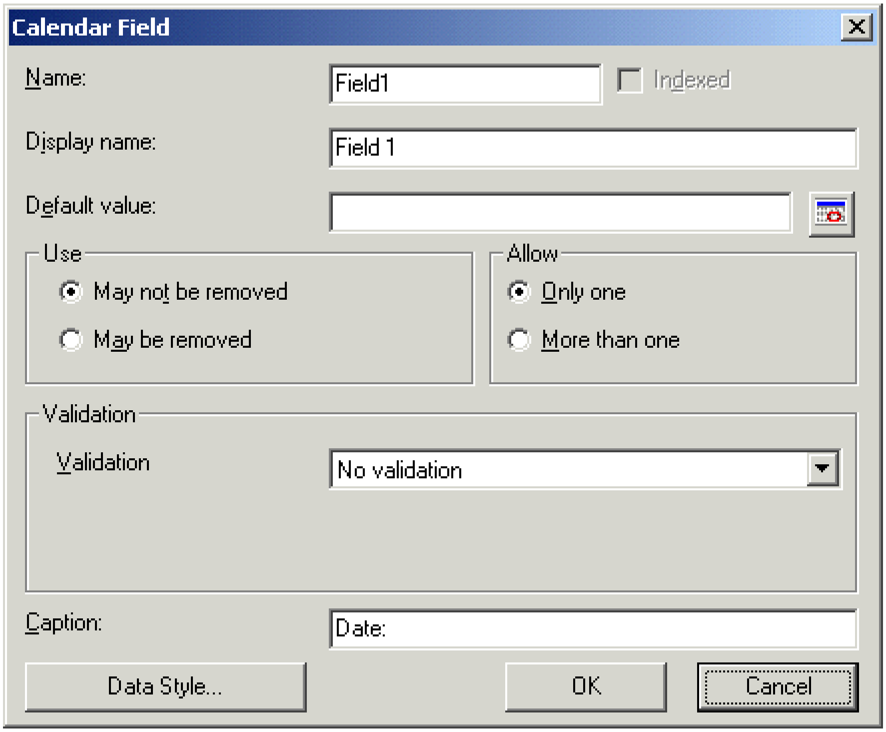
Insert a calendar field when you want the end user to enter a date. The user must click a date from an online, interactive calendar.



Because users cannot enter digits, a standard date format is ensured.

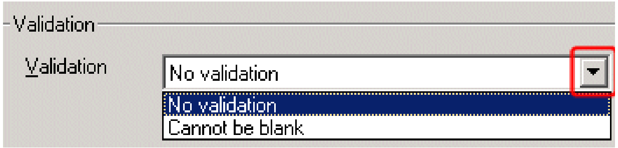
The date is stored as a standard XML date (in the format yyyy-mm-dd), and localized to the computer of the user viewing it.

Dialog Box



Fields on the Calendar 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 164

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.
Display name	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 199
Allow	See "The Allow Field" on page 199
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**. 

Field	Description
Caption	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. Note: The Caption field only appears on this dialog when you create the Calendar 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 200

Image Only Field ()

Use an ImageOnly 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.

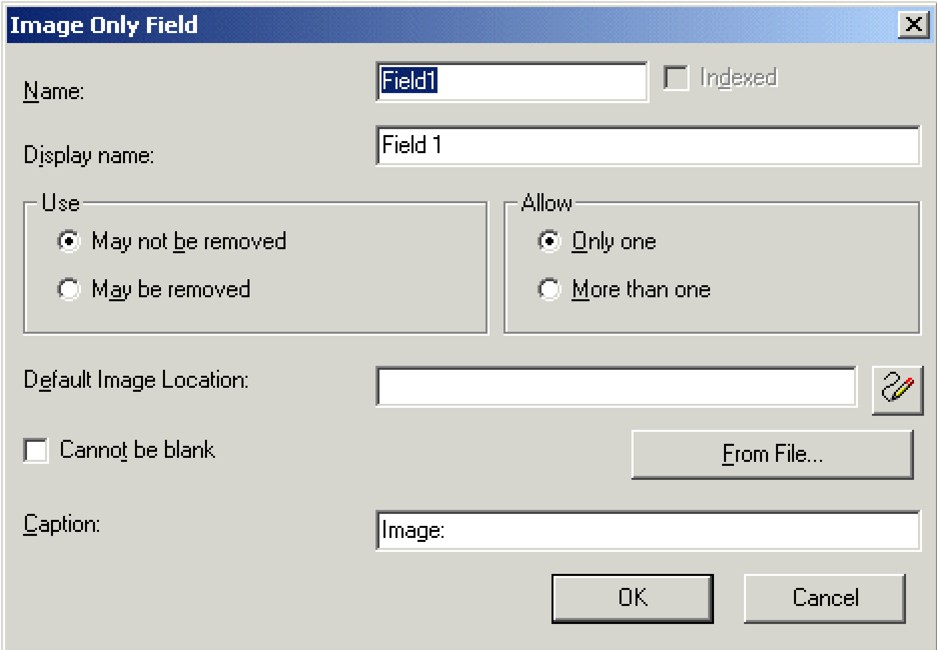
To let the user insert any file, such as a Microsoft Word document, use a File Link field. *See Also:* "File Link Field ()" on page 196

Using a 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: .

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



Fields on the Image Only 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 164
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.
Display name	Enter the text that appears when a user hovers the cursor over this field.

Field	Description
Use	See "The Use Field" on page 199
Allow	See "The Allow Field" on page 199
Default Image Location	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>
Cannot be blank	If you want to require the user completing this field to enter a response, click inside this check box.
Caption	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.

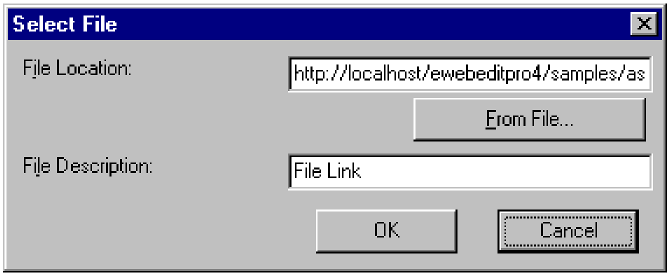
File Link Field ()

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 194)

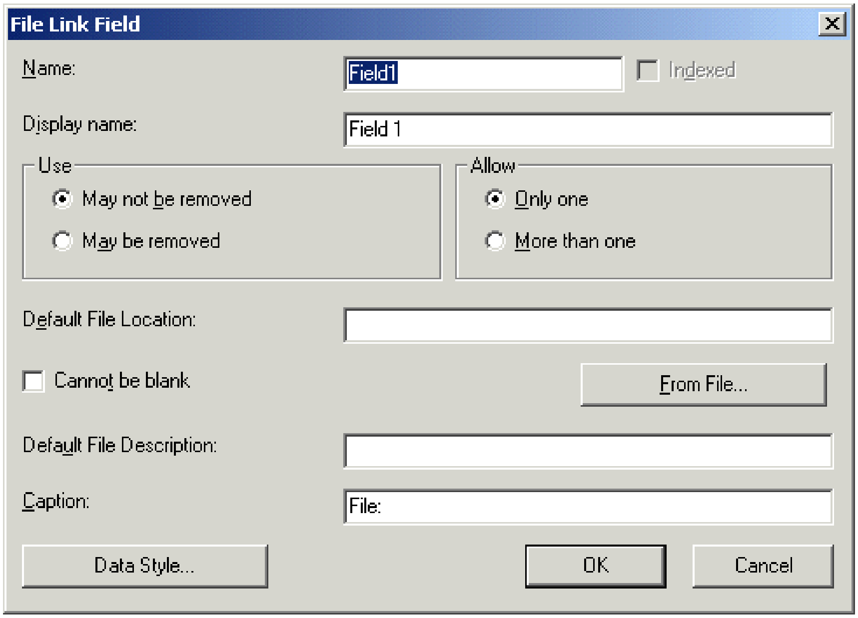
Using a File Link Field in Data Entry Mode

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 and a caption for it.

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



Fields on the File Link 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 164

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.
Display name	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 199
Allow	See "The Allow Field" on page 199

Default File 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 **From File** button and navigate to 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 inside this check box.
Default File Description	If desired, enter text that the user will be able to click on to access the linked file.
Caption	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. Note: The Caption field only appears on this dialog when you create the File Link 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 200

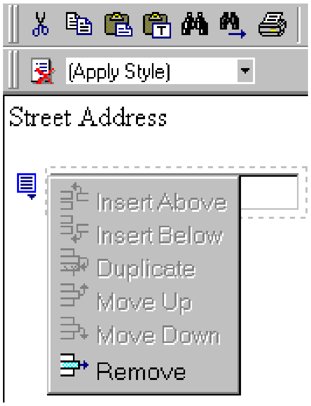
Fields that Appear on Several Dialogs

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.

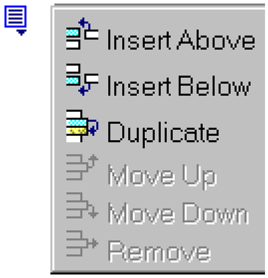
NOTE The menu icon ( ) can also indicate that the user can add instances of a field (see the Allow field, below). So, if a field is required, the icon could appear but omit a **Remove** option.

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.

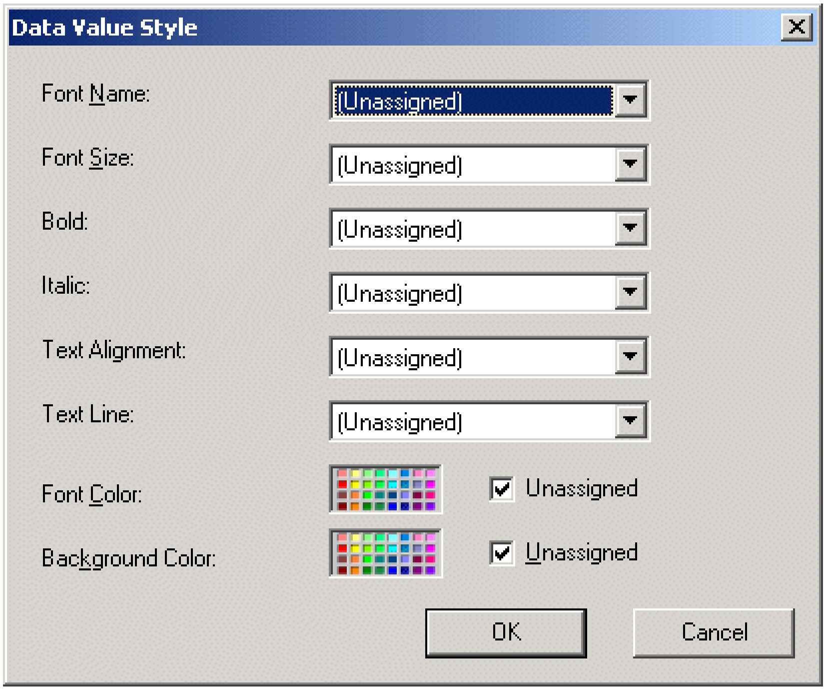


If the user entering data clicks , a menu appears (shown above), which lets the user add instances of the field to the screen.

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.

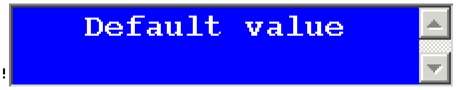


Use the dialog to assign the following formatting attributes to a user response field.

- 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

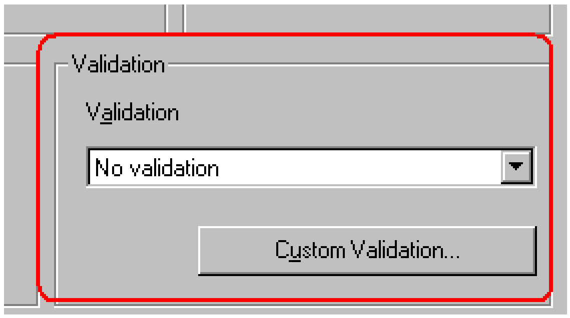
NOTE The configuration data controls a command's appearance on the toolbar and on the Data Style dialog. For example, if `<button command="cmdfontname" />` is removed from configdatadesign.xml, it disappears from the toolbar and the Data Style dialog.

Below is an example of a response field whose font, size, alignment, background, and foreground colors were modified via this dialog.



Custom Validation

The Plain Text and Calculation field dialogs feature a validation section (illustrated below).



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.

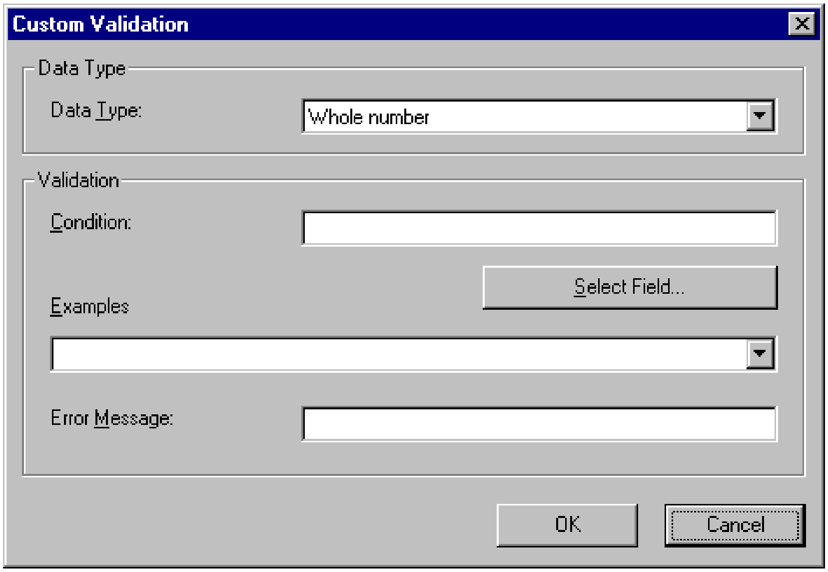
- The field value has one of the following relationships with another field, a number, or an expression - the default expressions are
  - between two values (either another field or a number that you specify)
  - less than

- equal to
- not equal to
- maximum length (usually for text responses)

NOTE Your system administrator may customize the choices.

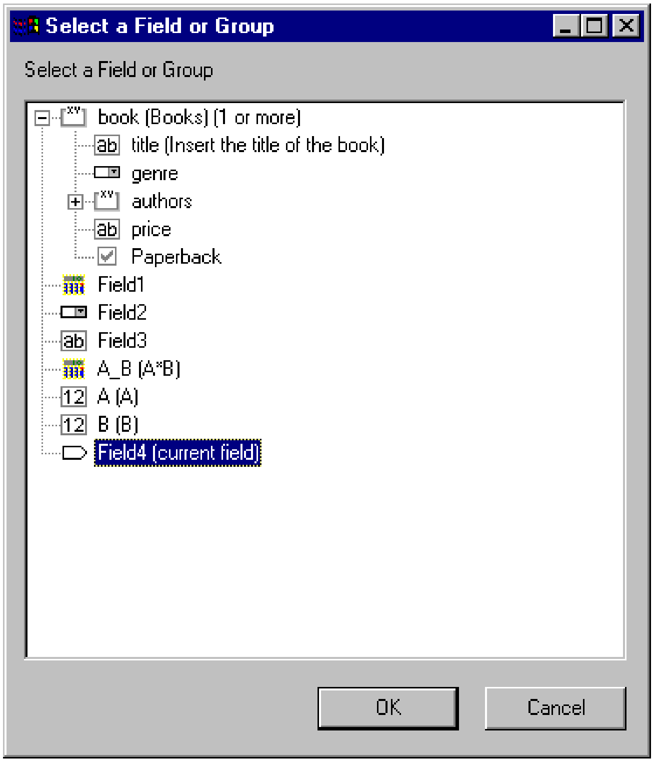
If the user's response fails to meet the criteria, you can compose an error message that appears when the data does not satisfy the criterion. Your system administrator determines if a user can save the invalid data.

When the **Custom Validation** button is clicked, the Custom Validation dialog appears.



- 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.

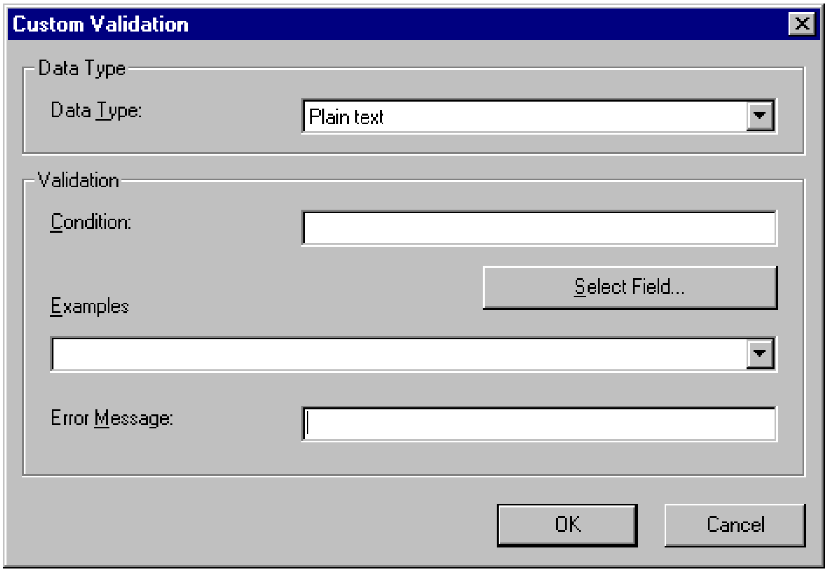


This dialog displays fields that can be inserted into the **Condition** field. Some field types, like the RichArea field, are not listed. *See Also:* "Referencing Other Calculated Fields" on page 186

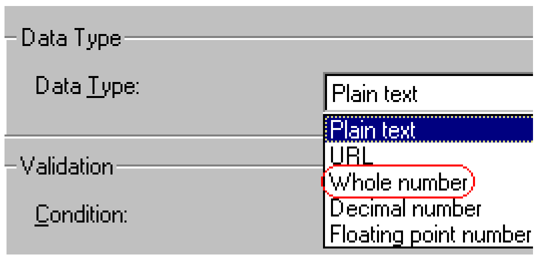
Example of Creating Custom Validation

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.

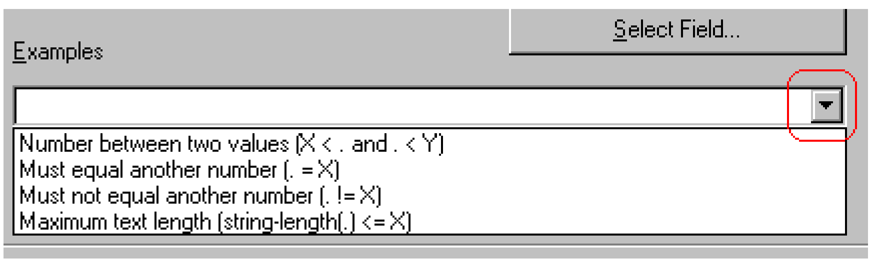
1. Click the Plain Text Field dialog and complete the screen.
2. In the validation section, click **Custom Validation**. The Custom validation screen appears.



3. In the **Data Type** field, select **Whole Number** from the drop down list. This ensures that the user can only enter digits.

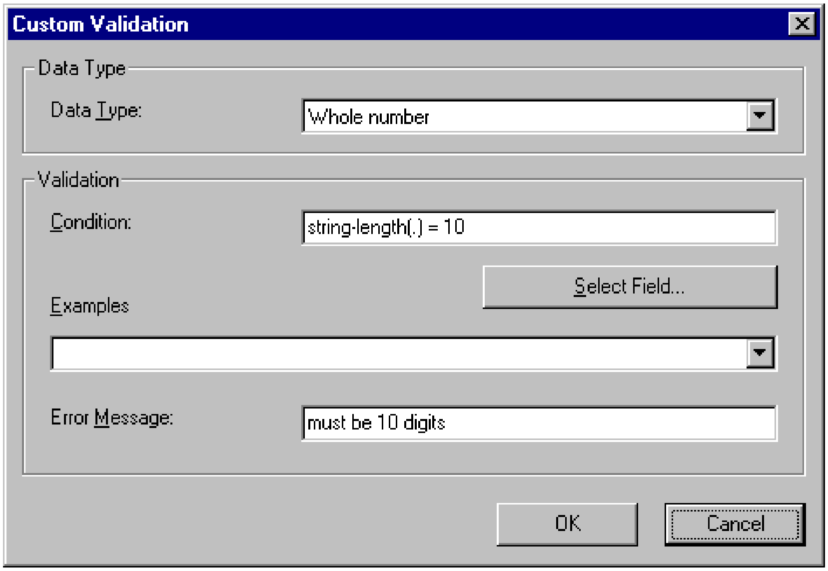


4. Click the down arrow to the right of the **Examples** field to see sample logic.



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.



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.

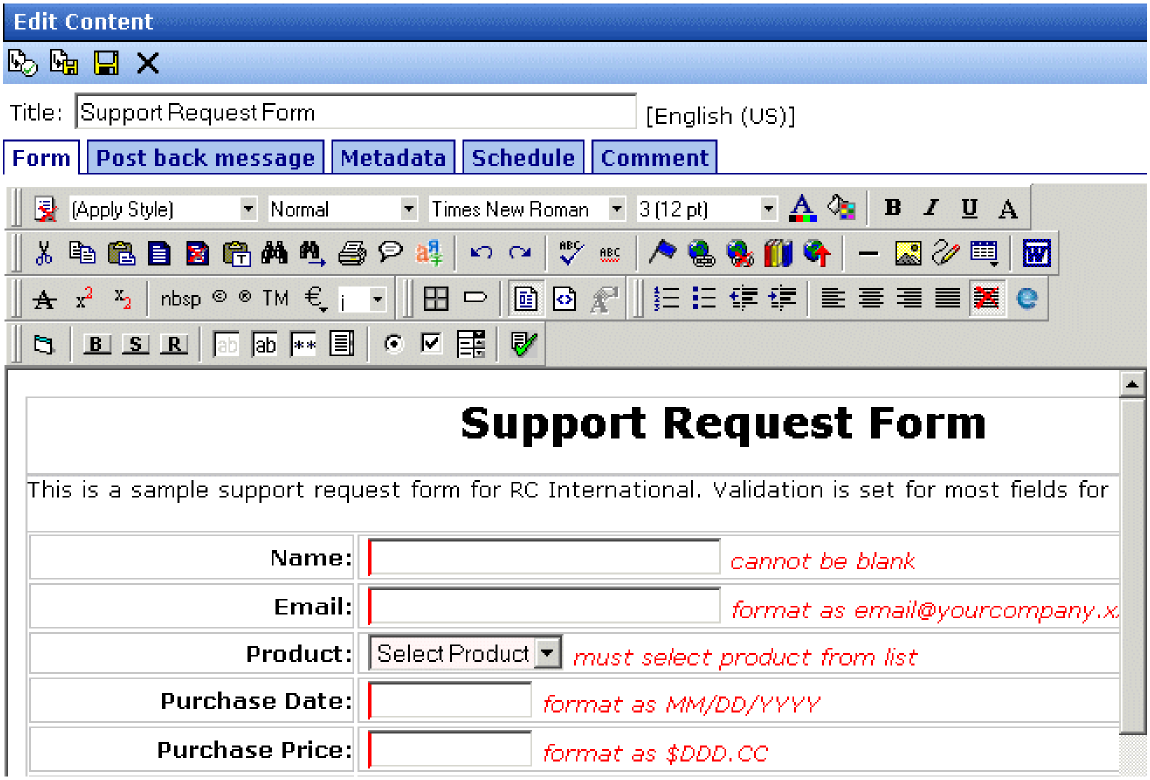
Working with HTML Forms

Ektron CMS300 provides powerful online form capabilities, allowing you to turn your Web site into a two-way street. Now anyone in your organization – not just a developer or Webmaster– can create and deploy Web forms to capture visitor information. Ektron lets you create an online dialog with visitors. Support marketing strategies by getting feedback on their needs. Follow up on their interest in your products and services. Register people for events.

Additional form capabilities include

- Creating a form and its postback message
- Adding validation criteria to form fields
- Reporting on form information
- Exporting results to Microsoft Excel

A sample form appears below.



This chapter explains how to perform all form actions through the following topics.

- ”Overview of Form Processing” on page 209
- ”The Structure of Form Data” on page 209
- ”Form Permissions” on page 212
- ”Preparing the Server to Send email” on page 213
- ”Accessing the Forms Folder” on page 213
- ”Form Module Toolbar” on page 214
- ”Creating a New Form” on page 216
- ”Creating a Form’s Content Block” on page 218
- ”Implementing a Form on a Web Page” on page 225
- ”Sending Data as XML” on page 226
- ”Form Validation” on page 233

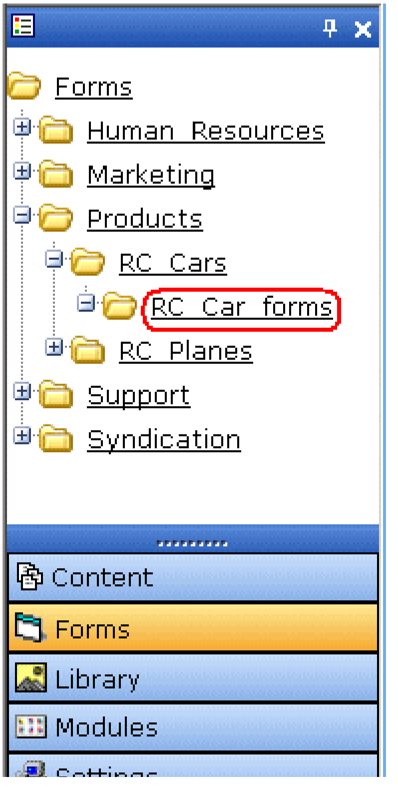
- ”Viewing Form Reports” on page 236
- ”Exporting Form Reports” on page 237
- ”Viewing Form Information” on page 238
- ”Editing a Form” on page 240
- ”Deleting a Form” on page 241

Overview of Form Processing

Step	For more information, see
1. Navigate to a Forms folder	”Accessing the Forms Folder” on page 213
2. Create a form	”Creating a New Form” on page 216
3. Create a form content block	”Creating a Form’s Content Block” on page 218
4. Insert fields into the content block	”Inserting Form Elements” on page 219
5. Assign the form content block to a template	”Implementing a Form on a Web Page” on page 225
6. User visits your Web site and completes form. Form is mailed to an email address, saved to a database, or both.	
7. View submitted form data and download it to a spreadsheet.	”Viewing Form Reports” on page 236

The Structure of Form Data

Each form resides within the Forms folder, a standard subfolder of it, or a custom subfolder (such as **RC Car Forms** below).

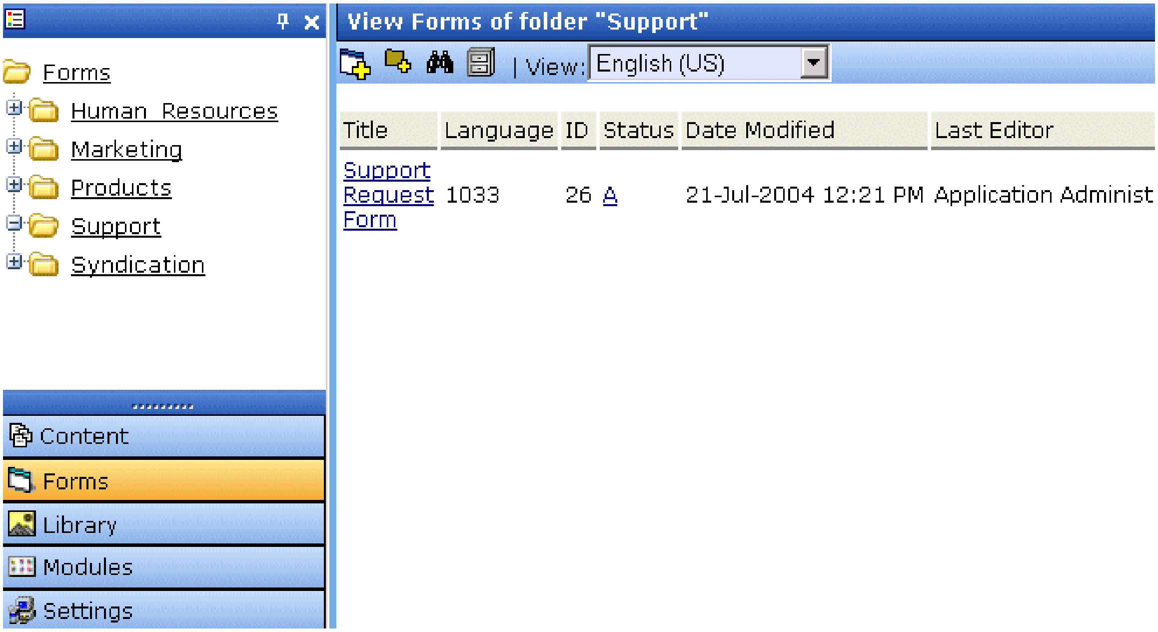


A form consists of the following components:

- **Form** (title, ID number, whether the form data is sent as email, and/or saved to a database, etc.)
    - **Content block** information (title, start and/or end date, status, summary which contains the form's postback message, etc.)
        - within the content block, **form fields** (text field, password field, hidden field, radio button, checkbox, select list, submit button, etc.)

Form Folders and Content Blocks

Before creating a form, select the Forms folder then select an existing folder or create a new folder. (The ability to create a new folder is a permission.) If you create a new subfolder, a corresponding folder is automatically created in the Content folder.



Within the folder, you create the form, and then a content block within it. To work with the form later, return to the Forms folder and select it. You cannot see or work with the form content block from the corresponding content folder. However, you use the corresponding content folder to assign permissions and an approval chain. *See Also:* "Form Permissions" on page 212

Mailto or Database Form

The Forms feature lets you create a mailto or a database form to use on your Web site. When creating or editing a form, you must specify the type of form you're creating. The options are:

- Send it via email
- Store it in a database
- Send it via email *and* store in a database

See "Creating a New Form" on page 216 for information about toggling this option on and off.

Advantages of a Mailto Form

By creating a mailto form, any email generation is done on the server-side, not on the client. This means that site visitors can submit email whether or not the client has email software.

Storing Form Data in a Database

By storing form data in the Ektron CMS300 database, you can keep information submitted by site visitors and view reports on that information. You can also export the form data to a spreadsheet.

Form Permissions

Folder Permissions

By default, form permissions are inherited from the form's folder. To customize permissions for any folder that contains forms, access the corresponding folder under Content and assign permission as described in "Setting Permissions for a Content Folder" on page 80.

Administrator Permissions

Similar to content blocks, 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 a content block to a form

You may also perform all actions on a form's content block.

User Permissions

Users who are not members of the administrator user group can add, edit, delete, and restore form content blocks if granted these permissions for the content folder or block.

Preparing the Server to Send email

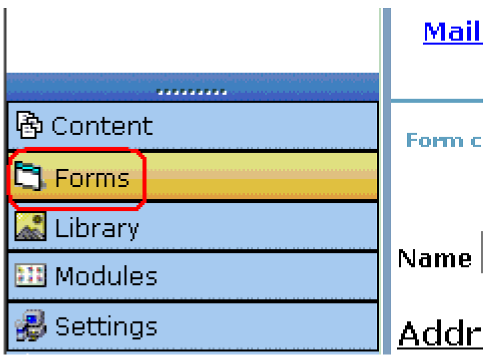
Since email generated by forms is created on and sent from the server that hosts Ektron CMS300, the server must be enabled to handle those responsibilities. To configure your Web server to send email, refer to Configuring email Notifications in the Ektron CMS300 Setup Manual.

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 CMS300 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 CMS300 installation. Any **Ektron CMS300** on a public site that includes the Ektron CMS300 sample site with the form.asp page and properly configured SMTP can be used to send spam.

Accessing the Forms Folder

To access the Forms folder, follow these steps.

1. Navigate to the Workarea.
2. Click the Forms button in the left frame.



3. Navigate to the folder whose forms you want to work with, or in which you want to create a new form.
4. The View Forms of Folder screen appears. Note that its folder structure matches the Content folder.

The screen has the following toolbar buttons. Click one to begin that action.

Button	Name	Description	More Information
	Add form	Create new form	"Creating a New Form" on page 216
	Add folder	Create new subfolder beneath current one	"Adding Subfolders" on page 53
	Search folder	Look for forms in current folder that satisfy user-specified criteria	"Search Content Folder" on page 45
	Archive	View archived forms in this folder	"Setting Archive Options" on page 61 See the **Ektron CMS300** User manual section "Scheduling Content to Begin and End" > "Setting Archive Options"

See Also: "Working with HTML Forms" on page 207

Form Module Toolbar

Several toolbar buttons and tabs help you work with Forms.

Button or Tab	Name	Description	More Information
	Edit Content	Edit the form's content block, which contains the form fields	"Editing a Form's Content Block" on page 240
Post Back Message or Summary	Edit Summary	Edit the summary assigned to a form's content block	"Editing a Form's Summary" on page 241
Metadata	Edit Searchable Properties	Edit the searchable properties assigned to a form's content block	"Search Data" on page 65

Button or Tab	Name	Description	More Information
 	View Staged/ Published Content	Click **View Staged** button to view content that has not yet been published. Click **View Published** button to view content that is live on the Web site.	
	View History	View (and possibly restore) older versions of a content bock	”Content History” on page 58
	View Difference	Compare two versions of a content block	”Comparing Versions of a Content Block” on page 86
	Edit Form Properties	Access Edit Form screen to change information about the form	”Editing a Form” on page 240
	Delete Form	Delete a form	”Deleting a Form” on page 241
	Check Links	Check for other content blocks that contain a link to this form	”Link Checking” on page 60
	Add Task	Add a task	”Managing Tasks” on page 249
	View Task	View task information	
	Add Form	Add a new form	”Creating a New Form” on page 216
	Export Report	Download form data to a Microsoft Excel spreadsheet	”Exporting Form Reports” on page 237
	View Reports	View submitted form data; can select range of dates	”Viewing Form Reports” on page 236
 or Form Properties	View Content Properties	Access view properties for the content block	”Viewing a Form’s Content Block Properties” on page 240

Button or Tab	Name	Description	More Information
View (language)	View	If you can view forms in more than one language, select a language from the drop down list.	
Add **-select language-**	**Add** **-select language-**	Lets you copy current form into new block and translate it to selected language.	”Translating a Content Block” on page 304

Creating a New Form

To create a new form, follow these steps.

NOTE You can also create a new edition of a form in another language by copying an existing form and translating it. For more information, see ”Translating a Content Block” on page 304.

1. Access the Forms folder, as described in ”Accessing the Forms Folder” on page 213.
2. Click the folder in which you want the form to reside. If you have permission to do so, click ( ) to create a new subfolder under any folder.
3. From the language drop-down, select the language in which to create the form.

WARNING! Do not choose a folder to which an XML configuration has been applied. This feature is designed for HTML forms, not XML. To learn about XML forms, see ”Using the Data Designer” on page 149.

4. Click the Add Form button ( ).
5. The Add Form screen appears.
6. Enter information using the following table as a reference.

Field	Description	Required?
Title	Title used to reference form within the Workarea	Yes
Description	Extended description of form.	No

Field	Description	Required?
Form Data	Specify what to do with the form data. Your choices are **mailto**, **database**, or both. See ”Mailto or Database Form” on page 211	No
Mail Properties These fields are used in the email that is generated when a mailto form is submitted. To let the user override any value while completing the form, see ”Letting the User Override email Values” on page 217.		
To:	email address to which the form will be sent	Yes
From:	email address to appear in the email’s **From:** field	No
CC:	email address to which a copy of the form will be sent	No
Subject:	Text to appear in email’s **Subject** field	No
Preamble:	Beginning text of email (could be used for entire text)	No
Send Data as XML	Check off to submit form as XML instead of plain text. *See Also:* ”Sending Data as XML” on page 226	No

7. Click the Save button ( ).

Now that you have entered information about the form, the next step is to enter information about the form’s content block. This procedure is described in ”Creating a Form’s Content Block” on page 218.

See Also: ”Working with HTML Forms” on page 207

Letting the User Override email Values

You can let the user completing a mailto form override default values for the following elements:

- to email recipient(s)
- from email recipient(s)
- cc email recipient(s)
- subject line
- preamble (that is, default text)

To set up a user override for these fields, follow these steps.

1. Perform steps 1-4 in "Creating a Form's Content Block" on page 218 or edit an existing content block.
2. Within the editor, insert an appropriate field label, such as **Enter your email address**.
3. Click the Text Field button () from the form element toolbar.
4. The Insert Text Field window is displayed.
5. In the **Name** field, enter the appropriate override name.

Name	Overrides...
`send_email`	to address(es) in the generated email
`send_from`	from address(es) in the generated email
`send_cc`	cc address(es) in the generated email
`send_subject`	subject line in the generated email
`send_preamble`	preamble in the generated email

6. Enter the remaining information and click **Insert** to add the field to the content.

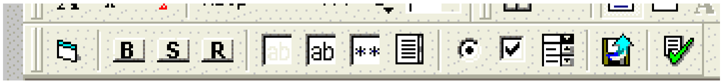
When a user is completing the form and inserts an email address into the field you inserted in Step 5, that field value is used in the email.

Creating a Form's Content Block

When you create a form, **Ektron CMS300** automatically creates a content block with the same name as the form. For example, if you create a form called ‘New Form’, a content block named ‘New Form’ is created for that form. Use this content block to insert the form’s elements.

This content block is only available after you identify the form. Unlike regular content blocks, it is not accessible from the Content folder -- it is only available from its form.

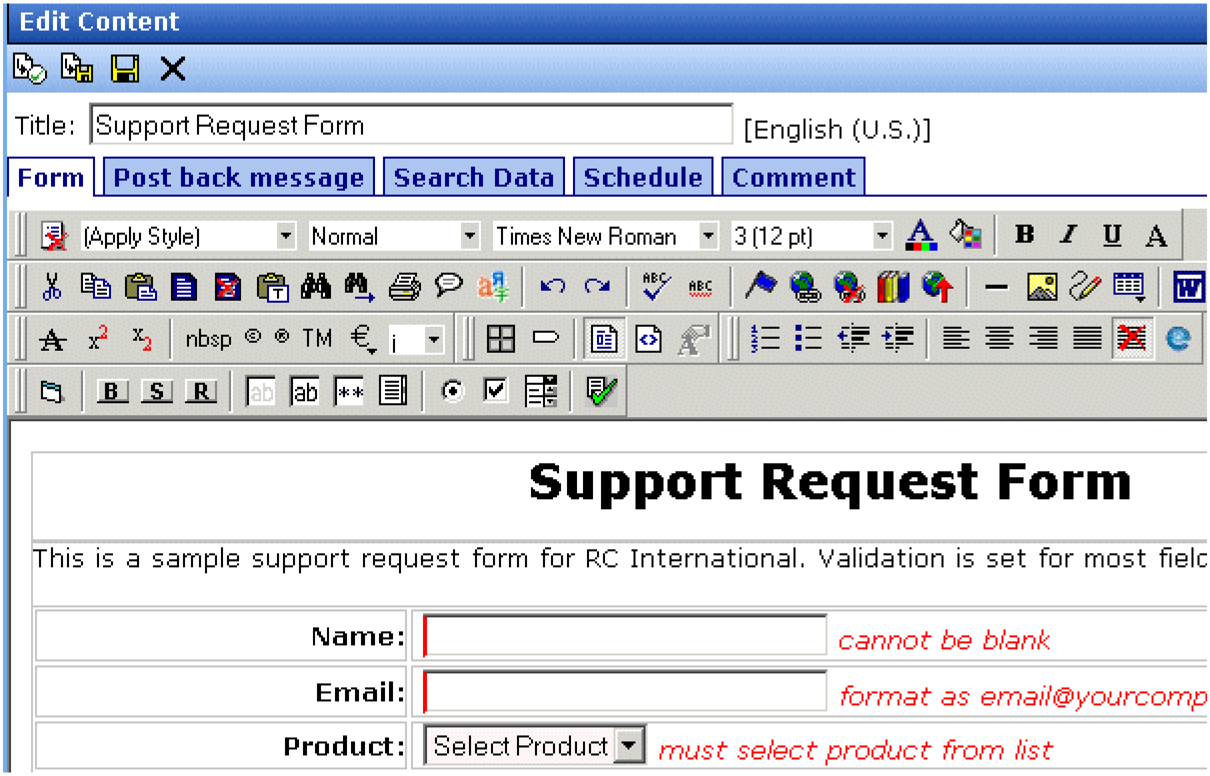
Creating a form content block is similar to creating a standard content block. (See ”Adding HTML Content” on page 41). The big difference is a special toolbar (illustrated below) to facilitate the insertion of form elements.



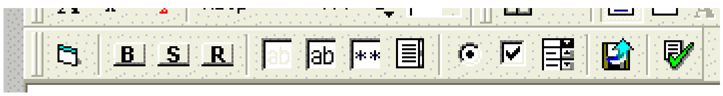
Inserting Form Elements

To create a form’s content block, follow these steps.

1. Access the form you created in ”Creating a New Form” on page 216.
2. Click the Edit button ().
3. The Edit Content window opens.

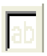
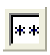


4. If desired, edit the form title.
5. Enter the form's fields. By default, the form elements toolbar appears.



The following table explains the form element toolbar buttons.

Button	Inserts this kind of field	Example of HTML inserted	Prompts on dialog box that appears
	Form	`<form name="Test" action="http://localhost/ewebeditpro4/formtest.htm" method="post"></form>` Note: If this content block is associated with a form, this button is not needed.	• Name • Action page • Method • Encode Type

Button	Inserts this kind of field	Example of HTML inserted	Prompts on dialog box that appears
	Button	<input type="button" value="Test Button" name="Test" />	• Name • Value
	Submit Button	<input type="Submit" value="Submit Button" name="Submit" />	• Name • Value
	Reset Button	<input type="reset" value="Reset Page" name="Reset"/>	• Name • Value
	Hidden Text Field	<input type="hidden" value="This is initial content" name="mycontent" />	• Name • Value
	Text Field	<input size="15" value="This is initial content" name="mycontent" /> Note: See "Letting the User Override email Values" on page 217 for information about overriding default Forms settings.	• Name • Value • Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.
	Password	<input type="password" size="5" value="" name="mypassword" />	• Name • Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)
	Test Area	<textarea name="mycontent" rows="5" cols="4" type="textarea">This is initial content</textarea>	• Name • Value • Rows • Columns
	Radio Button	<input type="radio" checked="checked" value="This is a radio button" name="mybutton" />	• Name • Value Default is Checked

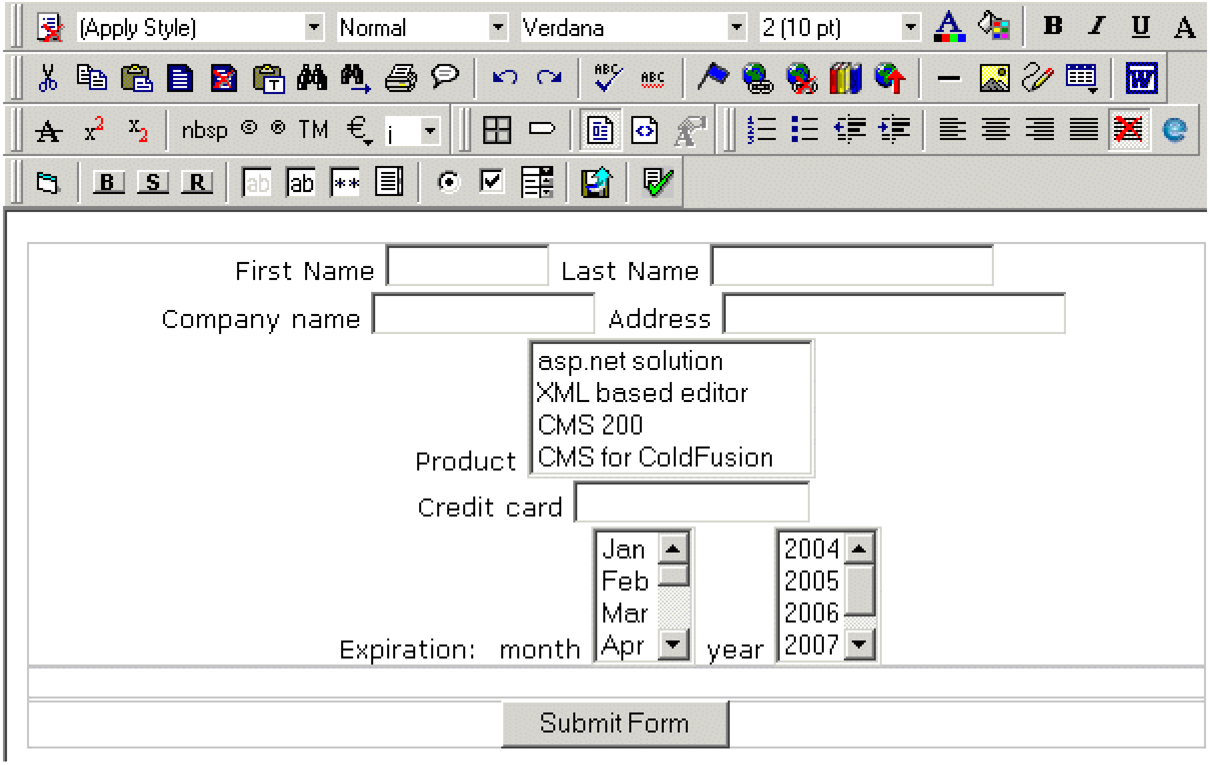
Button	Inserts this kind of field	Example of HTML inserted	Prompts on dialog box that appears
	Check Box	`<input type="checkbox" checked="checked" value="This is a check box" name="mycheckbox" />`	• Name • Value Default is Checked

	Select	`<select multiple="multiple" size="25" name="myselectbox">`
		`<option value="option1">option1</option>`
		`<option value="option2">option2</option>`
		`</select>`
			• Name
			• Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)
			• Allow multiple
			• Option name
			• Display value

	Form Validation	Applies a validation rule to selected form element. *See Also:* "Form Validation" on page 233	

6. Move the cursor to the screen position where you want the first field.
7. Click the button corresponding to the kind of field you want to insert.
8. Complete the dialog box that collects information about the field.

Here is an example of form content that you can create.



Note that the first four fields use plain text while the fifth uses a select box.

You can apply validation criteria to any field by selecting the field then clicking the Form Validation button (). For more information, see "Form Validation" on page 233.

9. After you complete the form, you have the following options.

Button or Tab	Description
Postback Message	Edit the summary for content block. If you want to customize the post back message, click the **Summary** tab. (A postback message informs the user submitting the form that his entry has been completed.) Then, enter a post back message for the form. The postback message can be as long as you want and include images, files, hyperlinks, etc.
Edit Search Data	Edit the search data for content block *See Also:* "Search Data" on page 65

Button or Tab	Description
Schedule	Assign start or end dates, or both, for when content is published to Web site *See Also:* ”Scheduling Content to Begin and End” on page 56
Comment	Enter history comment to indicate changes made to content
Submit	Submit content block into approval process
Publish	Publish content to Web site. Note: If a content block has any active tasks, a comments window pops up. You can insert comments to describe how approving or declining the content affects the task. Note: Only the last approver in the approval chain sees this button.
Check In	Save and check-in content. This button does not submit the content into the approval process, but rather lets other users change it.
Save	Save the content without submitting it into the approval process. If a user clicks save and then closes the editor, other users cannot edit the content.
Decline	This buttons appears if you are the next approver in the approval list. Click it to decline the changes made to the content. Note: If a content block has any active tasks, a comments window pops up. You can insert comments to describe how approving or declining the content affects the task.
Cancel	Close the editor without saving changes.

10. Click the Save and Submit or Publish button ( ). The form only appears on your Web site after it is published.

Next, the form may need to go through the approval process. When that is complete, add it to the site by assigning it to a page template. The next section explains that procedure.

Implementing a Form on a Web Page

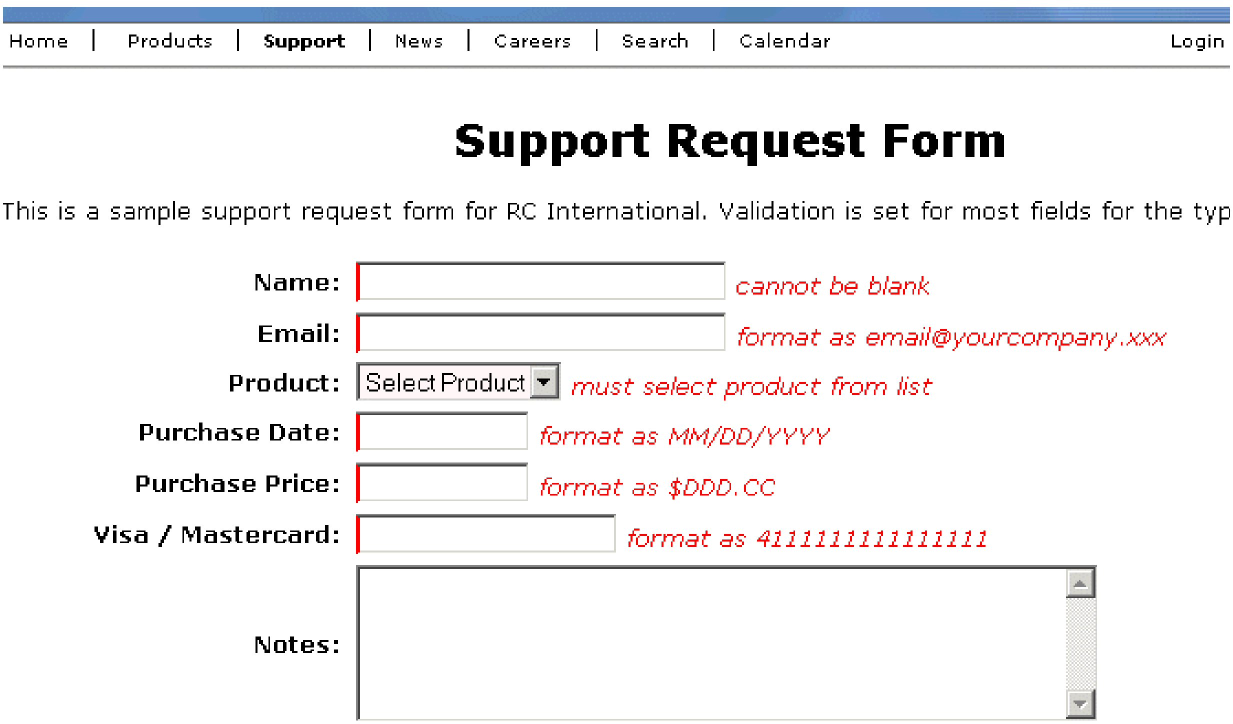
After you create a form, the next step is to implement it on a Web Page. To do that, follow these steps.

NOTE The use of functions to manage templates is documented in the Ektron CMS300 Developer's Manual.

1. Open the Web template on which you want the Form content block to appear. (This example uses support.asp.)
2. Place the custom function for a Form content block within the body of the template.

```
<%ecmFormBlock(31) %>
```

   This function calls the specified Form content block (in this example, `id=31`) to display the form within the support.asp template.



3. Save and close the template file.
4. To test your form, navigate to your Web site then to that page.
5. Complete the form.
6. Click the Submit Form button.

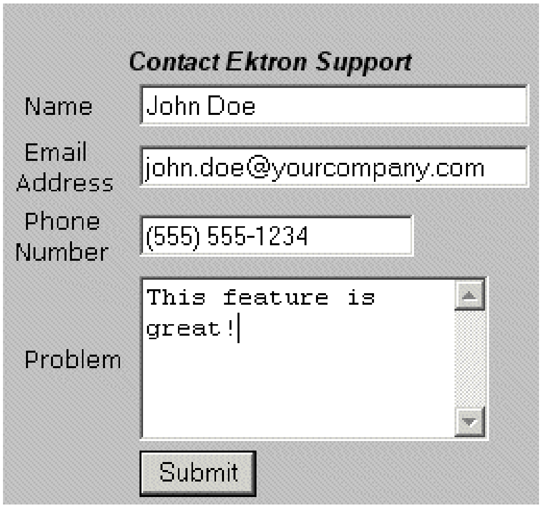
7. The screen is refreshed and displays the post back message that you created.

Sending Data as XML

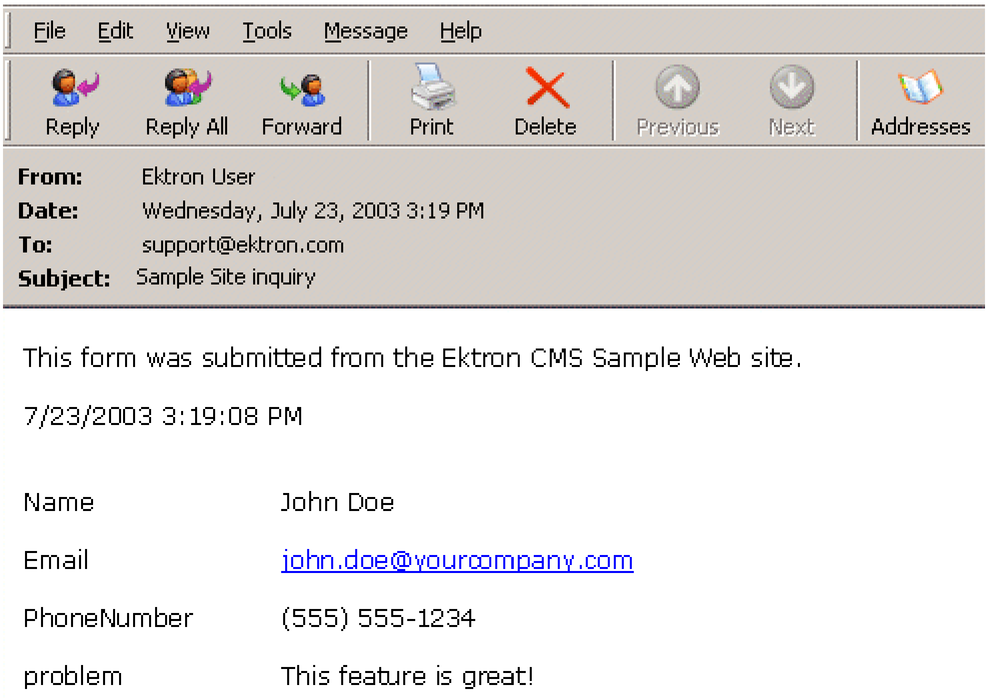
While creating a form that generates email, you can specify that the email be sent as XML data or plain text. (See ”Creating a New Form” on page 216 for information about setting this option.)

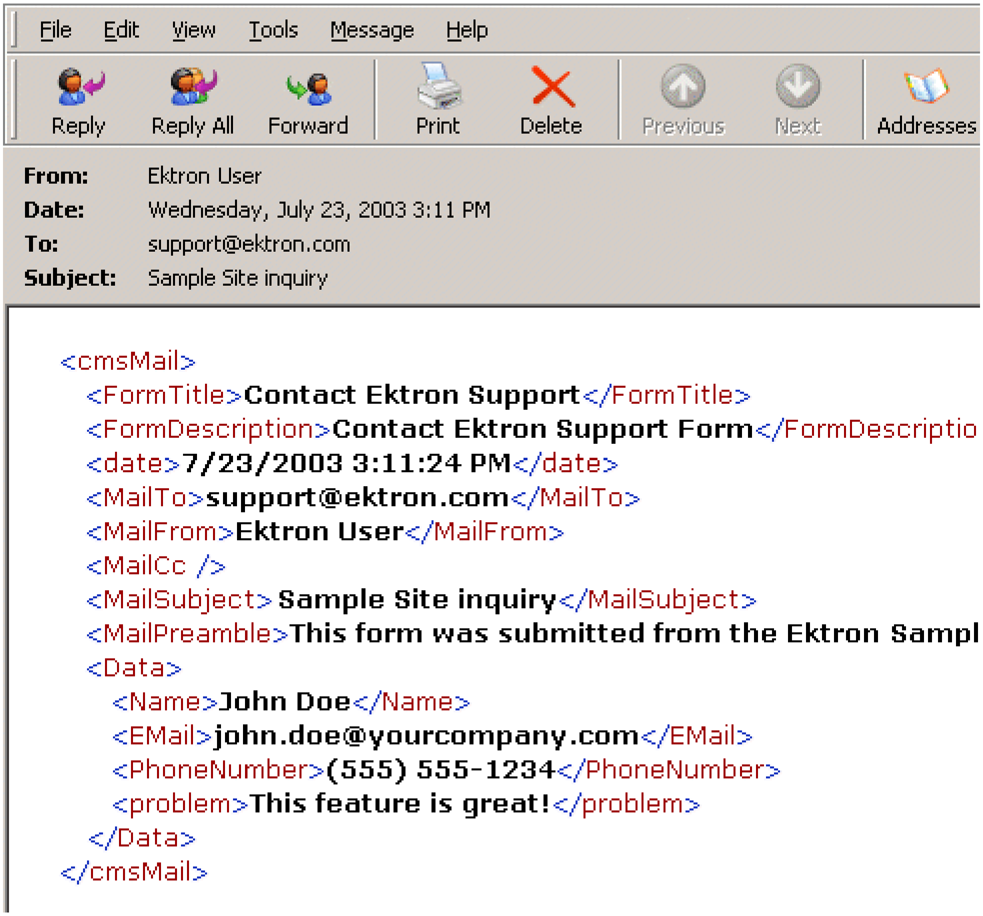
Because XML data is structured, you can easily parse the content to store and retrieve important information. Also, if you download the form data to an Excel spreadsheet, the XML tags become the spreadsheet’s column headers. *See Also:* ”Exporting Form Reports” on page 237.

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.



The following table displays the resulting email, depending on the method used.

<table>
<tr><th>Form sent as</th><th>Generated email</th></tr>
<tr><td>Plain Text</td><td>
</td></tr>
</table>

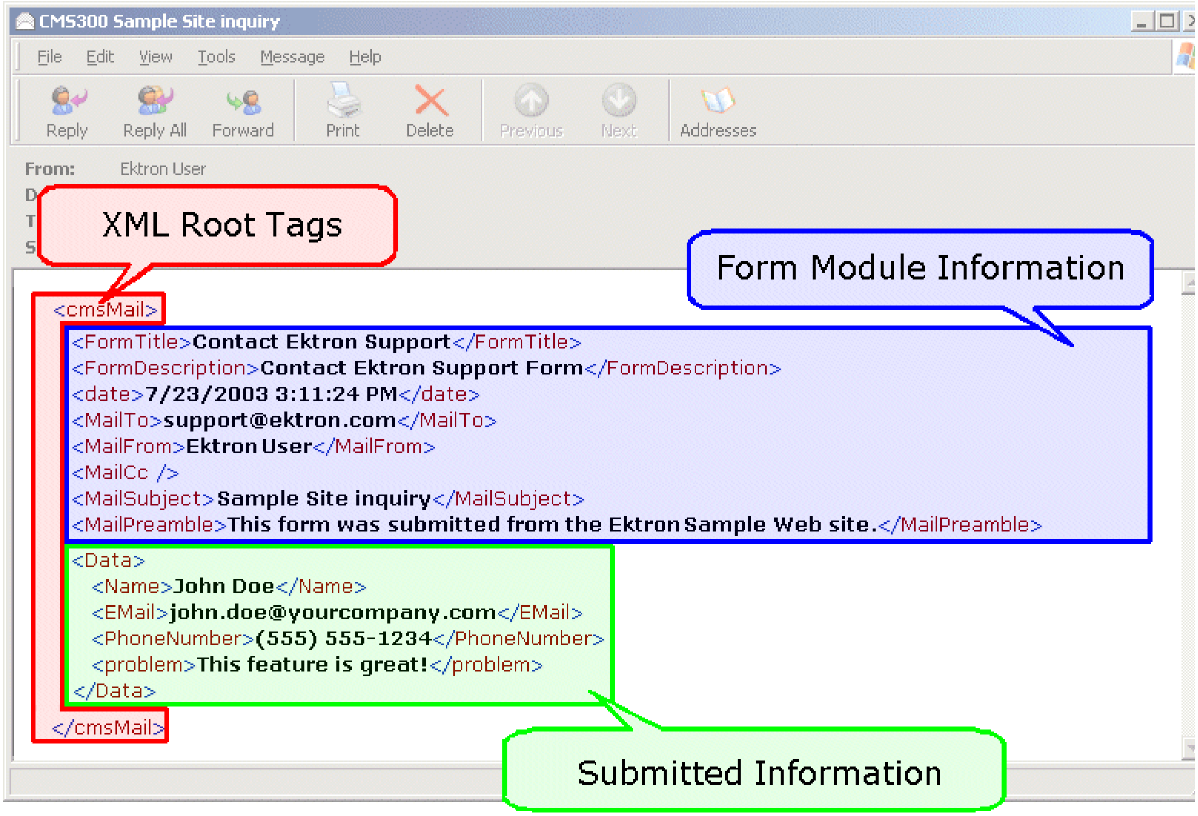
<table>
<tr><th>Form sent as</th><th>Generated email</th></tr>
<tr><td>XML</td><td>
</td></tr>
</table>

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.



The following explains the sections of the XML email.

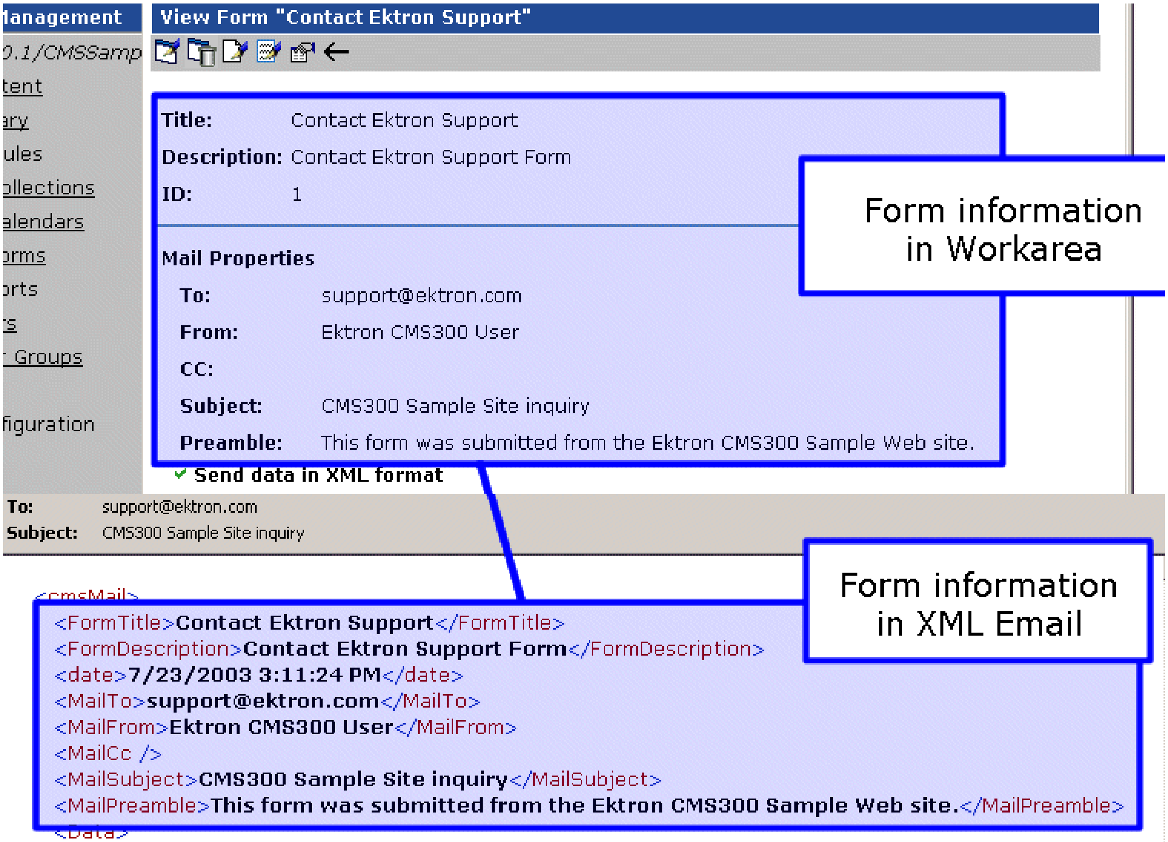
Root Tag

The XML email is wrapped in `<cmsMail>` root tags.

Form & 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.



The following table explains each XML tag in the form and mail sections of the email.

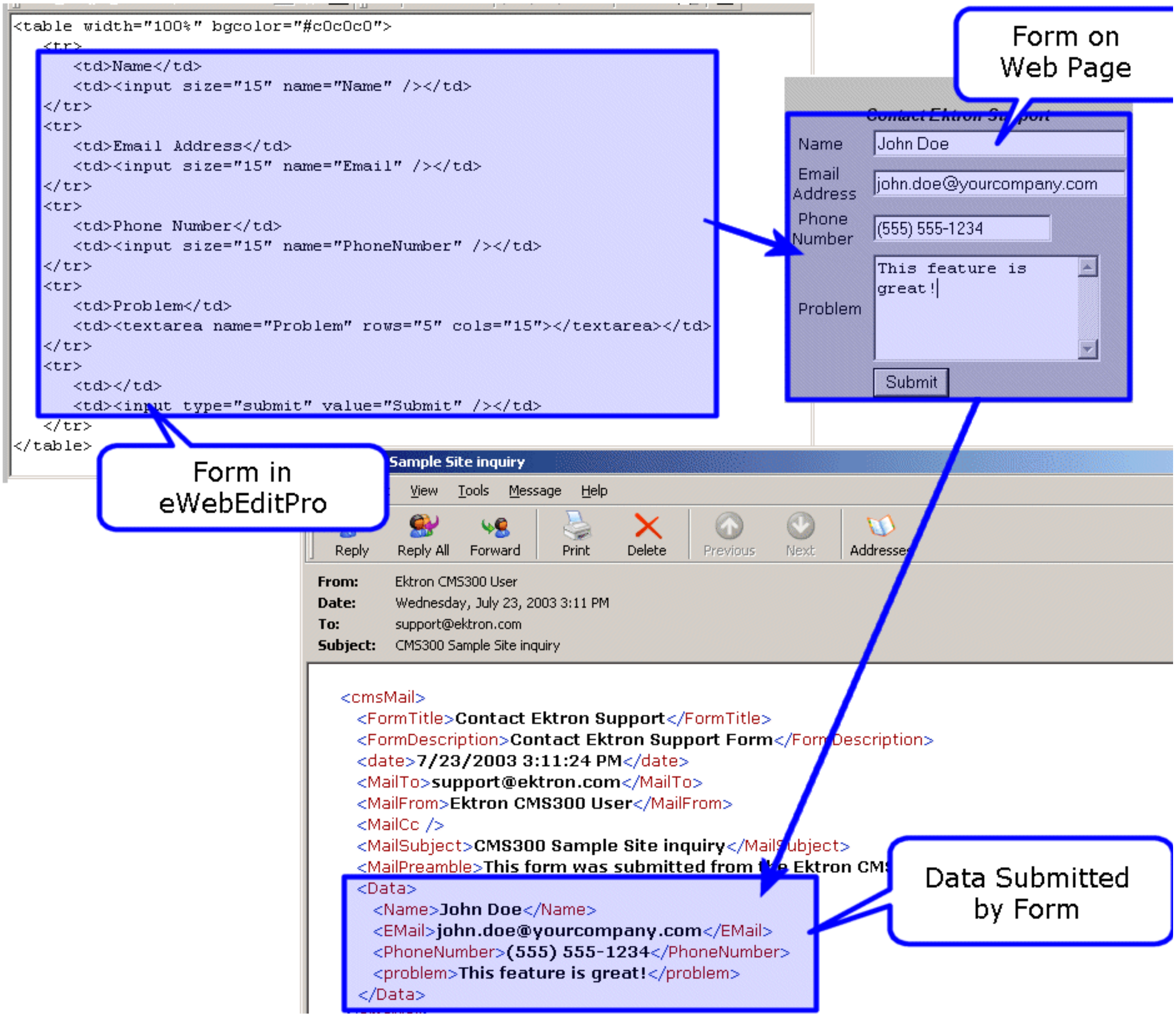
XML Tag	Description
<FormTitle>	Title given to the form that was submitted.
<FormDescription>	Description given to the form that was submitted.
<date>	Date and time the form was submitted.
<MailTo>	To email address(es) defined in the form.
<MailFrom>	From email address(es) defined in the form.

XML Tag	Description
<MailCc>	CC address(es) defined in the form.
<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 block 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.



As you can see, the content block is comprised of four form elements that are converted to XML tags:

- Name
- Email
- PhoneNumber
- Problem

Form Validation

You can apply validation rules to form elements in a form content block. Validation rules ensure that user input in a form field meets your criteria. For example, a validation rule can specify that a user's response to the **Birth Date** field conforms to a standard date format. If user input does not conform, an error message that you create informs the user of the problem. The input must conform before the form can be submitted.

You can only apply validation rules to these field types:

- Text field
- Text area field
- Select list field

The field's type determines which validation rules can be applied.

When Validation Rules are Applied

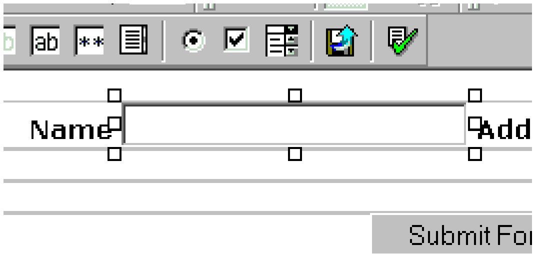
Validation rules are applied when a user submits a form, not when the input is entered. If invalid input is found, the error message that you define appears.

The user must change the field's input to conform to the validation rule. When he does, the next field is checked and, if that is invalid, its error message appears, etc.

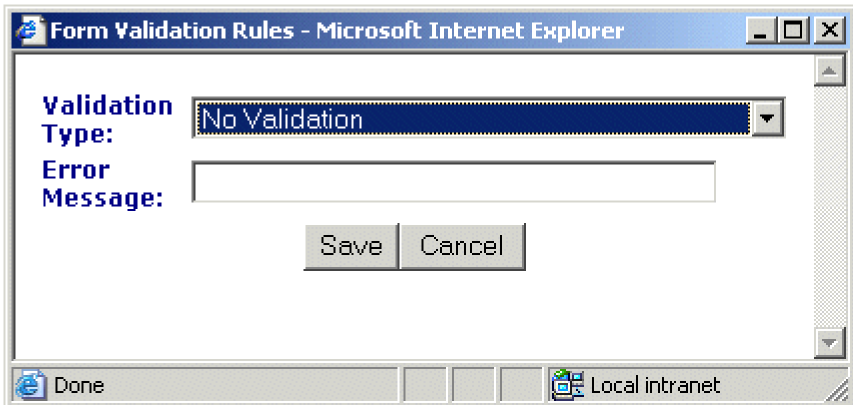
Steps for Applying Validation Rules to a Form Field

To apply a validation rule to a form field, follow these steps.

1. Perform steps 1-4 in "Creating a Form's Content Block" on page 218.
2. Insert a text field, text area field, or a selection list.
3. Click the form element you just inserted so that it is surrounded by small squares.



4. Click the Set Validation button () from the form element toolbar.
5. The Form Validation Rules window opens.



6. Select from the drop-down list a validation rule to apply to the form element.

   The following table explains validation rules, and the fields to which you can apply each rule.

Validation Rule	Can be applied to...	When applied, data in the field must...	Valid Examples...
No Validation	• Text field • Text area field • Select list field	No validation is applied	

Validation Rule	Can be applied to...	When applied, data in the field must...	Valid Examples...
Cannot be blank	• Text field • Text area field	Contain text or numbers. Field cannot be left blank.	anything
Numeric Only	Text field only	Contain only numbers, no text	1248361
Text Only	Text field only	Contain only text, no numbers.	yada
Date Only	Text field only	Conform to a date format. For example, mm/dd/yy or mm/dd/yyyy	03/02/80 08/29/2002
Email Type Only	Text field only	Be a valid email address	ajo@company.com
Credit Card Validation	Text field only	Be a valid credit card number	*VISA*: **4111 1111 1111 1111** (16 digits) *MC*: **5500 0000 0000 0004** (16 digits) *AMEX*: **340000000000009** (15 digits) *DC*: **30000000000004** (14 digits) *DIS*: **6011000000000004** (16 digits)
Social Security Number	Text field only	Be a valid social security number	123-45-6789 123456789
U.S. Postal Codes (2 Letter state)	Text field only	Be valid U.S. state postal code	NH MA
U.S. Zip Codes	Text field only	Be a 5 digit U.S. zip code, or zip+4.	12345 12345-6789
U.S. & Canadian Phone Number	Text field only	Match the U.S. or Canadian phone pattern.	(123) 456-7890 (123)456-7890
Canadian Postal Code	Text field only	Match the Canadian postal code format.	Z5Z-5Z5 Z5Z5Z5
Time	Text field only	Be in a valid time format. HH:MM, HH:MM:SS, HH:MM:SS.mmm	12:45 12:45:05 12:45:05.052

Validation Rule	Can be applied to...	When applied, data in the field must...	Valid Examples...
IP Address	Text field only	Be in a valid IP address format. For example, 999.999.999.999	192.168.0.1 255.255.255.255
Dollar Amount	Text field only	Be in a valid dollar format.	100 100.00 $100 $100.00
Canadian Social Insurance Number	Text field only	Be in a valid Canadian social insurance number format.	999999999 123456789
Number of Characters	Text area only	Adhere to the max/min settings specified.	
Cannot be first option	Select list only	Not be the first option on the selection list	

7. Enter an error message. This message appears if the user's input does not conform to the validation rule.

TIP! If you apply validation rules to more than one field, include the field name in the error message. For example, enter **The name field only allows text**. This is good practice because error messages only appear *after* the form is submitted and, if the message does not identify the field, the user may be unable to identify which field needs correction.

8. Click the Save button to save changes.

Viewing Form Reports

If a form is set to store data in the database, you can run a report that displays the submitted data. To view a form report, follow these steps.

1. Access the Forms folder, as described in "Accessing the Forms Folder" on page 213.
2. Navigate to the folder for which you want to view the report.
3. The Form Modules screen appears.
4. Click the form you want to view.

5. The View Form screen appears.
6. Click the View Reports button ().
7. The View Forms Report screen appears.
8. Enter report criteria using the following table as a reference.

Field	Description
Start Date	If desired, specify a start date. The report displays only forms that were submitted on or after the start date.
End Date	If desired, specify an end date. The report displays only forms that were submitted on or before the end date.
Report Display	Choose to display the report horizontally or vertically.
Data Type	Specify the data type to filter the report by.

9. Click the Get Result button to display the report.

Exporting Form Reports

After you run a report, you can export its data to a Microsoft Excel spreadsheet file (.xls) for further analysis. If a form uses an XML structure, each XML tag becomes a column header in the spreadsheet.

To export form data, follow these steps.

1. Access the View Form Reports screen for the report you want to export, as described in ”Viewing Form Reports” on page 236.
2. Click the Export Reports button ().
3. A File Download dialog box is displayed. Choose the option that best suits your needs.
4. After the data is exported, you can analyze and modify the .xls file.

Viewing Form Information

You can view

- information about a form
- information about a form's content blocks

Viewing a Form's Properties

After a form is created, you can view its information in the Forms folder. To view a form, follow these steps.

1. Access the Forms folder, as described in "Accessing the Forms Folder" on page 213.
2. Click the form you want to view.
3. The View Form screen displays. The following table explains the information on the screen.

Field	Description
Form Title	Title used to reference the form
FormID	ID number automatically assigned to form
Status	The form's current status
Description	Extended description for the form
Form Data	The type of form data: Mail or Database. *See Also:* "The Structure of Form Data" on page 209
Content Properties	Displays the properties of the form's content block
Content Title	Title of content block associated with form Note: The content name is the same as the Form name.
Content ID	Content ID number assigned to content block
Status	The status of the content block
Last Editor	Last user to edit the content block

Field	Description
Start Date	Date and time when the content block will go live on the Web site (if set for a future date)
End Date	Date and time when the content will be removed from the Web site (if set for a future date)
Date Created	Date and time when content block was created
Mail Properties	The form's mail properties link
To	Email address to which the form is sent when submitted. *See Also:* "Letting the User Override email Values" on page 217
From	Text that appears in the email's **From** field. *See Also:* "Letting the User Override email Values" on page 217
CC	Text that appears in the email's **CC** field. *See Also:* "Letting the User Override email Values" on page 217
Subject	Text that appears in the email's subject field. *See Also:* "Letting the User Override email Values" on page 217
Preamble	Beginning text of the email. *See Also:* "Letting the User Override email Values" on page 217
Send data in XML Format	A green check means email data will be in a structured XML packet. A red X means the email data will be in a standard mailto format. *See Also:* "Sending Data as XML" on page 226
Form Content	Content block associated with the form
Post Back Content	Summary of content block associated with form. This content is displayed when form is submitted.

The view form screen also contains several buttons to perform actions. To learn about the buttons, see "Form Module Toolbar" on page 214.

Viewing a Form's Content Block Properties

From the View Form screen, you can see the View Form's Content Block properties screen. From this screen, you can see additional information about the content block that does not appear on the View Form screen. To view the properties for a form's content block, follow these steps.

1. Navigate to the View Form screen of the form whose properties you want to view, as described in "Viewing a Form's Content Block Properties" on page 240.
2. Click the View Content Properties button ( ).
3. The View Content Properties screen for the selected content block is displayed. For more information, see "Content Properties" on page 60.

Editing a Form

After you create a form, it can easily be edited if information needs to be changed. To edit a form, follow these steps,

1. Access the View Form screen for the form you want to edit, as described in "Viewing a Form's Content Block Properties" on page 240.
2. Click the Edit Form button ( ).
3. The Edit Form screen is displayed. The screen is the same as the Add New Form screen. For documentation of individual fields, see "Creating a New Form" on page 216.
4. Make the necessary changes to the form.
5. Click the Save button ( ).

See Also: "Working with HTML Forms" on page 207

Editing a Form's Content Block

You can edit the content block associated with the form by a variety of methods, including:

- Accessing the content by the floating toolbar on the Web page

- Editing the content by the View Form screen
- Accessing the content by the View Form content properties screen

This section explains how to edit a form's content block from the View Form screen. To edit a form's content block, follow these steps.

1. Access the View Form screen for the content block, as described in "Editing a Form's Content Block" on page 240.
2. Click the Edit Content button ( ).
3. The Edit Content screen appears.
4. Make the necessary changes to the form's content block.
5. If needed, click the Edit Summary or Edit Search Data tab to edit to the content block's summary or metadata.
6. Click a workflow button (Submit for Publication or Publish).

Editing a Form's Summary

A content block's summary is used to contain the post back message when a visitor submits a form.

To edit a form's summary, follow these steps.

1. Access the View Form screen of the form whose summary you want to edit, as described in "Viewing a Form's Properties" on page 238.
2. Click the Edit Summary tab.
3. The Edit Summary screen is displayed.
4. Make the necessary changes to the summary.
5. Click the Save button ( ).

Deleting a Form

You can easily delete forms that are no longer needed.

NOTE Deleting a form also deletes its associated content block and summary.

To delete a form, follow these steps.

1. Access the View Form screen for the form you want to delete, as described in "Accessing the Forms Folder" on page 213.
2. Click the Delete Form button ().
3. A confirmation message is displayed.
4. Click **OK**.

Ektron CMS300 Help

The help folder in the administrator Workarea is a center of important and useful information about using Ektron CMS300. The help folder provides you with a centralized location of the manuals as well as a link to the Ektron CMS300 Online help screen.

To access the help folder

1. Access the Workarea by clicking the Workarea icon in a content block

   Or by clicking on the Workarea button on your Web page

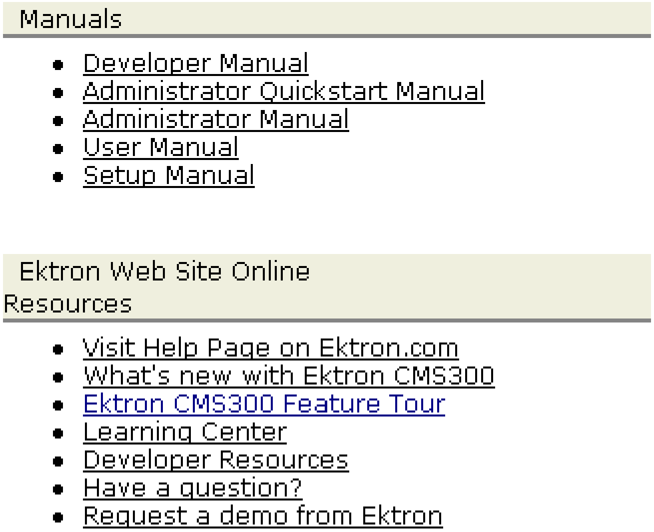
2. Click the Administrate folder button in the left frame of the Workarea window.

   A list of all the folders under the Administrate folder is displayed.

3. Click the **Help** Folder to view its contents.

4. A list of manuals appears.



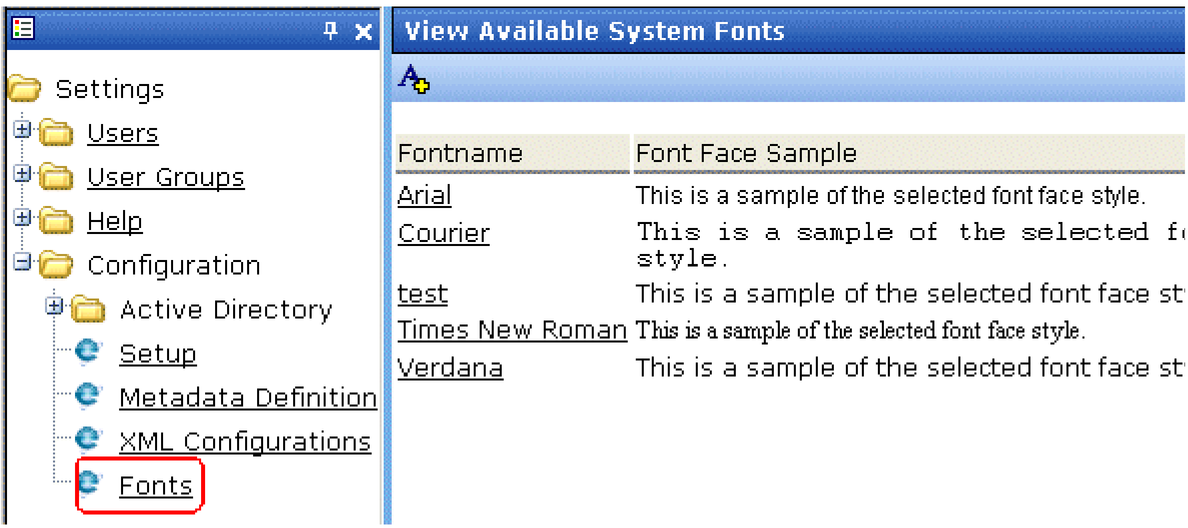
5. Click a link to open the documentation or Web page.

Font Manager

As an administrator, you can add, edit, and delete fonts to and from the Ektron CMS300 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.

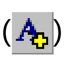
Minimizing the number of available fonts makes the Web site look more uniform.

Below is the Font Manager screen.

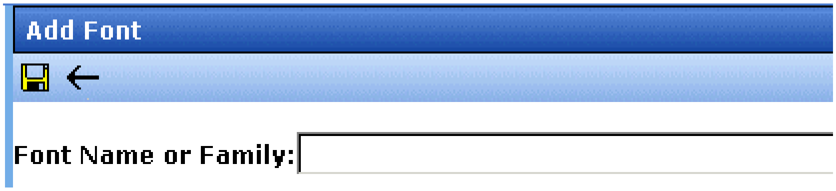


Adding Fonts

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.



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.

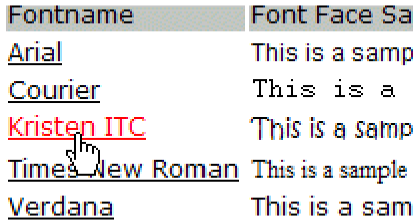
Viewing Fonts

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 245.

2. Click the font you want to view.



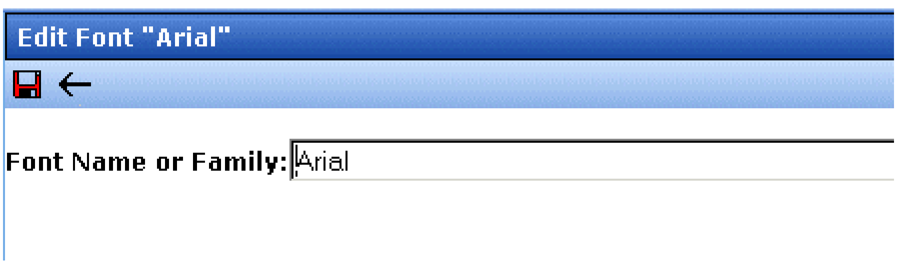
3. The view font screen is displayed.

Edit Fonts

When you edit a font, the font or family name is changed. Editing does not change any fonts in existing content blocks.

To edit a font name, follow these steps.

1. Access the view font screen, as described in "Viewing Fonts" on page 246.
2. Click the Edit button ( ).
3. The Edit Font screen is displayed.

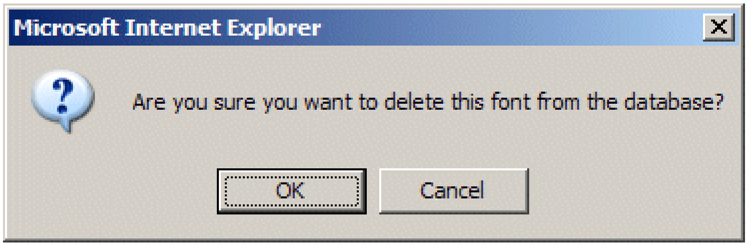


4. Edit the font name or family in the text field specified.
5. When finished, click the Update button ( ).

Delete Fonts

By deleting a font from the system, you are taking away the content contributors' use of that font in their content blocks. To delete a font, follow these steps.

1. Access the view font screen, as described in "Viewing Fonts" on page 246.
2. Click the Delete button ( ).
3. A message is displayed.



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 CMS300, you do not delete it from your computer.

Managing Tasks

NOTE Much of the Task functionality is documented in the **Ektron CMS300** Users Manual > “Managing Tasks” section . 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 CMS300, 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 CMS300 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 250
- ”Task Permissions” on page 250
- ”Task Categories and Types” on page 251
- ”Automatic Creation of Tasks Associated with Content Blocks” on page 261
- ”Task States” on page 263
- ”Email Notification” on page 270
- ”Archiving a Task” on page 271
- ”Deleting a Task” on page 272
- ”Purging a Task” on page 273

The Tasks Folder

The tasks folder in the Smart Desktop contains all tasks in the Web site.

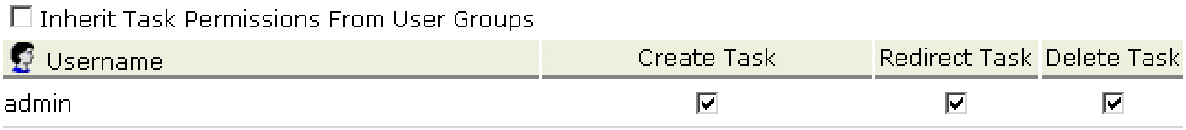
Task Permissions

You can assign the following task-related permissions in the Edit Users and Edit User Groups screens:

- Create task
- Redirect task (that is, assign to another user)
- Delete task

Users can only perform these functions as specified in the Edit Users and Edit User Groups screens.

Only administrator level users can edit these fields in the User profile. Non-administrative users can see but not edit them.



Assigning Group Permissions

A user can either inherit permissions from all groups of which he is a member or can be granted task permissions uniquely, without regard to his groups.

Inheriting Task Permissions from User Groups

To have a user inherit task permissions from all groups of which he is a member, check the **Inherit Task Permissions From User Groups** box on the Edit User screen.

Belonging to More Than One Group

If a user inherits task permissions from groups and is a member of more than one group, the user inherits permissions assigned to all groups. So, for example, if Group A is allowed to create tasks and Group B is only allowed to delete them, a member of both groups can create *and* delete.

Assign Unique Task Permissions

To assign unique task permissions to a user, regardless of permissions assigned to groups of which he is a member, uncheck the **Inherit Task Permissions From User Groups** box on the Edit User screen.

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.

You can create Task Categories and Task Types from three locations.

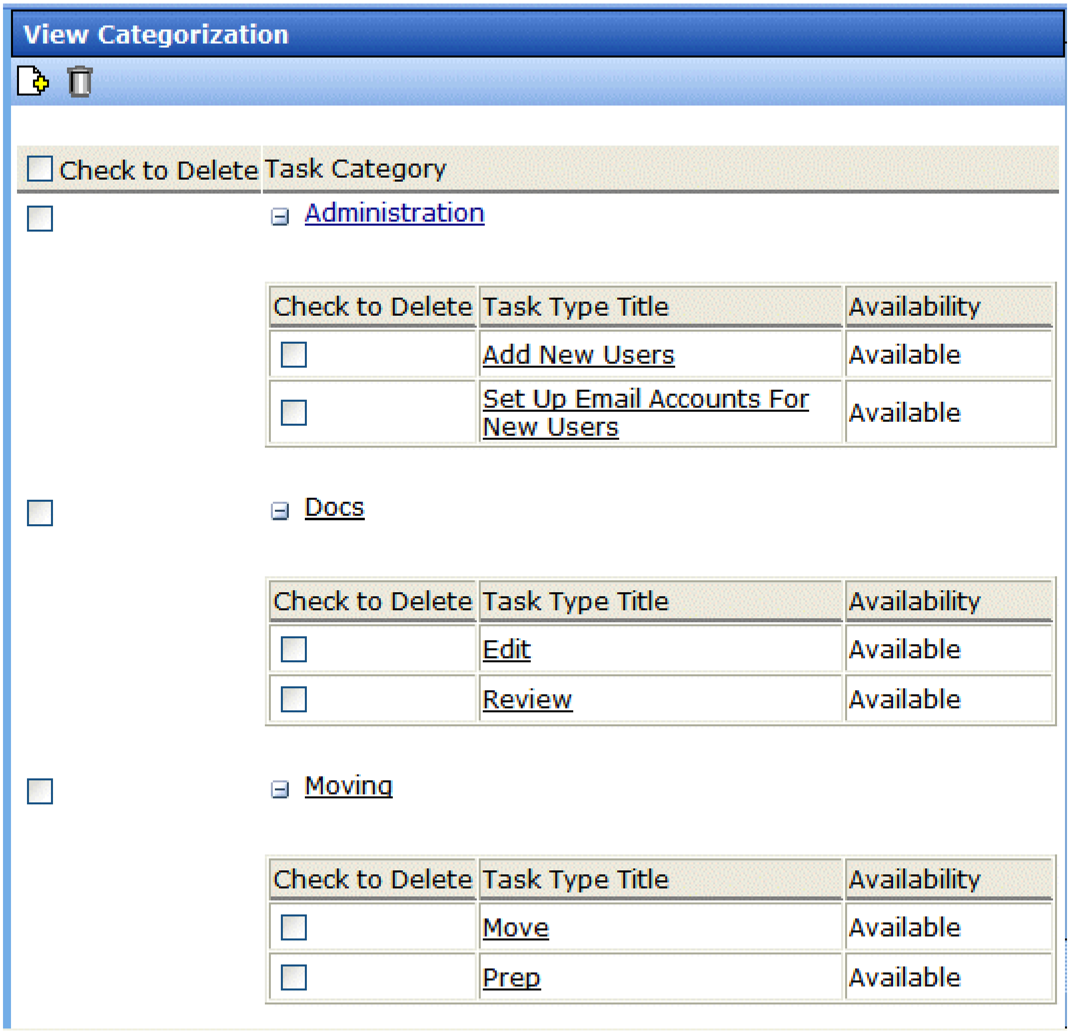
- When adding a task. *See Also:* **Ektron CMS300** User Manual section "Managing Tasks" > "Creating a Task via the Task Folder"
- When editing a task
- When working in the View Categorization screen. *See Also:* "View Categorization Screen" on page 252

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**.

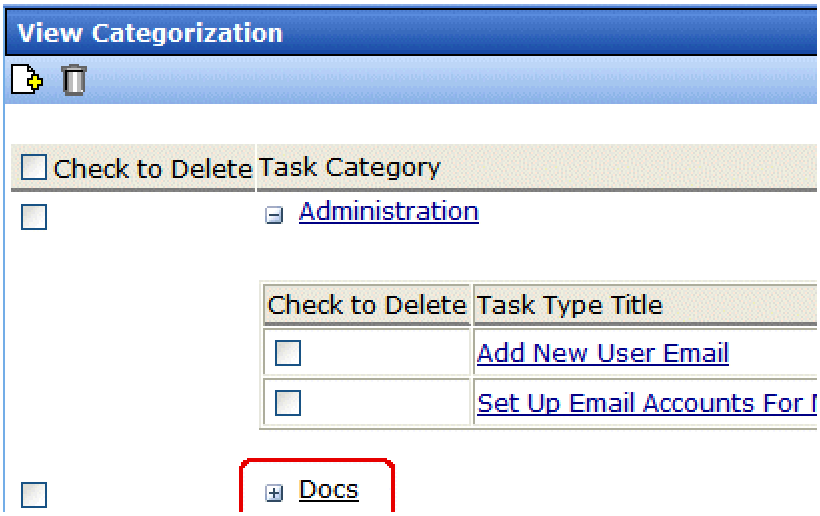
The following screen appears.



Viewing Task Categories

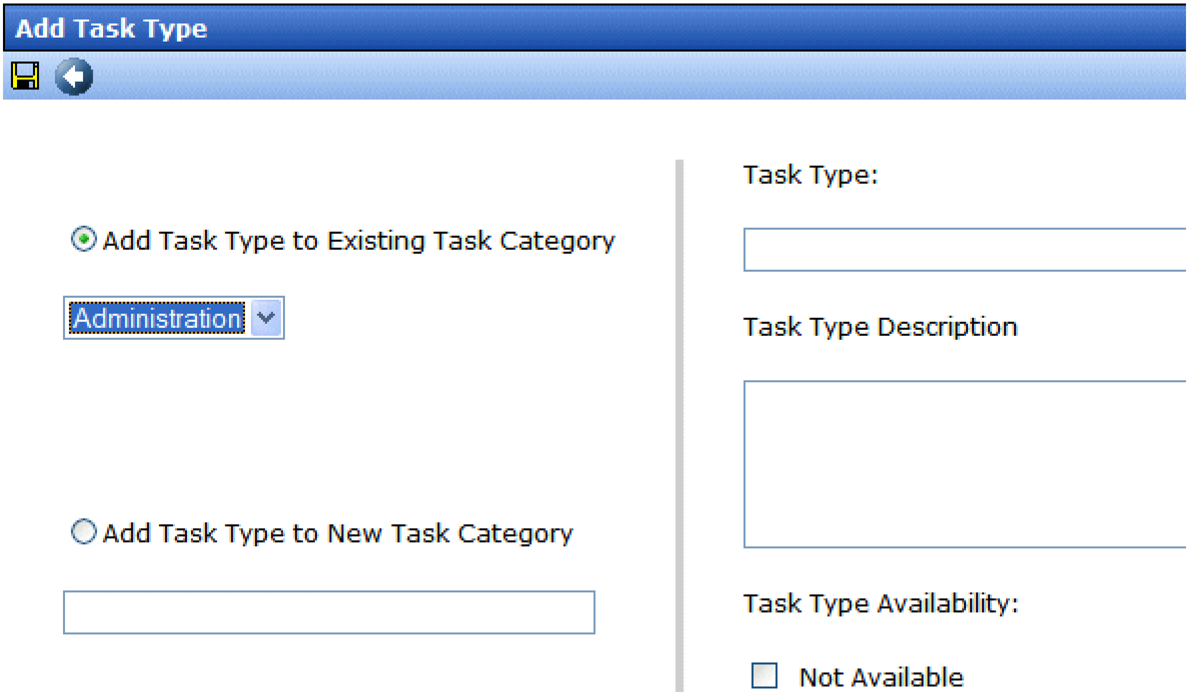
While in the View Categorization screen, you can collapse and expand Task Categories. To collapse a Task Category, click the ( ) button next to the Task Category name. To expand one, click the ( ) button next to the Task Category name.

The following example shows the View Categorization screen with one Task Category minimized.



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.



From this screen, you can

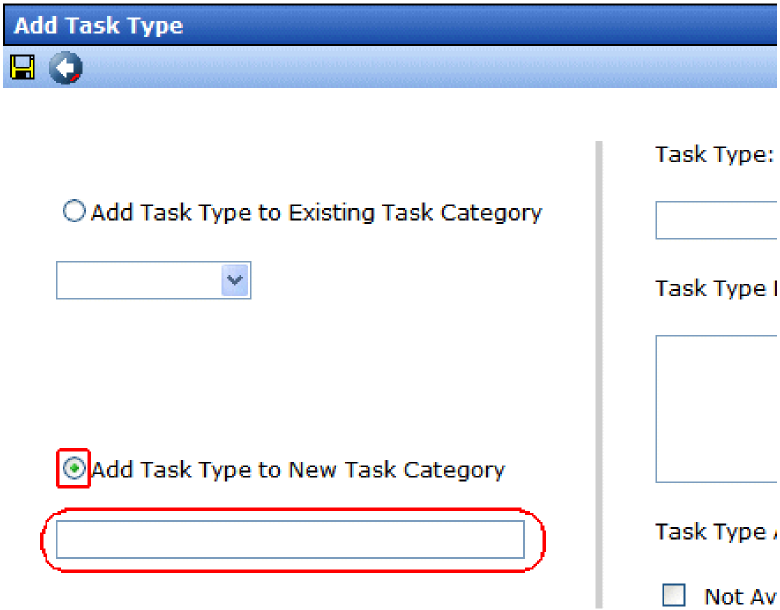
- Add a Task Type to an existing Category
- Create a new Task Category and Task Type
- Edit a task category
- Edit a task type and description
- Define Task Type availability

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.



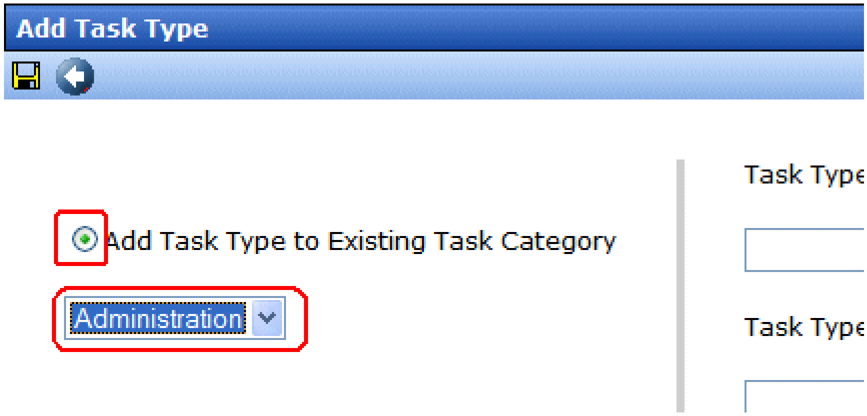
5. Add a Task Type name in the **Task Type** field.
6. Enter a **Task Type Description**.
7. Choose a Task Type Availability. *See Also:* "Task Type Availability" on page 259
8. Click **Save** ( ).
9. Your new Task Categories and Task Types appear on the View Categorization screen.

Adding a New Task Type to an Existing Task Category

To add 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.

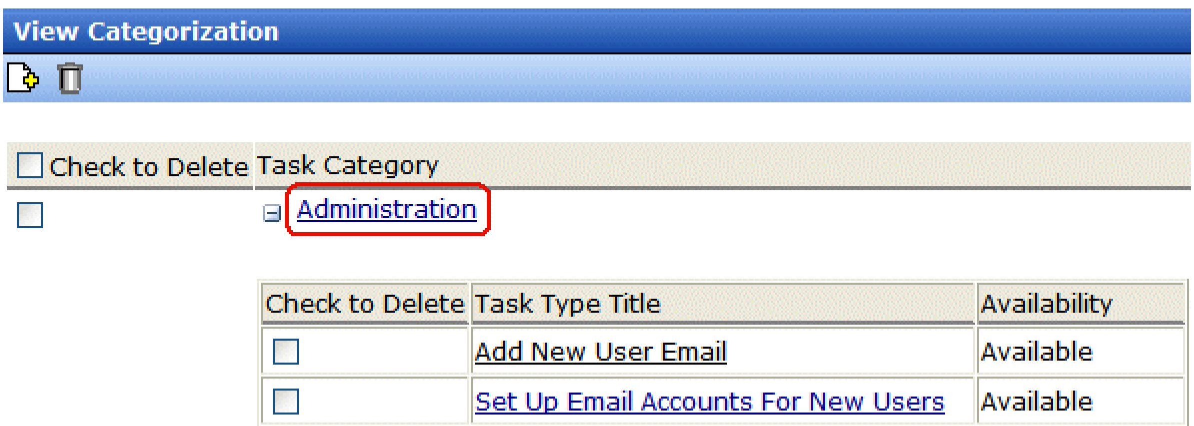
4. Choose a category from the drop down box.



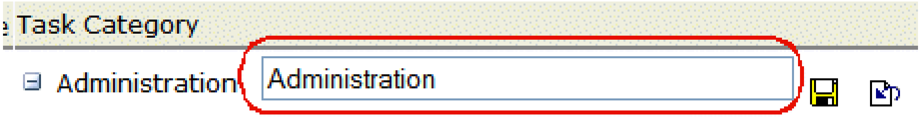
5. Complete Steps 5 - 9 from ”Adding a New Task Category and Task Type” on page 255.

Editing Task Category

You can edit a Task Category names. To edit a Task Category, click the Task Category link.



A text box screen appears next to the category name. Use the text box to change the name.



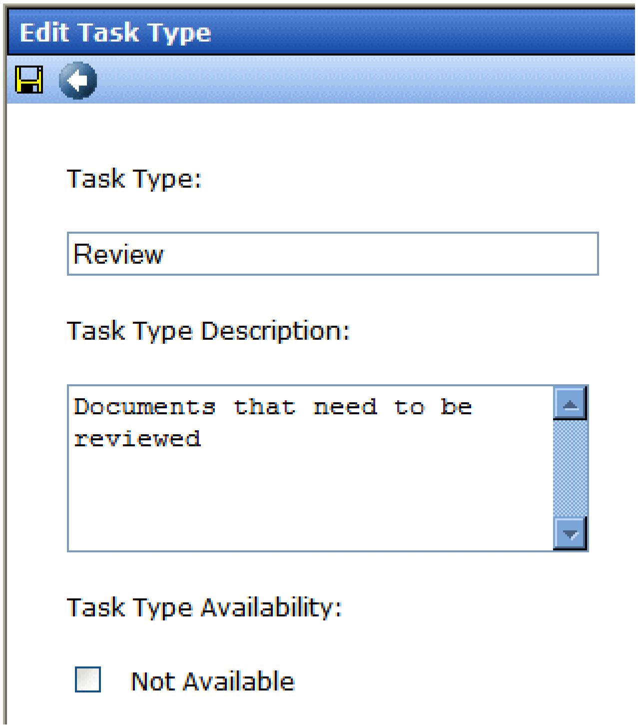
You can either save ( ) the changes, or cancel ( ) the edit.

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.



From this screen you can edit the following:

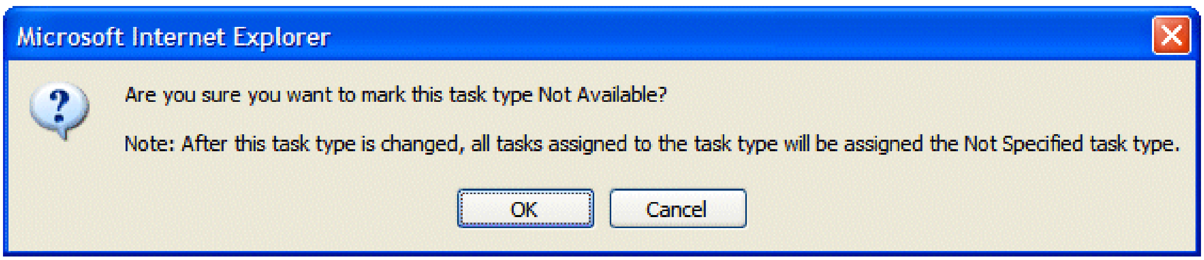
- Task Type
- Task Type Description
- Task Type Availability. *See Also:* "Task Type Availability" on page 259

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.



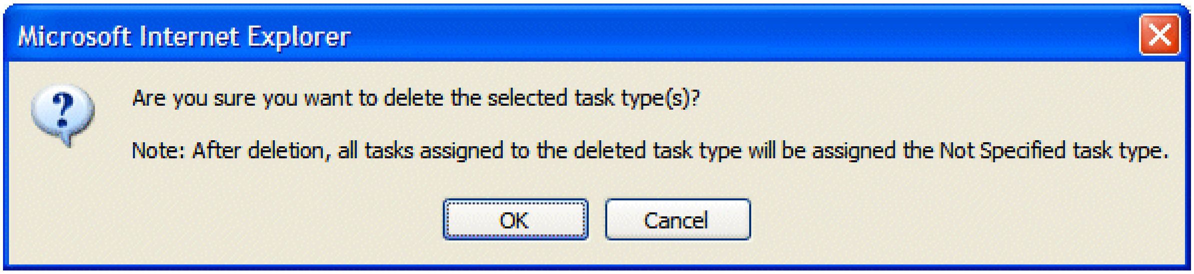
After you make a Task Type not available, the assigned tasks' Type and Category are changed to **Not Specified**.

Deleting Task Categories and Task Types

You can delete Task Types by Task Category or individually.

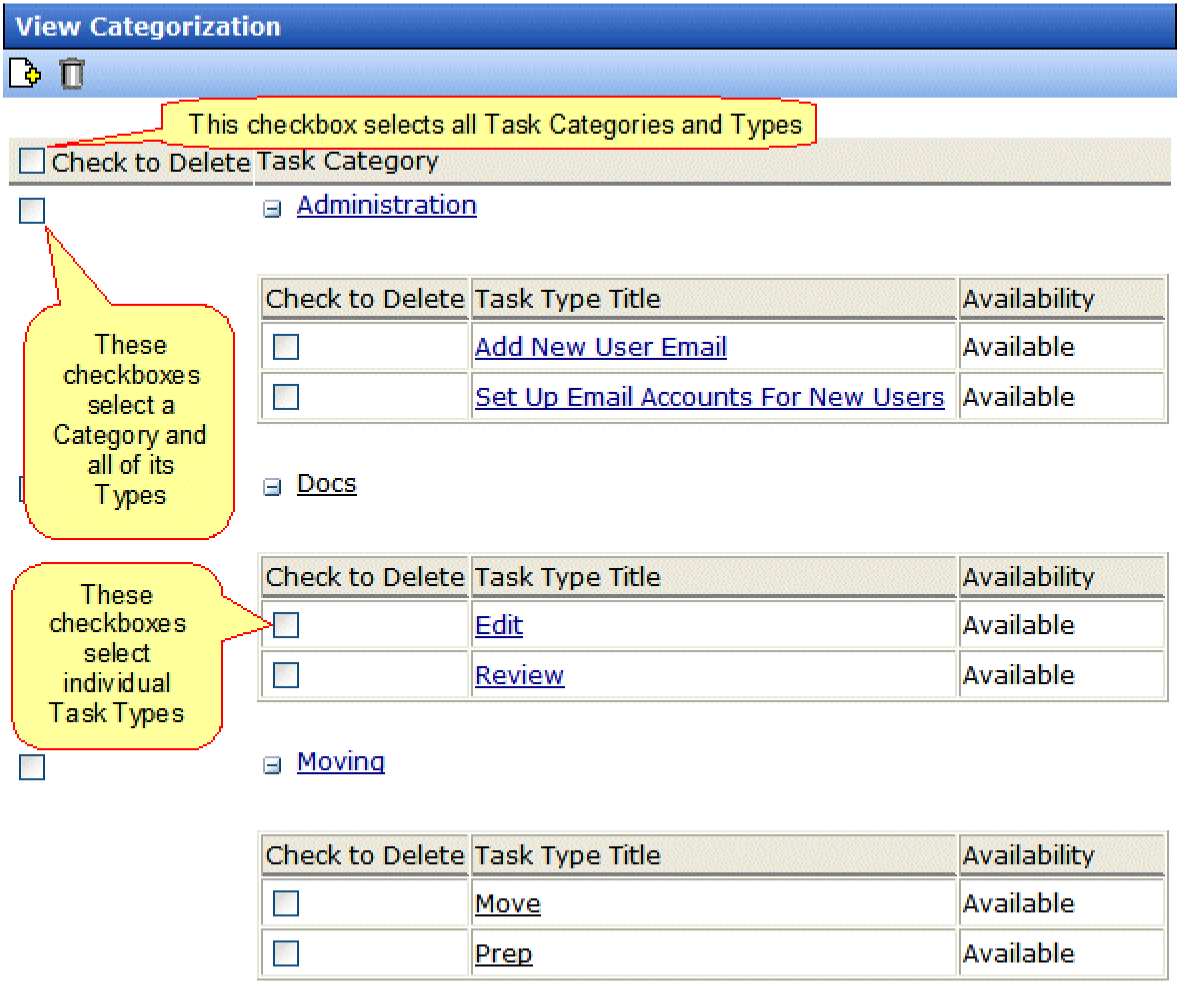
To delete a Task Type, click the check box next to the Task Type, then click the Delete ( ) button.

When you delete a Task Type, the following appears.



To delete all Task Types, check the **Delete all** check box.

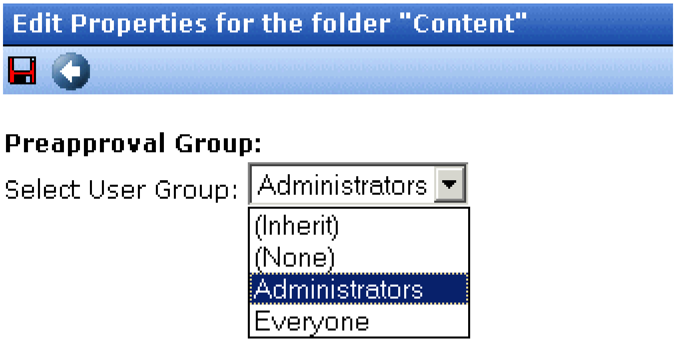
The following example shows which check boxes on the screen are associated with All Task Types, Task Categories, and individual Task Types.



Automatic Creation of Tasks Associated with Content Blocks

Enabling Automatic Task Creation

Each folder's Properties window has a Modify Preapproval Group toolbar button ( ). Click it to access the **Pre Approval Group:** field. This field turns automatic task creation on or off. If you assign a user group, the feature is turned on, and automatically created tasks are assigned to the designated user group.



How Automatic Task Creation Works

When a user submits a content block for approval, **Ektron CMS300** 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 automatic task creation is enabled (see "Enabling Automatic Task Creation" on page 261), a task is created and associated with the content block. Such a task must be approved by a member of the preapproval group before it can enter the approval chain.

NOTE The user submitting the content does not need permission to create tasks.

The task has the following information.

Field	Value
Title	A string formulated by joining the • content block title • content block ID number • underscore • Task For example, `Private Content2_Task`
Assigned to	The user group identified in the **Pre approval group:** field of the Application Setup screen
Assigned by	The user who submitted the content block

Field	Value
Content block	The content block being submitted for approval
Priority	Normal
State	Not Started
Due date	none
Start date	none
Created by	User who submitted content block
Description	none

Task States

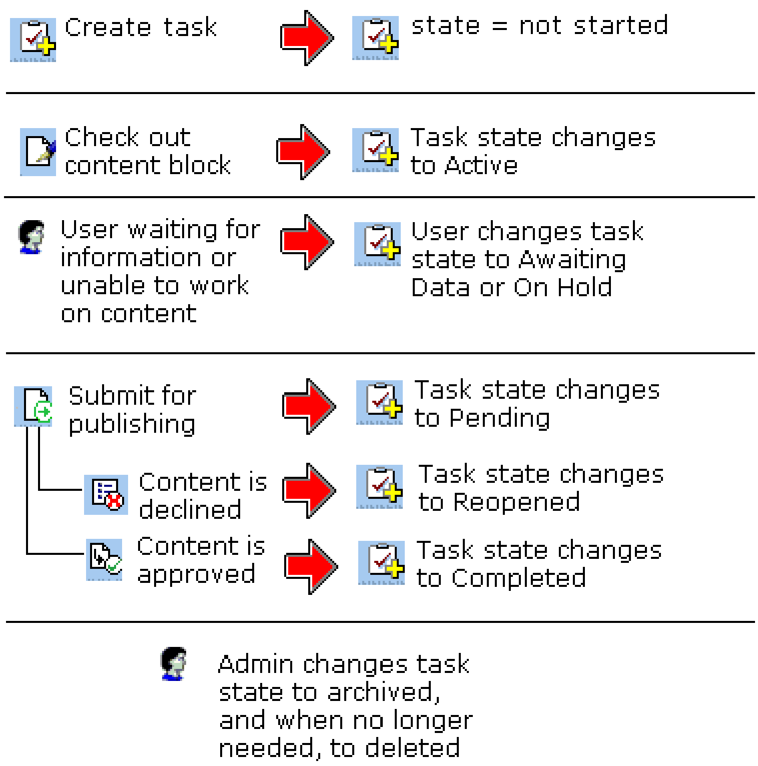
During the life of a task assigned to content, it normally progresses through a series of states. The state helps track a task's progress from creation to completion and even removal from the database. When reviewing the history of a task, the state can be used to review which actions changed the task's 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.



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 271	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 272 When you purge the task, it and all of its transactions are removed from the database. *See Also:* "Purging a Task" on page 273	User (user with delete permission can delete; only admin can purge)

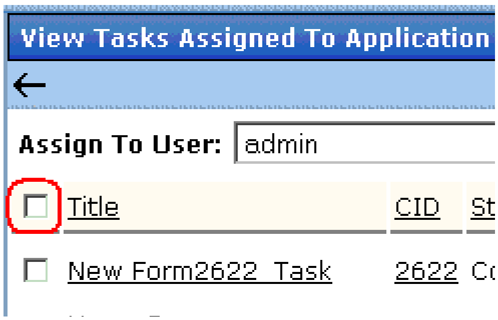
Restrictions on the Task Flow Process

- 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 250.

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).



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 Task Type • Sort tasks by column
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 Task Type • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
Assigned To Me	All open tasks assigned to you	• Assign tasks to a different user • View a task • Sort tasks by Task Type • 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 Task Type • Sort tasks by column
Created by Me	All open tasks you created	• View a task • Sort tasks by Task Type • 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 Task Type • Sort tasks by column
Not Started	All whose state is Not Started *See Also:* "Task States" on page 263	• Change to any other state • View a task • Sort tasks by Task Type • 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 Task Type • Sort tasks by column
Awaiting Data	All whose state is Awaiting Data	• Change to any other state • View a task • Sort tasks by Task Type • Sort tasks by column
On Hold	All whose state is On Hold	• Change to any other state • View a task • Sort tasks by Task Type • Sort tasks by column
Pending	All whose state is Pending	• Change to any other state • View a task • Sort tasks by Task Type • Sort tasks by column
Reopened	All whose state is Reopened	• Change to any other state • View a task • Sort tasks by Task Type • Sort tasks by column
Completed	All whose state is Completed	• Change to any other state • View a task • Sort tasks by Task Type • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
Archived	All whose state is Archived	• Change to any other state • View a task • Sort tasks by Task Type • Sort tasks by column
Deleted	All whose state is Deleted	• Change to any other state • Purge tasks • View a task • Sort tasks by Task Type • Sort tasks by column

Determining Which Tasks a User Can View

To provide security, **Ektron CMS300** 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

View option	Administrator group member	User or group to whom task assigned	User who assigned task	User who created task	All users
Not Started	all tasks in specified state	only tasks assigned to user in specified state			
Active	|	|			
Awaiting data	|	|			
On hold	|	|			
Pending	|	|			
Reopened	|	|			
Completed	|	V			
Archived	|				
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 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.

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.

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 265.

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.

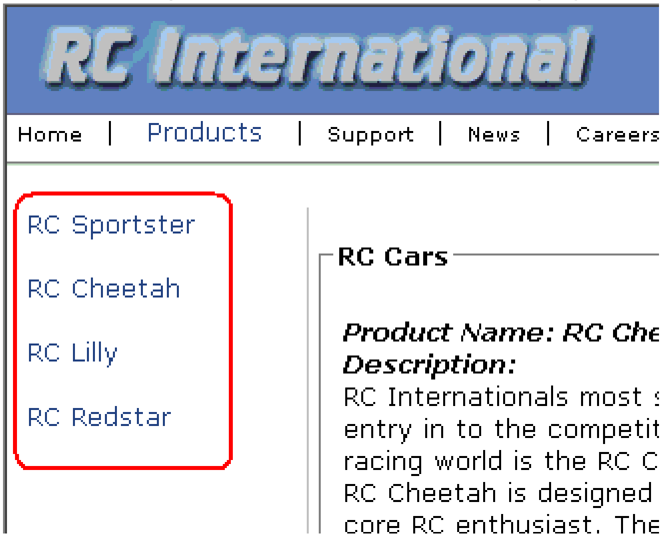
To purge one or more tasks, follow these steps.

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.

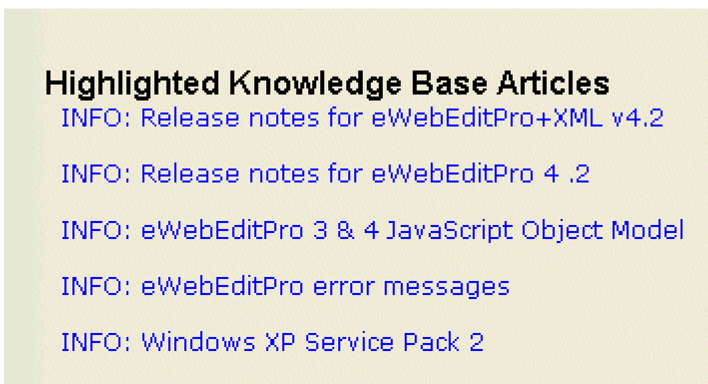
4. Click the Purge button.

Collections

Ektron CMS300’s Collection feature lets users create a list of content blocks 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.



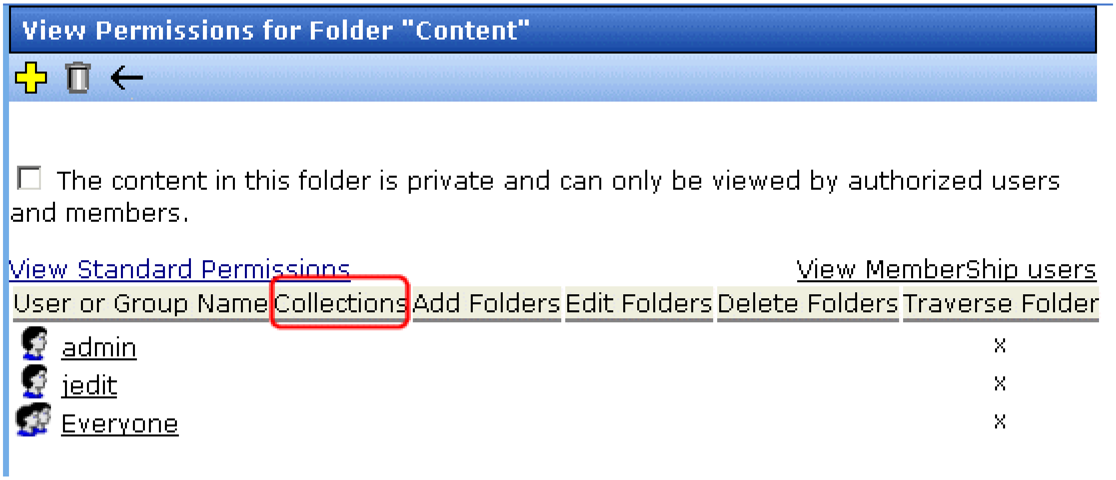
Collections can also be used to display listings such as job postings, press releases, and Knowledge Base articles. The following graphic illustrates the use of a collection on the landing page of Ektron’s Knowledge Base.



This section only describes managing permissions to use the Collections feature. For more information about the Collections feature, see the **Ektron CMS300** User Manual section “Working with Collections.” ”Working with Collections” on page 137

Collection Permissions

Permissions for collections are set in the content folder permissions table, in the advanced permissions section. *See Also:* ”Setting Permissions” on page 77



Menu Feature

Ektron CMS300'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 blocks, library assets, external hyperlink and submenus.

This section only describes managing permissions to use the Menus Feature and suggestion for implementing it. For more information about using the Menus feature, see the **Ektron CMS300** User Manual.

Permission to Use the Menus Feature

Only users with permission to use the Collections feature (illustrated below) can work with menus. If user does not have permission to Collections, the menus toolbar button does not appear.

Also, if a user has permission to Collections but Read Only permission for content and the library, he cannot add a content block 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 CMS300** Developer Manual section “Menus”.

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 Ektron CMS300 User Manual's "Working with Calendars" chapter 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 CMS300 Developer's Manual provides instructions on using the Calendar custom function/custom function.

This chapter explains **Ektron CMS300** calendars through the following topics.

- "Calendar Toolbar Buttons" on page 278
- "Calendar Permissions" on page 280
- "Adding a New Calendar" on page 281
- "Calendar Style Sheet" on page 285
- "Calendar Event Types" on page 287
- "Displaying Calendars on Web Pages" on page 290

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 281
	Save	Save calendar or calendar event	

Button	Name	Lets you	More Information
	Show Calendar	Display calendar in Workarea	“Viewing a Calendar” in the **Ektron CMS300** 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 287
	Add Calendar Event	Access Add Calendar Event screen in the Workarea	“Adding a Calendar Event” in the **Ektron CMS300** User Manual chapter “Working with Calendars”
	Edit	Edit calendar or event name	”Editing Calendars” on page 284; ”Editing the Event Type Name” on page 289
	Delete	Delete calendar or calendar event	”Deleting Calendars” on page 285
	Delete all recurring events	Delete all events in a recurring series	“Deleting All Events in a Recurring Series” in the **Ektron CMS300** User Manual chapter “Working with Calendars”
	Add Calendar Event	Access the Add Calendar Event screen from calendar on Web page	“Adding a Calendar Event” in the **Ektron CMS300** User Manual chapter “Working with Calendars”
	View Date	View calendar events for selected day	“Viewing a Calendar Event” in the **Ektron CMS300** User Manual chapter “Working with Calendars”
	Add Library	Select a library Quicklink for an event.	Hyperlink field description in the **Ektron CMS300** User Manual chapter “Working with Calendars”

Calendar Permissions

Calendar permissions are derived from the content folder assigned to the calendar. The following section explains the permissions you can set for a calendar.

NOTE See "Setting Permissions for a Content Folder" on page 80 for more information.

Administrator Permissions

Members of the administrator user group have full control over all calendar features (as they do for content blocks). You *must* be a member of the administrator group to add, edit, or delete a calendar.

Administrators may also add, edit, and delete calendar events.

User Permissions

Users who are not in the administrator user group cannot add, edit, or delete calendars.

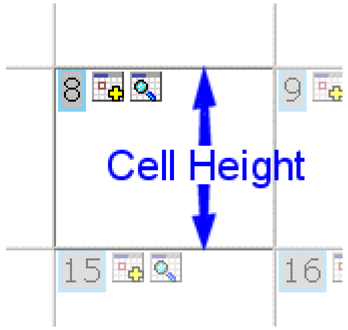
Non-administrator users can add, edit, or delete calendar events *if* they have add, edit, and delete permissions for the calendar's content folder. *See Also:* "Setting Permissions" on page 77

Cell Properties

While adding or editing a calendar, you can define several attributes to customize its display. The following section explains table property attributes.

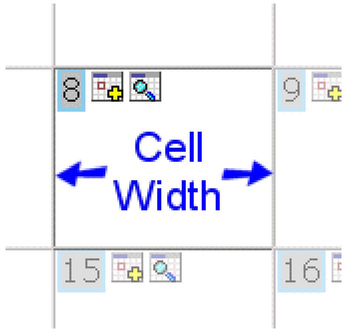
Cell Height

The cell height attribute is used to determine the height, in pixels, of each calendar cell. If there are several calendar events inside a table cell, the height expands to accommodate all events.



Cell Width

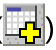
The cell width attribute determines the width, in pixels, of each calendar cell. The width of a cell never changes, even if the contents extend past the cell. Instead, the text wraps to the next line. You may, however, specify no-wrap in the calendar style sheet. *See Also:* ”Calendar Style Sheet” on page 285



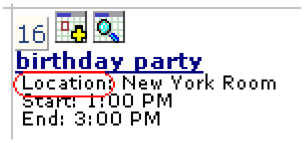
Adding a New Calendar

To add a new calendar, follow these steps.

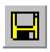
See Also: ”Calendar Permissions” on page 280

1. Access the Calendars screen.
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. 
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.
Table Properties	You may configure the calendar size by modifying the cell properties. *See Also:* ”Cell Properties” on page 280
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 283

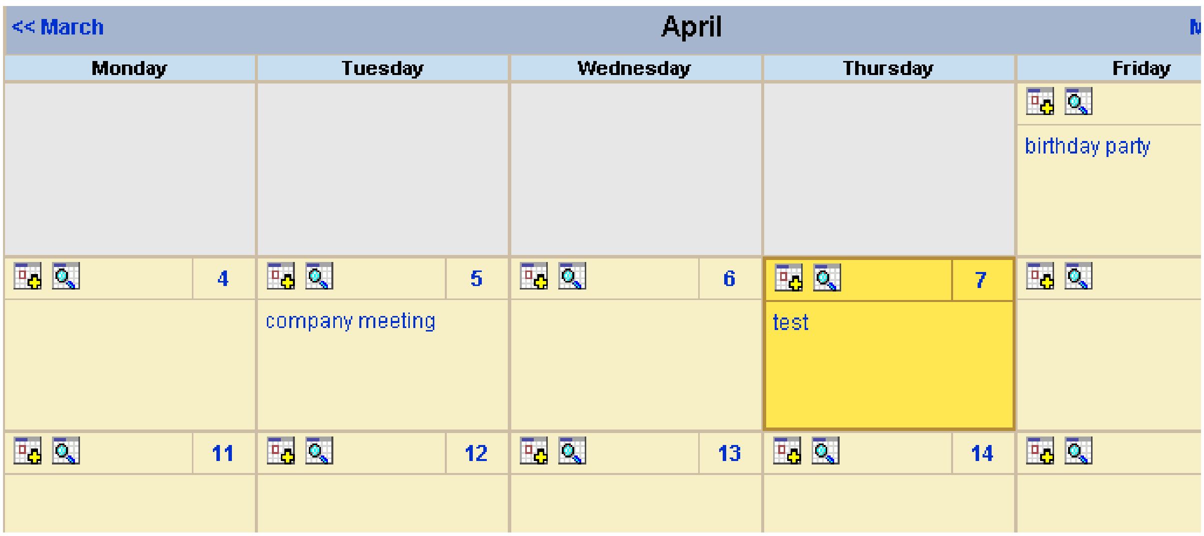
Section	Description
Event Type Label	One section of the Add Calendar Events screen displays available event types and lets the user assign them to the event.  By default, this text is **Event Type:**. To change the default text, edit this field.
Event Types Available	If you want to allow users to assign 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.
Content Folder	Specify the calendar's content folder. To understand how folder assignment affects calendar use, see "Calendar Permissions" on page 280.

4. After you enter calendar information, 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.

Do Not Display Weekends



Editing Calendars

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 281 as a reference.
5. Click the Save button ().

Deleting Calendars

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 Style Sheet

The look and feel of a calendar, when displayed on a Web page, are controlled by a style sheet. By default, two style sheets define the styles for calendars in Ektron CMS300.

Style Sheet	Defines the styles for the calendar in the
\CMS300Sample\ekcalendar.css	sample Web site template
\CMS300Sample\CMS300Scripts\ekcalendar.css	Workarea

You may modify either style sheet to create a unique look for your calendar on your Web site and in your Workarea. If desired, you may create a different style sheet for each calendar.

Style Sheet Architecture

the calendar style sheet consists of several classes. The following table explains each class and where it is used on the calendar.

Style Class/Element	Defines the style for...
table	Table tags on the Web page.
table.ekcalTableInner	Table inserted within calendar table. TableInner consists of the grid of dates.
table.ekcalTableOuter	The entire calendar table. These styles will be used unless other styles override them.
td, tr	Table rows and cells on the Web page.
td.ekcalcell	Each calendar day cell.
td.ekcalcelltoday	Today’s calendar cell.
td.ekcaldayrow	The calendar row that contains the days of the week.
td.ekcalmonthyear	The current month and year at the top of the calendar.
td.ekcalnextmonth	The links to move forward or back a month.
tr.ekcalfirstrow	The calendar’s heading table row.
tr.ekcallastrow	The calendar’s last row.
a	Anchor tags used throughout the calendar.
a:hover	Anchor tags, when the mouse is hovering over them, throughout the calendar.
a:active	Active anchor tags throughout the calendar.
.ekday	The numerical date displayed.

Style Class/Element	Defines the style for...
.ekeventendlabel	The end time label in a calendar event.
.ekeventlocationlabel	The location label in a calendar event.
.ekeventlocaton	The location line of the of the calendar event.
.ekeventstartlabel	The start time label in a calendar event.
.ekeventtime	The start and end times of the calendar event.
.ekeventtitle	The title of the calendar event

Including Style Sheet on Web Page

You may create as many style sheets as you want for defining the look of your calendars. You might have one style sheet for a calendar in one section of your Web site, and another for a calendar in another section. When inserting a calendar custom function into your Web template, be sure to add a reference to a style sheet to the template.

NOTE Refer to the Ektron CMS300 Developer’s Reference Manual for additional information.

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 288
- ”Viewing Event Types” on page 288
- ”Adding Event Types” on page 288
- ”Editing the Event Type Name” on page 289

- "Deleting Event Types" on page 289
- "Assigning an Event Type to an Event" on page 290

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 281

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 288 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 288.
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 290 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 288.
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 288.
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 CMS300** 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 CMS300 Developers Reference Manual.

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`.

Multi-Language Support

There are several aspects to translating within **Ektron CMS300**. They are listed below.

Type of Translation	Seen by	For more information, see
Screens and messages	Content contributors	"Translating Screens and System Messages" on page 291
Content	Content contributors (when viewing or editing); visitors to your site	"Working with Multi-Language Content" on page 296
Spell check dictionary	Visitors to your site	"Set the Language of Spell Checking" on page 331
Special Character Encoding	Visitors to your site	"Character Encoding" on page 331

Translating Screens and System Messages

Out of the box, Ektron CMS300 has translated strings for:

- English (US)
- French (Standard)
- German (Standard)

To enable any other language, translate screen labels and messages with the Language Translation Tool. Then, set the language active via the **Settings > Configuration > Language Settings** screen. You should only activate a language after you complete the translation.

The Language Translation Tool

Ektron CMS300 provides a tool for translating the screen labels and system messages from English into more than 120 languages. The following instructions explain how to access, convert, and set new languages active on your Web site.

Before You Begin

Before using the language translator utility, read this section carefully to understand the security issues that can arise. When you install Ektron CMS300, the language translator is installed under `Program Files/Ektron/CMS300/utilities/language_SDK` directory. When you are ready to use the translator, move the following files to the `CMS300Sample` directory located under your Web root.

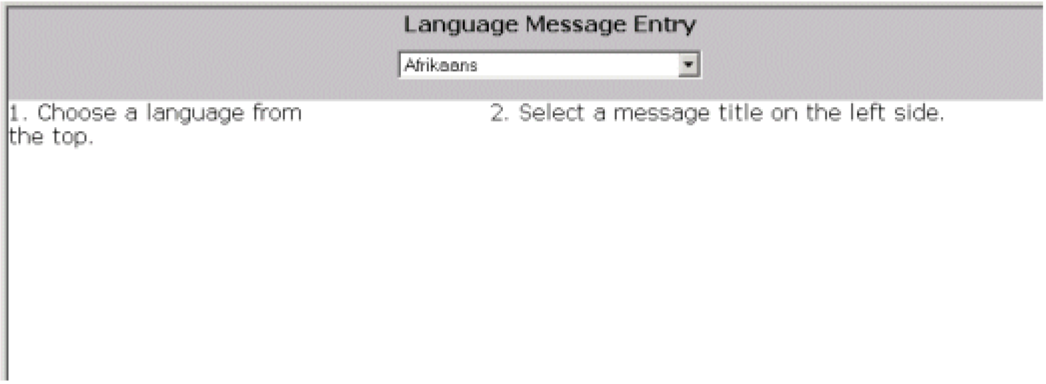
- lang.asp
- lang_entry.asp
- lang_top.asp
- langfill.htm
- lang_englishdisplay.asp

After you move the files, you can access the utility by browsing to `http://www.yourEktronwebsite.com/CMS300Sample/lang.asp`. From that page, you can perform the actions described later in this section.

When you finish using the language translator, Ektron recommends moving the files into a non-public directory, such as `C:\Program Files\Ektron\CMS300`. This practice prevents outside users from changing your Web site.

Accessing the Translator

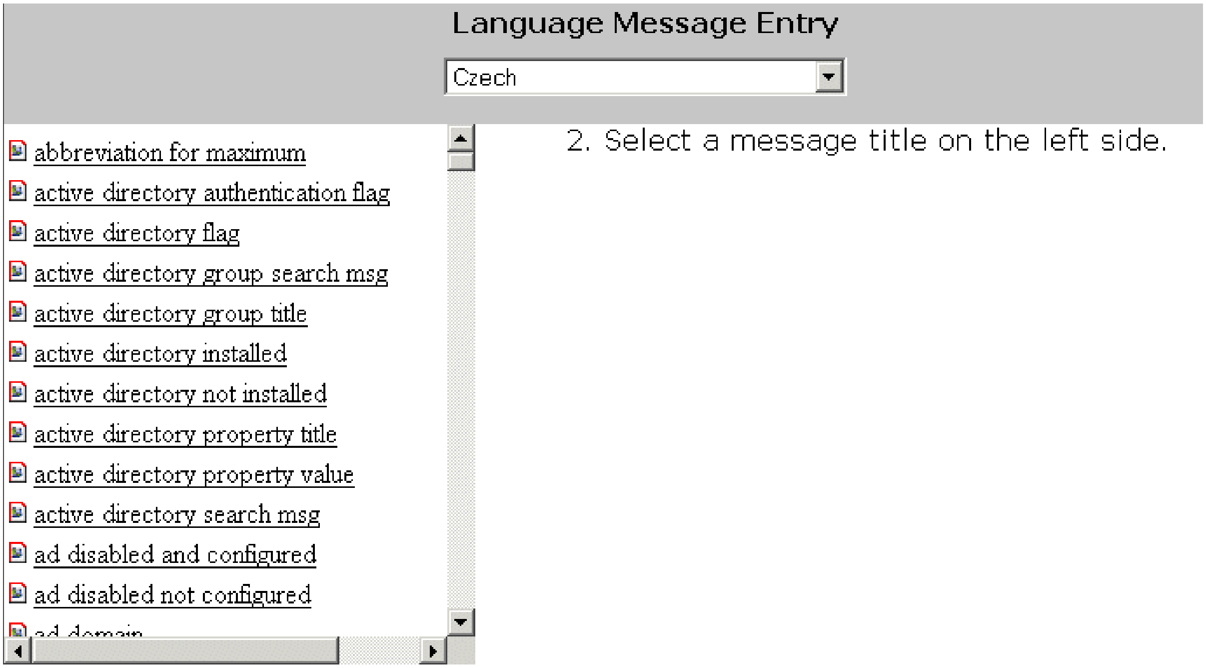
To access the language area, go to URL where you placed the lang.asp file, for example `http://www.yourEktronwebsite.com/CMS300Sample/lang.asp`. When you arrive at the page, the following screen appears:



Selecting a Language

To select a language to which to translate English strings, use the **Language Message Entry** drop down box at the top of the screen

When you select a language, the following screen appears.



Here, you can access and translate each string.

String Icons

Two string icons are used throughout the translation process.

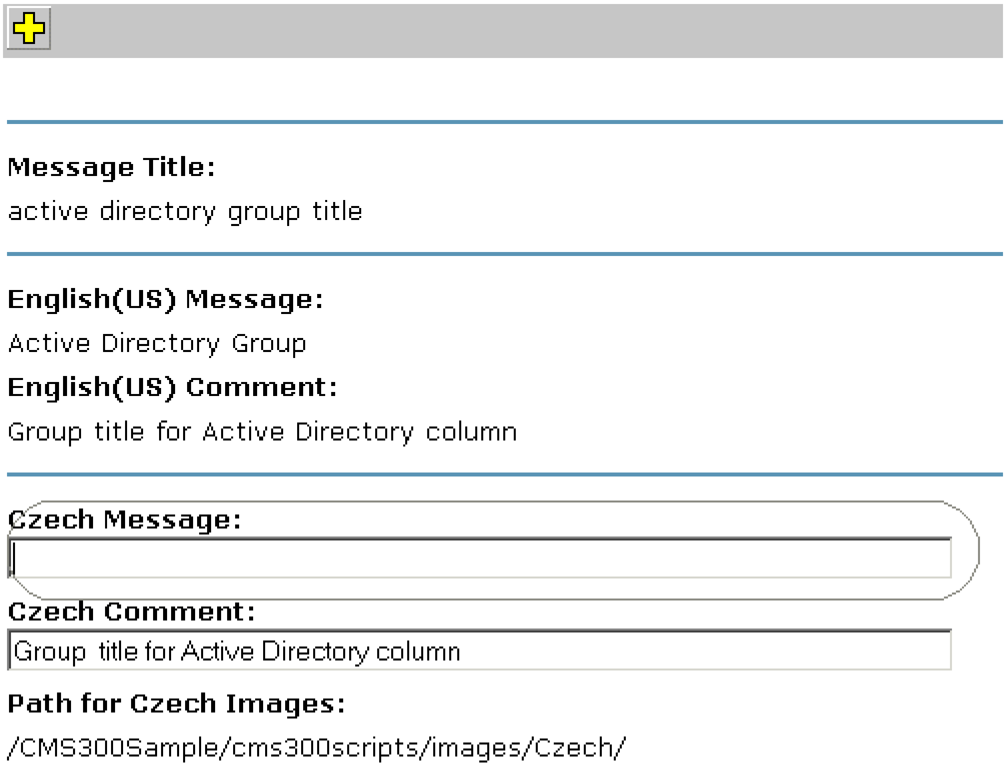
Icon	Meaning
	Translated string
	Un-translated string

Translating Strings

Selecting String

To translate a string, follow these steps:

1. Click the string to be translated in the left frame.



2. In the right frame, you can see the English version of a string. Enter the translation in the **(new language) Message** field, circled above.
3. Insert the translated comment in the **(new language) Comment** field (maximum75 characters).
4. Click the Add button ( ).
5. The icon next to the string you translated changes. *See Also:* "String Icons" on page 294

NOTE This may take some time. Please wait until the utility is complete.

Editing a String

If you need to modify a string, select it again and make the necessary changes.

Images

Although most Ektron CMS300 buttons are pictures and do not require translation, a few images contain words and so require translation. The language translation utility does not translate text within images. Instead, you must make the changes manually by creating a directory and then copying and editing the images. For example, if you are translating **Ektron CMS300** to Swedish, you would create a new folder under `webroot/CMS300Sample/cms300scripts` named `swedish`.

Location of Images

When a language is set active, Ektron CMS300 references the images from the corresponding directory. As examples:

- when English (US) is set active, images are referenced from `webroot/CMS300Sample/CMS300Scripts/images/english`.
- when German is set active, images are called from `webroot/CMS300Sample/CMS300Scripts/images/german`.

NOTE You can copy images from the English folder into a foreign language folder, and only modify images that translating.

Working with Multi-Language Content

Ektron CMS300 supports the creation of content in any language supported by the Unicode standard. This section explains how to create and work with content blocks in any language.

Overview

First, determine the languages in which your site's content should appear (see "Determining Which Languages are Available" on page 300). Then, for any content block, you can provide editions in each supported language.

To provide multi-language content, you can either create a new content block or copy and edit an existing one. For example, you can begin the creation of a German content block by copying

English content into it, then translating that content into German and deleting the English content.

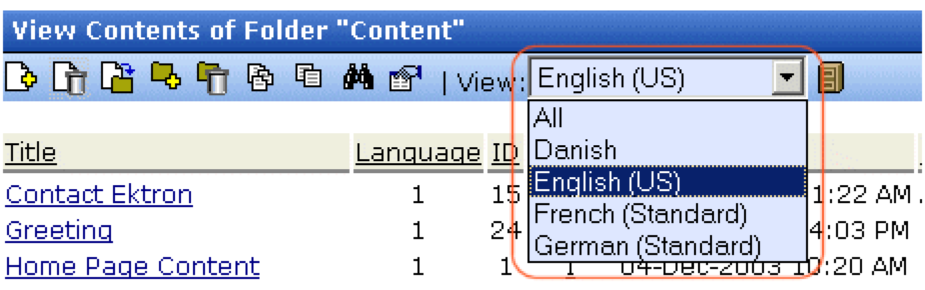
Ektron CMS300 also provides a computer-generated translation feature and the ability to create an XLIFF file from any content block. (XLIFF is a globally-accepted format used for translation.)

All editions of a content block 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 block, but what is displayed is determined by the selected language. There are two ways that a content block'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.asp?LangType=1033`.

NOTE For a list of the decimal values for each supported language, see ”Appendix A: List of Supported Languages” on page 453.

The View Contents of Folder screen's **View** field lets you choose a language then view and create content blocks in that language. You can also view *all* content blocks in the folder, regardless of language. This field makes to easy to find and work on content block editions in a selected language.



The View Contents of Folder screen also displays the language of each content block. This helps you distinguish them when viewing all content blocks.

Finally, you can set up a separate approval chain for each edition of a content block, 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 298
- ”Viewing Your Site in Another Language” on page 299
- ”Determining Which Languages are Available” on page 300
- ”The Default Language” on page 302
- ”Creating a New Content Block” on page 303
- ”Translating a Content Block” on page 304
- ”Multi-Language Approval Chains” on page 320
- ”Working with Tasks in a Multi-Language System” on page 321
- ”Working with Collections in a Multi-Language System” on page 321
- ”Working with Menus in a Multi-Language System” on page 321
- ”Setting Up a Multilingual Web Site” on page 322
- ”Resolving Conversion Issues” on page 326

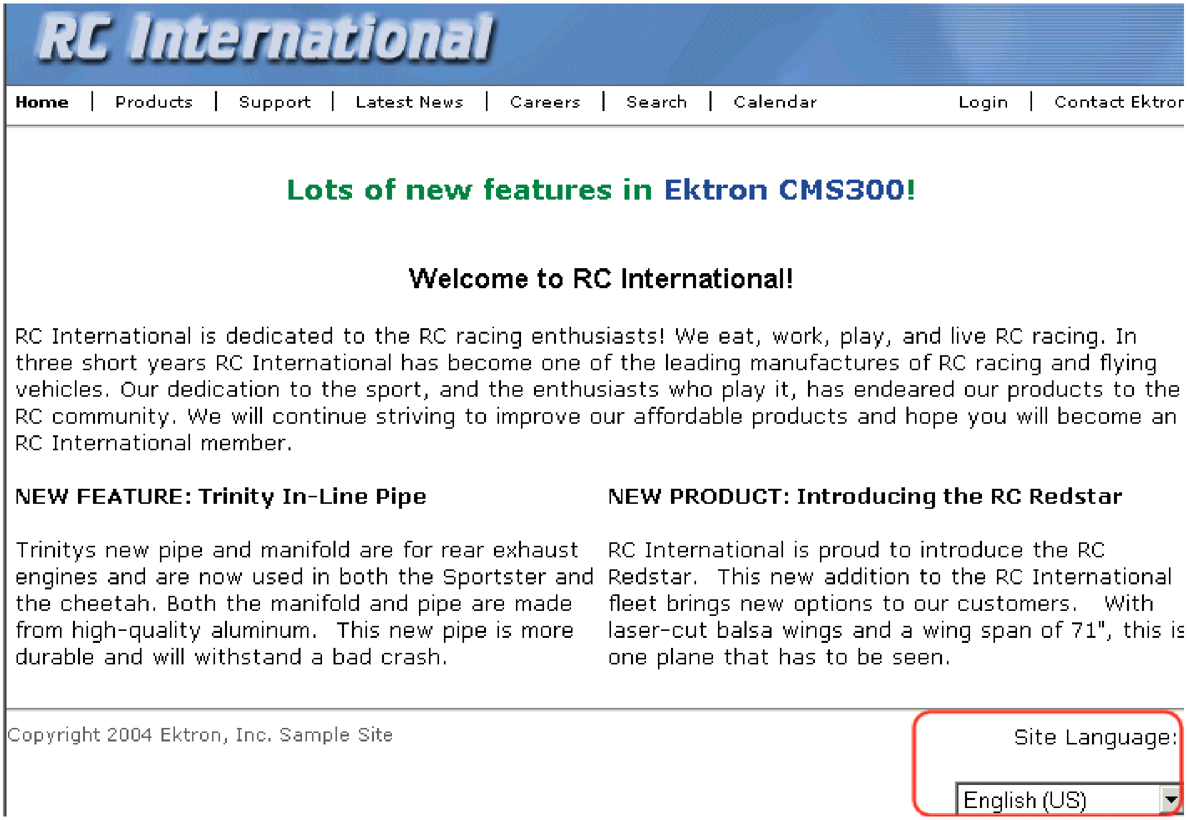
Enabling/Disabling Support for Multiple Language Content

Support for multi-language content is enabled in the setup . To enable or disable it, follow these steps.

1. Open the file `webroot\CMS300Sample\cms300scripts\setup.asp`.
2. To enable multi-language content, set the value of `EnableMultilingual` to 1. To disable it, set it to zero (0).
3. Save and close `setup.asp`.
4. If you are using a platform other than ASP, repeat steps 1 through 4 for the setup file of your server platform. For example, if you are running on ColdFusion, edit setup.cfm.

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).



(For more information about the function used to display this, `ecmShowSiteLanguage`, see the **Ektron CMS300** Developer's Manual.) On the sample site provided with **Ektron CMS300**, this drop-down list appears in the lower right corner of the home page, but your developer can place it anywhere on any page.

Another way to indicate which language-edition of a content block to display is by adding the language parameter (`langType`) to the Quicklink. For example, `products.asp?LangType=1033` displays the English (US) edition of the products.asp content block. This syntax automatically sets the language cookie.

NOTE For a list of the decimal values for each supported language, see "Appendix A: List of Supported Languages" on page 453.

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 CMS300** uses the following criteria to determine which language edition to display for a content block.

1. If an edition of the content block 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 DefaultContentLanguage variable in setup.asp).

NOTE When **Ektron CMS300** is installed, the default language is English. *See Also:* ”The Default Language” on page 302

3. If neither edition is available, display nothing.

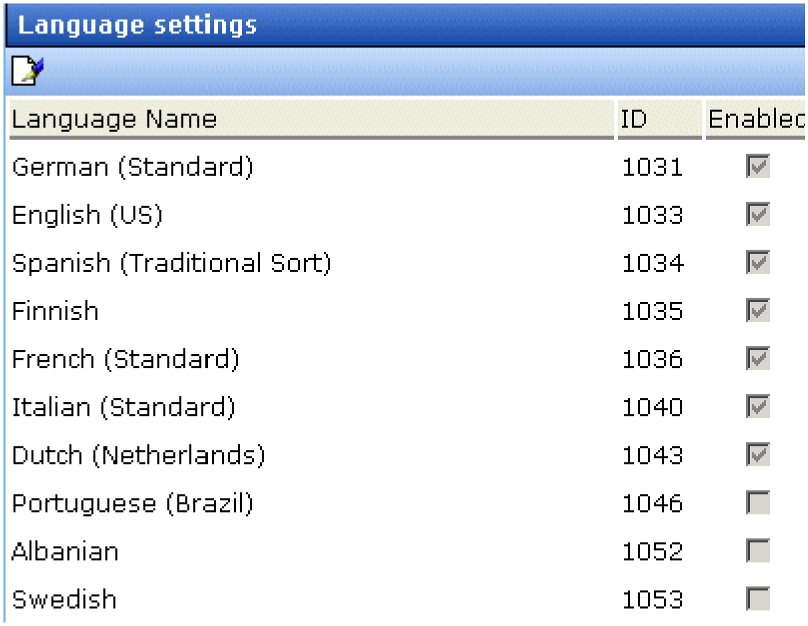
Determining Which Languages are Available

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 Before enabling a language, translate its strings according to ”Translating Screens and System Messages” on page 291.

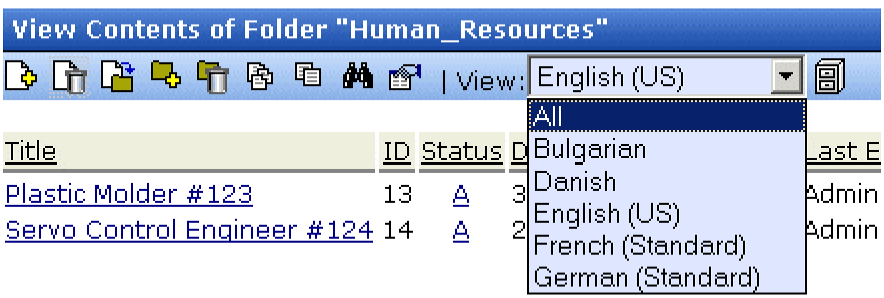
To change the list, follow these steps.

1. Click the Edit button ( ).
2. The Edit Language Setting screen appears.
3. Check the boxes next to languages you want to make available to your content contributors.



The checked languages populate the language drop-down list, which helps visitors to your site select a language. It's also used within **Ektron CMS300** on screens that display multiple languages such as the View Contents of Folder screen (illustrated below).

NOTE The default language on a dropdown list is determined by the value in the **Default Application Language** field in the Configuration Setup screen.



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 CMS300**. All content is created in that language.

The Default Language

The default language determines which edition of a content block 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 a content block for which content does not exist in the selected language. In that case, **Ektron CMS300** displays that content in the default language (if available).

Within **Ektron CMS300**, 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 CMS300**, 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\cms300scripts`.
2. Within that folder, open Setup.asp.
3. Set the value of `DefaultContentLanguage` to the locale id of the default language. For example, 1031 for German.

NOTE For a list of locale ids, see "Appendix A: List of Supported Languages" on page 453.

4. Save and close Setup.asp.
5. If you are using a platform other than ASP, repeat steps 1 through 4 for your server platform's setup file. For example, if you are running ColdFusion, edit setup.cfm.

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 300.)

If you want to disable the default language, you must first assign a new default language. "The Default Language" on page 302 explains what a default language is and how to assign one.

What Happens to Content Blocks When You Disable Their Language

If you disable a language for which content blocks exist, those content blocks remain in the database but no one can access them, either from within **Ektron CMS300** or when visiting your site.

If you later enable that language, the content blocks are once again available.

Creating a New Content Block

To create a content block in a non-English language, follow these steps.

1. Navigate to the content folder in which you want to create the content block. (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.

If the desired language is not available, see "Determining Which Languages are Available" on page 300.

3. Click the Add Content button () and create the content as you would any content block. *See Also:* "Adding Content" on page 41
4. In order to add search data to a content block, search data specifications must have been created for the selected language. *See Also:* "Search Data" on page 65

Translating a Content Block

When translating a content block into a foreign language, you have three options.

Option	For more information, see
Copy original content into a new content block in a new language. Then, translate content manually.	"Translating Content Manually" on page 304
Use the computer-based translation tool provided with **Ektron CMS300**.	"Using Machine Translation" on page 306
Create an XLIFF or XHTML file from existing content blocks. 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 Xport Feature" on page 309

Translating Content Manually

Use this procedure when you want to initialize a new foreign language content block 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 a new content block 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 CMS300**, you copy a content block into a new content block 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 a Content Block 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 299
2. Select the language into which you want to translate the content.
3. Navigate to a content block that you want to translate. You must have privileges to add content to this folder. *See Also:* ”Setting Permissions” on page 77
4. Right click within the content block’s border and a small menu appears.
5. Click the Add Content Block icon ().
6. The original language content appears. Translate into the new language then delete the original content.
7. In order to add search data to a content block, search data specifications must have been created for the selected language. *See Also:* ”Search Data” on page 65
8. When you save the content block, it is saved as the edition of that content block in the selected language.

Accessing a Content Block via its Content Folder

To copy a content block into a new content block of a different language, follow these steps.

1. Go to the View Content screen for the content block 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 block that 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 search data to a content block, search data specifications must have been created for the selected language. *See Also:* "Search Data" on page 65
8. When you save the content block, it is saved as the edition of that content block in the selected language.

Using Machine Translation

Ektron CMS300 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 a Content Block via the Web Site

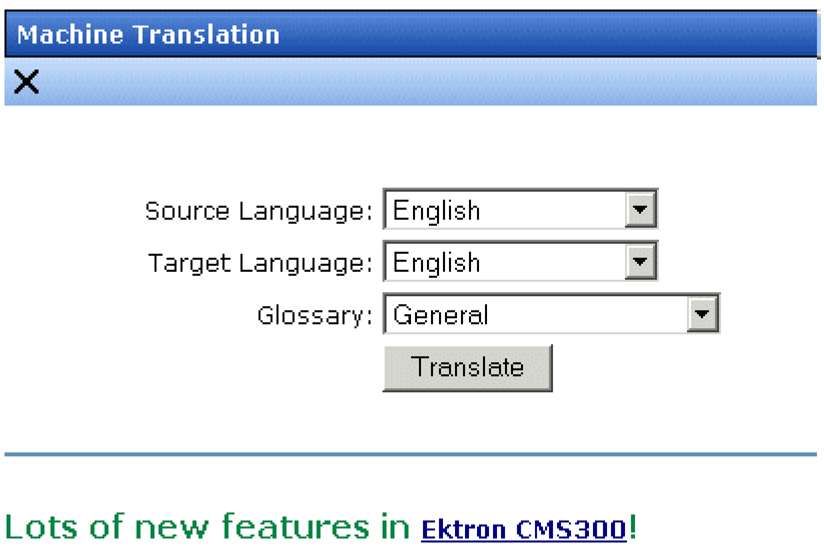
1. Navigate to a page on which you can select the site language. *See Also:* ”Viewing Your Site in Another Language” on page 299
2. Select the language into which you want to translate.
3. Navigate to a content block you want to translate.

NOTE You must have privileges to add content to the folder. *See Also:* ”Setting Permissions” on page 77

4. Right click within the content block’s border. A menu appears.
5. Click the Add Content Block button ( ).
6. The original language content appears.
7. If the screen uses an XML configuration, select the text that you want to translate.

NOTE You cannot use Machine Translation to translate field names in an XML configuration. XLIFF files are a good way to translate XML field names. *See Also:* ”Using the Language Xport Feature” on page 309

8. Click the Translate Content button ( ).
9. The translation screen appears.



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 search data to a content block, search data specifications must have been created for the selected language. *See Also:* "Search Data" on page 65
16. When you save the content block, it is saved as the edition of that content block in the selected language.

Accessing a Content Block via its Content Folder

To machine translate a content block by identifying its content folder, follow these steps.

1. Log into the Workarea and go to the View Content screen for the content block 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 block 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. Continue directions from "Click the Translate Content button (). " on page 307

Using the Language Xport Feature

The Language Xport feature lets you copy content blocks 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 block back into **Ektron CMS300**.

What is XLIFF?

XLIFF (XML Localisation Interchange File Format) is a format that stores extracted text and carries data from one step to the next in the localization process. 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/

Overview of Exporting/Importing Translation Files

1. You select one or more target languages.
2. You select which content blocks to translate. You can select by:
   - all content in a folder or only selected blocks
   - range of last published dates
   - all content blocks that satisfy the first two criteria or only content blocks that either do not yet exist or whose last published date precedes the source content
3. You can preview which content blocks are about to be converted into XLIFF and XHTML files. If necessary, you can modify the selection criteria and rerun the preview until you are satisfied with the list of content blocks to be translated.
4. **Ektron CMS300** converts selected content blocks to an XLIFF or XHTML file. The converted content blocks are saved to `webroot/CMS300sample/uploaded files/xliff` or `webroot/CMS300sample/uploaded files/xhtml`.

   You can prepare the same content blocks for translation into several languages at once.

5. Transmit the XLIFF or XHTML files to a translation agency, which converts them into the new language(s). When the translation agency returns the files, replace the original files with the translated versions.
6. Use the Import feature to upload the translated content blocks to your Web site. If the editions of the content blocks do not exist in the target language, they are created at this point.

•

Creating the XLIFF or XHTML File

To create an XLIFF or XHTML file, follow these steps.

1. From the Workarea, click **Modules > Import/Export Lang**.
2. Click **Export Ektron CMS content to XLIFF and XHTML files**.
3. The Select Target Languages screen appears.

Selecting a Target Language

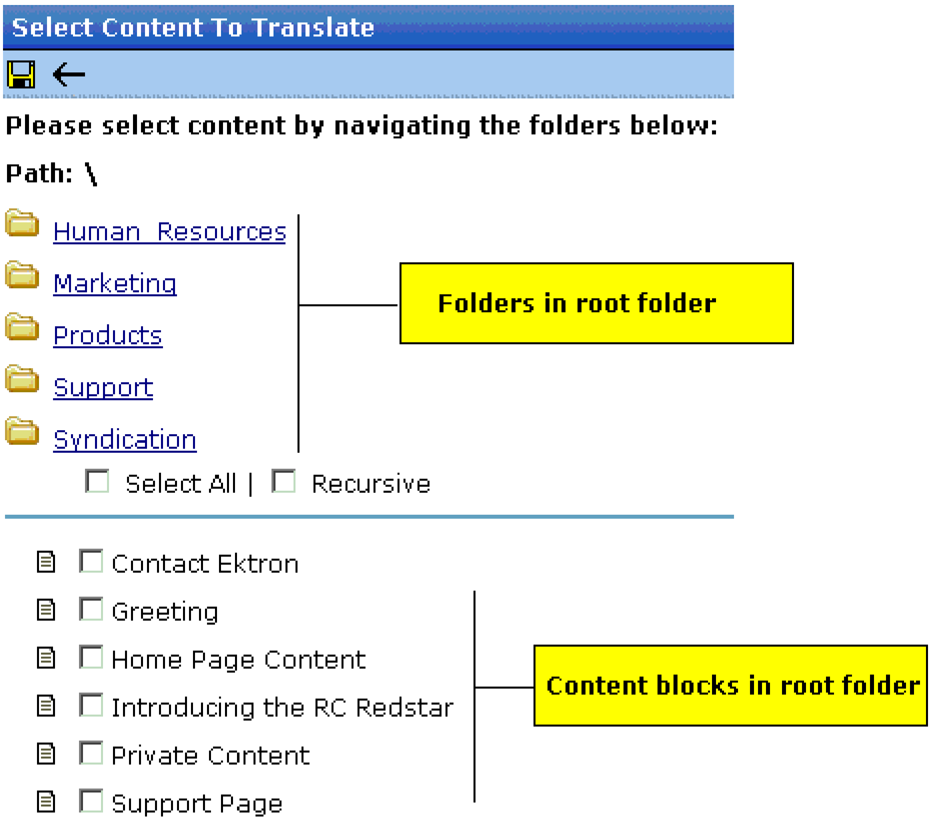
The screen lists all languages enabled in your Language Settings screen. *See Also:* "Determining Which Languages are Available" on page 300.

1. Check each language into which you want to translate content.

   If you need to change the source language, click the drop-down box in the upper right corner.

2. Click the Next button ( ).
3. The Select Content To Translate screen appears.

Selecting Content To Translate



The Select Content To Translate screen provides three methods of filtering content blocks before they are copied to the translation files.

- **Selecting content blocks and folders** - see "The Select All and Recursive Fields" on page 312
- **Only if target language is older or does not exis**t - see "The Only if target language is older or does not exist Field" on page 312

- **Last published date range** - ”Only content blocks with published date from: “No Start Date” to: “No End Date” Field” on page 313

IMPORTANT! Content blocks must satisfy *all* criteria to be converted to translation files.

The Select All and Recursive Fields

Use the **Select All** and **Recursive** fields to help choose content blocks by folder. The initial screen displays all *folders* in the root folder followed by all *content blocks* in that folder. To choose all files in a folder, check **Select All**. To select all files in a folder’s subfolders, check **Recursive**. If you check **Recursive**, **Select All** is automatically checked for the current folder.

Here are some tips on using these fields.

- To select *all content blocks in your CMS*, click **Select All** and and **Recursive** while viewing the root folder.
- If you check **Select All** then uncheck one file, **Select All** becomes unchecked.
- To select files in another folder, click that folder then check its files as needed.
- If you are not using **Select All**, you can only select content blocks from one folder at a time. To select individual content blocks from several folders, repeat the entire process for each folder.

The Only if target language is older or does not exist Field

Check this field if you want to select content blocks by the following criteria.

- Only select a source content block if its last published date precedes the last published date of the content block in the source language. (The table below illustrates this point.)

or

- An edition of the content block does not exist in the target language. You are creating the first edition.

If you do not check this field, this content block is copied to the translation file regardless of current editions.

Example 1 - **Only if target language is older or does not exist** is checked

Content block edition	Last published date	Are translation files created for content block?
Target	12/01/2004	No because target file's last published date = source file's last published date
Source	12/01/2004	

Example 2 - **Only if target language is older or does not exist** is checked

Content block edition	Last published date	Are translation files created for content block?
Target	10/18/2004	Yes because target file's last published date precedes source file's last published date
Source	12/01/2004	

Example 3 - **Only if target language is older or does not exist** is checked

Content block edition	Last published date	Are translation files created for content block?
Target	does not exist	Yes because target file does not exist
Source	12/01/2004	

Only content blocks with published date from: "No Start Date" to: "No End Date" Field

Use this field to limit content blocks by a range of published dates.

For example, to include only content blocks whose last published date is no later than December 1, 2004, you would enter no **Start Date** and December 1, 2004 as the **End Date**.

In this case, if a content block was published on November 28 and again on December 5, the version published on November 28 would be copied to the translation files.

To select a start date, follow these steps. (Follow the same procedure for end date.)

1. Click **No Start Date**.
2. The following date selector appears.

3. Select the year, month and day.
4. Click **insert**.

Previewing Translation Files

After deciding on target languages and selecting content blocks, you can view a report of what will appear in the translation files before creating them. For each content block in the file, you see information such as its ID number and its folder ID number, last published date of source edition, and last published date of target edition.

After viewing the report, you can go ahead and create the translation files for those content blocks or modify the content block criteria. If you modify, you can the view the report again until you are satisfied that the correct content blocks will be included.

To preview the contents of the translation files, follow these steps.

1. Complete the criteria on the Select Content To Translate screen. *See Also:* ”Selecting Content To Translate” on page 311
2. Click the Reports button ().
3. The screen displays the report for all content blocks that satisfy the criteria. An example is below.

XLIFF/XHTML files created

Title	ID	Src-Date	Trg-Date	FolderID	Target Language	File Status
Bob's new content	29	09-Dec-2004	N.A.	0	2064	Does not exist
Contact Ektron	15	26-May-2004	07-Dec-2004	0	2064	Up to date
Greeting	24	04-Dec-2003	07-Dec-2004	0	2064	Up to date
Home Page Content	1	04-Dec-2003	07-Dec-2004	0	2064	Up to date
Introducing the RC Redstar	23	04-Dec-2003	08-Dec-2004	0	2064	Up to date
new content	28	07-Dec-2004	N.A.	0	2064	Does not exist
Private Content	2	03-Mar-2004	08-Dec-2004	0	2064	Up to date
Support Page	8	27-Aug-2002	08-Dec-2004	0	2064	Up to date
Trinity In-Line Pipe	22	04-Dec-2003	08-Dec-2004	0	2064	Up to date

The following table describes the report's column headers.

Column Header	Description
Title	The content block title
ID	The content block ID number
Src-date	The most recent publish date of the source edition of the content block.
Trg-date	The most recent publish date of the target edition of the content block.
FolderID	The content block 's folder ID number
Target Language	The language into which the source content block will be translated. *See Also:* "Appendix A: List of Supported Languages" on page 453

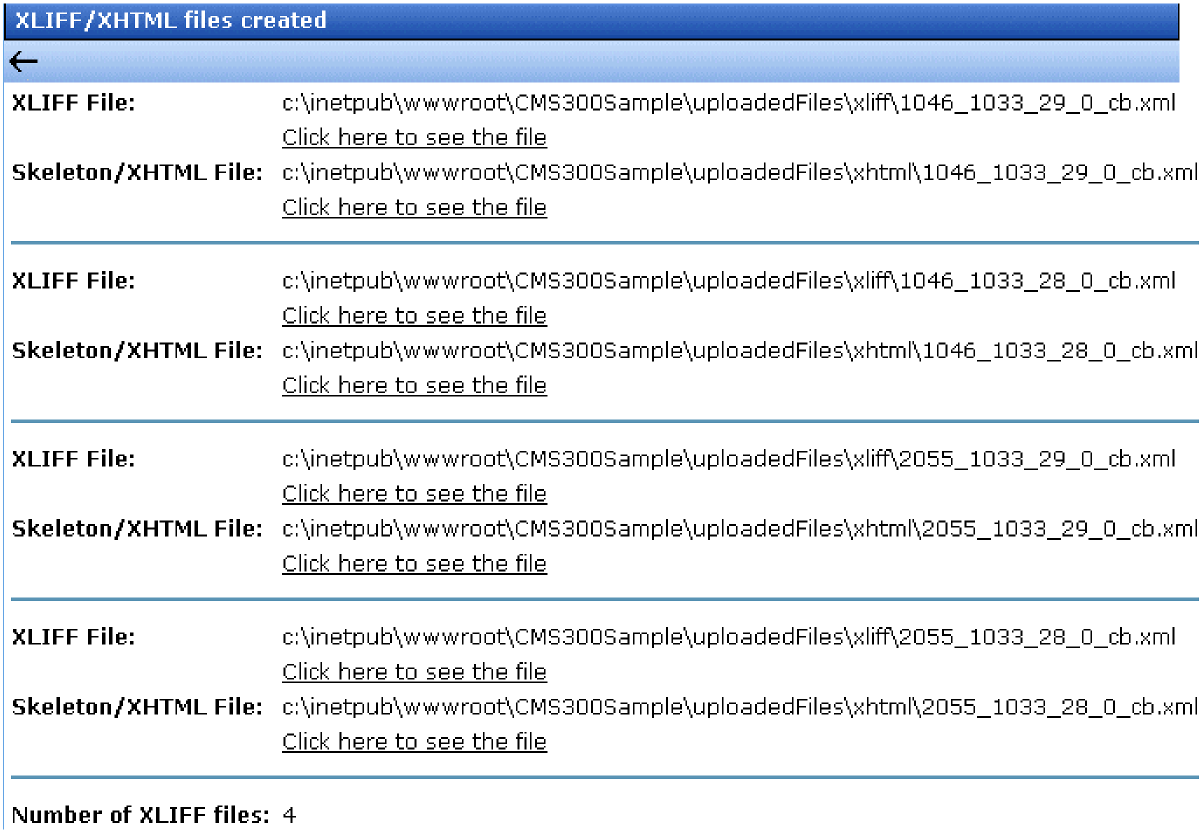
Column Header	Description
File Status	The status of the target language edition of the content block. Possible values are: • Does not exist - there is no target-language edition of that content block • Up to date - the last published date of the target language edition matches the last published date of the source-language edition • Older than source - a target-language edition of that content block exists; its last published date precedes the last published date of the source-language edition

Once you are satisfied with the content blocks on the report, proceed to "Creating Translation Files" on page 316.

Creating Translation Files

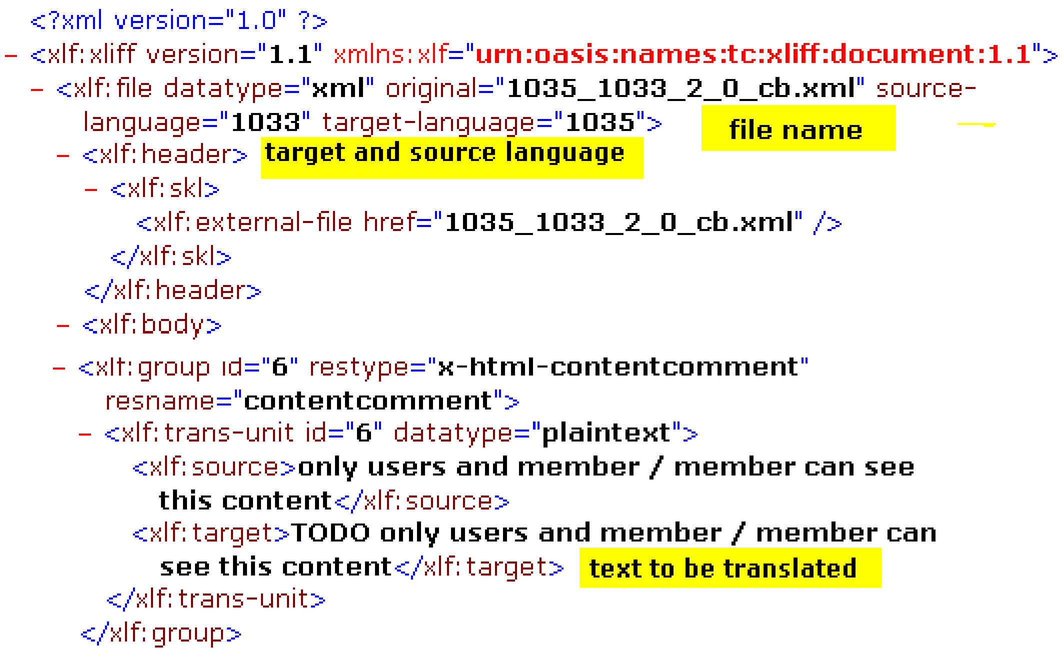
To create translation files, follow these steps.

1. Complete the criteria on the Select Content To Translate screen. *See Also:* "Selecting Content To Translate" on page 311
2. Click the Save button ().
3. A screen displays the XLIFF and XHTML files that were created. An example is below.



For each content block that satisfied the criteria on the Select Content to Translate screen, two files were created: one XLIFF and one Skeleton XHTML file.

The following information is included inside the XLIFF file. Note that **TODO** precedes each string that needs to be translated.



The file name syntax is explained below.

XLIFF/XHTML File Names

When an XLIFF or XHTML edition of a content block is created for a translation agency, it is named according to the following pattern:

*folder path _target language_source language_content block ID_ folder ID_*cb.xml

For example

```
c:\inetpub\wwwroot\CMS300Sample\uploadedFiles\xliff\1031_1033_24_0_
cb.xml
```

NOTE The XLIFF files are saved to `webroot\uploaded files\xliff`, while the XHTML files are saved to `webroot\uploaded files\xhtml`.

The above file was created from English (1033) for translation into German (1031). It is content block 24 in the root folder (folder ID= 0).

Submitting Translation Files to Service Agency

After you create the translation files, determine which format the service agency wants: XLIFF or XHTML. Then make a copy of the corresponding folder and send it to the service agency.

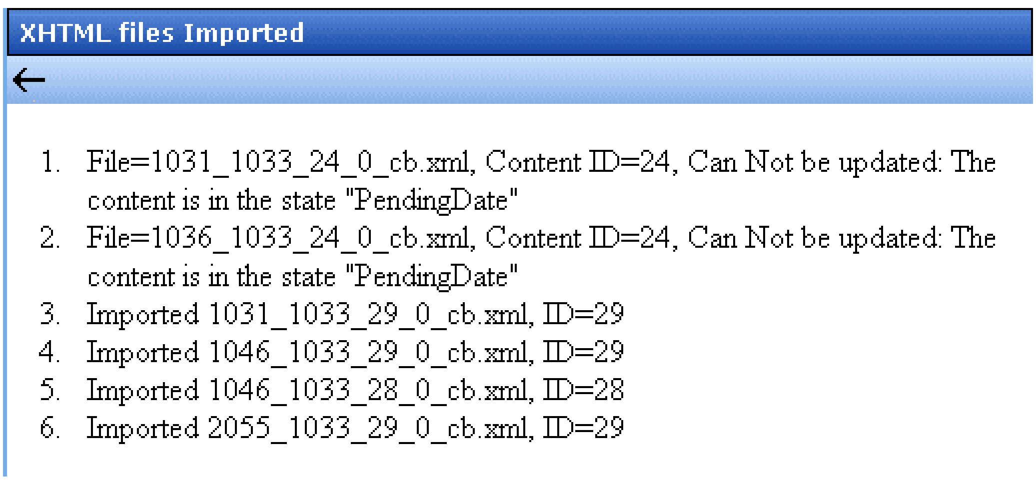
IMPORTANT! Leave the original translation files (both XLIFF and XHTML) intact. They are needed when you import the translated files back into **Ektron CMS300**.

When the service agency returns the files, copy them back to the original folder. During this process, you overwrite the translation files that were copied to that folder. It is important that your translation agency does not rename the files -- if they do, you cannot import them successfully.

Importing Translated Files into Ektron CMS300

WARNING! You can only import each file once. After the you import the file once, subsequent translated versions of content are ignored .

To import the translated files into **Ektron CMS300**, go to the **Workarea > Modules > Import/Export Lang**. Then, choose the import option corresponding the type of file your service agency translated. After the translation files are imported, a report shows the results. An example is below.



As you can see, content block ID=24 was not imported because it has a future start date. You also cannot import a content block that is currently checked out. When such a content block is flagged on the report, check it back in, then import the files again.

New, foreign language editions of the **Imported** content blocks on the report are now created. For each new edition:

- the next available number is appended to the title to distinguish it from the source edition. For example: **Home Page Content(1)**.
- its status is checked in. It can now enter the approval process just like any other content block.
- its history indicates it was checked in at the time the report was run

After you import the translation files, **Ektron CMS300** removes them from the file system.

Viewing a Foreign Language Content Block

1. Navigate to the folder that contains the content block.
2. Click the **View** language drop-down list and select the desired language.

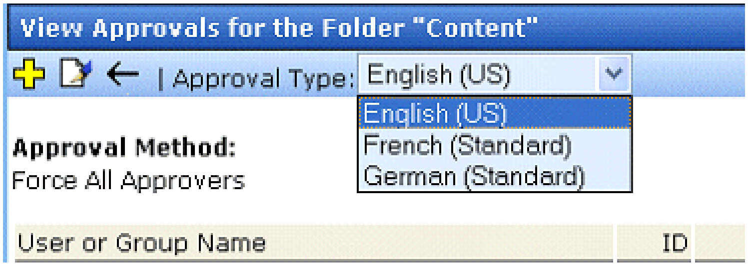
3. Only content blocks in that folder and the selected language appear.

You can perform the same activities with these content blocks as any other content block.

Multi-Language Approval Chains

Just as you can create separate editions of content blocks 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 blocks in that folder and that language.

The screen below shows the language selection drop-down list on the View Approvals screen.



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 90

Working with Tasks in a Multi-Language System

If you create a content block then add a task to it, the task can be in any enabled language. This would be helpful if, for example, you review an English content block then want to assign the task of translating it into another language in that language.

If you create a task then try to assign a content block to it, you can only choose from content blocks in the language of the task.

Working with Collections in a Multi-Language System

In a multi-language **Ektron CMS300** system, you can create a language-specific edition of each collection. For information about doing this, see the **Ektron CMS300** User Manual section "Working with Collections."

Working with Menus in a Multi-Language System

NOTE If you are not familiar with the Ektron CMS300's menus feature, please read "Menu Feature" on page 276 and the Ektron CMS300 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 CMS300** 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 blocks that will be on the menu. In this way, you can link these content blocks 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 CMS300** 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 CMS300 supports content blocks in several languages. This section lists the steps to follow when setting up such a site.

Step	For details, see
1. InSetup.asp , make sure multilingual support is enabled.	"Enabling/Disabling Support for Multiple Language Content" on page 298
2. Set a default content language to be the one used by the majority of your site's content blocks. If you had a previous version of **Ektron CMS300** and selected a default language on the Database Upgrade Utility, be sure that default language matches the one inSetup.asp .	"The Default Language" on page 302
3. If necessary, translate text of system messages and screens.	"Determining Which Languages are Available" on page 300

Step	For details, see
4. Enable languages your site will support.	"Determining Which Languages are Available" on page 300
5. Add language selection function to templates.	"Viewing Your Site in Another Language" on page 299
6. Create a search data definition for each supported language.	"Adding a Search Data Definition" on page 68
7. Create or translate content blocks.	• "Creating a New Content Block" on page 303 • "Translating a Content Block" on page 304
8. Change the language of content blocks not in the default language. Note: Only needed if Web site previously had content blocks in more than one language.	"Resolving Conversion Issues" on page 326
9. Set up approval chains for new content blocks.	"Multi-Language Approval Chains" on page 320
10. Set up multilingual collections.	"Working with Collections in a Multi-Language System" on page 321
11. Set up multilingual menus.	"Working with Menus in a Multi-Language System" on page 321
12. Modify text on templates.	"Modifying Page Content Based on Language Selection" on page 324
13. Translate graphics.	"Modifying Images Based on Language Selection" on page 325

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 blocks, menus, collections	• ”Translating a Content Block” on page 304 • ”Working with Collections in a Multi-Language System” on page 321 • ”Working with Menus in a Multi-Language System” on page 321 After you create these items, have the page invoke that item dynamically using an appropriate function (such as `ecmContentBlock`). When **Ektron CMS300** 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 299.
Adjust template content to user language	”Modifying Page Content Based on Language Selection” on page 324
Translate text in images	”Modifying Images Based on Language Selection” on page 325

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. For each supported language, create a folder within your Web site's images folder. Name each folder according to the language's decimal id value (for example, German is 1031). *See Also:* "Appendix A: List of Supported Languages" on page 453

   If your site supports English, don't forget to create a folder named 1033.
2. Copy all images to each language-specific folder.
3. Within each folder, translate the text on each image but *do not change its name.*

WARNING! If you change an image's name, this procedure will not work.

4. Wherever the image is referenced in your template or Web page, replace the current reference with this:

   ```
   img src="images/<%= Contentlanguage %>/image name"
   ```

   For example:

   ```
   img src="images/<%= Contentlanguage %>/companylogo.jpg"
   ```

When a visitor to your Web site selects a language then navigates to the page with the image, the `Contentlanguage` variable comes into play. It uses the visitor's language selection value to identify the folder that contains images in that language. That image then appears on the page.

To continue the above example, if a user views the site in German, the code that invokes the image translates to this:

```
img src="images/1031/companylogo.jpg"
```

Resolving Conversion Issues

IMPORTANT! This section is only relevant to Web sites that upgrade to **Ektron CMS300** Release 4.7 or higher and which, prior to the upgrade, had content blocks 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 blocks in your site are then assigned that language. (Prior to Release 4.7, content blocks did not have a language attribute.) If all content blocks are 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 blocks: three English and one French. During the database upgrade, you select English. Three content blocks are then assigned the correct language, but the fourth content block, which should be assigned French, is also assigned English. You cannot simply change a content block's language assignment. When resolving the discrepancy, there are two possible scenarios.

Scenario 1

Prior to 4.7, your site had a unique content block in French (id number 4). To resolve this, copy the content block to a new French edition with the same id number. Then, delete the English edition.

Before Upgrade

Content block id	Language attribute	Actual language
1	not available	English
2	not available	English
3	not available	English
4	not available	French

After Upgrade

Content block id	Language attribute	Actual language
1	English	English
2	English	English
3	English	English

4	**English**	**French**

After Following Procedure Listed Below

Content block 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 block's language, follow these steps.

NOTE Before beginning this procedure, make sure

- the correct language for the content block is enabled. See "Determining Which Languages are Available" on page 300.
- metadata has been defined for the new language. See "Adding a Search Data Definition" on page 68

1. Within **Ektron CMS300**, navigate to the View Content screen on content block 4.
2. From the Add drop-down list, select French.

3. **Ektron CMS300** creates a French edition of the content block.

4. Check in that edition of the content block.
5. Delete the English edition of the content block.

Scenario 2

Prior to 4.7, your site had English and French content blocks (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 block with the same id number, then delete the French content block.

The advantage of this solution is that both editions of the content block have a single id number. So, when a site visitor selects a language and navigates to that page, **Ektron CMS300** displays the edition of the content block for the selected language.

To resolve this, create a French edition of the English content block, copy the French content, then delete the French content block.

Before Upgrade

Content block id	Language attribute	Actual language
1	not available	English
2	not available	English
3	not available	English
4	not available	French

After Upgrade

Content block id	Language attribute	Actual language
1	English	English

2	English	English
3	English	English
4	**English**	**French**

After Following Procedure Listed Below

Content block 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 block is enabled. See "Determining Which Languages are Available" on page 300.
- metadata was defined for the new language. See "Adding a Search Data Definition" on page 68

1. Within **Ektron CMS300**, navigate to the View Content screen of content block id 3.
2. From the Add drop-down list, select French.

3. **Ektron CMS300** creates a French edition of content block 3.
4. Translate the title into French.
5. Delete the English elements of content block 3 (content, summary, search data, schedule, and comments).
6. Check in the French edition of content block 3.
7. Copy and paste all relevant elements of the French content block (id 4) into the French edition of content block 3 (content, summary, search data, schedule, and comments).
8. Delete content block id 4. *See Also:* ”Deleting a Content Block” on page 56

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 CMS300**. Note that these articles refer to eWebEditPro, Ektron’s WYSIWYG editor embedded within **Ektron CMS300**.

Wherever these articles contain references to eWebEditPro’s configuration data or file (config.xml), you should instead update the cms_config.asp file, located in the `cms300 scripts/ewebeditpro` 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)
- HOWTO: store unicode characters so they are searchable (www.ektron.com/developers/cms300_developers.cfm)

Microsoft SharePoint Portal Server Integration

Before you begin using the Ektron CMS300 Web Parts, it is recommended that you read the following section of the documentation. It provides information about installing and configuring the Ektron CMS300 Web Parts, as well as overview information about Microsoft SharePoint Portal Server 2003.

Once completed, you can move on to ”Ektron CMS300 Web Parts” on page 346 for information about how to use the Ektron CMS300 Web Parts.

Overview

Ektron CMS300 can easily be integrated with Microsoft’s SharePoint Portal Server. Ektron CMS300’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 CMS300 and the power of Microsoft SharePoint Portal Server, users can easily access, share, and manage Ektron CMS300 Web site content from a single application.

This section explains how Ektron CMS300 easily, and seamlessly, integrates with Microsoft SharePoint Portal Server.

Prerequisites

Ektron CMS300 Server

A server running Ektron CMS300 must have a directory under the root folder called `CMS300Sample`, which contains the necessary SharePoint Portal Server .aspx display pages. These pages are included in the .zip file that you received with the SharePoint integration files. They are commonly inserted into the following directory:

```
\CMS300Scripts\Portals\SharePoint2003
```

This directory is referenced by your SharePoint Portal Server's Web.config file.

NOTE These files enable Ektron CMS300's Web Parts to work.

SharePoint Portal Server

For Ektron CMS300 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 CMS300. This is because SharePoint alters some of the settings in the IIS site to which it is installed.

Configuring Your SharePoint Portal Server

Ektron CMS300 includes a separate installation program to install necessary files onto your SharePoint Portal server, as well as update necessary files.

What Does the Installation Program Do?

The installation program performs many actions, including:

- Installs all Ektron CMS300 Web parts
- Registers Web Parts in your SharePoint Web.config file
- Adds a necessary reference to your Ektron CMS300 Web site within your Web.config file

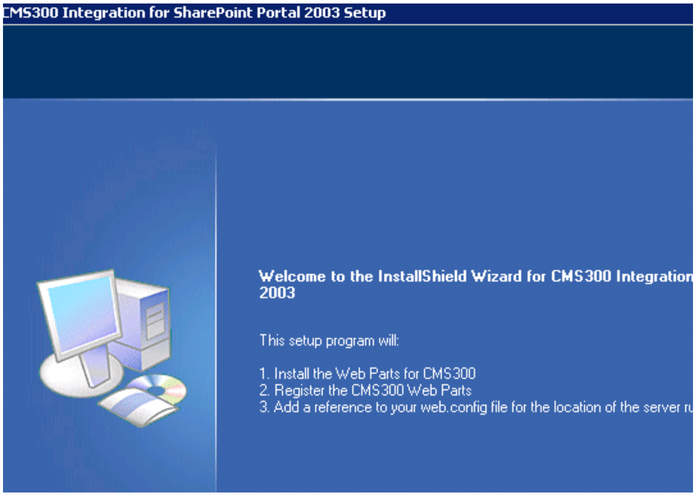
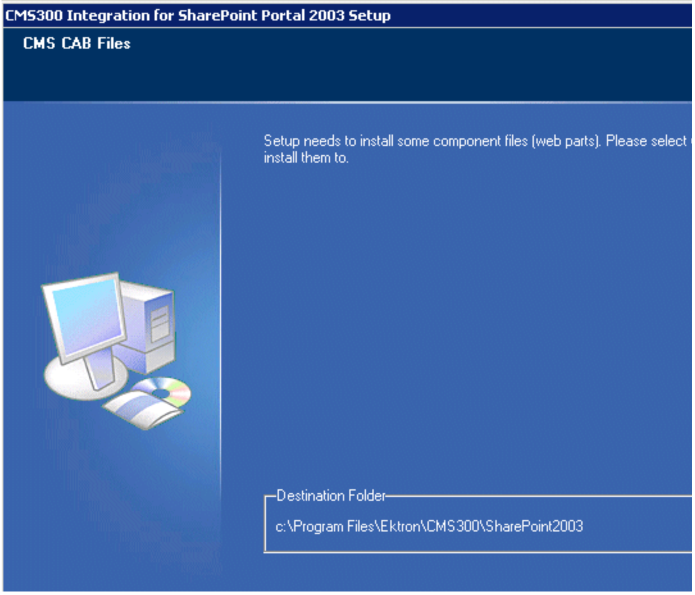
Performing the Installation

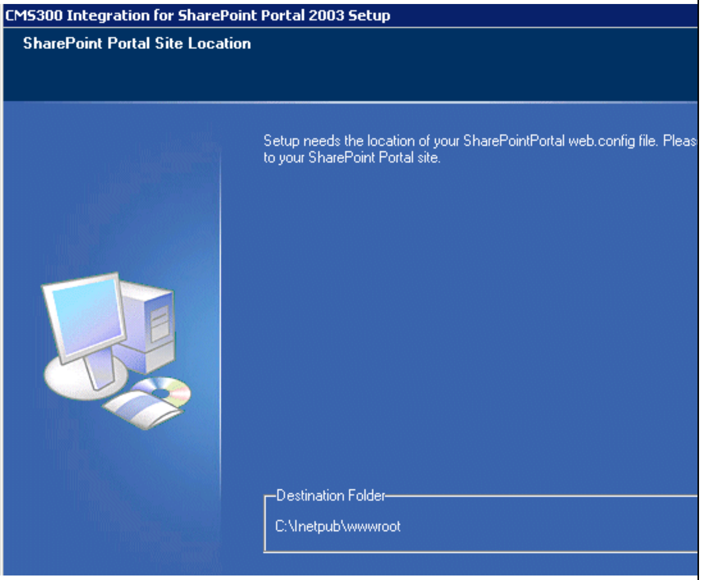
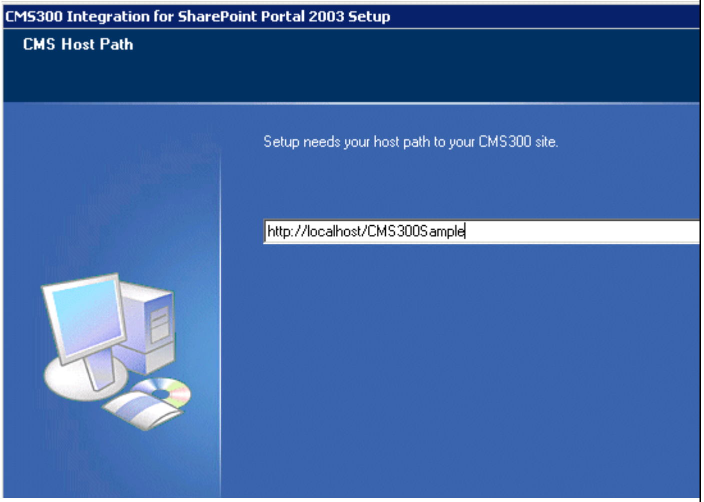
To configure your SharePoint Portal server using the Ektron CMS300 SharePoint integration .exe, follow these steps.

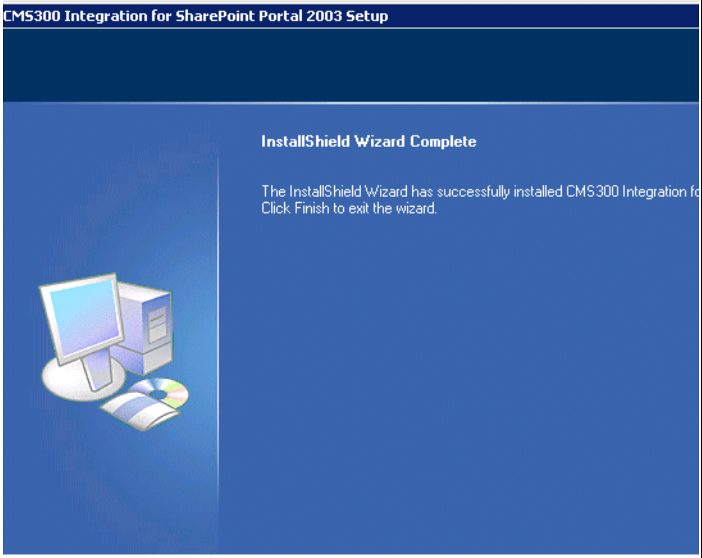
1. Move the installation file, SharePointForCMS.exe, to your SharePoint Portal Server.
2. Double-click the .exe file.

3. The installation's splash screen is displayed, and 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.	
5. Specify the location on your SharePoint server where you want to install the Ektron CMS300 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.	

Action	Setup Screen
7. Specify the root directory of your SharePoint Portal site (the directory that contains your Web.config file). Click **Browse** to specify a directory other than the default. 8. Click **Next** to proceed. The CMS Host Path screen is displayed.	
9. Enter the fully qualified path of your Ektron CMS300 Web site's root directory. For example, `http://www.yourEktronwebsite.com/CMS300sample` 10. Click **Next** to proceed. The installation performs the Web Part registrations. When complete, the Installation Complete screen is displayed.	

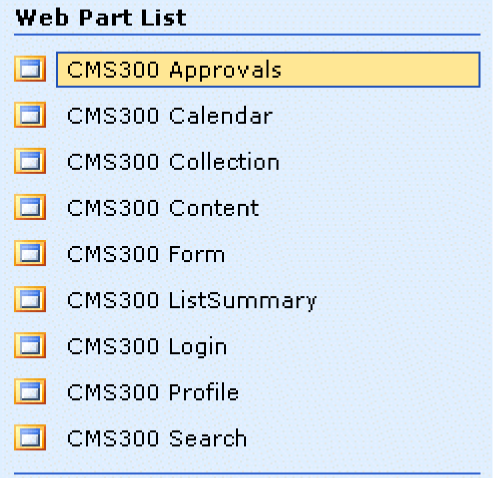
Action	Setup Screen
11. Click **Finish** to exit the installation program. The necessary Ektron CMS300 integration files and settings are installed and configured on your SharePoint Portal Server.	

Testing the Installation

Once the installation has been successfully completed, you can perform a simple test to be certain.

To test the installation, access your 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 CMS300 Web Parts, appear at the bottom of the page.



If the installation was not successful, see "Installation Troubleshooting" on page 338.

What's Next?

Having configured the SharePoint Portal Server, you are ready to add Ektron CMS300 Web Parts into your portal pages. See "Microsoft SharePoint Portal Server Overview" on page 342 for information about working with Ektron CMS300 Web Parts.

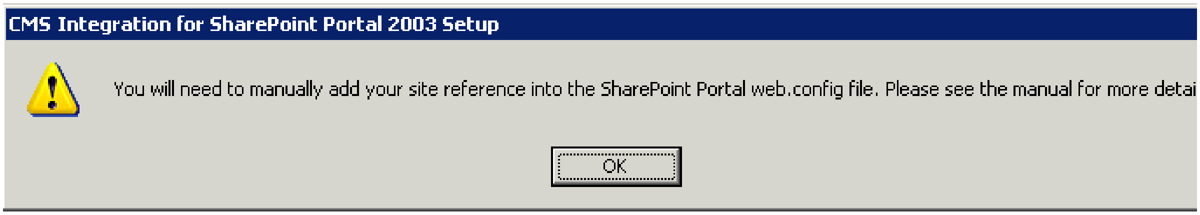
Installation Troubleshooting

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 CMS300 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

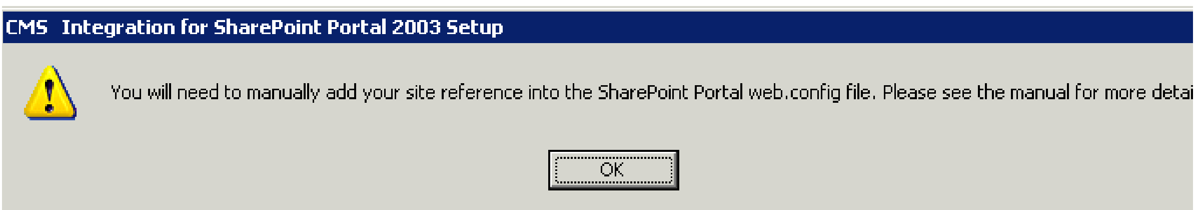
If an incorrect SharePoint Portal Server path location is given, the following message is displayed.



When the installation is complete, you must update your Web.config file manually (or perform the installation program again using the correct path). See ”Updating Web.config Manually” on page 339 for more information.

Incorrect Ektron CMS300 Host Path

If an incorrect Ektron CMS300 Host Path is given during installation, the following message appears.



When the installation is complete, you must update your Web.config manually (or perform the installation program again using the correct path).

See ”Updating Web.config Manually” on page 339 for more information.

Updating Web.config Manually

Your SharePoint Portal Server’s Web.config file must contain the following Ektron CMS300 information for integration to work:

- Ektron CMS300 Web Parts as safe controls
- Ektron CMS300 site location

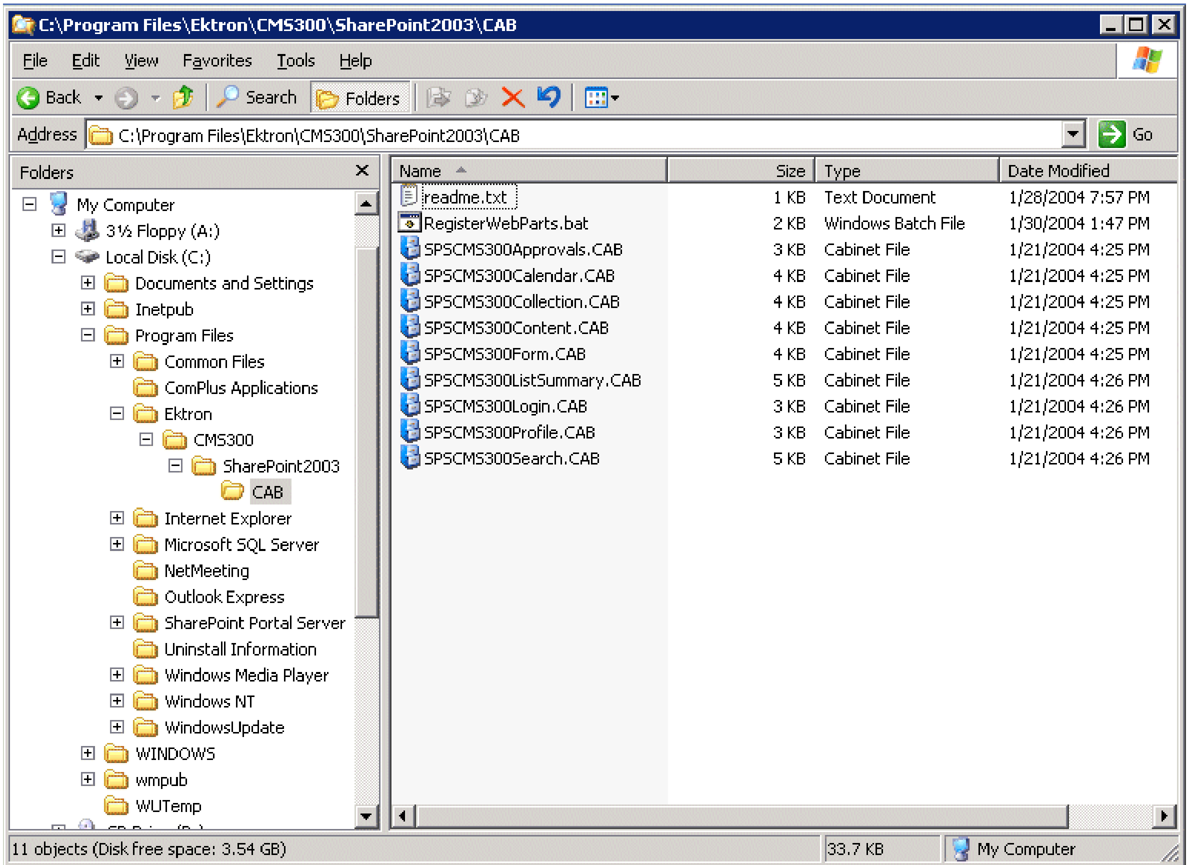
During installation, if you receive a message that you must update your Web.config file manually, the following section explains the actions that you must perform.

Registering Ektron CMS300 Web Parts as Safe Controls

In order for SharePoint to use Ektron CMS300 Web Parts, they must be registered by SharePoint as safe controls. To do that manually, follow these steps.

1. Complete the Ektron CMS300 SharePoint Portal Integration Installation program. This installs the files that need to be registered. *See Also:* "Configuring Your SharePoint Portal Server" on page 334
2. Access the directory to which you installed CMS cab files during installation.

NOTE The default location is C:\Program Files\Ektron\CMS300\SharePoint2003\CAB



3. Double-Click **RegisterWebParts.bat** to execute the batch file that registers Ektron CMS300 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="CMS400Approvals" Namespace="CMS400Approvals" TypeName="*" Safe="True"/>
<SafeControl Assembly="CMS400Calendar" Namespace="CMS400Calendar" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS400Content" Namespace="CMS400Content" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS400Form" Namespace="CMS400Form" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS400ListSummary" Namespace="CMS400ListSummary" 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="CMS400Login" Namespace="CMS400Login" TypeName="*" Safe="True" />
```

The Ektron CMS300 Web Parts are successfully registered, and your Web.config is updated with the Web Parts registered as safe controls.

Specifying Your Ektron CMS300 Site Path Manually

The Web.config file must contain a reference to your Ektron CMS300 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 CMS300'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 CMS300 Web server that contains the Ektron CMS300 display files for SharePoint.

   For example, `http://www.yourEktronwebsite.com/cms400Example/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.

See Also:

- "SharePoint Portal Web Page Layout" on page 342
- "What is a Web Part?" on page 343
- "Web Part Zones" on page 344
- "SharePoint Server Permissions" on page 345
- "Personal vs. Shared View" on page 345
- "Ektron CMS300 Web Parts" on page 346

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.

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 CMS300 display function, as well as Web Parts for other useful Ektron CMS300 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 CMS300 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

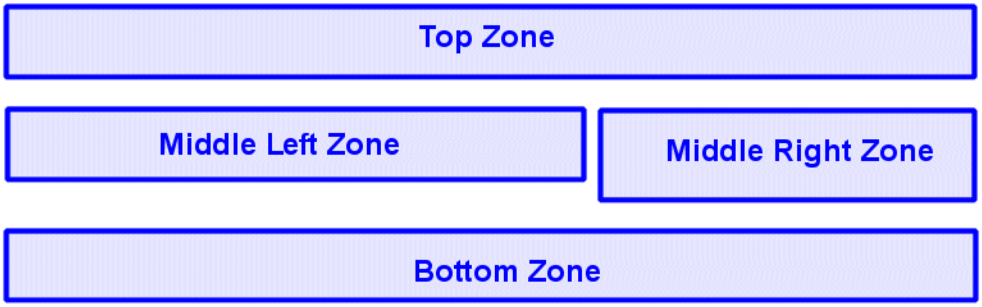
Web Part Zones

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 these four 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 CMS300 Web Parts. These permissions are configured on the SharePoint server by the *SharePoint Portal Server* administrator, not the Ektron CMS300 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.

Web Page View	Description
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 sub menu is displayed.
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 CMS300 Web Parts

When configured properly, all Ektron CMS300 Web Parts are available to be inserted by browsing to the SharePoint Portal **Virtual Server Gallery**.

Inserting Ektron CMS300 Web Parts

This section explains the basics behind inserting Ektron CMS300 Web Parts.

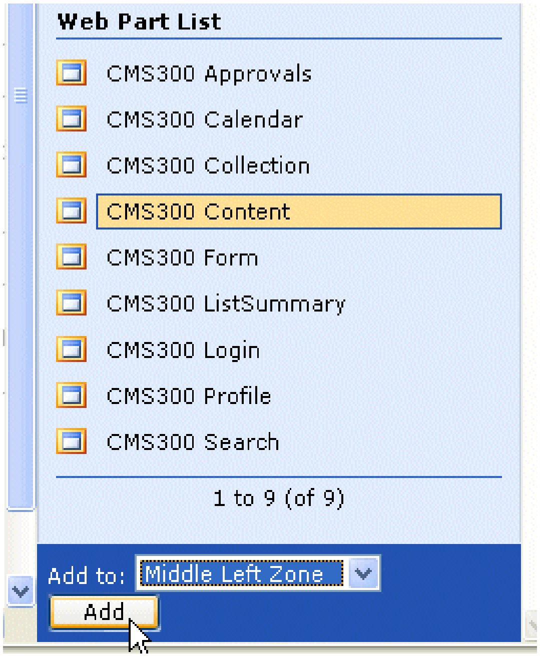
1. Log in to SharePoint Portal Server.
2. Create or navigate to the Web Part zone into which you want to insert an Ektron CMS300 Web Part.
3. Click **Edit Page** at the bottom of the left navigation menu.

4. You are in Edit Page Mode.
5. Click **Modify Shared Page**, **Add Web Parts**, then **Browse**.
6. The Web Part zones are displayed, and the Add Web Parts menu appears on the right side of the screen.
7. Click **Virtual Server Gallery**.
8. A list of all Web Parts that have been added to the Virtual Server Gallery, including the Ektron CMS300 Web Parts, appears at the bottom of the page

NOTE For information about Ektron CMS300 Web Parts, see "Managing Ektron CMS300 Web Parts" on page 350.

9. Insert an Ektron CMS300 Web Part one of two ways:

Method	Screen
Drag and drop the Web Part to the desired zone	

Method	Screen
1. Click a Web Part. 2. Choose the location at the bottom of the page. 3. Click **Add**.	

The selected Web Part is added to the selected zone.

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 CMS300 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 CMS300 Web Part that you want to modify.
3. Click **Edit Page** at the bottom of the left navigation menu.
4. You are in Edit Page Mode.
5. Click the Down Arrow ( ) at the top right corner of the Web Part you want to modify.
6. The Web Part Menu is displayed.
7. Click **Modify Shared Web Part**.
8. The Web Part is surrounded by a yellow dashed border, and the modify Web Part menu appears on the right side of the screen.
9. Modify the Web Part.

NOTE Information about modifying Ektron CMS300 Web Parts can be found in "Managing Ektron CMS300 Web Parts" on page 350.

10. Click **Apply** for the changes to take effect without closing the menu. Or, click **OK** to save and close the menu.

Managing Ektron CMS300 Web Parts

Ektron created Web Parts for all display functions in Ektron CMS300, 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 blocks awaiting approval by the logged in Ektron CMS300 user.	"Approvals Web Part" on page 351
Calendar	A calendar created for the Ektron CMS300 Web site.	"Calendar Web Part" on page 352
Collection	A collection, as well as its display function, for a collection created in the Ektron CMS300 Web site.	"Collection Web Part" on page 353

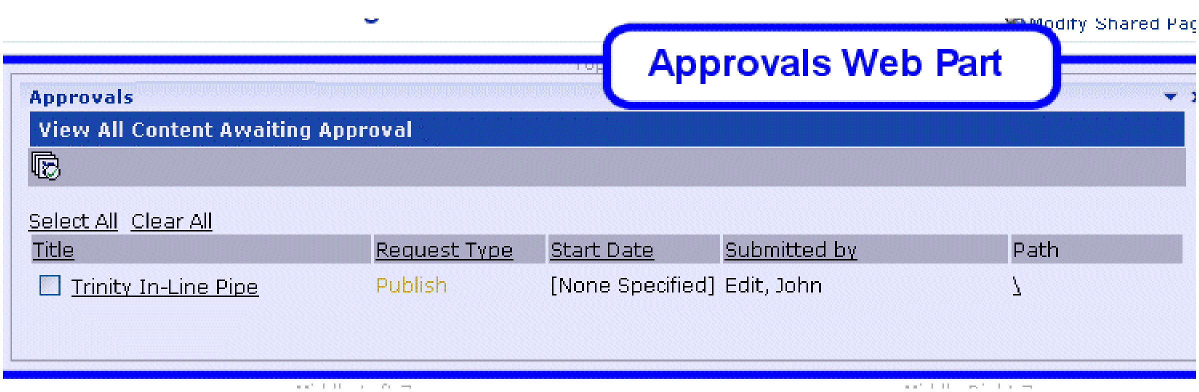
Web Part	Displays	More Information
Content	A content block created for the Ektron CMS300 Web site.	”Content Web Part” on page 356
Form	A form content block created for the Ektron CMS300 Web site.	”Form Content Block Web Part” on page 358
Summary List	A summary list for a specified content folder in the Ektron CMS300 Web site.	”Summary List Web Part” on page 361
Login	A login button which allows users to log in, and be authorized, by the Ektron CMS300 Web site.	”Login Web Part” on page 364
Profile	Configurable profile settings for the logged in Ektron CMS300 user.	”Profile Web Part” on page 365
Search	Ektron CMS300 Web site search box and search results.	”Search Web Part” on page 367

Approvals Web Part

When logged into Ektron CMS300 via Microsoft SharePoint Portal Server, the approvals Web page displays a list of content blocks awaiting your approval.

NOTE See ”Login Web Part” on page 364 for additional information.

Here is an example of the approvals Web Part displayed in SharePoint Server.



The approvals Web Part is identical to the approvals report page within the Ektron CMS300 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 block as you would in the Ektron CMS300 Web site.

Calendar Web Part

The calendar Web Part displays an event calendar created within the Ektron CMS300 Web site. Here is an example of a calendar Web Part displayed in the SharePoint Portal Server.

In addition to displaying the event calendar, if you are logged into the Ektron CMS300 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 364 for information about adding a login Web Part and logging into the Ektron CMS300 Web site via SharePoint Server.

Calendar Web Part Settings

The calendar Web Part can be configured to display any event calendar from your Ektron CMS300 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 349.
2. Minimize the **Appearance Settings**, and expand the **CMS300 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 CMS300 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 CMS300 Web site. Here is an example of a collection Web Part displayed in the SharePoint Portal Server.

In addition to displaying the collection in the portal, if you are logged into the Ektron CMS300 Web site via SharePoint, you can perform all actions related to collections.

NOTE See "Login Web Part" on page 364 for information about adding a login Web Part and logging into the Ektron CMS300 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 349.
2. Minimize the **Appearance Settings**, and expand the **CMS300 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.

Field	Description
Collection Display Function	The name of the display function you want to apply to the collection. Contact your Ektron CMS300 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 CMS300 Content

When logged into the Ektron CMS300 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 CMS300 Web site collection within SharePoint, follow these steps.

1. Log In to the Ektron CMS300 Web site via the Login Web Part (see ”Login Web Part” on page 364 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.

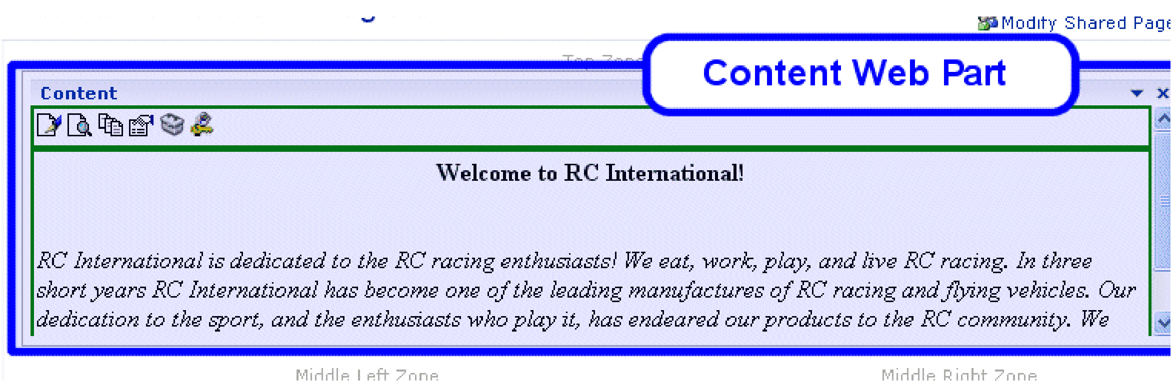
2. The collection displayed by the collection Web Part is surrounded by a colored border.

3. Perform actions by using the floating toolbar, or by clicking on the Workarea button to access the Ektron CMS300 Workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS300 collections.

Content Web Part

The content Web Part is used to display any content block created in the Ektron CMS300 Web site. Here is an example of one displayed in the SharePoint Portal Server.



If you are logged into the Ektron CMS300 Web site via SharePoint server, you may also manage the content (see ”Managing Ektron CMS300 Content” on page 357 for more information).

NOTE See ”Login Web Part” on page 364 for information about adding a login Web Part and logging into the Ektron CMS300 Web site via SharePoint Server.

Content Web Part Settings

The content Web Part can be configured to display any content block from your Ektron CMS300 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 349.
2. Minimize the **Appearance Settings** and expand the **CMS300 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 block 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 CMS300 Content

As stated earlier, when logged into the Ektron CMS300 Web site via SharePoint, you may manage content displayed by the content Web Part (assuming you have permissions to do so within the Ektron CMS300 Web site).

Content-related actions you may perform include:

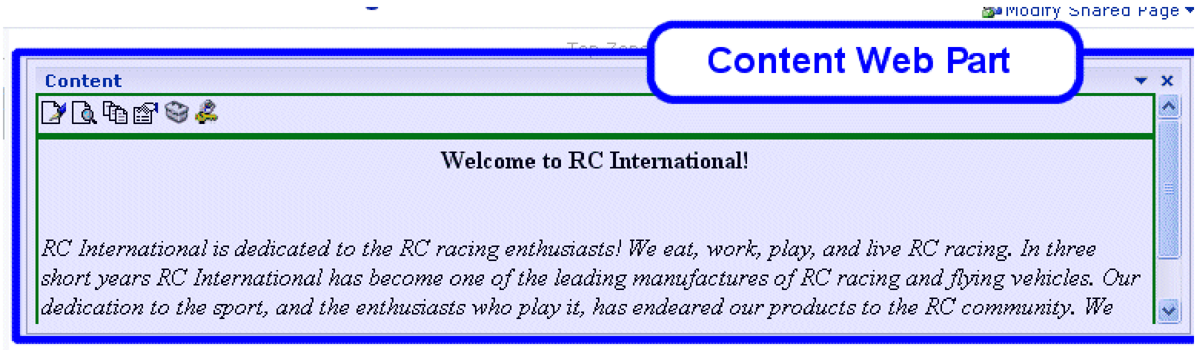
- Editing existing content, summaries, and search data
- Creating new content
- Deleting content
- Viewing historical versions of content and restoring them
- Managing collections

To manage the Ektron CMS300 Web site content within SharePoint, follow these steps.

1. Log in to the Ektron CMS300 Web site via the Login Web Part (see "Login Web Part" on page 364 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.



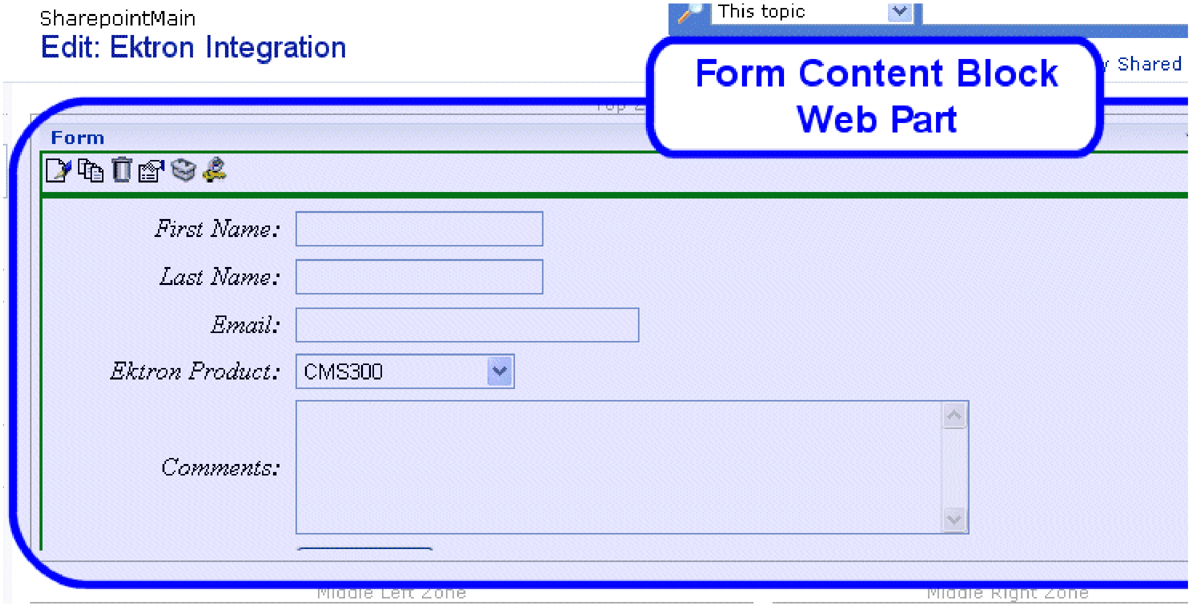
3. Perform actions by using the floating toolbar, or by clicking the Workarea button to access your Ektron CMS300 Workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS300 content.

Form Content Block Web Part

A form content block Web Part is used to display an Ektron CMS300 form content block.

Here is an example of a form content block being displayed in SharePoint as a Web Part.



If you are logged into the Ektron CMS300 Web site via SharePoint server, you may also manage the form content (see "Managing Ektron CMS300 Form Content" on page 360 for more information).

NOTE See "Login Web Part" on page 364 for information about adding a login Web Part and logging into the Ektron CMS300 Web site via SharePoint Server.

Form Content Web Part Settings

The form content Web Part can be configured to display any form content block from your Ektron CMS300 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 349.
2. Minimize the **Appearance Settings**, and expand the **CMS300 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 block 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 CMS300 Form Content

When logged into the Ektron CMS300 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 CMS300).

Some form content related actions that you may perform include

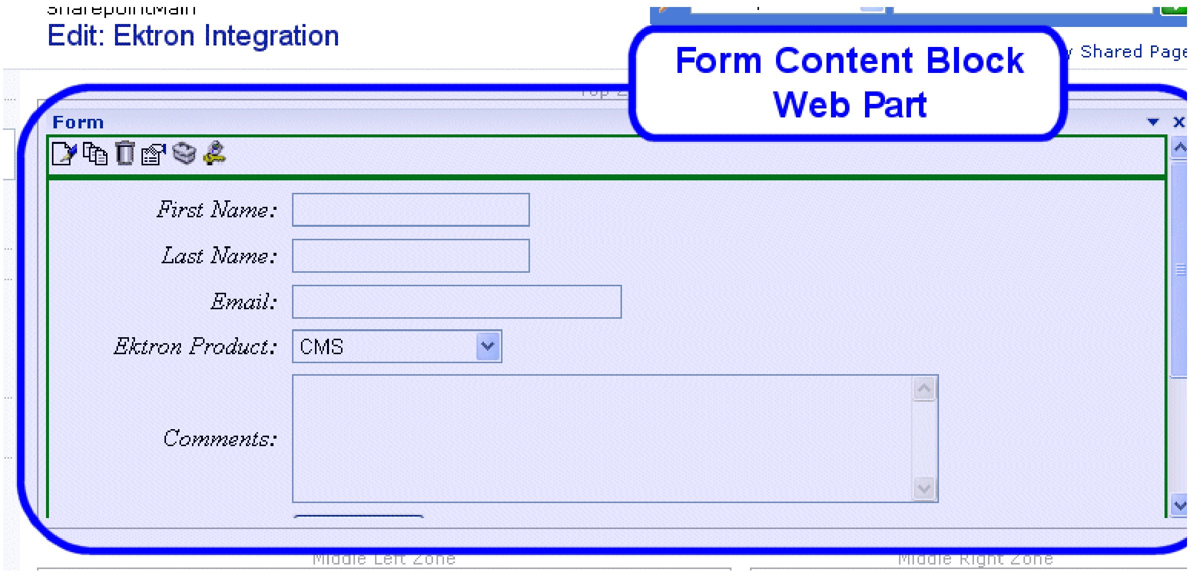
- Editing form content
- Modifying form processing information
- Creating new form content

To manage the Ektron CMS300 Web site form content within SharePoint, follow these steps.

1. Log in to the Ektron CMS300 Web site via the Login Web Part (see "Login Web Part" on page 364 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.



3. Perform actions by using the floating toolbar, or by clicking on the Workarea button to access your Ektron CMS300 Workarea.

Summary List Web Part

The summary list, or list summary, Web Part displays a list of summaries for some, or all, content blocks in a specified Ektron CMS300 content folder.

Here is an example of a summary list Web Part being displayed in the SharePoint Portal Server.

If you are logged into the Ektron CMS300 Web site via SharePoint Server, you can also manage the summary list (see ”Managing the Summary List” on page 363 for more information).

NOTE See ”Login Web Part” on page 364 for information about adding a login Web Part and logging into the Ektron CMS300 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 349.
2. Minimize the **Appearance Settings**, and expand the **CMS300 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 CMS300 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 blocks 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 block • **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

Field	Description	Default
Order By Asc/ Desc	Choose how to sort the summary list. • **Asc** - ascending order (A >Z) • **Desc** - descending order (Z>A)	Asc
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.

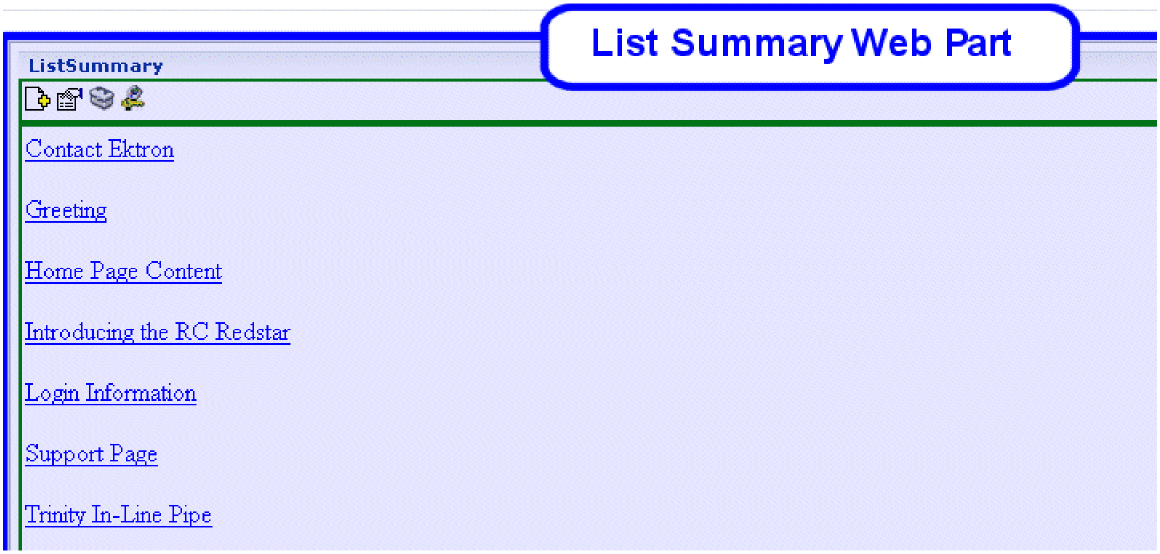
Managing the Summary List

When logged into the Ektron CMS300 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 CMS300 Web site via the Login Web Part (see "Login Web Part" on page 364 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.

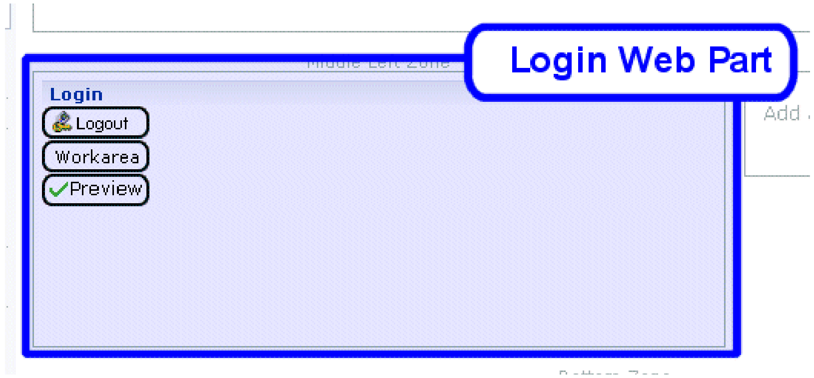


3. Perform actions by using the floating toolbar, or by clicking the Workarea button to access the Ektron CMS300 Workarea.

Login Web Part

The Login Web Part displays a login button that lets users log in to the Ektron CMS300 Web site via SharePoint, and be authorized to work with Ektron CMS300 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 CMS300 Web Site Via SharePoint Server

You can log in to your Ektron CMS300 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 CMS300 Web site via SharePoint Portal Server, follow these steps.

1. Navigate to the SharePoint Zone that contains the Ektron CMS300 Login Web Part.
2. Click the **Login** button.
3. The Ektron CMS300 Login box appears.
4. Enter a valid Ektron CMS300 username and password.
5. Click the **Login** button.
6. The username and password are sent to the Ektron CMS300 server. Upon successful authorization, you are logged in to Ektron CMS300.

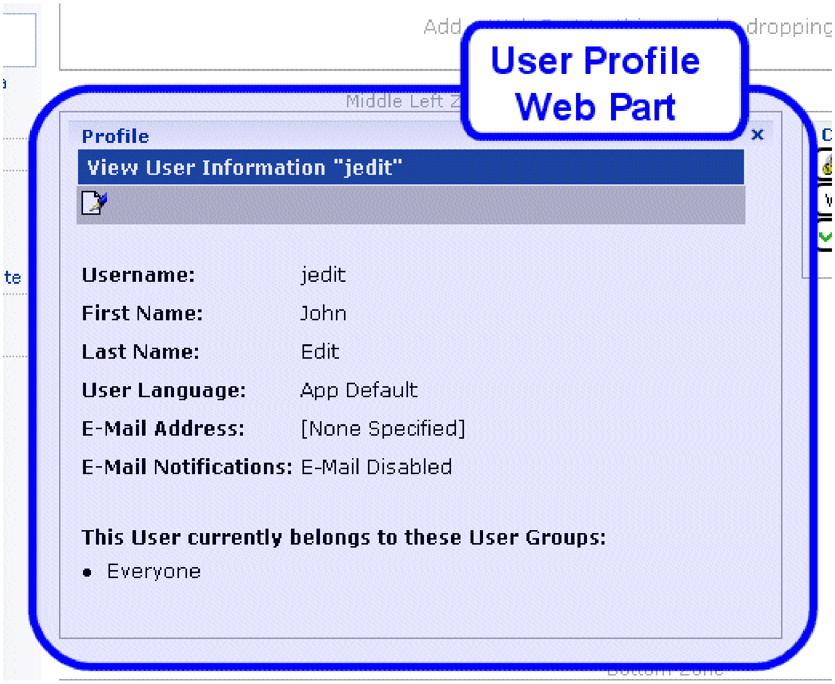
NOTE Logging in via SharePoint does not refresh the entire screen. Instead, only the zone that includes the login Web Part appears to be logged into. Refresh each zone, or the entire screen, for the changes to take effect.

Profile Web Part

Every user of an Ektron CMS300 Web site has access to their user profile, which allows them to view and modify information about themselves. When logged into Ektron CMS300 via SharePoint, each user can access his profile information.

NOTE See ”Login Web Part” on page 364 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**.



Although you cannot modify the profile Web Part, you can update your Ektron CMS300 user profile information (see "Editing Profile Information" on page 366 for additional information).

Profile Web Part Settings

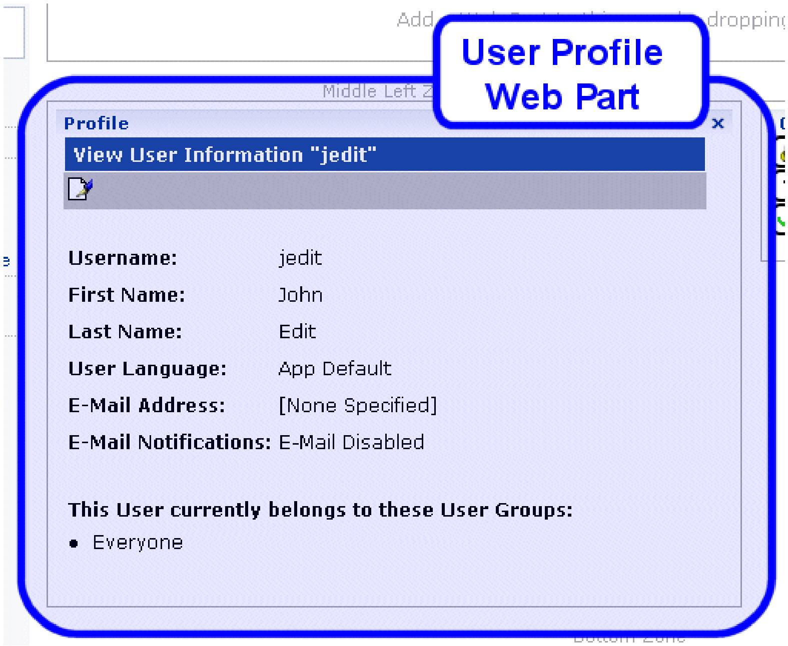
The profile Web Part includes no configurable settings.

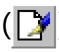
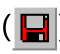
Editing Profile Information

All Ektron CMS300 users can update their profile information directly from SharePoint. To update Ektron CMS300 profile information, follow these steps.

NOTE Before updating profile information, you must be logged in to your Ektron CMS300 Web site via SharePoint. See "Logging Into a Ektron CMS300 Web Site Via SharePoint Server" on page 365 for more information.

1. Access the SharePoint portal page that contains the Ektron CMS300 profile Web Part.



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 CMS300 Web site from SharePoint.

Here is an example of a search Web Part inserted into a SharePoint portal server screen.

When visitors to the SharePoint portal page access this search Web Part, they can perform a search on your Ektron CMS300 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 349.
2. Minimize the **Appearance Settings** and expand the **CMS300 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 CMS300 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 CMS300 search Web Part.

2. Enter search criteria in the search text box.
3. Click **Search**.
4. The search is performed, and all content blocks in your Ektron CMS300 Web site that match the criteria appear.

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 CMS300's Web services support for your Web site, refer to Web Services in the Ektron CMS300 Developer's Reference Manual.

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 CMS300, 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 CMS300 as RSS, refer to Syndicating Web Content as RSS, in the Ektron CMS300 Developer's Reference Manual.

JavaScript Syndication

With the help of some JavaScript, Ektron CMS300 allows you to receive syndicated content from a server other than the one Ektron CMS300 is running on. Syndication lets you display or send out content that may or may not be your own.

The content can be viewed on an HTML Web page instead of an .asp page that Ektron CMS300 typically runs with.

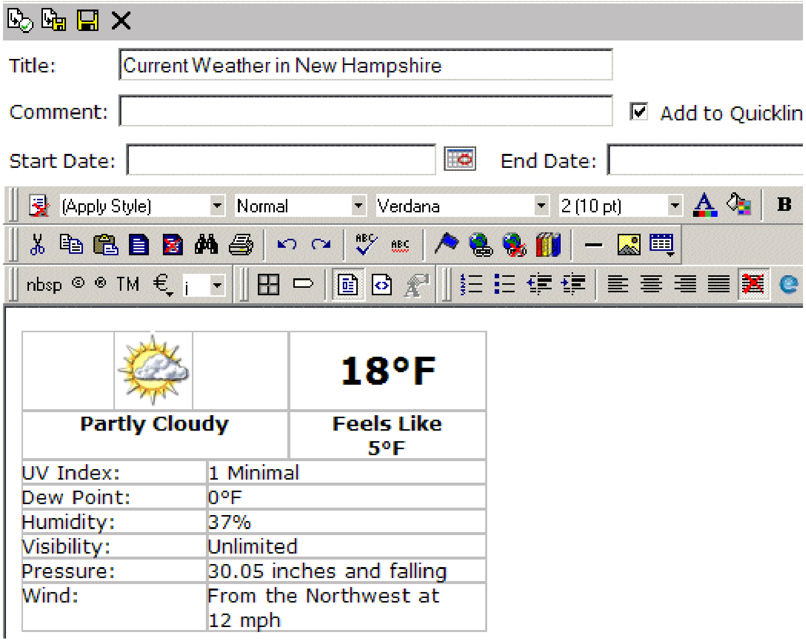
What is Syndication?

JavaScript syndication on a static, HTML-based Web site lets you retrieve content from an Ektron CMS300 Web site and post it on your Web site. When the content gets updated on the Ektron CMS300 Web site, it is updated on the static HTML page as well.

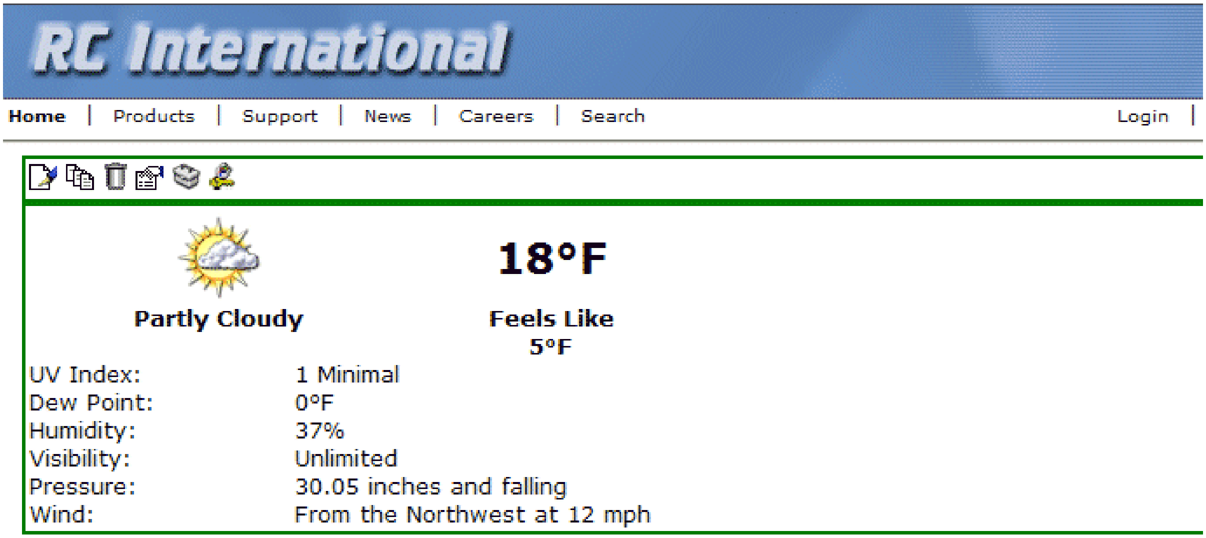
Syndication Example

This example uses the sample Ektron CMS300 Web site and a blank static HTML page to display syndicated content.

Let’s begin by creating a new content block in Ektron CMS300 and enter content about the current weather for New Hampshire.



After we create content, we can publish it so that it is live on the Ektron CMS300 Web site.



After the content block is published, and we know its ID number (in this case, ID=19), we can create a static HTML page to display this content. Below is the code for the HTML page that we will create.

```
<HTML>
    <HEAD>
        <TITLE>Weather</TITLE>
    </HEAD>
    <BODY>
        <script language="javascript src="http://192.168.0.156/
        CMS300Sample/CMS300scripts/jsyndication.asp?id=19"></script>
    </BODY>
</HTML>
```

In this code, the source (src) of the script is made up of three parts:

- The path of the Ektron CMS300 Web site

  http://192.168.0.111/CMS300Sample/CMS300scripts/

- The syndication template

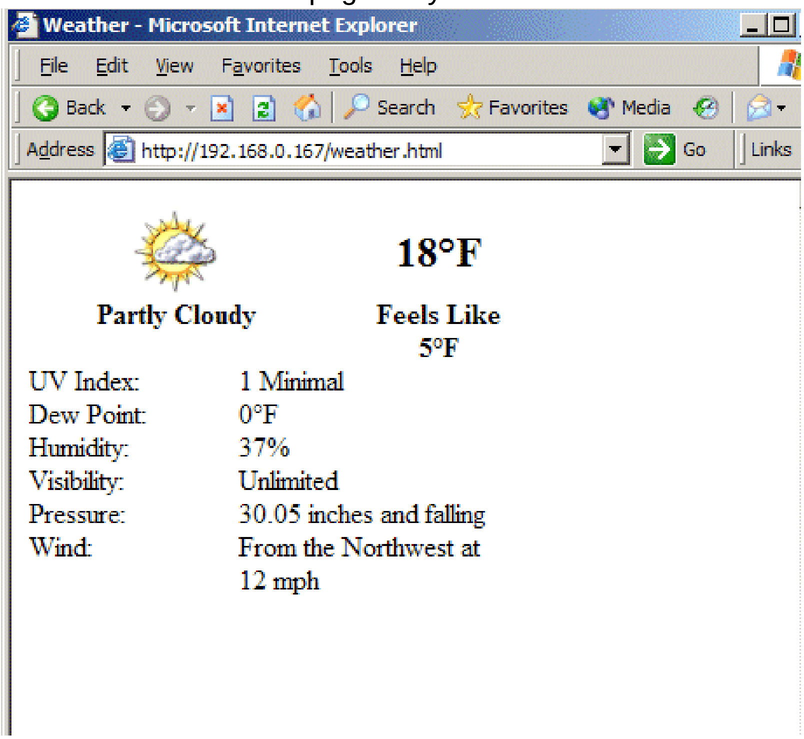
  jsyndication.asp

- The content ID number to be displayed.

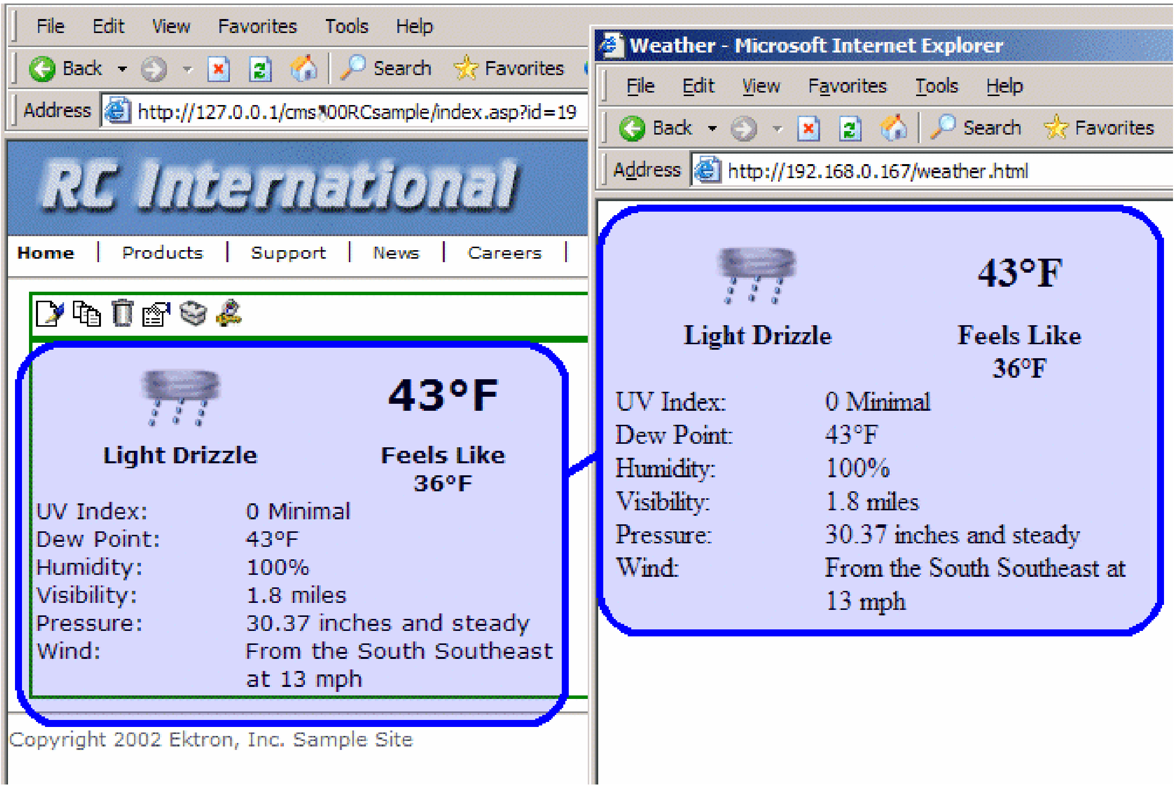
  ?ID=19

NOTE Each page that displays a syndicated content block *must* have all three parts of the JavaScript to display properly.

Once the script is inserted into the HTML page, you can view the syndicated content on the page via your browser:



When this content gets changed on the Ektron CMS300 Web site, the content on the HTML page changes as well



Notice that the two content blocks are the same. If the content on the sample site changes, the content on the static HTML page automatically reflects the changes.

Hosting & Syndication

Syndication can be a very powerful tool if you are a hosting company. The JavaScript used to post syndicated content can be inserted into ASP, HTML, CFM, or any other types of templates.

If you host many Web sites, you can create a special place on each site to display syndicated content. For example, you could include up-to-date pricing for your services, information about your hosting company, etc.

When you implement this feature, the possibilities become endless, and the time required to update each Web site is drastically reduced.

In the diagram above, the Ektron site is displayed as the hosting company's Web site, while the sample site is the Web site where the content is also displayed.

Setting up a Syndicated Template

Before a Web site can use your content, you must set up your Ektron CMS300 Web site to send out the content.

The template used to syndicate the content is left blank except for the code that handles the syndication. This is done so that the content being displayed on the other server only shows content from the content block, and no other images that might change the look and feel of the Web site.

To do this, create an Ektron CMS300 template that includes the following custom tag and nothing else.

```
<%option explicit%>
<!-- #include file="Setup.asp" -->
<%
dim currentUserID, jsObj
Dim cConts, conObj
Dim ErrString, id, Site

IF (request.cookies("ecm").HasKeys) THEN
 currentUserID = request.cookies("ecm")("user_id")
 Site = request.cookies("ecm")("site_id")
else
 currentUserID=0
 Site = ""
end if

Set jsObj = CreateObject("Scripting.Dictionary")
jsObj.Add "Browser" , Request.ServerVariables("http_user_agent")
jsObj.Add "ServerName" , Request.ServerVariables("SERVER_NAME")
jsObj.Add "ResolveImgPath" , TRUE
jsObj.Add "ResolveHrefPath" , TRUE
jsObj.Add "jsPath",Request.ServerVariables("HTTP_REFERER")
jsObj.Add "ContentID", Request.QueryString("id")
Set conObj = CreateObject("EkBrMach4Content.EkMach4Content")
if (Request.QueryString("id") <> "") then
Set cConts = conObj.jSyndication(AppConfStr, currentUserID, jsObj, Site, ErrString)
if (cConts.Count) then
%>
document.writeln('<% Response.write(
Replace(cConts("ContentHtml"),chr(13),"');document.writeln('") ) %>');
```

```
<%
end if
end if
Set jsObj = nothing
%>
```

Ektron CMS300 provides a special template named jsyndication.asp. This template has no images, just the custom tag seen above. It is all that is needed to allow other servers to display your content.

Load Balancing

Setting up a load balance path via Ektron CMS300 is easy using the interface supplied in the Library.

NOTE Refer to "Load Balancing" on page 98 for additional information about setting up load balance paths in Ektron CMS300.

Why Do I Need Load Balancing?

When used properly, load balancing is an extremely efficient and time saving tool for your Ektron CMS300 Web site. Instead of uploading an image or file on each Web server that makes up your Web site, you only need to upload once. The load balancing feature replicates the image or file in each directory specified by Ektron CMS300.

How Do I Configure Load Balancing?

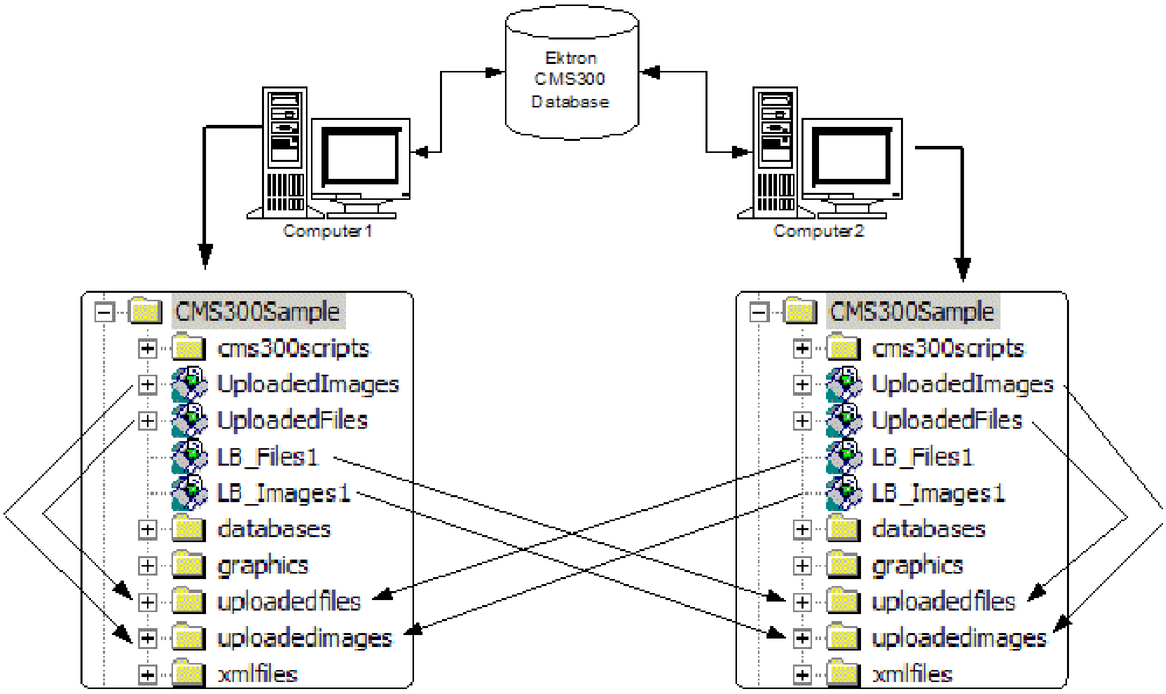
Setting up Ektron CMS300 for load balancing requires additional setting up outside of Ektron CMS300. Actions you need to perform include:

- Setting up Ektron CMS300 on multiple Web servers, and sharing one database.
- Creating virtual directories pointing to the folders where images and files will be uploaded to.
- Setting up load balance paths in Ektron CMS300, as described in "Load Balancing" on page 98

This chapter explains the configurations that must be made to your Web servers for load balancing to work efficiently and properly.

Ektron CMS300 on Two Machines

The following diagram illustrates how IIS consoles are set up for load balancing on two Ektron CMS300 Web servers.



As you can see, both servers are set up to point to the same database. Also, four virtual directories are set up in each Web server's IIS console.

This section looks at a Web site driven by Ektron CMS300 and two Web server machines.

See Also:

- "Setting Up Multiple Ektron CMS300 Web Sites" on page 380
- "Setting Up Virtual Directories" on page 381
- "Setting Up Ektron CMS300 Load Balancing" on page 390

Setting Up Multiple Ektron CMS300 Web Sites

For an identical Ektron CMS300 Web site to run on two machines, the same database must be used for each site. To do this:

1. Install the .exe file for Ektron CMS300 on each Web server on the Web site.

NOTE Refer to the Ektron CMS300 Setup Manual for additional information on performing an install.

2. Select one installed database, and use that as your master database. Each Web site points to this database for content, users, and load balance paths.
3. Create an ODBC or OLE DB connection to that database. Also, edit the `/CMS300Scripts/Setup.asp file`for each Web site to use that DSN, Provider string, or file string.

If performed correctly, each Ektron CMS300 Web site on each Web server uses the same database.

Setting Up Virtual Directories

Through Internet Information Services (IIS) on both Web servers, create virtual directories for all image or file folders used with your load balancing model. In addition, change the default UploadedImages and UploadedFiles' directories to virtual directories.

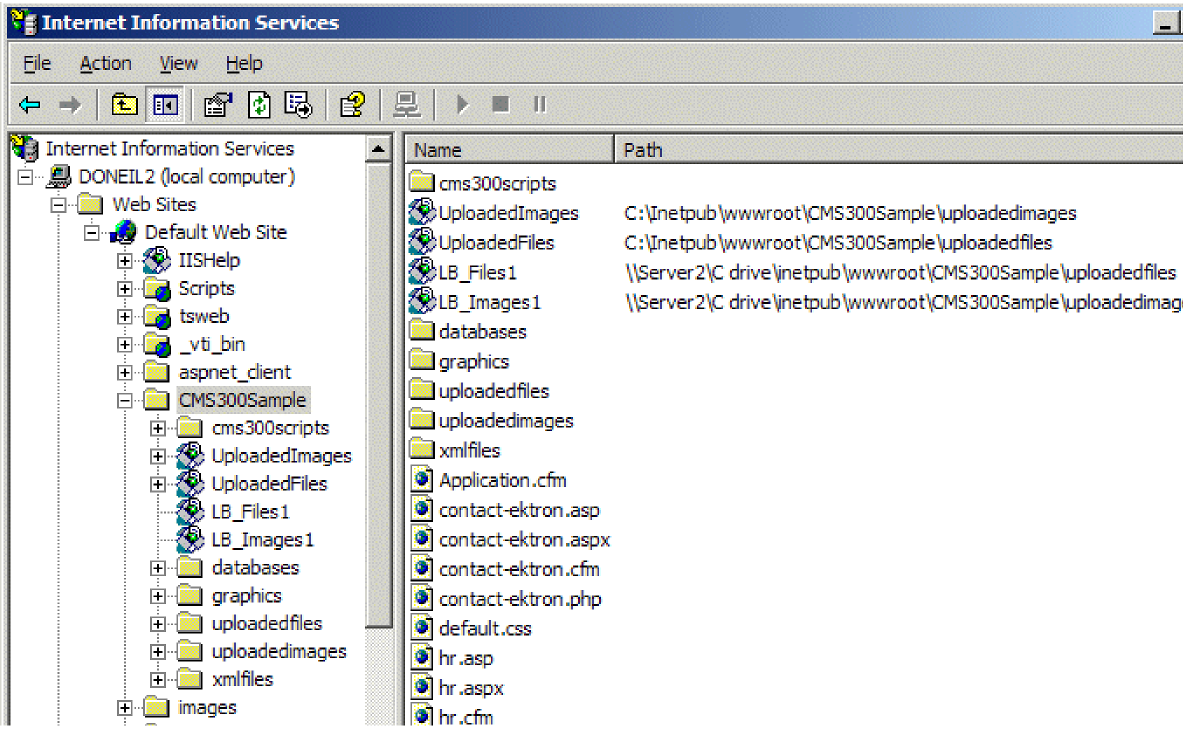
For our example, we create the following virtual directories on both Ektron CMS300 Web server machines.

Virtual Directory	Points to
UploadedImages	Default UploadedImages folder installed by Ektron CMS300 on the Web Server.
UploadedFiles	Default UploadedFiles folder installed by Ektron CMS300 on the Web server.
LB_Images1	UploadedImages folder installed on the second Ektron CMS300 Web server.
LB_Files1	UploadedFiles folder installed on the second Ektron CMS300 Web server.

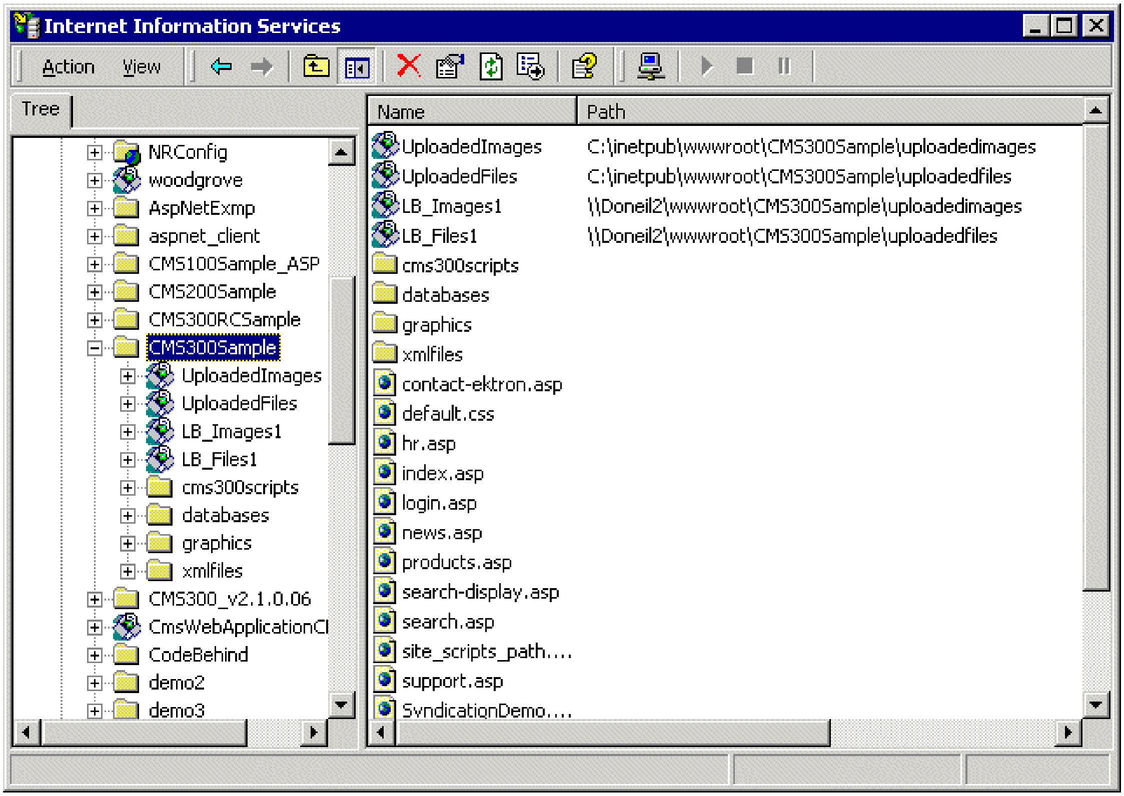
These four identical, virtual directories must exist in the IIS console for each Web server machine used in your load balancing model.

Displayed below is how the machines should be configured.

IIS on Computer1



IIS on Computer2



Why Must the Virtual Directory Names Be Identical?

The virtual directory names must be identical because, when load balance paths are created in Ektron CMS300, they are stored in one database. The names of the load balance paths in Ektron CMS300 are unique, but depending on the Web server machine that a user is on, IIS resolves the path to point to the virtual directory stored on that Web server machine.

Example:

A load balance path is called LB_Images1. Ektron CMS300 talks to IIS and resolves the path for the virtual directory LB_Images1, which happens to be `\\{Computer1}\C:\InetPub\wwwroot\CMS300Sample\UploadedImages.`

However, if the Web site is accessed from another Web server machine, the load balance path LB_Images1 points to the physical

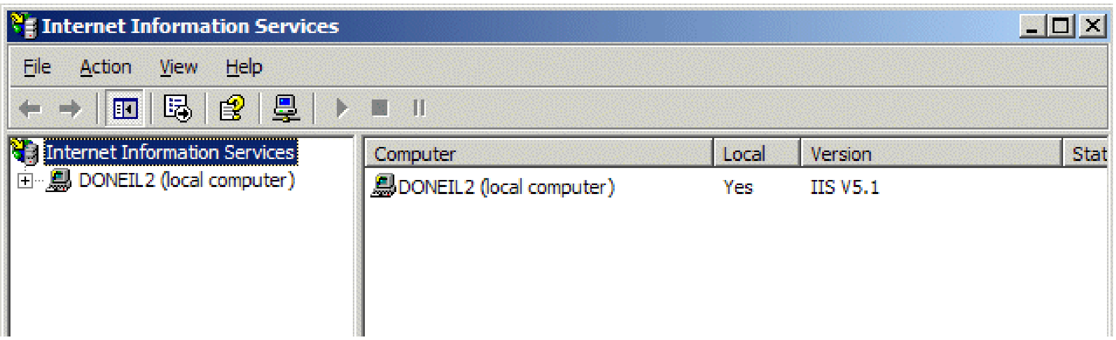
directory
`\\{Computer2}\C:\InetPub\wwwroot\CMS300Sample\UploadedImages.`

IMPORTANT! In order for the load balancing model to work correctly, the virtual directories on each Web server must be identical!

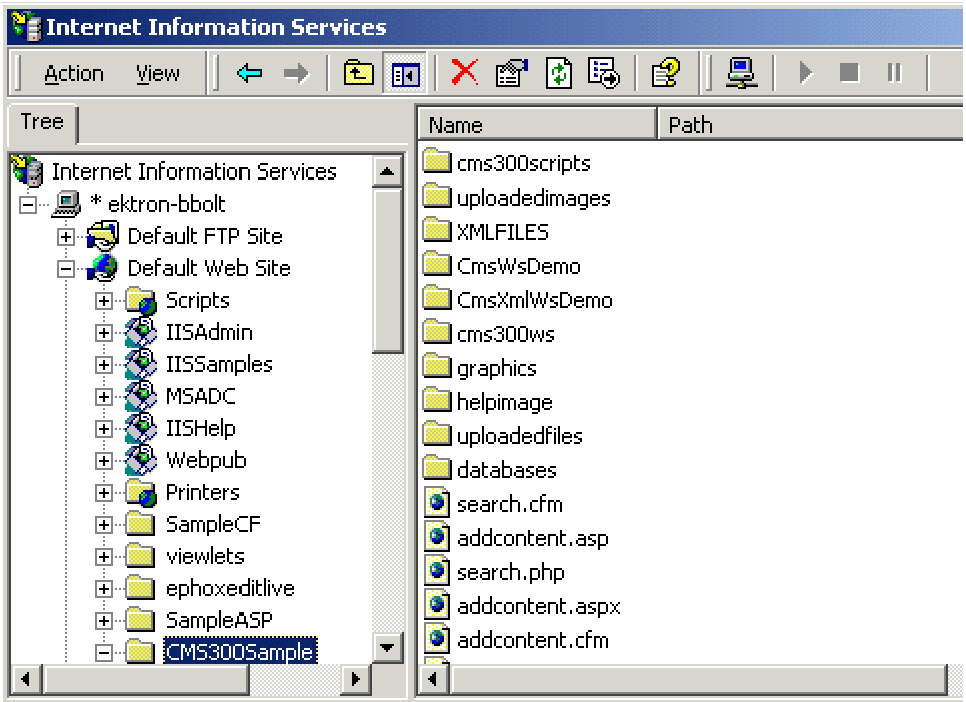
Creating a Virtual Directory

This section explains the steps needed to create a virtual directory in IIS. To create a virtual directory:

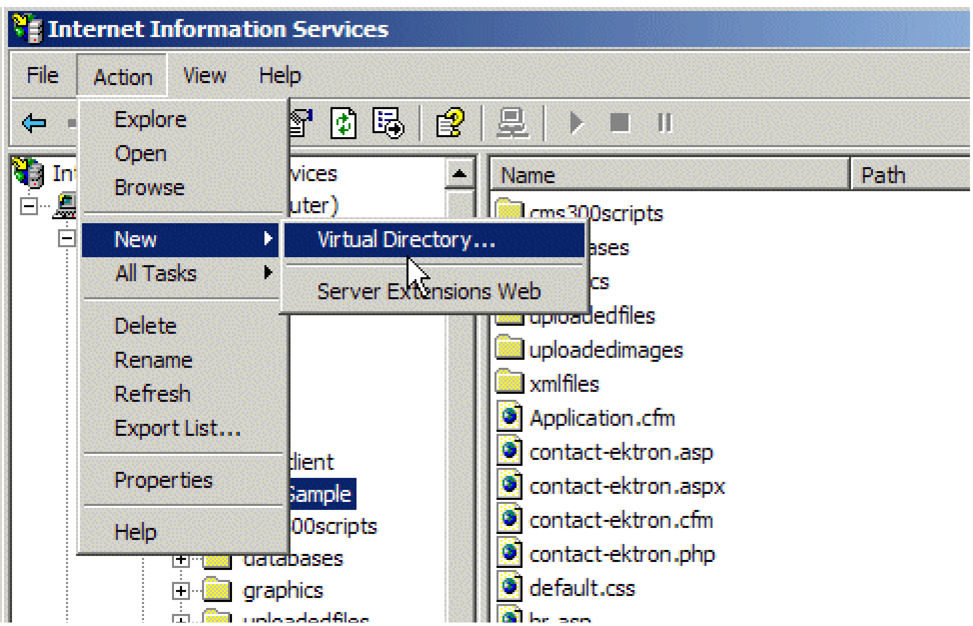
1. Access your IIS management console.



2. In the folder tree on the left side of the console, navigate to the Ektron CMS300 Site root folder. In this case, it is CMS300Sample.



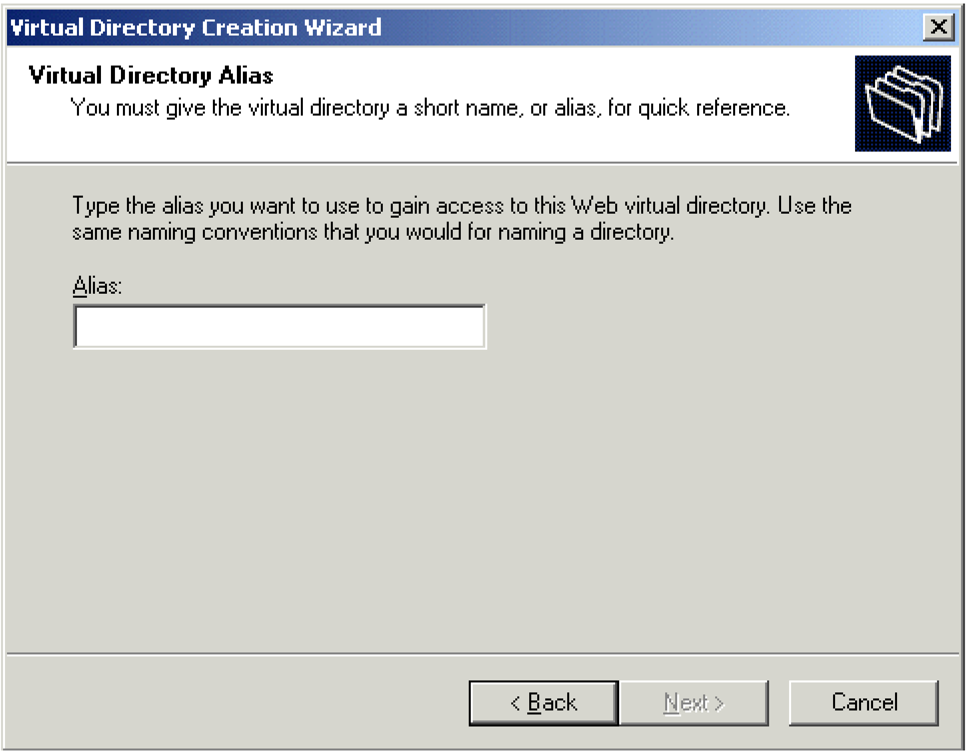
3. In the toolbar at the top of the screen, follow the path **Action > New > Virtual Directory...**



4. The Virtual Directory Creation Wizard is displayed.

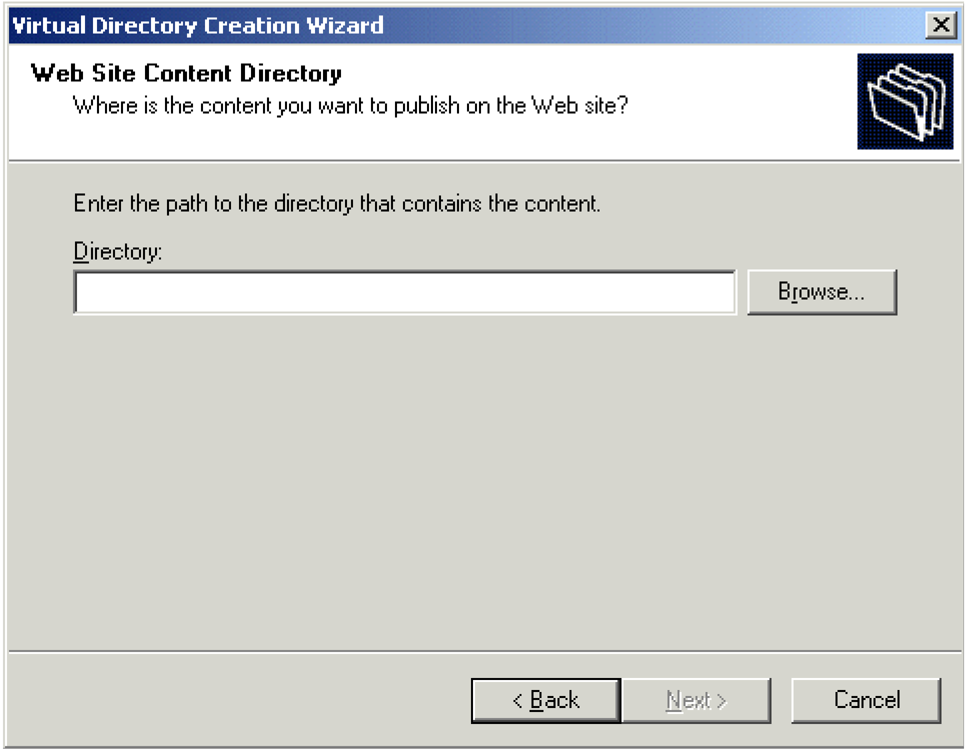
5. Click **Next** to proceed.

6. The Virtual Directory Alias screen is displayed.



7. Enter an alias for the virtual directory. This name will reference the virtual directory in Ektron CMS300.
8. Click **Next** to continue.

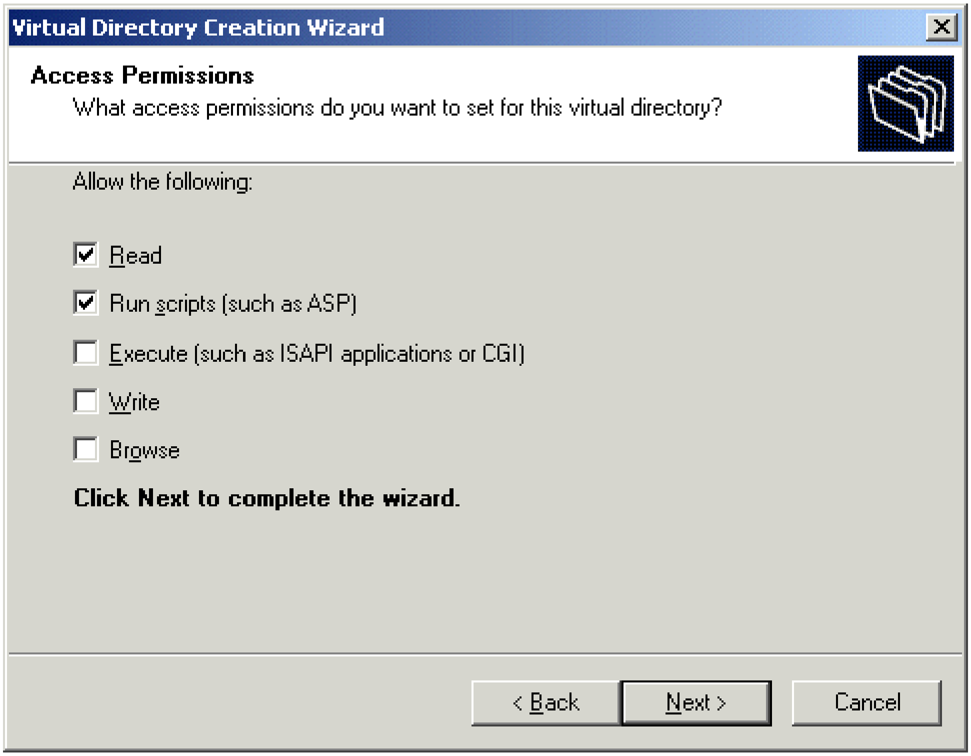
9. The Web Site Content Directory screen is displayed.



10. Enter the path to the directory to be used for the virtual directory, or click the **Browse** button to locate it.

NOTE The path is constructed using \\{ComputerName}\{FilePath} format.

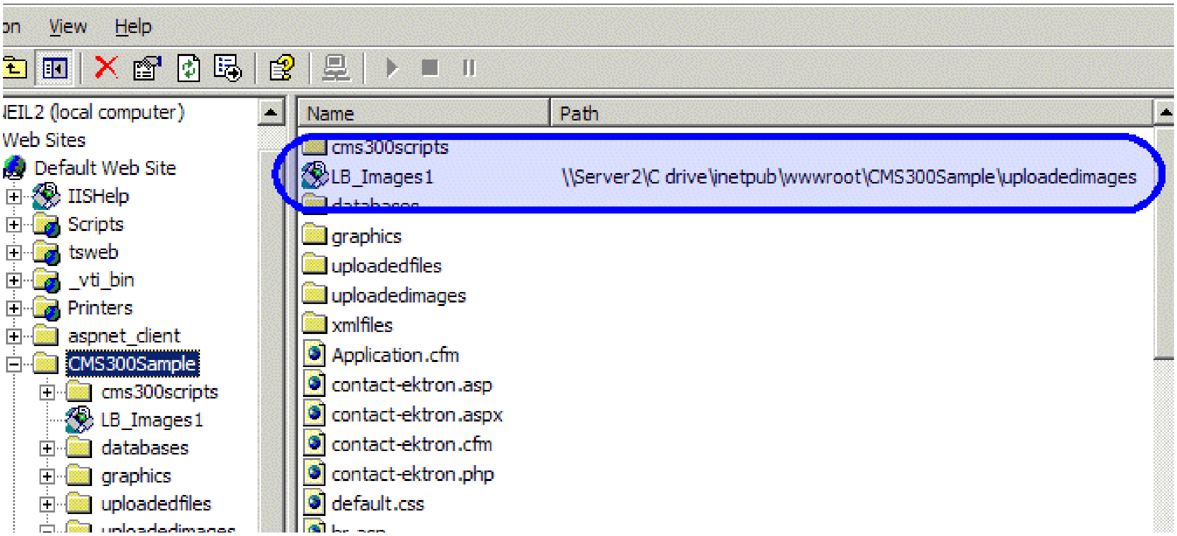
11. Click **Next** to continue.
12. Check off the permissions that you want to allow for the virtual folder.



NOTE At a minimum, the IIS user needs read and write permissions.

13. Click **Next** to complete the wizard.
14. A confirmation notifies you that you have created a virtual directory. Click the **Finish** button.

15. The IIS console is displayed with the virtual directory added to the specified location.



16. Repeat the above steps for each virtual directory that you need to create on each Web server running Ektron CMS300.

NOTE Remember, the names of the virtual directories on each server *must* be identical!

Setting Up Ektron CMS300 Load Balancing

After setting up the virtual directories on both Web server machines, you are ready to create the load balance paths in Ektron CMS300.

Review

Before we begin, let's review the virtual directories that have been created.

Computer1	
Virtual Directory	**Points to...**
UploadedImages	`C:\InetPub\wwwroot\CMS300Sample\UploadedImages`
UploadedFiles	`C:\InetPub\wwwroot\CMS300Sample\UploadedFiles`

Computer1	
Virtual Directory	**Points to...**
LB_Images1	`\\{Computer2}\C:\InetPub\wwwroot\CMS300Sample\UploadedImages`
LB_Files2	`\\{Computer2}\C:\InetPub\wwwroot\CMS300Sample\UploadedFiles`

Computer2	
Virtual Directory	**Points to...**
UploadedImages	`C:\InetPub\wwwroot\CMS300Sample\UploadedImages`
UploadedFiles	`C:\InetPub\wwwroot\CMS300Sample\UploadedFiles`
LB_Images1	`\\{Computer1}\C:\InetPub\wwwroot\CMS300Sample\UploadedImages`
LB_Files2	`\\{Computer1}\C:\InetPub\wwwroot\CMS300Sample\UploadedFiles`

Setting Up Load Balance Paths in Ektron CMS300

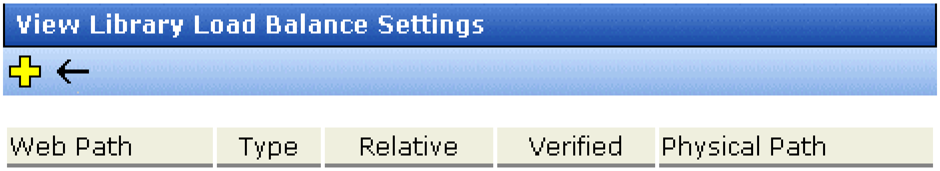
In this section, we set up load balance paths in Ektron CMS300 that point to the LB_Images1 and LB_Files1 virtual directories that we created earlier.

NOTE For additional information about working with load balance paths in Ektron CMS300, refer to ”Load Balancing” on page 98.

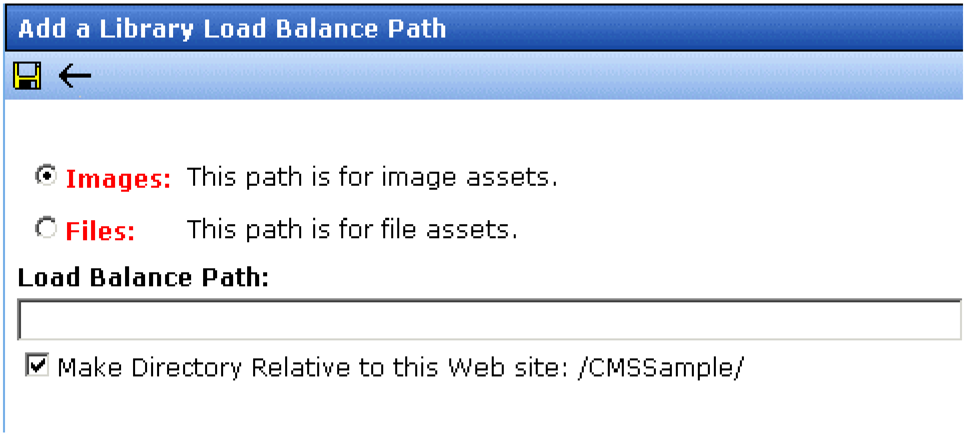
To add a load balance path in Ektron CMS300:

1. Log in as an administrator to an Ektron CMS300 Web site you set up in ”Setting Up Multiple Ektron CMS300 Web Sites” on page 380.

2. Access the Load Balance Settings Screen in the library folder, as described in "Accessing Library Load Balancing Screen" on page 98.



3. Click the Add button ( ).
4. The Add a Library Load Balancing Path screen is displayed.



5. Use the following table to help you fill out the form.

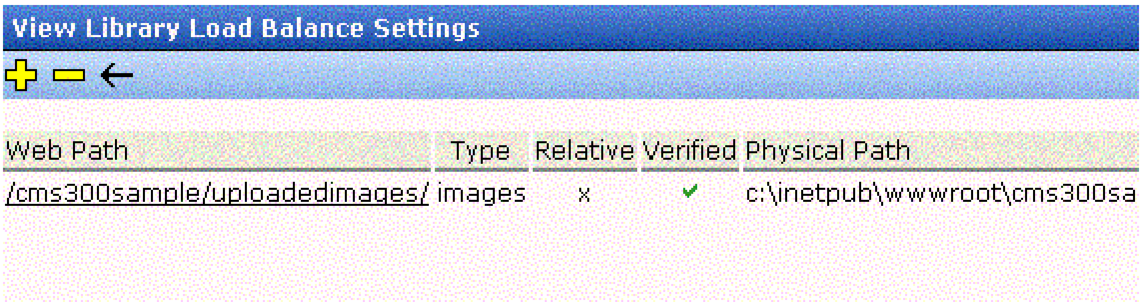
Field	Description
Images/Files	Specify if the load balance path folder is for images or files.
Load Balance Path	Enter the folder path.
Make Relative	If the folder (or virtual folder) resides under your Ektron CMS300 site root, check off the box to make the path relative to that. Otherwise, remove the check if the path is not relative to the site path.

6. Click the Save button ( ) to save and add the new load balance folder to the Ektron CMS300 library.

   The screen is refreshed, and the View Library Load Balance Settings screen is displayed with the changes reflected.

   Notice the green check. It notifies you that IIS on the current Web server successfully resolved the virtual directory and located its physical folder.

7. To further verify the load balance path is working successfully, look at the View Library Load Balance Setting screen in the Workarea for the other Ektron CMS300 Web server machine.



   Notice that the two Web path names are identical, but the physical paths are different. This proves that IIS resolved each one differently.

What Now?

After successfully configuring your load balancing model for your Ektron CMS300 Web site, you are ready to use it. Now, each time an image or file gets uploaded in your Web site, regardless of the Web server the user is currently working on, the asset is replicated in all folders specified.

Ektron CMS300 on Three Machines

This section examines a Web site driven by Ektron CMS300 and three Web servers.

Setting Up Multiple Ektron CMS300 Web Sites

To run an identical Ektron CMS300 Web site on three machines, you must use the same database for each site. To do this:

1. Install the Ektron CMS300 .exe file on each Web server that will be part of the Web site.

NOTE Refer to the Ektron CMS300 Setup Manual for additional information on performing an install.

2. Identify one installed database as your master database. Each Web site points to this database for content, users, and load balance paths.
3. Create an ODBC or OLE DB connection to that database, and edit the `/CMS300Scripts/Setup.asp` file for each Web site to use that DSN, Provider string, or file string.

If performed correctly, each Ektron CMS300 Web site on each Web server uses the same database.

Setting Up Virtual Directories

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. In addition, it is recommended that you change the default UploadedImages and UploadedFiles' directories to virtual directories as well.

For our example, we create the following virtual directories on all Ektron CMS300 Web servers.

Virtual Directory	Description
UploadedImages	Virtual directory that points to the default UploadedImages folder installed by Ektron CMS300 on the Web Server.
UploadedFiles	Virtual directory that points to the default UploadedFiles folder installed by Ektron CMS300 on the Web server.
LB_Images1	Virtual directory that points to the UploadedImages folder installed on the second Ektron CMS300 Web server.
LB_Files1	Virtual directory that points to the UploadedFiles folder installed on the second Ektron CMS300 Web server.
LB_Images2	Virtual directory that points to the UploadedImages folder installed on the third Ektron CMS300 Web server.

Virtual Directory	Description
LB_Files2	Virtual directory that points to the UploadedFiles folder installed on the third Ektron CMS300 Web server.

These four identical virtual directories must exist in the IIS console for each Web server machine in your load balancing model.

Creating a Virtual Directory

Refer to "Creating a Virtual Directory" on page 384 for information about creating virtual directories in IIS.

Setting Up Ektron CMS300 Load Balancing

With the completion of setting up the virtual directories on both Web server machines, you are ready to create the load balance paths in Ektron CMS300.

Review

Before we begin, let's review the virtual directories that have been created:

Computer1	
Virtual Directory	**Points to...**
UploadedImages	C:\InetPub\wwwroot\CMS300Sample\UploadedImages
UploadedFiles	C:\InetPub\wwwroot\CMS300Sample\UploadedFiles
LB_Images1	\\{Computer2}\C:\InetPub\wwwroot\CMS300Sample\UploadedImages
LB_Files1	\\{Computer2}\C:\InetPub\wwwroot\CMS300Sample\UploadedFiles
LB_Images2	\\{Computer3}\C:\InetPub\wwwroot\CMS300Sample\UploadedImages
LB_Files2	\\{Computer3}\C:\InetPub\wwwroot\CMS300Sample\UploadedFiles

Computer2	
Virtual Directory	**Points to...**
UploadedImages	C:\InetPub\wwwroot\CMS300Sample\UploadedImages
UploadedFiles	C:\InetPub\wwwroot\CMS300Sample\UploadedFiles
LB_Images1	\\{Computer1}\C:\InetPub\wwwroot\CMS300Sample\UploadedImages
LB_Files1	\\{Computer1}\C:\InetPub\wwwroot\CMS300Sample\UploadedFiles
LB_Images2	\\{Computer3}\C:\InetPub\wwwroot\CMS300Sample\UploadedImages
LB_Files2	\\{Computer3}\C:\InetPub\wwwroot\CMS300Sample\UploadedFiles

Computer3	
Virtual Directory	**Points to...**
UploadedImages	C:\InetPub\wwwroot\CMS300Sample\UploadedImages
UploadedFiles	C:\InetPub\wwwroot\CMS300Sample\UploadedFiles
LB_Images1	\\{Computer1}\C:\InetPub\wwwroot\CMS300Sample\UploadedImages
LB_Files1	\\{Computer1}\C:\InetPub\wwwroot\CMS300Sample\UploadedFiles
LB_Images2	\\{Computer2}\C:\InetPub\wwwroot\CMS300Sample\UploadedImages
LB_Files2	\\{Computer2}\C:\InetPub\wwwroot\CMS300Sample\UploadedFiles

Setting Up Load Balance Paths in Ektron CMS300

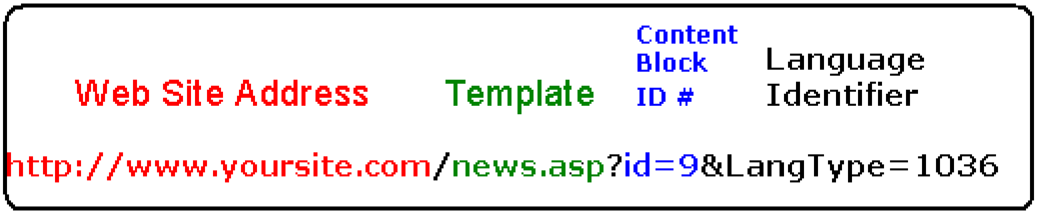
Refer to ”Setting Up Load Balance Paths in Ektron CMS300” on page 391 for information about how to configure Ektron CMS300 for load balancing.

What Now?

After you configure your load balancing model for your Ektron CMS300 Web site, you are ready to use it. Now, each time an image or file gets uploaded in your Web site, regardless of the Web server the user is working on, assets are replicated in all folders specified in Ektron CMS300.

URL Aliasing

Aliasing is an **Ektron CMS300** feature that lets you change the name of your Web site's pages. By default, **Ektron CMS300** Web pages have the following format:



See Also: "Forming URLs For Ektron CMS300 Documents" on page 47

- Sometimes, you want to change a page's name. **Ektron CMS300** can automatically change each page's name to a format that search engines more easily recognize. This is called *Automatic Aliasing*.

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 search engines may not work as well with the URL parameters that make up an **Ektron CMS300** 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 CMS300** 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 a content block.

Original URL

```
/cms300sample/mycalendars.asp?id=2&calendar_id=1&eky=2003&ekm=9
```

Aliased version

```
/cms300sample/mycalendars_ektid2_ektcalendarid1_ekteky2003_ektekm9.asp
```

Automatic Aliasing involves the installation of an ISAPI filter, which examines and modifies the URL. So, a small amount of additional resources may be used to help tread through a filter for every request.

Working with the ISAPI Filter

You must install the ISAPI filter before you can enable aliasing.

Installing the ISAPI Filter

See Also: How To Install an ISAPI Filter Dynamic-Link Library on Microsoft Web site (http://support.microsoft.com/kb/150312/EN-US/); Windows IIS help is available at http://localhost/iisHelp/.

To install the ISAPI filter, follow these steps.

1. Open IIS.
2. Right click **Default Web Site** and click **Properties**.
3. Click the ISAPI filter tab.
4. Click the **Add** button.
5. In the Filter name field, enter **Ektron Redirector**.
6. Click the **Browse** button and browse to `C:/Program Files/Ektron/CMS300/Utilities/EktronRedirector.dll`.
7. Click **OK**.
8. Click **OK** to close the Properties window.

Checking the Status of the ISAPI Filter

1. Open IIS.
2. Right click **Default Web Site** and click **Properties**.
3. Click the ISAPI filter tab.
4. The status column indicates the filter's status. A green up arrow means the filter is running.

NOTE If you edit any information associated with your ISAPI filter, restart IIS afterwards to make sure everything is working properly.

Removing the ISAPI Filter

To remove the ISAPI filter, follow these steps.

1. Open IIS.
2. Right click **Default Web Site** and click **Properties**.
3. Click the ISAPI filter tab.
4. Select the Ektron redirector.
5. Click the **Remove** button.

Enabling Automatic URL Aliasing

Be sure the ISAPI filter is running before you enable Aliasing. *See Also:* "Installing the ISAPI Filter" on page 399

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 setup.asp file, located in your Web site's `cms300scripts` folder.
2. Change the value of `ektRedirectorInstalled` to **True**.

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 400.

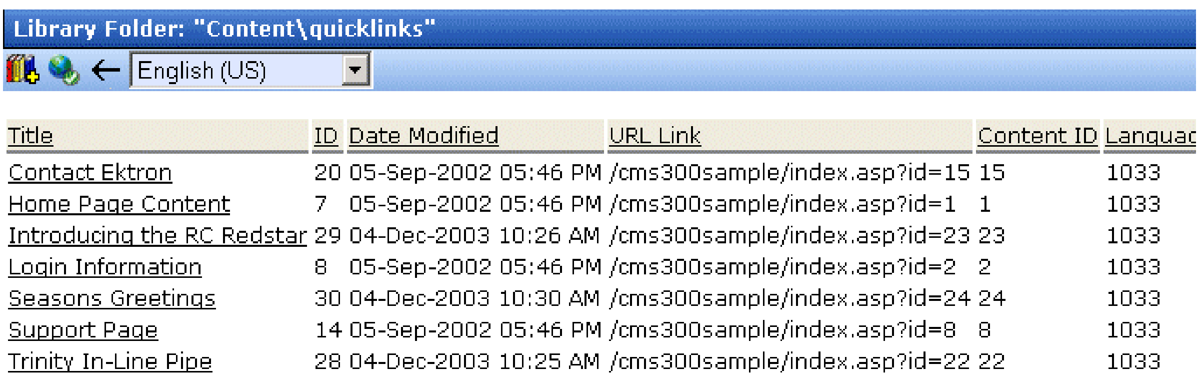
The screen indicates if automatic aliasing is currently on or off. To change its state, click the Edit button ( ), check or uncheck the box, and click the Save button ( ).

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 401).

Effect of Activating Automatic URL Aliasing

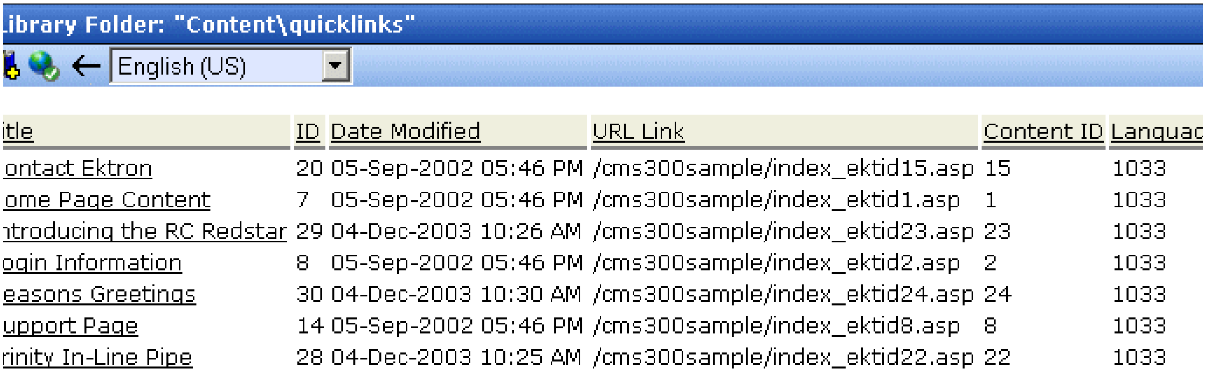
When you enable automatic URL aliasing, the feature updates every Quicklink in your **Ektron CMS300** library to the new format. This may take a few moments.

Sample Quicklinks Folder with URL Aliasing Turned Off



Title	ID	Date Modified	URL Link	Content ID	Languac
Contact Ektron	20	05-Sep-2002 05:46 PM	/cms300sample/index.asp?id=15	15	1033
Home Page Content	7	05-Sep-2002 05:46 PM	/cms300sample/index.asp?id=1	1	1033
Introducing the RC Redstar	29	04-Dec-2003 10:26 AM	/cms300sample/index.asp?id=23	23	1033
Login Information	8	05-Sep-2002 05:46 PM	/cms300sample/index.asp?id=2	2	1033
Seasons Greetings	30	04-Dec-2003 10:30 AM	/cms300sample/index.asp?id=24	24	1033
Support Page	14	05-Sep-2002 05:46 PM	/cms300sample/index.asp?id=8	8	1033
Trinity In-Line Pipe	28	04-Dec-2003 10:25 AM	/cms300sample/index.asp?id=22	22	1033

Sample Quicklinks Folder with URL Aliasing Turned On



itle	ID	Date Modified	URL Link	Content ID	Languac
ontact Ektron	20	05-Sep-2002 05:46 PM	/cms300sample/index_ektid15.asp	15	1033
ome Page Content	7	05-Sep-2002 05:46 PM	/cms300sample/index_ektid1.asp	1	1033
ıtroducing the RC Redstar	29	04-Dec-2003 10:26 AM	/cms300sample/index_ektid23.asp	23	1033
ogin Information	8	05-Sep-2002 05:46 PM	/cms300sample/index_ektid2.asp	2	1033
easons Greetings	30	04-Dec-2003 10:30 AM	/cms300sample/index_ektid24.asp	24	1033
upport Page	14	05-Sep-2002 05:46 PM	/cms300sample/index_ektid8.asp	8	1033
rinity In-Line Pipe	28	04-Dec-2003 10:25 AM	/cms300sample/index_ektid22.asp	22	1033

The aliasing feature does not review Quicklinks embedded in your content blocks -- these maintain their original format. When a user or site visitor is navigating through **Ektron CMS300**, either format works.

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>
```

WARNING!

3.

email Features

Configuring SMTP Server

For information about configuring Microsoft's SMTP service for your Ektron CMS300 Web server, please refer to Configuring Email Notifications, in the Ektron CMS300 Setup Manual.

Automatic eMail Notification

Ektron CMS300 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 a content block 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 104

The Tasks feature also has automatic email notification. For more information, see "Email Notification" on page 270.

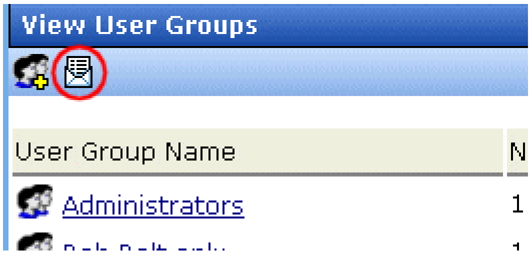
Content of Automatic email

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 CMS300** does not currently support HTML emails, but the messages are fully customizable. To learn about customizing them, see Customizing **Ektron CMS300** emails in the **Ektron CMS300** Setup Manual.

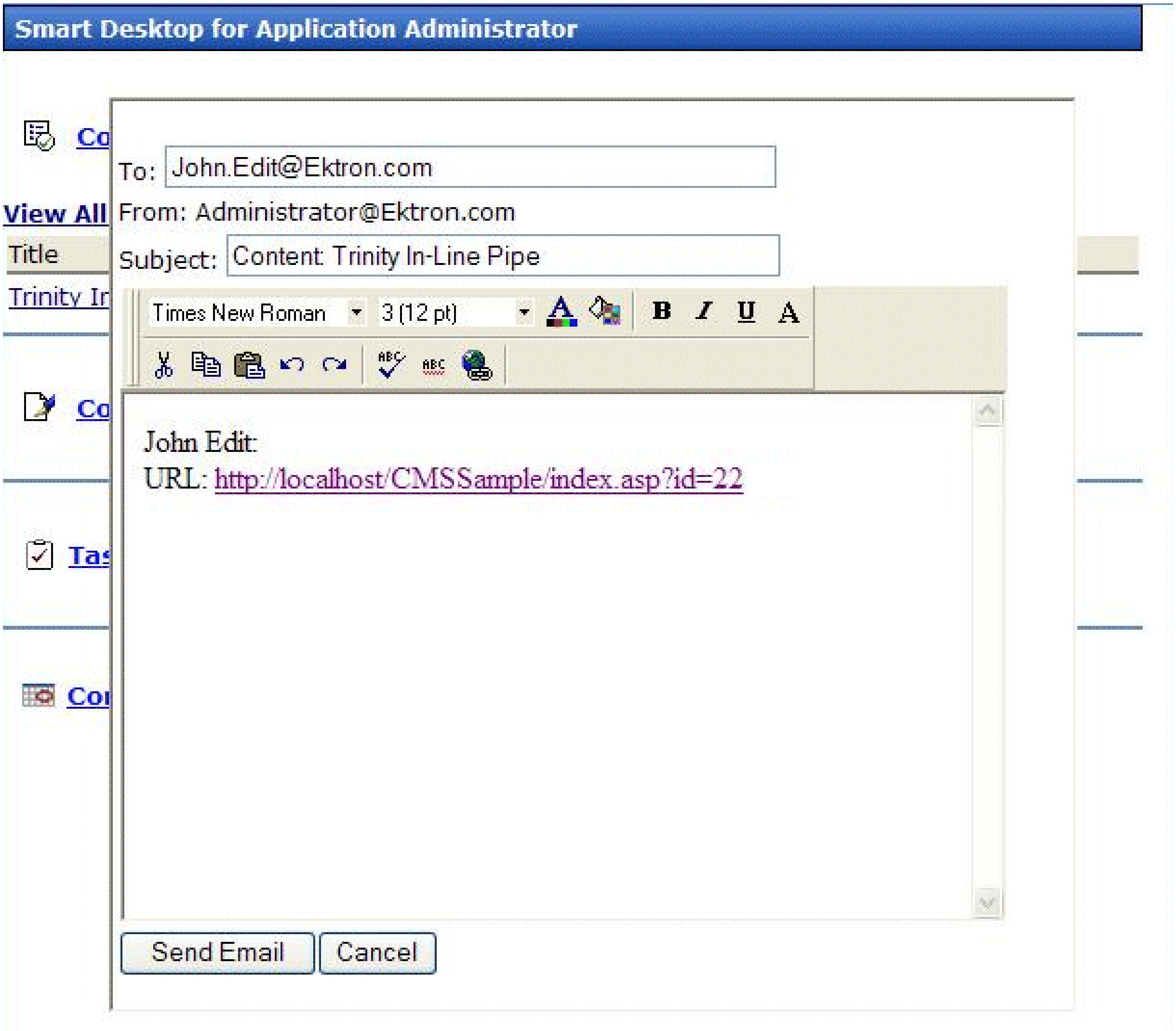
Instant eMail

In addition to automatic email, **Ektron CMS300** 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)



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.



The following sections explain how to set up and use Instant email.

Conditions for Instant eMail

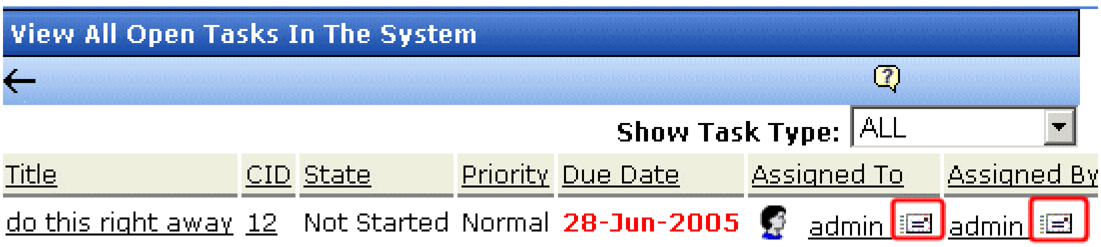
- The user who is using **Ektron CMS300** must have a valid from email address set up in the user profile. If not, email icons do not appear in **Ektron CMS300**.
- The email software must be configured for your server. See "Configuring SMTP Server" on page 404

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 CMS300** 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).



Modifying Instant eMail

When the email screen appears, the following information is copied from **Ektron CMS300** 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.

Field	Source of Default Information	Editable?
From	User who signed on to **Ektron CMS300**.	No
Subject	If the email message is linked to a content block, its title appears. The screen section below provides an example of a content block (**Trinity In-Line Pipe**) that is linked to a message.	Yes
		
Body of message	If the email message is linked to content block, a link to the content block appears.	Yes

Searching Content on the Web Site

NOTE This section explains how to use the search function on a browser page. For information about inserting the search function into an Ektron CMS300 Web template, refer to the Ektron CMS300 Developer Manual.

NOTE This section describes the search on your Web site. To learn about searching through the folders of your Content Management System, see "Search Content Folder" on page 39.

Ektron CMS300 has a search function that can be easily integrated into any Ektron CMS300 template. The search command looks through your XHTML Web site content and assets, then displays links to the content found by the search.

IMPORTANT! Each content block and asset includes a **Content Searchable** field. The search only considers content blocks if this field is checked.

When you insert the search function onto a template, it looks something like this on the Web site.

When performing a search, the user enters one or more words into the text box, selects the necessary search preferences, then clicks the **Search** button.

Your system administrator can add custom search fields that only appear if a user is logged in. For more information, see "Search Data" on page 65.

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 blocks that have 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 blocks that have *at least one* of the words entered in the search text field. In other words, it returns content blocks with the word partners *or* content *or* Monday *or* employee *or* green.

Exact Phrase

Exact Phrase returns content blocks that have 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 blocks 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 blocks with the letters “at”. This search finds words such as **At**, B**at**, Ch**at**ter, **At**oll, **AT**M, etc.

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 CMS300. 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 CMS300.

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 447
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 415

WARNING! To successfully operate Ektron CMS300 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. 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 CMS300 server. See SSL Support in the **Ektron CMS300** Setup Manual for more information.

Active Directory Integration

This chapter covers the following topics:

- ”How Information is Transferred from AD to Ektron CMS300” on page 415
- ”Which Information is Transferred from AD to Ektron CMS300” on page 416
- ”Logging into a System that Uses AD Integration” on page 418
- ”Associating User Information in AD with Ektron CMS300” on page 418
- ”User Groups” on page 422
- ”The Screens of the Active Directory Feature” on page 429
- ”Setup Guidelines” on page 443
- ”Disabling AD Integration” on page 445

How Information is Transferred from AD to Ektron CMS300

Ektron CMS300 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 CMS300.

- Once you enable AD integration, all changes to user and user group information must be made in the AD -- the Ektron CMS300 Edit User and User Group screens change to primarily view screens.
- When adding a new user or user group toEktron CMS300, 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 CMS300.

Which Information is Transferred from AD to Ektron CMS300

Ektron CMS300 accesses the following AD user information.

- Authentication (password, user logon name, and domain) for signing in to Ektron CMS300.

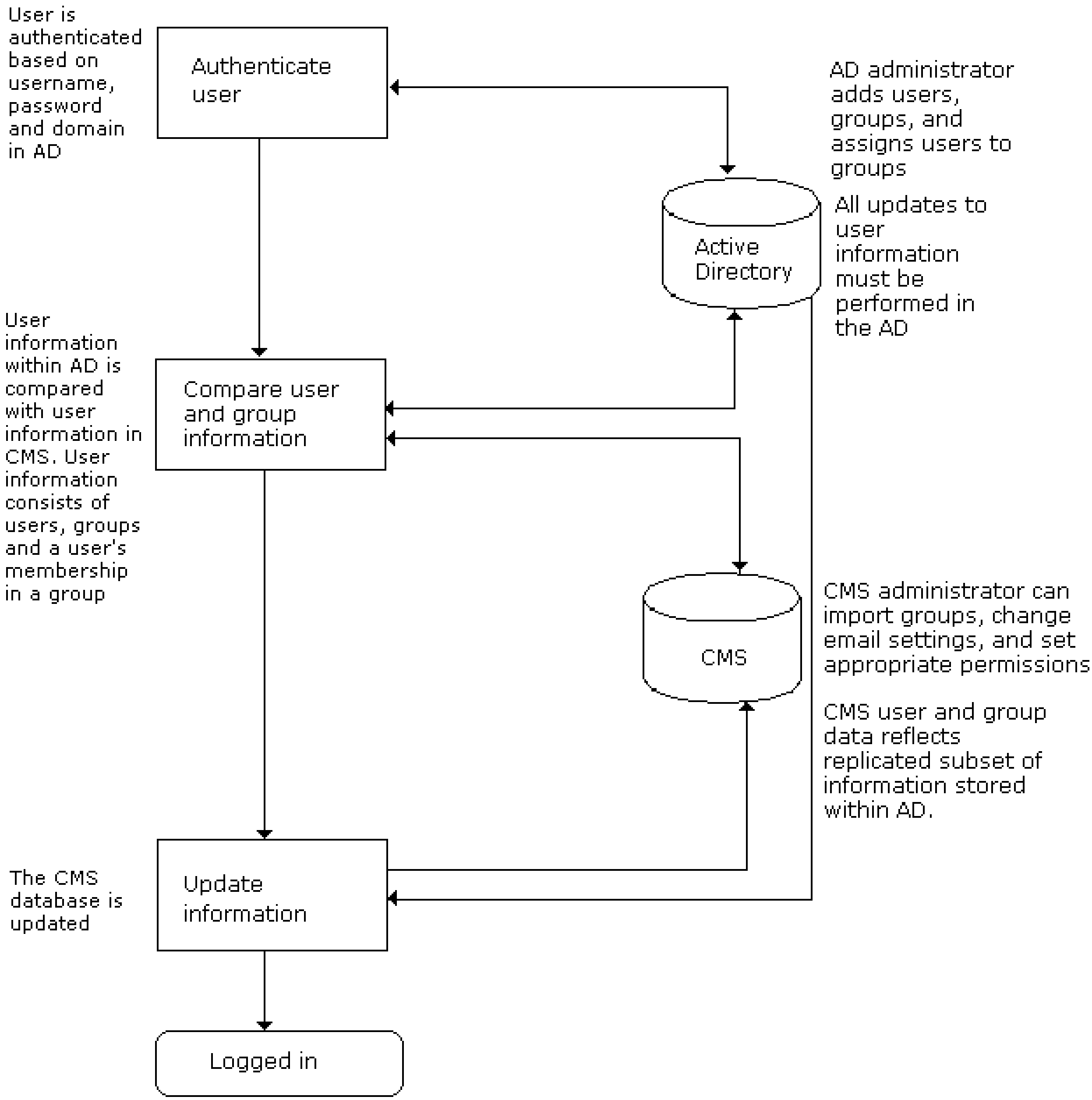
  The password is not stored in Ektron CMS300 – the application only refers to the password during sign in.
- User information, listed in the following table

Field in AD	AD attribute	Corresponding field in Ektron CMS300
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 CMS300
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.



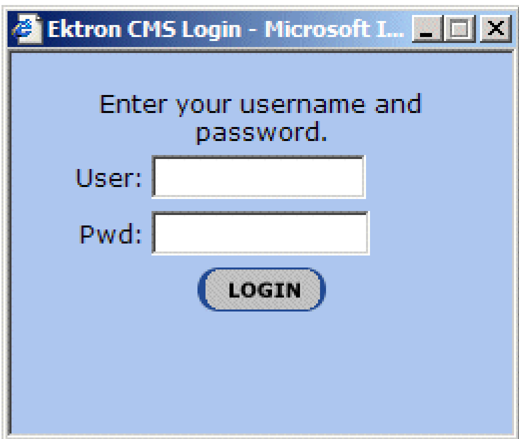
Overview of Active Directory Integration

A key component of this feature is keeping information in the AD consistent with Ektron CMS300. The next sections explain

- logging into a system that uses Active Directory integration
- associating user information in AD with Ektron CMS300
- how user group information is maintained between systems
- the screens of the Active Directory Feature

Logging into a System that Uses AD Integration

Because usernames and passwords are stored in the AD by domain, the AD sign-in procedure requires you to select a domain name. So, if AD integration is enabled, the sign-in screen includes a pull-down list that the user clicks to select a domain.



NOTE Your organization determines AD domain names.

For more information about logging in, see "Logging Into an Ektron CMS300 Web Site" on page 8.

Associating User Information in AD with Ektron CMS300

A key component of the Active Directory Integration feature is to maintain consistent information between the AD and Ektron CMS300 systems. This section explains how user information is transmitted between AD and Ektron CMS300 when integration is first enabled and on an ongoing basis.

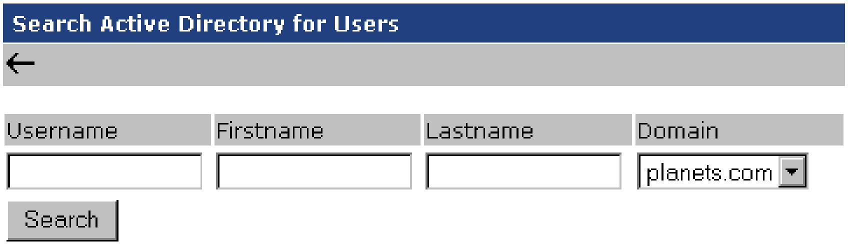
This section covers the following topics.

- Adding user information from AD to Ektron CMS300
- Associating user information when integration is first enabled
- Associating user information after integration is enabled
- Editing user information in Ektron CMS300
- Deleting Users
- Replacing a User

Adding User Information from AD to Ektron CMS300

Before using the AD integration feature, you should add all AD users that you will use in your Web site into Ektron CMS300. To copy an AD user into Ektron CMS300, 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.

   A new screen displays all users that satisfy the search criteria you entered.
7. Click the check box under the **Add** column to add users to Ektron CMS300.

8. Click the Save button ( ) to add AD users to Ektron CMS300.

   The View Users in Group Everyone screen appears, displaying the new user and the other Ektron CMS300 users.

When Integration is First Enabled

Ektron CMS300 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 CMS300 when that user logs in or when the user is added to Ektron CMS300.

See Also: "The Active Directory Setup Screen" on page 429

The first time the user information is copied, the AD information overwrites all Ektron CMS300 information. To learn how information is updated from then on, see "After Integration is Enabled" on page 421.

If two or more AD users have the same Ektron CMS300 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 CMS300, the Active Directory Setup and Active Directory Status screens highlight this discrepancy using the following message:

CMS users need to be associated with Active Directory users.

Click the message to proceed to the Associate Ektron CMS300 Users to Active Directory Users screen and associate an AD user with the Ektron CMS300 user.

See Also: "Associating Ektron CMS300 Users with Active Directory Users" on page 435

Ektron CMS300 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 CMS300. When you add a user, the user information is copied from the AD to Ektron CMS300.

See Also: "The Search Active Directory for Users Screen" on page 439

NOTE You can only select AD users that do not already exist in Ektron CMS300. 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 CMS300 whenever 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 438

If a user's last name, first name, email field, or group membership changed in the AD, those changes are copied to Ektron CMS300. However, if a user's *logon name* changed in the AD, that change is not copied to Ektron CMS300 because Ektron CMS300 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 CMS300 Users to Active Directory Users screen, where you can update the AD user who is associated with the Ektron CMS300 user.

See Also: "Associating Ektron CMS300 Users with Active Directory Users" on page 435

Editing User Information in Ektron CMS300

Because **Ektron CMS300** does not write to the AD, you can only change the **User Language** and **Disable email Notifications** fields within the Ektron CMS300 Edit User screen. You must edit all other user fields from the AD.

Deleting Users

If a user is deleted in AD, Ektron CMS300 does not automatically delete the user. However, the user's login fails because he cannot be authenticated.

The user remains in Ektron CMS300, and the discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should delete the user from Ektron CMS300 using the Delete User function.

See Also: "Deleting a User" on page 107

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 28.

Replacing a User

If you associate the wrong AD user with a Ektron CMS300 user, you can replace the user. If you do so, all Ektron CMS300 privileges and workflow responsibilities assigned to the old user are transferred to the new one.

Follow these steps to associate a Ektron CMS300 user with a new AD user.

1. From the left side of the Workarea, click **Users**.
2. Click the user that 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 () to finalize the change.

When you complete this procedure, the first user is deleted from Ektron CMS300.

User Groups

This section explains how a user's group membership is copied from the AD to the Ektron CMS300 system when integration is first enabled, and then on an ongoing basis. Once assigned to a group, the user automatically receives all Ektron CMS300 privileges and workflow responsibilities associated with it.

NOTE The Active Directory has two kinds of user groups: security and distribution. Ektron CMS300 does not distinguish between them – as long as a user is a member of either kind of group, group information is imported to Ektron CMS300.

This section explains the following topics.

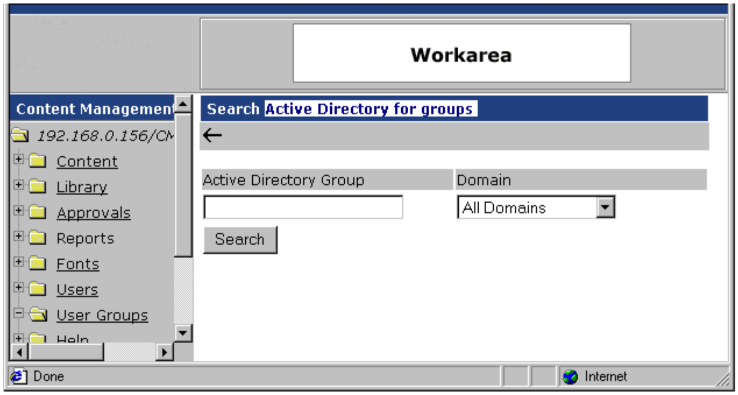
- Copying user group information from AD to Ektron CMS300
- Associating a user's AD group information with Ektron CMS300
- Mapping the administrator group
- User belongs to AD group that does not exist in Ektron CMS300
- User belongs to Ektron CMS300 group that does not exist in AD
- Removing users from a group
- Adding user groups
- Adding a user to a group
- Replacing a user group
- Deleting a user group

Copying User Groups from AD to Ektron CMS300

Before using the AD integration feature, you should copy all AD groups that you will use in your Web site into Ektron CMS300. To copy an AD group into Ektron CMS300, follow these steps.

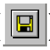
1. From the left side of the Workarea, Click the **User Groups** folder.
2. Click the Add Groups button ().

The Search Active Directory for Groups screen appears.



3. From the **Domain** pull-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 for groups 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 CMS300.
8. Click the Save button ().

Associating a User's AD Group Information with Ektron CMS300

When Integration is First Enabled

Ektron CMS300 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 CMS300 or when a user logs in or is added. At this time, any AD group memberships overwrite Ektron CMS300 group memberships *except* the Everyone group, to which all users belong.

NOTE The Everyone group, unlike other Ektron CMS300 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 CMS300, nothing happens because the feature assumes that all AD groups are not meaningful in Ektron CMS300.

If a user belongs to an Ektron CMS300 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 CMS300.

See Also: ”Associating User Group Membership with Active Directory User Group Membership” on page 436 and ”Associating Groups with Active Directory Groups” on page 437

To learn how membership is updated from then on, see ”After Integration is Enabled” on page 425.

Ektron CMS300 is Being Installed, so No User Groups Exist

Follow the procedure described in ”Copying User Groups from AD to Ektron CMS300” on page 423 to copy AD user groups to Ektron CMS300. As users in those groups are added to Ektron CMS300, their group membership is copied from AD to Ektron CMS300.

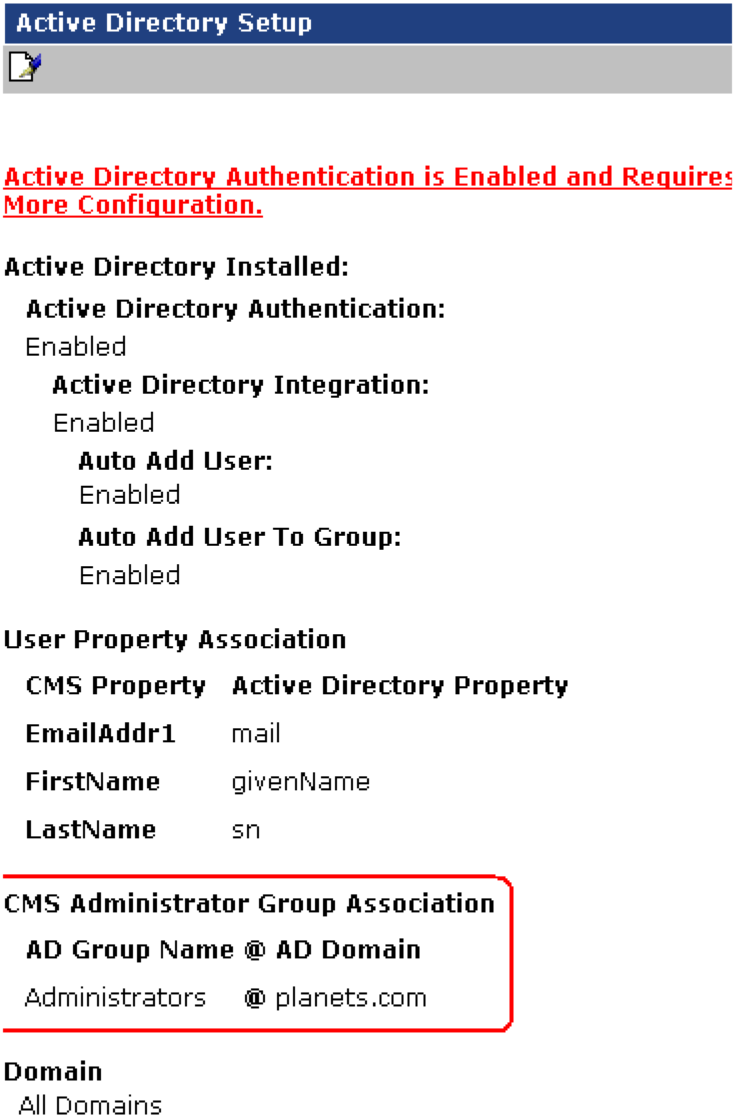
After Integration is Enabled

A user’s group membership is updated in Ektron CMS300 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 CMS300 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 CMS300 Active Directory Setup screen, you can identify an AD user group that maps to the Ektron CMS300 Administrator group.



Administrators have access to all functions documented in this documentation. (Unlike other Ektron CMS300 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 CMS300 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 CMS300 Administrator group -- you cannot have an AD administrator group within each AD domain.

See Also: "The Active Directory Setup Screen" on page 429

User Belongs to AD Group that Does Not Exist in Ektron CMS300

If user is assigned to an AD user group that does not exist in Ektron CMS300, nothing happens. The AD integration feature assumes that an Ektron CMS300 administrator only maintains user groups that are meaningful to Ektron CMS300, and not all AD groups may be meaningful to Ektron CMS300.

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 CMS300.

User Belongs to Ektron CMS300 Group that Does Not Exist in AD

If a user was a member of a user group in Ektron CMS300 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 CMS300.

See Also: "Associating Groups with Active Directory Groups" on page 437

Removing Users from a Group

If you delete a user from an AD group, the user is automatically removed from the associated Ektron CMS300 group the next time the user's information is updated (as explained in "After Integration is Enabled" on page 421).

Adding User Groups

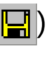
Once AD integration is enabled, you can only add new user groups in the AD. In Ektron CMS300, use the Search Active Directory for Groups screen to copy an AD user group to Ektron CMS300. You can only add groups that do not already exist in Ektron CMS300. This procedure is described in "Copying User Groups from AD to Ektron CMS300" on page 423.

Adding a User to a Group

You cannot add a user to a user group within Ektron CMS300 -- 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 CMS300 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 CMS300 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 CMS300, the group is not automatically deleted in Ektron CMS300. However, any Ektron CMS300 users who were members of the group are no longer members the next time their Ektron CMS300 information is updated. The discrepancy is flagged on the Active Directory Setup and Active Directory Status screens.

Deleting a User Group in Ektron CMS300

If you delete a user group in Ektron CMS300 and users are assigned to that group within AD, nothing happens. This is because the AD Integration Feature assumes that, in Ektron CMS300, the administrator only sets up user groups that are meaningful to Ektron CMS300, and some AD groups are not meaningful to Ektron CMS300.

The Screens of the Active Directory Feature

The Active Directory feature uses the following screens:

- the Active Directory Setup screen
- the Active Directory Status screen
- the View Users Screen
- the View User Groups Screen

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 feature, 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.

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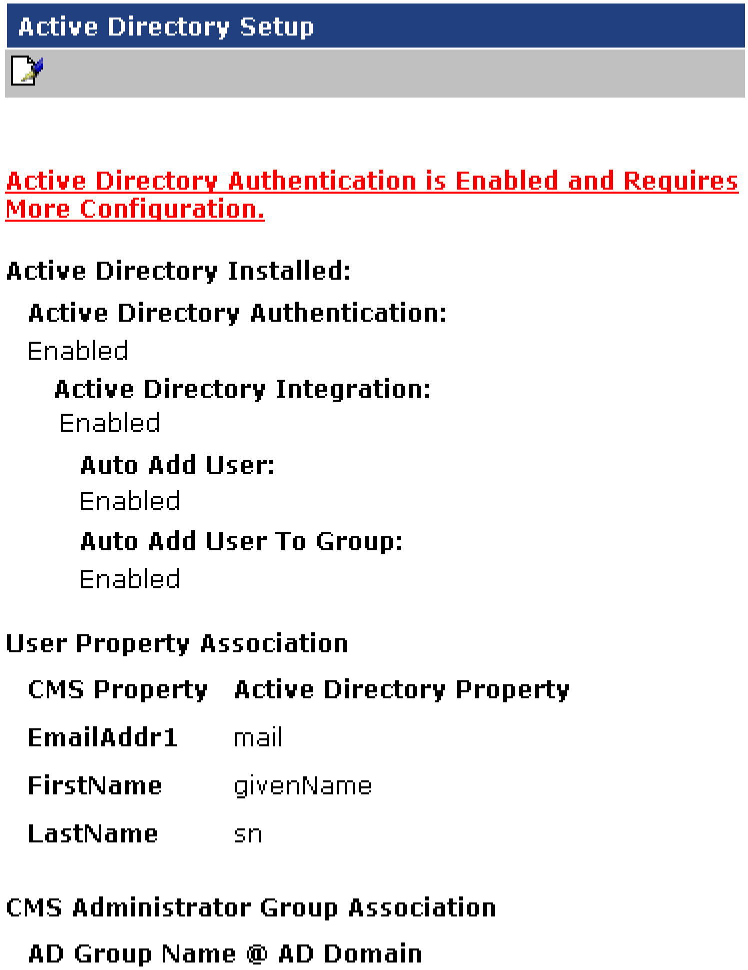


The following table describes the fields on the screen.

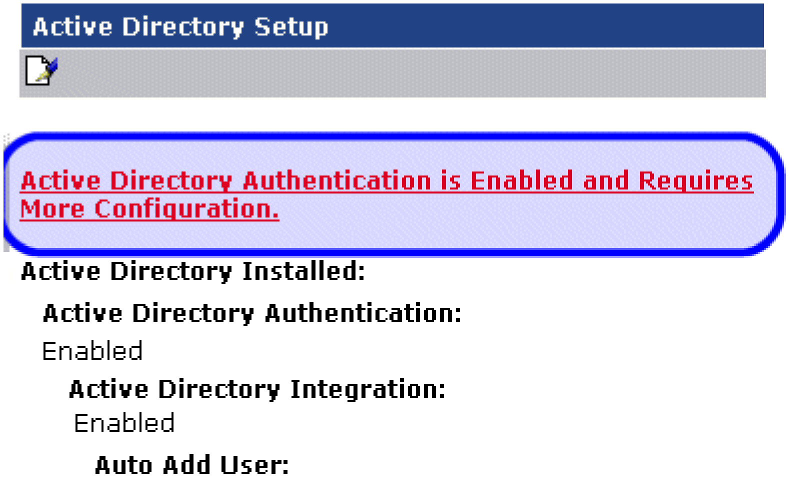
See Also: ”Messages Near the Top of the Active Directory Setup Screen” on page 432

Field	Description	For more information, see
Active Directory Installed		
Active Directory Authentication	If enabled, user authentication is functional, and you can enable the following three fields.	”User Authentication Only Mode” on page 447

Field	Description	For more information, see
Active Directory Integration	If enabled, the Active Directory feature is functional. Can only be enabled if Active Directory Authentication is enabled.	"Active Directory Integration" on page 415
Auto Add User	If enabled, user information is copied from the AD to Ektron CMS300 when that user logs in or when the user is added to Ektron CMS300. Can only be enabled if Active Directory Integration is enabled.	"Associating User Information in AD with Ektron CMS300" on page 418
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. Can only be enabled if Active Directory Integration is enabled.	"User Groups" on page 422
User Property Mapping		
FirstName	Enter the Active Directory Property that maps to the user's first name in Ektron CMS300. 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 > Active 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 CMS300. 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 CMS300. By default, this is set to `mail`, but you can change it to any AD property.	same reference as FirstName (above)
Ektron CMS300 Administrator Group Mapping		

Field	Description	For more information, see
AD Group Name @ AD Domain	Enter the Active Directory user group and domain name that maps to the hard coded Ektron CMS300 administrator group. If you do not have an AD user group that includes all Ektron CMS300 administrators, you should create one and enter its name and domain here.	"Mapping the Administrator Group" on page 426
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 CMS300 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



Message	Explanation
Active Directory Authentication is Enabled and Requires More Configuration.	Some Ektron CMS300 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.
Active Directory Authentication is disabled, but needs further configuration	Some Ektron CMS300 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 CMS300 users or groups can no longer share a name -- each name must be unique.

If you see either message, click it. You proceed to the Active Directory Status screen, which helps you resolve the discrepancies.

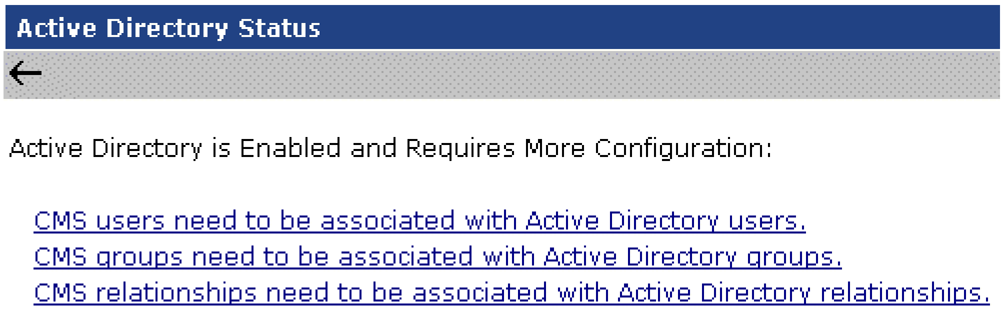
See Also: "The Active Directory Status Screen" on page 434

The Active Directory Status Screen

Use the Active Directory Status screen to resolve the following discrepancies between Ektron CMS300 and AD.

- an Ektron CMS300 user needs to be associated with an AD user
- an Ektron CMS300 user group needs to be associated with an AD user group
- an Ektron CMS300 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.



There are several reasons why such discrepancies may occur. To learn more about why

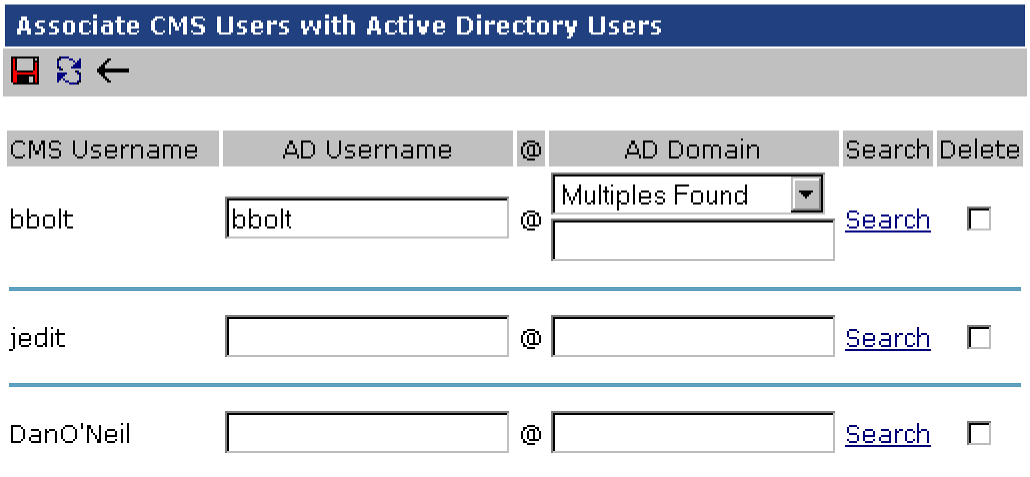
- an Ektron CMS300 user is not associated with an AD user, read "Associating User Information in AD with Ektron CMS300" on page 418.
- an Ektron CMS300 user's group membership is not associated with the user's AD group membership, read "Associating a User's AD Group Information with Ektron CMS300" on page 424
- an Ektron CMS300 group is not associated with an AD group, read "User Groups" on page 422

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

- Associating Ektron CMS300 Users with Active Directory Users
- Associating Ektron CMS300 User Group Membership with Active Directory User Group Membership
- Associating Ektron CMS300 Groups with Active Directory Groups

Associating Ektron CMS300 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 CMS300 Users with Active Directory Users screen appears (illustrated below). Use this screen to associate Ektron CMS300 users with AD users.



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 CMS300 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 CMS300 username, make the change in the AD. Then, click the

Refresh button ( ) to update Ektron CMS300 and resolve the discrepancy.

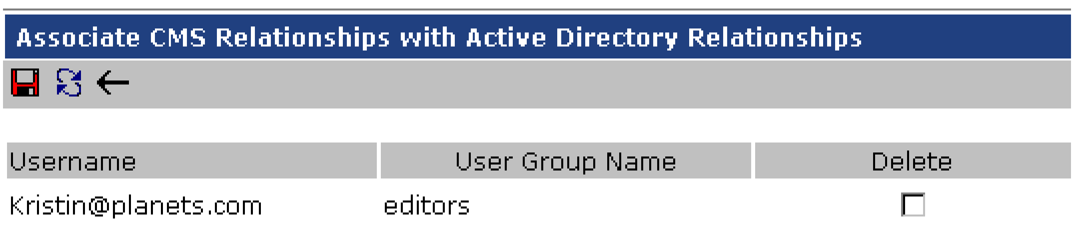
Finally, if this user should not exist in the Ektron CMS300 database, click the box under the **Delete** column to delete the user from Ektron CMS300.

After you make all necessary changes, click the Save button ( ) to save them.

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 CMS300 Relationships with Active Directory Relationships screen appears (illustrated below). Use this screen to coordinate Ektron CMS300 user group membership with AD user group membership.

The screen displays a user's group membership that exists in Ektron CMS300, but does not exist in the AD.



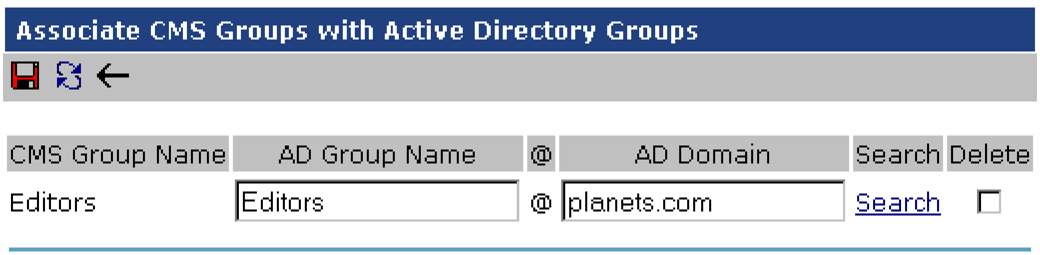
See Also: "Associating a User's AD Group Information with Ektron CMS300" on page 424

After viewing the discrepancy on the screen, you have two choices:

- To associate the user with the same user group in the 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 CMS300.
- To remove the user's group membership in Ektron CMS300, 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 CMS300 User Groups with Active Directory Groups screen appears (illustrated below). Use this screen to associate Ektron CMS300 groups with AD groups.



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.

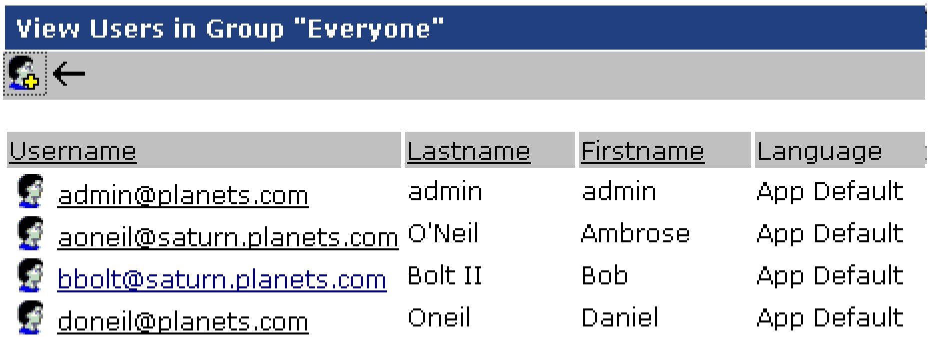
If there is no default and you know the AD group name to associate with an Ektron CMS300 group, enter that in the **AD Group Name** and **AD Domain** fields. If you do not know the AD groupname, click **<u>Search</u>** to find the group in the AD.

Finally, if this group should not exist in the Ektron CMS300 database, click the box under the **Delete** column to delete the group from Ektron CMS300.

After you make all necessary changes, click the Save button ( ) to save them.

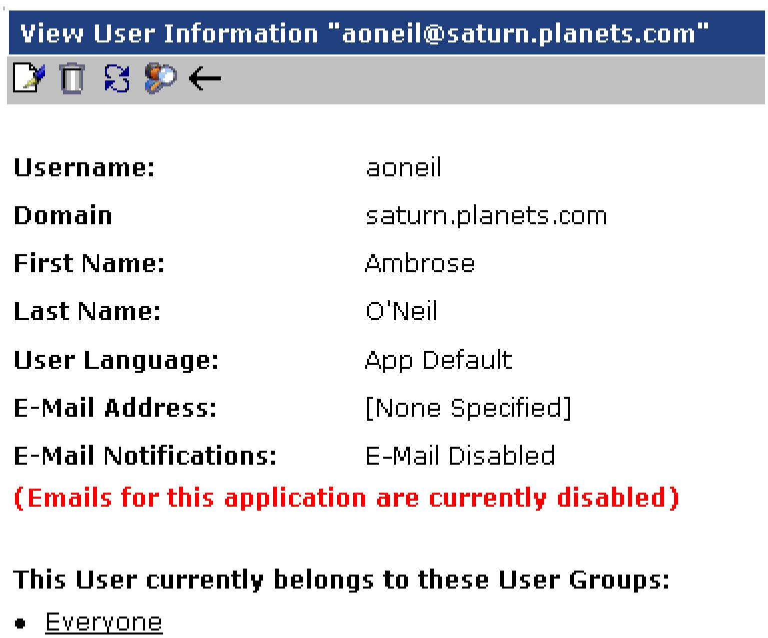
The View Users Screen

The View Users screen (illustrated below) lists all users in the Ektron CMS300 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.



The View Users screen also provides a toolbar button ( ) that lets you add AD users to the Ektron CMS300 database. When you click it, the Search Active Directory for Users Screen appears.

The View User Information Screen



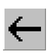
The View User Information Screen displays the user's

- 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.

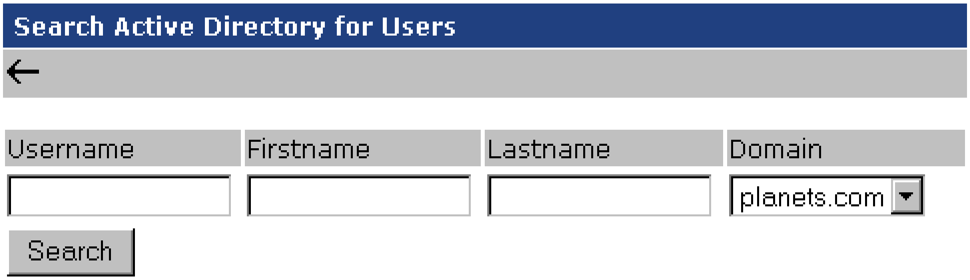
If you are using *full AD Integration mode*, you can only edit **language** and whether the user receives email notifications. You must edit the other fields in the AD.

The screen also displays the following buttons.

Button	Description
	Edit information on screen
	Delete user *See Also:* "Deleting Users" on page 421
	Retrieve latest information from AD into Ektron CMS300 *See Also:* "After Integration is Enabled" on page 421 This toolbar button does not appear if you are using user authentication mode.
	Replace user *See Also:* "Replacing a User" on page 422
	Return to previous screen

The Search Active Directory for Users Screen

Use this screen to add AD users to Ektron CMS300. To access the screen, click **Users** from the left panel of the Workarea, then click the Add button ().



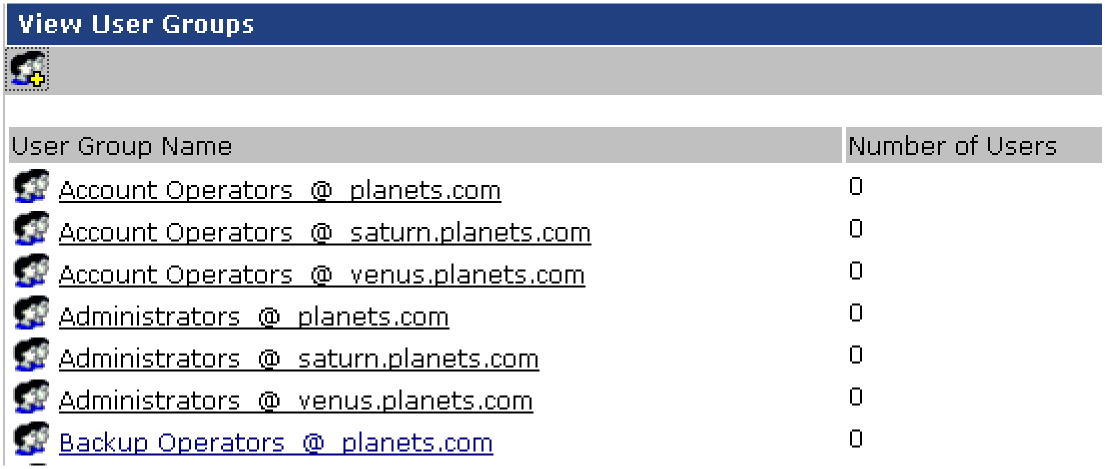
Enter as much search criteria as you know to reduce the number of users that the search yields. For example, if you know that the user's last name is Jackson and the user is in the planets domain, enter those criteria and you will get many fewer hits.

When the Active Directory Users screen appears, click the box next to users that you want to create in Ektron CMS300. Then, click the Save button () to copy their information into Ektron CMS300.

The View User Groups Screen

The View User Groups Screen displays all AD user groups that have been copied into Ektron CMS300. (See "Copying User Groups from AD to Ektron CMS300" on page 423).

To access the screen, click **User Groups** from the left panel of the Workarea.



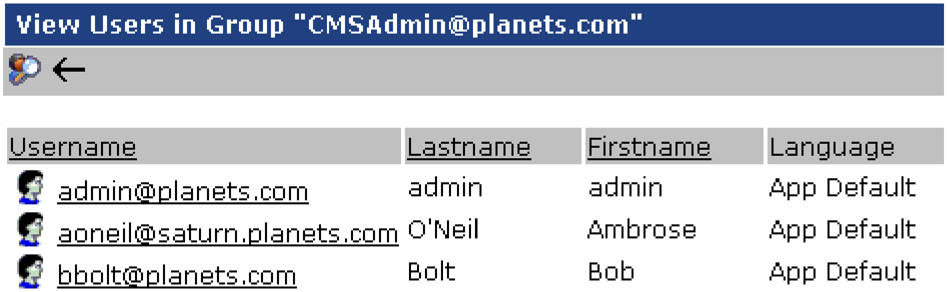
To view more information for a group, click that group to move to the View Users in Group screen.

The View User Groups screen also provides a toolbar button () that lets you add AD groups to the Ektron CMS300 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

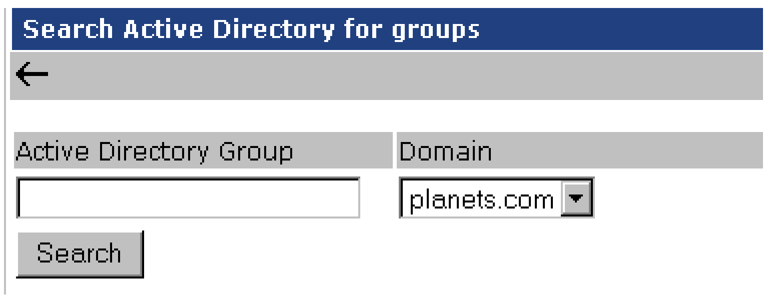
- username and domain
- first and last name
- language



The screen also displays the following buttons.

Button	Description
	Replace group *See Also:* ”Replacing a User Group” on page 428
	Return to previous screen

The Search Active Directory for Groups Screen



Use this screen to add AD groups to Ektron CMS300. 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 CMS300. 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.

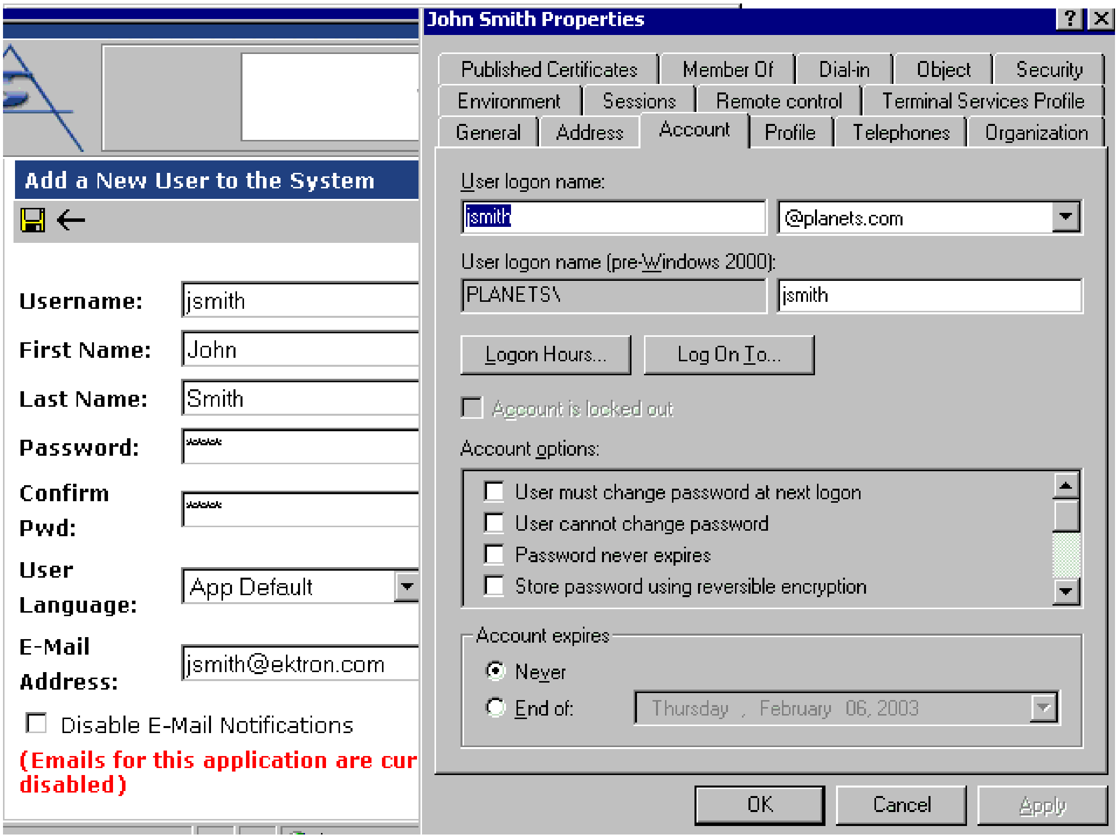
For example, if you know that the group begins with S and is in the planets domain, enter those criteria and you will get many fewer hits.

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 CMS300. Then, click the Save button ( ) to copy their information.

Setup Guidelines

1. Make sure that the users and user groups in the Active Directory are defined correctly. Remember that, when you enable AD integration, first name, last name and email are copied from AD to Ektron CMS300.
2. Determine which AD users and groups will be used in your Ektron CMS300.
3. Try to match up names. For example, if a user in Ektron CMS300 has the username of jsmith, but that user in AD has a username of john.smith, rename the user in Ektron CMS300 or

in Active Directory so they match. This can be done during the actual integration, but doing it beforehand will simplify the process later.



4. Determine which users should be in which groups, and make sure those relationships exist in both Ektron CMS300 and AD.

5. If you have multiple domains in your Active Directory Forest, decide if you want Ektron CMS300 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.)

6. Determine if you want users to automatically be added at log in or if 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 at 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.)

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**.

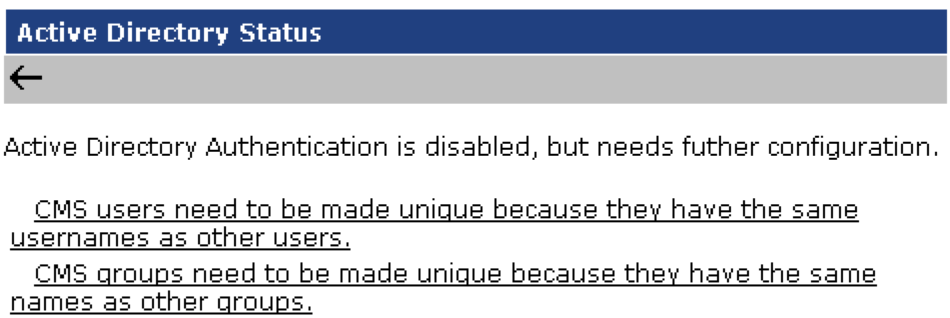
See Also: "The Active Directory Setup Screen" on page 429

If you do this, and any users or groups share the same name within different domains, the following message appears on the screen.

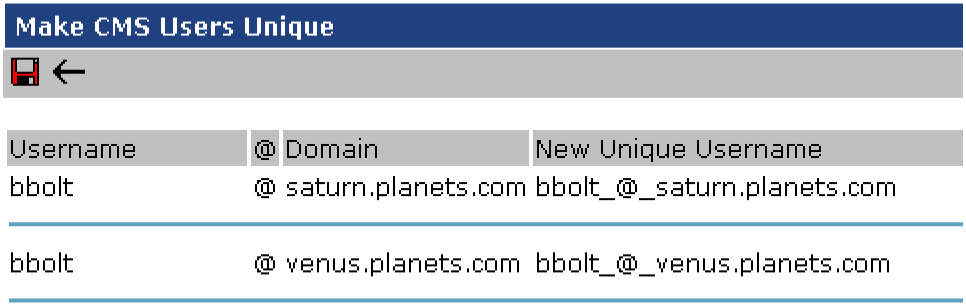
Active Directory Authentication is disabled, but needs further configuration

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.

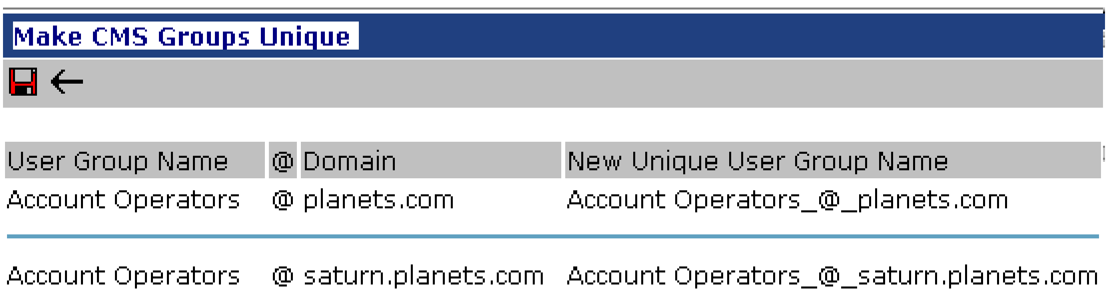


Click the message to proceed to the Make Ektron CMS300 Users Unique screen (illustrated below).



This screen lists all users whose user names are not unique and suggests a new, unique Ektron CMS300 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 CMS300 Groups Unique screen would look like this.



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 CMS300 users or groups.

User Authentication Only Mode

How Information is Transferred from Active Directory to Ektron CMS300

Ektron CMS300 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 CMS300.

- Changes to user logon name, domain and password must be made in the AD — you cannot update these fields in the Ektron CMS300 Edit User screens.
- When adding a new user to Ektron CMS300, 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 CMS300.

Which Information is Transferred from Active Directory to CMS300

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 418

Adding User Information from AD to Ektron CMS300

”Adding User Information from AD to Ektron CMS300” on page 419

Changing the User Login Name in AD

If a user's *logon name* changes in the AD, it no longer matches the Ektron CMS300 logon name. This discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should proceed to the Associate Ektron CMS300 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 CMS300 user with Different AD user toolbar button ().
4. Select the AD user and domain.

See Also: "Associating Ektron CMS300 Users with Active Directory Users" on page 435

Editing User Information in Ektron CMS300

Ektron CMS300 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 CMS300 Edit User screen.

Deleting Users

See "Deleting Users" on page 421

Replacing a User

See "Replacing a User" on page 422

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 108.

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 429

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 CMS300 Users with Active Directory Users" on page 435

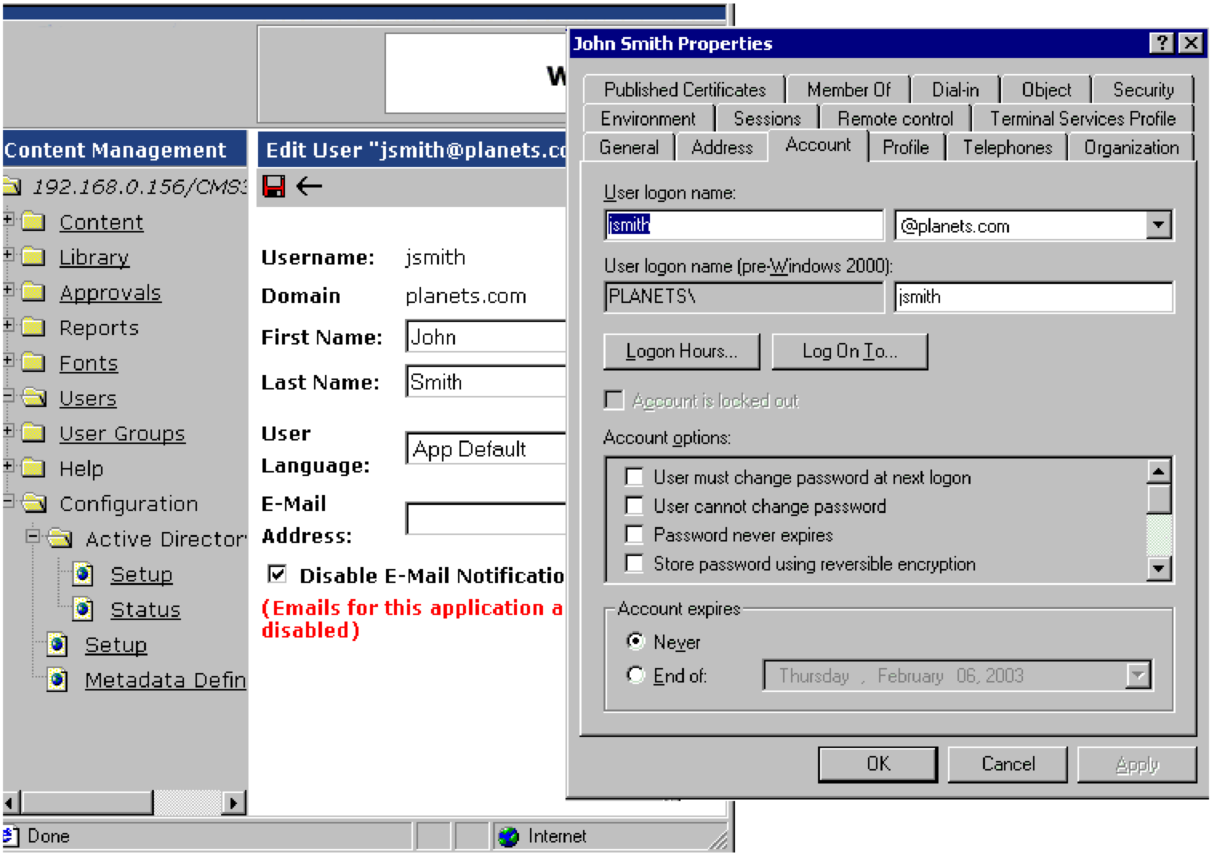
The View Users Screen works the same for both modes.

See Also: "The View User Information Screen" on page 438

Setup Guidelines

1. Make sure that each AD user to be used in Ektron CMS300 is defined correctly in the Active Directory. Remember that, when you enable AD integration, logon name and domain are copied from AD to Ektron CMS300.

2. Try to match up names. For example, if an Ektron CMS300 user's username is jsmith, but that user's AD username is john.smith, rename the user in Ektron CMS300 or Active Directory so they match. While you can match user names when authentication is enabled, doing it beforehand simplifies the process.



3. If you have multiple domains in your Active Directory Forest, decide if you want Ektron CMS300 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.)

Disabling AD Authentication

See "Disabling AD Integration" on page 445

Additional Information

Supporting Documents

You can find more detailed information about Ektron CMS300 in the following manuals:

- Ektron CMS300 Developer’s Reference Manual
- Ektron CMS300 User Manual
- Ektron CMS300 Quick Start Manual
- Ektron CMS300 Setup Manual

Support

If you are experiencing trouble with any aspect of Ektron CMS300, please contact the Ektron Support Team via our Web Site:

http://www.ektron.com/support/cms300_support.aspx

Sales

For questions and answers about purchasing Ektron CMS300 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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Appendix A: List of Supported Languages

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

Index

A

active directory
integration 415
data transfer from AD to CMS 415
disabling 445
login procedure 418
user groups
adding 428
adding user to 428
associating AD info with CMS 424
copying to CMS 423
deleting 428
introduction 422
mapping administrator group 426
removing users 428
replacing 428
user information
deleting 421
editing 421
replacing 422
transfer to CMS 418
screens
setup screen 429
status screen 434
view user groups 440
view users screen 438
setup guidelines 443
user authentication only mode 447
adding user information to CMS 447
changing user login name 448
data transfer 447
disabling 450
editing user information 448
log in 447
screens 449
setup guidelines 449
users
deleting 448
replacing 448
advanced permissions 79
aliasing, URL see URL aliasing
Application Setup screen
default application language 23
enable application mail m essages 24
license key 23
maximum summary size 23
modifying 22
system email address 23
viewing 22
work page size 24
approval chain
approvers
adding 87
deleting 88
creating 85
editing approval order 87
editing for content block 89
examples 85
inheritance from parent folder 85
introduction 84
multi-language content 320
viewing
for content 89
for folder 85
approval method
changing 91
description 90
approve, toolbar button 19
archiving, tasks 271

B

border color, meaning 13
broken links, finding 57
browser, save when closing 124
builtin user 28
button text, display in title bar 25

C

calculated field, data designer 181
calendar field, data designer 191
calendars
content folder assignment 283
creating 281
deleting 285
display weekends 283
displaying on Web page 290
editing 284
event type label 283
event types
adding 288
available 283
deleting 289
editing name 289
enabling 288
introduction 287
required 283
viewing 288
introduction 278
location label 282
permissions 280
start and end time labels 282
toolbar buttons 278
character encoding 331
choices field, data designer 174
collections
introduction 274
permissions 275
comment
adding to content 43
content
adding
HTML content block 41
programmatically 63
XML content block 46
applying search data 43
approval chain, editing 89
assigning permissions 83
automatic notification of activity 404
blocks, recognizing 13
border color, meaning 13
comment, adding 43
deleting 56
editing 51
folder see folder, content
history 58
moving
one content block 54
several blocks at once 54
moving. move content 53
multi-language see multi-language content
private, see private content
properties tab 49
purging historical versions 37
reports 62
restoring historical versions 55
scheduling 56
searchable property 43
searching 410
options 411
setting permissions
private content 112
status 16
summary, inserting 43
syndication

RSS 372
tasks, assigning 60
toolbar buttons 50
viewing 48
XML content block, adding 44
content block
deleting 56
custom validation, data designer 202

D

data design package
editing 143
data designer
calculated field 181
calendar field 191
checkbox field 165
choices field 174
custom validation 202
deleting a field from screen 154
design mode vs. data entry mode 151
field types 153
File Link Field 196
group box field 161
how eWebEditPro+XML changes when using 150
image only field 194
plain text field 167
rich area field 172
select list field 178
steps for designing a screen 152
using 149
walkthrough of screen design 155
default application language, setup information 23
difference, view content, toolbar button 18
display button text in title bar 25
Do Not Force All Approvers 90
documentation, accessing 243

E

edit, toolbar button 17
editor, HTML 124
email
automatic
content 405
notification of content activity 404
configuring SMTP server 404
disabling notification for a user 105
features 404
instant 405
conditions 407
modifying 408
system address 23
enable application mail messages
setting 24
event types
calendar see calendars, event types
eWebEditPro, using 124
expired license key, emergency user for login 28

F

file extensions
library folder property 94, 95
File Link Field, data designer 196
file upload path
library folder property 94, 96
floating toolbar 14
buttons 15
folder
content
accessing 31
applying
style sheet 37
template 37
creating on server to match CMS folders 26
deleting 39
fields displayed on 32
managing 31
properties 33
toolbar 35
searching 39
toolbar buttons 33
XML configuration 37
permissions
setting 80
font buttons, enabling 29
fonts
adding 245
deleting 247
editing 247
managing 245
viewing 246
Force All Approvers 90
forms
HTML
accessing folder 213
creating 216
creating content block 218
database 212
deleting 241
editing
content block 240
introduction 240
summary 241
implementing on Web page 225
introduction 207
mailto 211
permissions 212
preparing server for email 213
reports 236
sending data as XML 226
structure of data 209
toolbar 214
validation 233
viewing 238
properties 238
XML email structure 228

H

height, screen, adjusting 25
help, accessing 243
history
view
toolbar button 20
window 58
hosting and syndication 376
HTML editor 124

I

image extensions
library folder property 94, 95
image only field
data designer 194
image upload path
library folder property 94, 95
images
login, changing 8
inheritance
breaking 78
restoring 78

J

Javascript syndication
introduction 373
setting up template 377

L

landing page after login, setting 25
language export feature, see multi-language content
language, foreign see multi-language content
languages
supported, list 453
library
folders
creating 92
properties 93
items
actions that can be performed 96
permissions 92

using with WebImageFX 101
license key
emergency user for login 28
modifying 23
links, broken, finding 57
load balancing 98
accessing screen 98
adding new folder 99
configuring 379
two machines 380
introduction 379
library path
deleting 101
entering 100
setting up load balance paths 390
setting up multiple sites 380
setting up virtual directories 381
three machines 393
login
images, changing 8
login, determining page that appears after 25

M

mail messages, enabling 24
maximum content size, setting 23
maximum summary size, setting 23
membership module
accessing 116
membership user groups 119
adding 119
adding users 120
deleting 121
deleting users 121
introduction 115
name, editing 120
viewing users 119
membership users
adding 116
deleting 118
editing 117
introduction 115
permissions, assigning 121
viewing 117
menus
implementing 277
introduction 276
permissions 276
multi-language content
approval chains 320
creating new content 303
creating Web pages in several languages 324
default language 302
determining available languages 300
disabling a language 302
enabling/disabling 298
introduction 296
language export
creating XLIFF or XHTML file 310
introduction 309
translation files
creating 316
previewing 314
setting up Web site 322
spell checking 331
translating content 304
by machine 306
translation files
importing 319
submitting to agency 319
viewing site in another language 299
working with menus 321
working with tasks 321

P

password, setting for user 105
permissions
advanced 79
assigning to content block 83
assigning to membership users 121
calendars 280
collections 275
inheritance
breaking 78
restoring 78
list of 79
menus 276
setting 77
setting for folder 80
standard 79
table
accessing 80
adding user or group 81
deleting user or group 82
editing user or group 82
task 250
preferences, force on all users 26
preserve MS Word
classes 29
styles 29
preview, toolbar button 20
private content 112
introduction 112
purge history 37

Q

quicklinks
applying to content block 42
broken, finding 57

R

remove styles option 29
RSS 372

S

sample sites 7
save when closing browser 124
screen height, adjusting 25
screen width, adjusting 24
search
making content searchable 43
search data
adding to content 76
applying to content block 43
definitions
adding 68
viewing 74
searchable properties
adding to content 76
definitions
deleting 75
editing 74
searchable property fields 70
searchable property
definitions
adding 68
editing 74
HTML tag additional fields 70
meta tag additional fields 70
searchable additional fields 71
making publicly viewable 71
response field style 72
searching content, see content, searching
setup screen, modifying 22
SharePoint integration
configuring server 334
installation troubleshooting 338
introduction 333
overview 342
prerequisites 333
server permissions 345
web page layout 342
Web parts
approvals 351
calendar 352
collection 353
content 356
form content block 358
installing 346
login 364, 365
managing 350
modifying 349
search 367
summary list 361
zones 344

Smart desktop, set as start location in Workarea 25
spell checking
  foreign language 331
standard permissions 79
status, content block 16
style sheet
  applying to content folder 37
  determining appearance of page on Web site 37
subfolders, adding 38
summary
  content, inserting 43
  maximum size, setting 23
syndication
  example 373
  Javascript 373
  RSS 372
system email address 23

T

table
  permissions
    accessing 80
    adding user or group 81
    deleting user or group 82
    editing user or group 82
tasks
  archiving 271
  deleting 272
  email notification 270
  folder 250
  introduction 249
  permissions 250
  purging 273
  states
    description 264
    introduction 263
    user vs. system assigned 263
  view
    options 266
    options by users 269
templates
  applying to content folder 37
  creating and updating 40
  defined 3
toolbar, floating 14
translation files
  importing 319
  submitting to agency 319

U

URL aliasing
  automatic
    activating 400
    deactivating 400
    enabling 400
    introduction 398
    result 401
  introduction 398
  manual
    adding base reference to template 402
user groups
  accessing user group folder 104
  creating 108
  deleting 110
  editing 110
  introduction 103
  membership, see membership user groups
  removing user from 108
  viewing 109
users
  accessing user folder 103
  adding to permissions table 81
  builtin 28
  creating new 104
  deleting 107
  deleting from permissions table 82
  editing 107
  editing in permissions table 82
  email, disabling notification 105
  emergency when you cannot log in 28
  introduction 103
  language, introduction 105
  membership, see membership users
  password, setting 105
  preferences, force on all users 26
  removing from user group 108
  viewing 106

V

validation
  HTML form 233
view content difference, toolbar button 18
view history
  toolbar button 20
  window 58

W

Web parts, see SharePoint integration, Web parts
web services 371
WebImageFX
  inserting license 26
  using with library 101
weekends, display on calendar 283
width, screen, adjusting 24
Word
  classes, preserve 29
  styles, preserve 29
work page size, setting 24
workarea
  accessing 9
  closing 11
  navigation 11
  site map 10

X

XLIFF
  creating file 310
  description 309
XML configurations
  accessing 128
  adding
    via data designer 129
    via external XML file 131
  applying to content folder 37
  assigning 134
  breaking inheritance 135
  creating
    based on existing configuration 145
  deleting 147
  editing 143
  file verification 133
  inheriting 134
  toolbar 127
  viewing 136
  viewing XSLTs 146
XML content block, adding 44
XML, managing 126
Xpath expression, entering for calculated field 183
XSLTs
  viewing 146

Ektron Redefining Web Content Management

Ektron CMS300
Quick Start Manual

Version 4.8, Revision 1

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Table of Contents

Introduction **1**
Selecting a Sample Site 1
Logging Into the Sample Web Site 2
Entering the Work Area 4
Selecting and Editing a Content Block 5
Selecting a Content Block 5
Editing a Content Block 6
Installing eWebEditPro for Netscape & Firefox Users 7
Publishing Content 8
Closing the Work Area... 8
Logging Out of the Sample Site... 9
More Information **9**

Introduction

Welcome to the Ektron CMS300 Quick Start Manual. The purpose of the manual is to quickly get you using Ektron CMS300; in it we will cover the following:

- ”Selecting a Sample Site” on page 1
- ”Logging Into the Sample Web Site” on page 2
- ”Entering the Work Area” on page 4
- ”Selecting and Editing a Content Block” on page 5
- ”Publishing Content” on page 8
- ”Closing the Work Area” on page 8
- ”Logging Out of the Sample Site” on page 9
- ”More Information” on page 9

Selecting a Sample Site

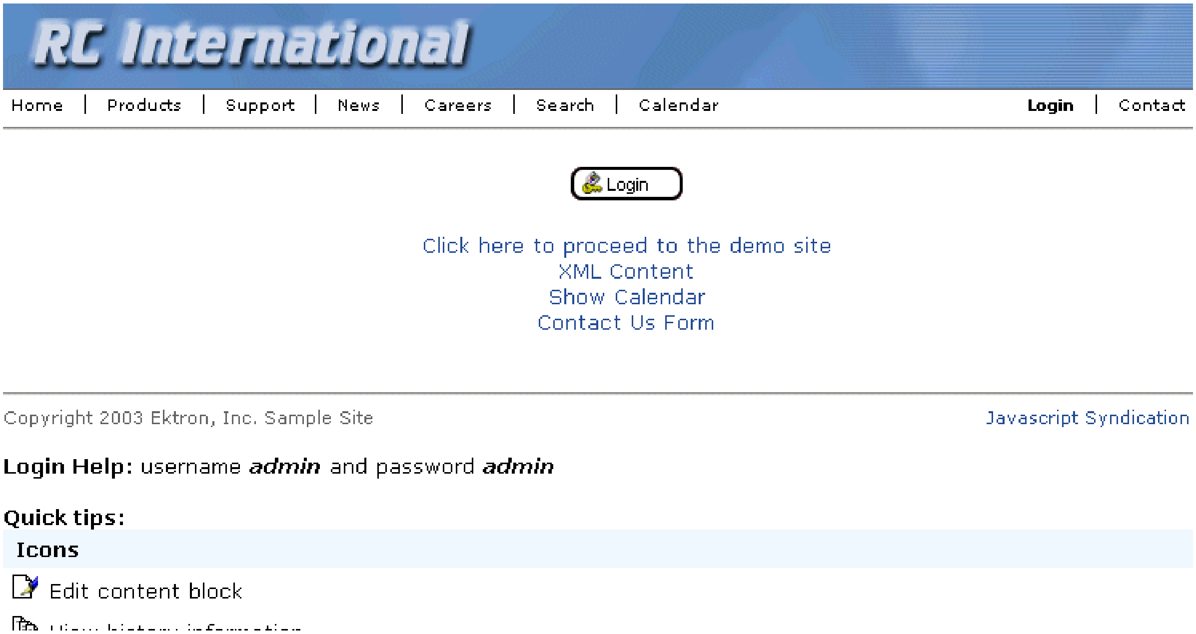
1. On the desktop, click **Start > Programs > Ektron > CMS300 >CMS300 Sample Sites Menu**.
2. In the folder tree to the left of the Thank you page, click on a sample site.

NOTE Only sample sites chosen during the install have content. This Quick Start uses the RC International sample site.

NOTE It is STRONGLY recommended that you use the RC International site while reading this Quick Start manual.

3. Click on **RC International**.

The sample website's Login page appears.



Now, you can check out the sample site by clicking on any of the links.

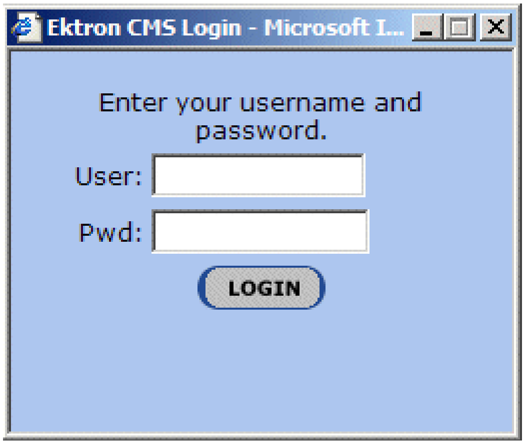
To return to the login page, click **Login** in the upper right corner of the page.

The next section explains how to log in.

Logging Into the Sample Web Site

1. Click **Login** at the top right corner of the page. (If you are already on the Login page, go to step 3.)
2. The login page appears.
3. Click the **Login** button .

4. The login dialog box appears.



5. Enter your **username** and **password**.

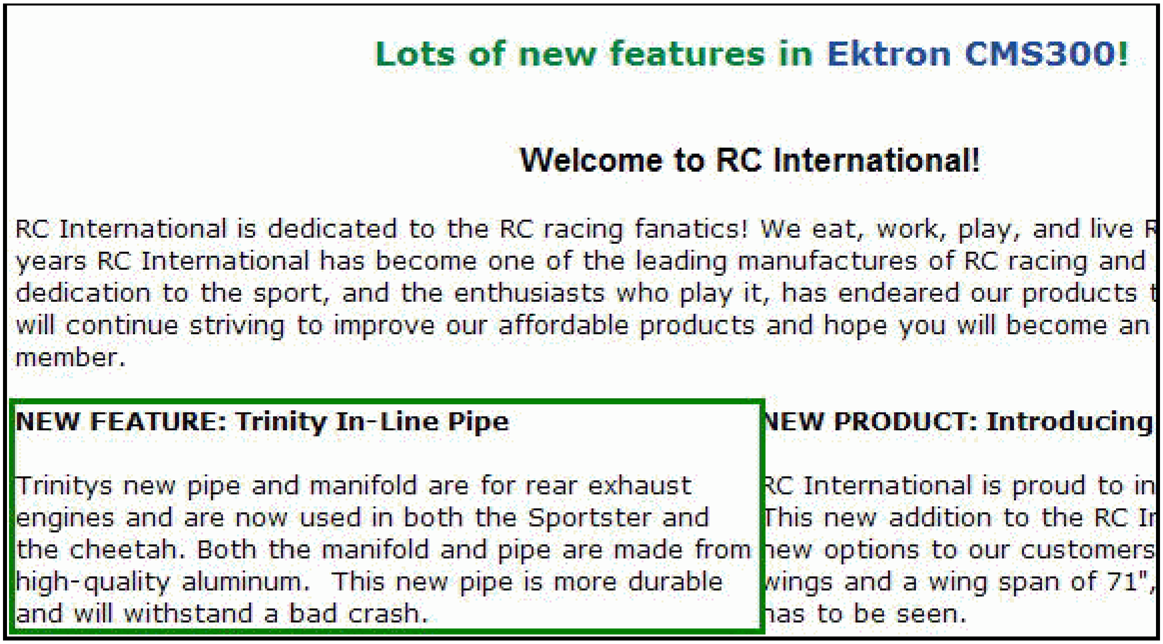
   User: **jedit**   Pwd: **jedit**

   Or you can use:

   User: **admin**   Pwd: **admin**

6. Click the **Login** button.
7. The Login page refreshes.

You can navigate around your Web site as you could before signing in. But now, a colored box surrounds the content when you move the cursor over it (illustrated below). This is a content block.

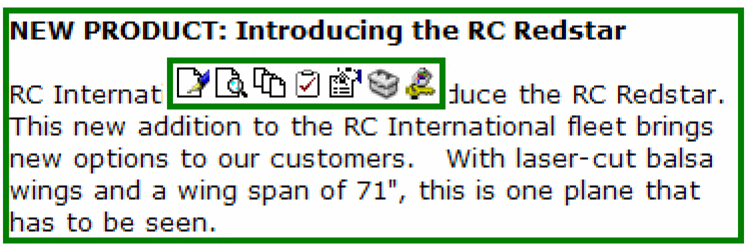


For more information on what the colors represent, please consult the Ektron CMS300 Users Guide, Appendix A: Content Statuses.

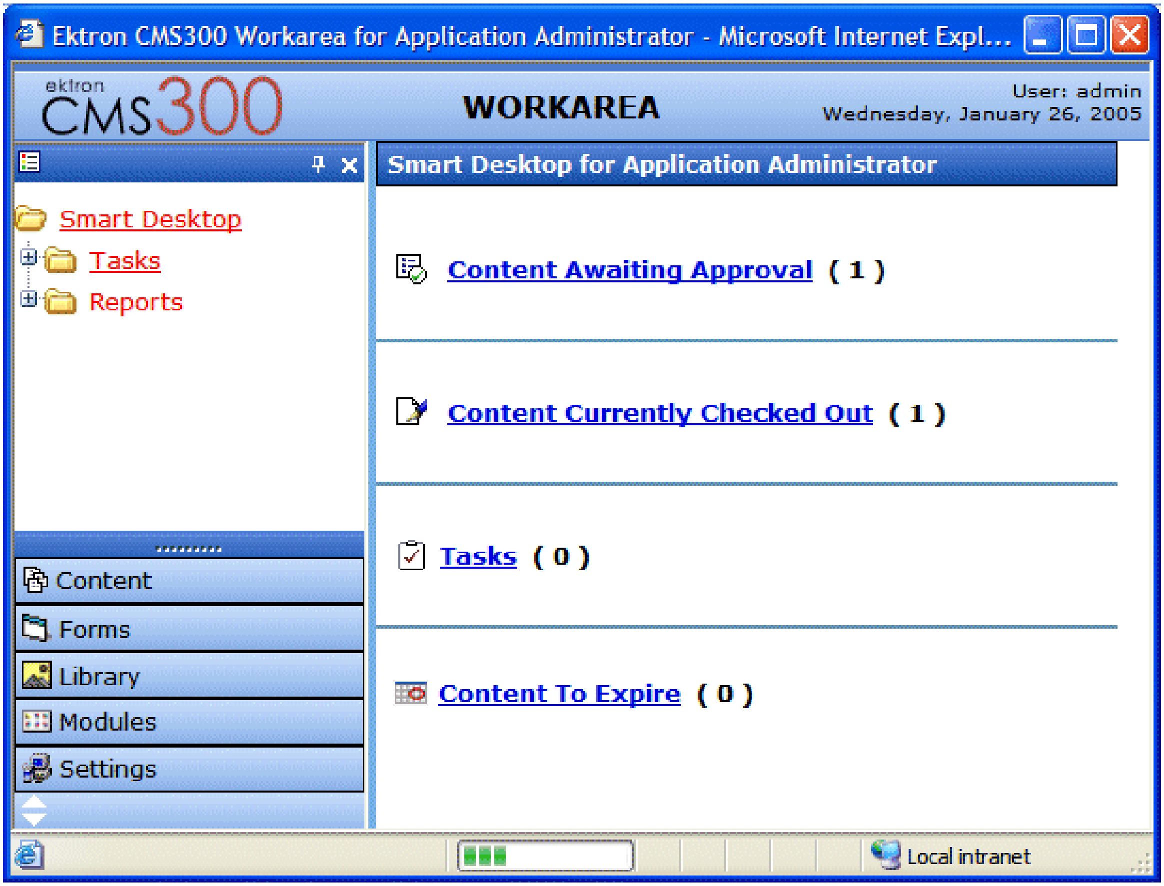
Entering the Work Area

The Workarea is a central screen from which you can perform all activities within Ektron CMS300.

1. Click **Home** in the upper left corner.
2. Hover your mouse pointer over a content block.
3. Right click on the content block.
4. A floating toolbar pops up.



5. Click the **Workarea** button () on the floating toolbar.
6. The workarea appears.



Selecting and Editing a Content Block

Now that you have entered the Workarea, you can select and edit a content block.

Selecting a Content Block

1. Click **Content** from the lower left side of the workarea.
2. The View Contents of Folder screen appears.
3. Under the Title column, click **Home Page Content**.
4. The Home Page Content screen appears.

Editing a Content Block

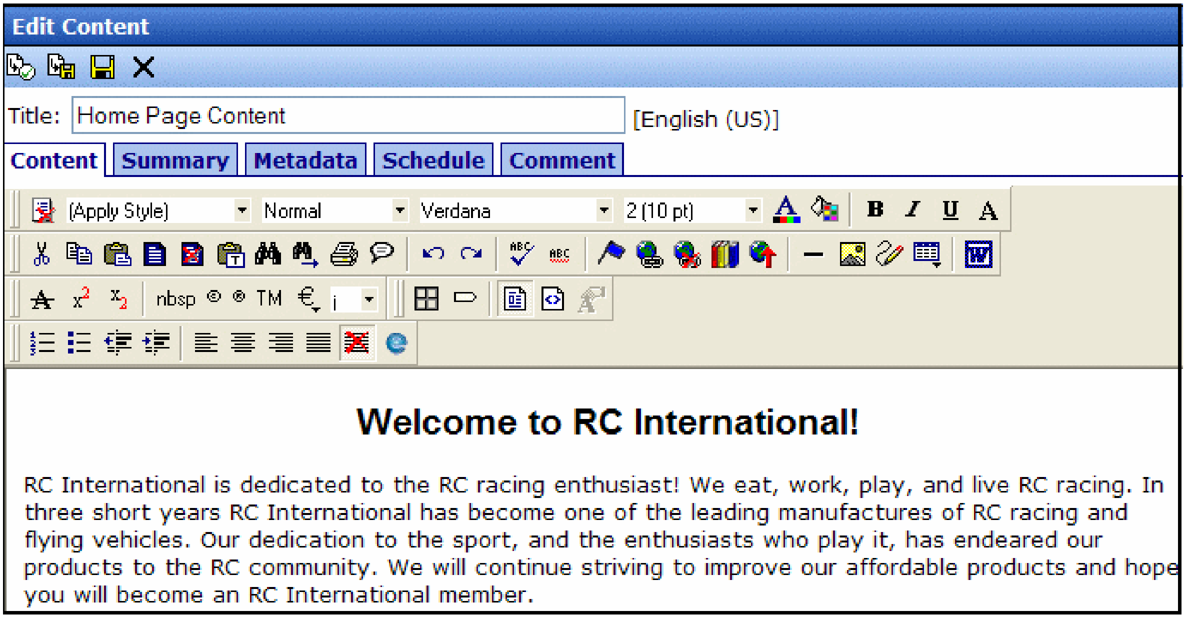
Now you can edit the content block. Let's change the word enthusiasts to fanatics to learn how to edit.

1. Click the **Edit** button ( ) located above the tabs.

NOTE The first time you edit a content block, you need to install eWebEditPro with WebImageFX. Please follow the instructions on the pop-up screen. THE INSTALLATION ONLY HAPPENS ONCE.

NOTE Netscape & Firefox Users, go to the end of the section for special install instructions.

2. The editor appears.



3. Double click the word **enthusiasts**. (This selects the word).
4. Type **fanatics**.
5. Click the **Checkin** button ( ) above the tabs.
6. The view contents screen reappears.

7. To see the changes that will take place, click the **View Diff** button () located above the tabs. This screen indicates the changes that will occur when the content block is published.

8. Click the **X** in the toolbar to close this window.

Installing eWebEditPro for Netscape & Firefox Users

1. When a client first accesses a Web page that hosts eWebEditPro, the browser displays a text box where eWebEditPro should appear.
2. Below the box are instructions that direct the user to click some text to begin installation. Click the text.
3. A standard Windows dialog box for saving a file appears. Save the file (ewebeditproclient.exe) to a directory on the client's hard drive.
4. Close all open Netscape or Firefox Windows.
5. Using Windows Explorer, go to the directory to which you saved the file and double click the saved file.
6. You are prompted to select a language for the installation windows. This language affects only the installation, and has no effect on using eWebEditPro. (To learn more about changing the language of eWebEditPro, see the chapter "Modifying the Language of eWebEditPro" in the Developer's Reference Guide.)
7. A series of dialog boxes guides you through the rest of the installation.

After completing the installation, log in to the sample site and continue "Editing a Content Block" step 2.

Publishing Content

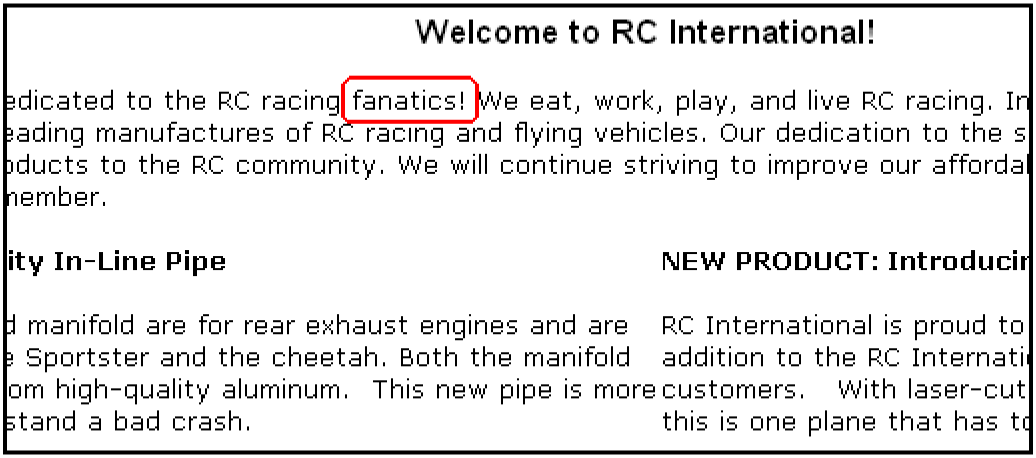
Now you can publish the "Home Page Content" content block.

1. Click the **Publish** button ( ) located above the tabs.

This publishes your changes to the RC International Web site.

NOTE On your web site, you can set up a group of approvers to review a content block before it goes to the live site.

2. Click on the open window that shows the RC International site.
3. Click on the link for Home.
4. Notice that, under "Welcome to RC International!," enthusiasts has been replaced with fanatics.



Congratulations! You've just published your first content block.

To learn how to create a new content block read "Adding a Content Block" in the Users Manual.

Now you can go back, close the work area, and log out.

Closing the Work Area

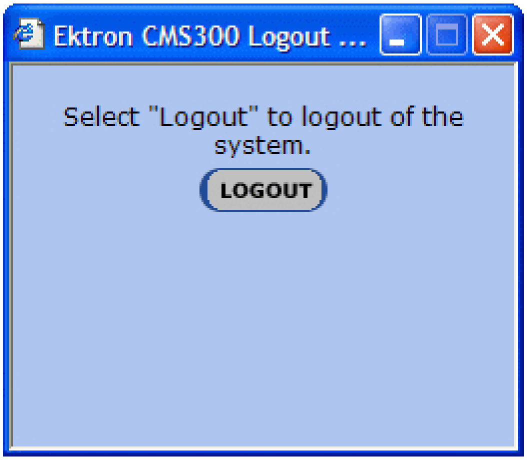
To close the workarea, click the X in the upper right corner of the window. When you close the workarea, you return to the Ektron CMS300 view of your Web site. You do not exit (Logout) from Ektron CMS300.

Logging Out of the Sample Site

To log out of Ektron CMS300, follow these steps.

1. Click the **Logout** button () in a content block's floating toolbar, or click the **Logout** button 

located on the login page.
2. The Logout dialog box appears.



3. Click the **Logout** button.
4. The page refreshes, the Login page reappears.

More Information

Thank you for taking the time to go through this Quick Start Manual. For more information on other great features, please use the following tools.

The Ektron CMS300 User Manual

The Ektron CMS300 Administrator Manual

Or, visit the Ektron Learning Center Website at the following link for animated tutorials and other feature explanations.

http://www.ektron.com/cms300-web-cms.aspx?id=922

Ektron

Redefining Web Content Management

Ektron CMS300 Developer Manual

Version 4.8, Revision 3

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Summary Table of Contents

About This Manual 1

Web Services 2

Syndicating Web Content as RSS 25

Custom ASP Functions 44

Custom ASP.Net Functions 137

Custom ColdFusion Functions 140

Custom PHP Functions 159

Dreamweaver Extension Support 179

Additional Information 243

Detailed Table of Contents

About This Manual 1

Web Services 2

Introduction to Web Services 2
Ektron CMS300's Implementation of Web Services 3
Benefits of Using Web Services 3
WS Components and Ektron CMS300 Architecture 3
Software and Hardware Requirements 4
Installation of Files 4
Setup Instructions 5
Providing Web Service Information in Your CMS 7
Ektron CMS300 Methods 7
The Ektron CMS300 Content Sample Page..................................... 9
Sample Output from One Method.. 13
The News.aspx Sample (non-XML)... 14
The News.aspx Sample (XML)... 17
Creating a Page that Provides a Web Service.........................23

Syndicating Web Content as RSS 25

What is RSS Syndication? 25
The RSS Specification.. 25
RSS Syndication in Ektron CMS300..26
Syndicating via ASP 27
RSS Functions 27
ecmRssCollection.. 27
ecmRssSummary 28
Syndicating Collections 30
Example.. 30
Creating Your Own Collection News Feed Files............................. 30
Configuring News Feed Application 32
Alternate Dynamic Method 33
Syndicating Summary Lists..34
Example.. 34
Creating Your Own Summary News Feed Files 35
Configuring News Feed Application 36
Alternate Dynamic Method 37
Syndicating via .Net 40
Architecture of RSS Syndication 40
aspx pages 40

Creating Your Own aspx Collection Page 41
Example.. 41
Example.. 42
Creating Your Own aspx List Summary Page 42
Example.. 42
Example.. 43

Custom ASP Functions 44
Login Function 46
Login Tag Example 47
Placing Your Login Button 47
Partner Login 47
Content Block Function.. 49
Content Block Examples.. 51
Static Content Block 52
Dynamic Content Block 53
XML Content Block... 54
Dynamic and Static Combination....................................... 57
Add Content... 58
Add Content Example 61
Add Content Web Form Example 63
Search Function 64
Search Tag Example 66
Search Tag Attributes... 67
Starting Folder 67
Recursive.. 67
Target Page 68
Text Box.. 68
Maximum Characters 69
Button Image Source.. 69
Button Text.. 70
Font Face 71
Font Size 72
Horizontal 73
Spare 1 73
Search Display Function 74
Search Display Example 75
Search Display with Default Content 75
Search Display Attributes 76
Max Number of Content Blocks Returned 77
Style Info... 78
Show Date... 79
List Summary Function 80
List Summary Example 81
List Summary Attributes.. 82

Starting Folder 82
Recursive 83
Show Summary 83
Style Info 84
Order By 84
Show Info 86
Max Number 86
Spare 1 & 2 87
Archive List Summary Function 88
Single Summary Function 89
Single Summary Example 90
Single Summary Attributes 90
Content ID 90
Show Summary 91
Style Info 91
Show Info 92
Spare 1 92
Collection Function 94
Collection Examples 94
The ecmNavigation Display Function 95
The ecmTeaser Display Function 96
Collection Attributes 99
ID 99
DisplayFunction 99
Creating Custom Display Functions 99
Function Structure 100
Building Blocks 103
Defining Display Functions 106
Using a Custom Display Function 106
Random Content 108
Random Summary 109
Event Calendar Function 110
Event Calendar Style Sheet 110
Event Calendar Sample 111
Abbreviating Day Names 113
Configuring ApplicationAPI.asp 114
Form Function 116
MultiPurpose Function 118
Metadata Function 119
Creating an Item List 119
ecmMetadata Example 120
More ecmMetadata Examples 122
ecmMetadata Attributes 124
Item List 124
Spare 1 126

Show Site Language Function 127
Custom API 129
Menus 130
Additional Documentation in Ektron Knowledge Base 130
Displaying a Menu on a Web Page 131
GenerateMenu and DropMenu 131
Displaying Menus in a Multi-language System 132
Customizing the Menu's Appearance 132
ek_Menu.js 132
FontFamily 134
menuLiteBgColor 134
Application API 135

Custom ASP.Net Functions 137
Custom API 138

Custom ColdFusion Functions 140
Login Function 141
Login Tag Example 141
Content Block Function 141
Static Content Block 142
Dynamic Content Block 142
XML Content Block 142
Random Content 143
Random Summary 143
Search Function 143
Search Tag Example 144
Search Display Function 145
Search Display Example 145
List Summary Function 145
List Summary Example 146
Archive List Summary Function 146
Single Summary Function 147
Single Summary Example 147
Collection Function 147
Example Using the ecmNavigation Display Function 148
Example Using the ecmTeaser Display Function 150
Collection Variables 152
DisplayFunction 152
Event Calendar Function 153
Event Calendar Sample 153
Form Function 154
MultiPurpose Function 155
Metadata Function 156

Custom ColdFusion Tags 158

Custom PHP Functions 159
Login Tag 160
Login Tag Example 160
Content Block Tag 161
Static Content Block 161
Dynamic Content Block 161
XML Content Block 162
Search Tag 162
Search Tag Example 163
Search Display Tag 163
Search Display Tag Example 163
List Summary Tag 163
List Summary Example 164
Archive List Summary Tag 164
Single Summary Tag 165
Single Summary Example 165
Collection Function 165
Collection Examples 166
Collection Variables 170
DisplayFunction 170
Random Content Function 170
Random Summary Function 171
Event Calendar Function 171
Event Calendar Sample 172
Form Function 172
MultiPurpose Function 174
Metadata Tag 175
Custom API 178

Dreamweaver Extension Support 179
Requirements 180
Installing the Extension 181
Setup 185
Using the Ektron CMS300 Extension 189
Custom Function Symbols 191
Ektron CMS300 Commands Menu 193
Inserting Custom Functions 196
Manage Content... 196
Accessing Manage Content Commands... 196
Edit Content 197
Save Content 199
Create Folder 204

CMS Content... 207
Accessing CMS Content Commands... 207
Insert a Login Tag... 208
Inserting a Partner Login Tag 209
Inserting a Static Content Block 211
Inserting a Dynamic Content Block 212
Inserting a Collection Tag 215
Inserting a List Summary Function 216
Inserting a Metadata Function 219
Inserting a Search Function 221
Inserting a Search Display Function 224
Inserting a Single Summary Function 225
Inserting a Random Content Function 227
Inserting a Random Summary Function 229
Inserting an Event Calendar Function 231
Inserting a Form Content Function 233
XML Functions... 235
Accessing XML Function Commands 235
Insert Content XSLT Tag... 236
Insert Meta XSLT Tag... 238
Insert Collection XSLT Tag... 240

Additional Information 243
Supporting Documents 243
Support 243
Sales 243
Information 243

About This Manual

To utilize the full potential of an Ektron CMS300 driven Web site, learning and using the custom functions supplied by Ektron is essential. These custom functions help make your site more robust and easier to maintain.

This manual can be used as a reference for the developer, or the person is who is setting up your Ektron CMS300 Web site. This manual explains all custom tags for each platform supported by Ektron CMS300:

- ASP
- ColdFusion
- ASPX (.NET)
- PHP

Besides explaining how to insert the functions to your Web templates manually, this manual also explains how to create Ektron CMS300 templates in a WYSIWYG environment by using the Dreamweaver extension supplied with the installation. See ”Dreamweaver Extension Support” on page 179 for additional information.

Ektron CMS300 has also implemented support for Web Services as well as syndication using RSS. Information about configuration and use of these features is also found in this manual.

Web Services

Introduction to Web Services

Web Services (WS) are reusable software components that can be consumed by variety of clients, independent of operating system, programming language, or Web server, using standard Internet technologies. Because Web Services allow heterogeneous systems to communicate with each other in a standard way, they have received quick acceptance for data interchange over the Web.

It's easy for anyone to integrate your WS into their application. The client application can be a Web application, a Windows application, a Java application, a Cold Fusion application, or a host of others -- it does not matter as long as it supports Web Services.

A Web Service consists of one or more methods that expose functionality. In this sense, a Web Service is an API that can be accessed using SOAP over HTTP. (SOAP is an XML-based, lightweight protocol that defines the message format of Web Services.)

For example, you might develop a purchasing application that automatically obtains price information from several vendors, lets the user select a vendor, submits the order and then tracks the shipment until it is received. The vendor application, in addition to exposing its services on the Web, might in turn use XML Web services to check a customer's credit, charge the customer's account and set up the shipment with a shipping company.

This manual does not explain how Web Services work. To learn more about them, try these sites.

- http://msdn.microsoft.com/webservices/understanding/readme/default.aspx

- http://aspalliance.com/jnuckolls/articles/introws/default.aspx
- http://aspnet.4guysfromrolla.com/articles/062602-1.aspx
- http://www.15seconds.com/Issue/010430.htm

Ektron CMS300's Implementation of Web Services

Ektron CMS300 supports XML Web Services. This means that you can create pages that offer your content to any Web-enabled device, and you can create pages that consume existing Web Services. **Ektron CMS300**'s Web Services feature can return data separated from presentation. In combination with XML support, this feature lets consumers retrieve your XML data independent of presentation information and act on it however they see fit.

Benefits of Using Web Services

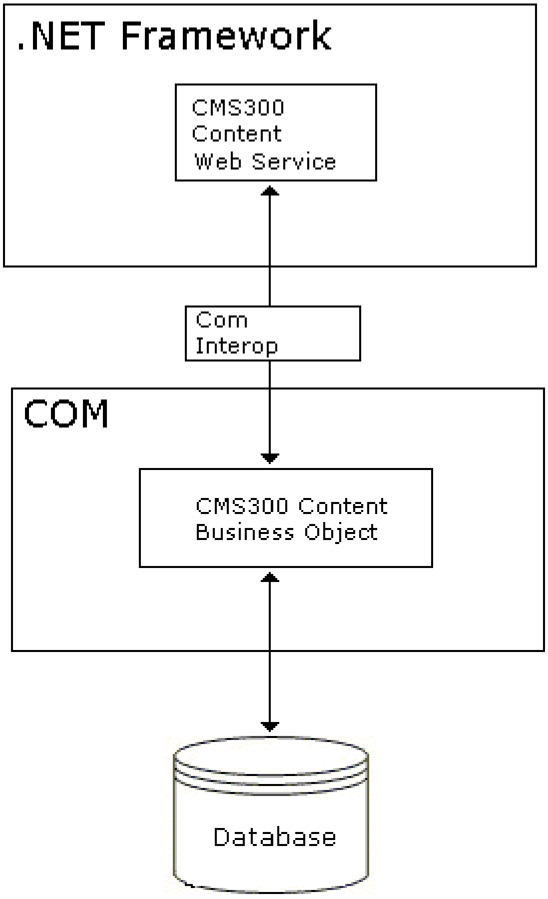
Web Services make it easy to connect with partners. They can also deliver more personal, integrated experiences to users via smart devices, including PCs. WSs can save time and money by reducing development time, and increase revenue by making your own XML Web services available to others.

WS Components and Ektron CMS300 Architecture

The following diagram shows how Ektron's Web Services interact with **Ektron CMS300**. Web Services require the installation of the .NET Framework on the server.

NOTE For a detailed description of **Ektron CMS300**'s architecture, see `http://www.ektron.com/whitepaper/Ektron-unique-component-based-approach-to-CM.pdf.`

Ektron's Web Service, cms300content.asmx, runs within the .NET Framework. Through COM Interop, a facility provided with the .NET Framework, .NET managed code can communicate with COM code. cms300content.asmx utilizes the Content Business Object as applicationApi.asp to ensure that business logic functionality is consistent throughout **Ektron CMS300**.



Software and Hardware Requirements

- The .NET Framework, version 1 SP2, must be installed on the server (for more information, see http://msdn.microsoft.com/netframework/).
- **Ektron CMS300** version 2.5 or higher

Installation of Files

Below is a list of the files and their locations that make up the Web Services feature. They are installed when you install **Ektron CMS300**. However, if you do not choose the .aspx (.NET) sample files during installation, the Web Service demos (cmswsdemo, cmsxmlwsdemo) are not installed.

File or folder location	Description
webroot/cms300sample/cms300ws	Root directory of the Web Services files
webroot/cms300sample/cms300ws/web.config	XML-based configuration file for web services; similar to setup.asp
webroot/cmd300sample/cmsxmlwsdemo	Samples that demonstrate the consumption of content block information as XML. For example, a page could process the WS page's date created, "go live" date, etc.
webroot/cmd300sample/cmswsdemo	Contains only the HTML version of the Web Service. That is, the samples only prepare a string of HTML data for reading by a browser.
webroot/cms300sample/cms300ws/ cms300content.asmx	Entry point for Web Service. This page displays examples of all available methods.
webroot/cms300sample/cms300ws/global.asax	Application start file
webroot/cms300sample/cms300ws/bin	Directory for compiled Web Service code
webroot/cms300sample/cms300ws/bin/ CMS300WS.dll	Web Service dll
webroot/cms300sample/cms300ws/bin/ WSContentDisplay.dll	Collection display dll for four supplied display methods: • ecmNavigation • ecmTeaser • ecmNavigationPop • ecmTeaserPop
webroot/cms300sample/cms300ws/plugins	User-defined display dlls for collection method call. This is configurable within the web.config file.

Setup Instructions

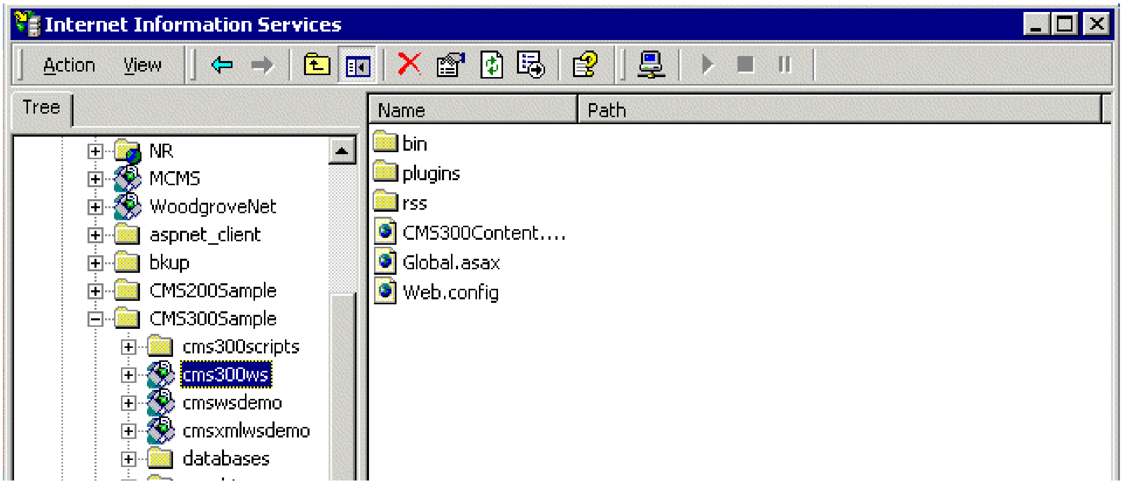
After you install **Ektron CMS300**, you need to open IIS, select the following folders, and make each an application.

- `/CMS300sample/cms300ws`

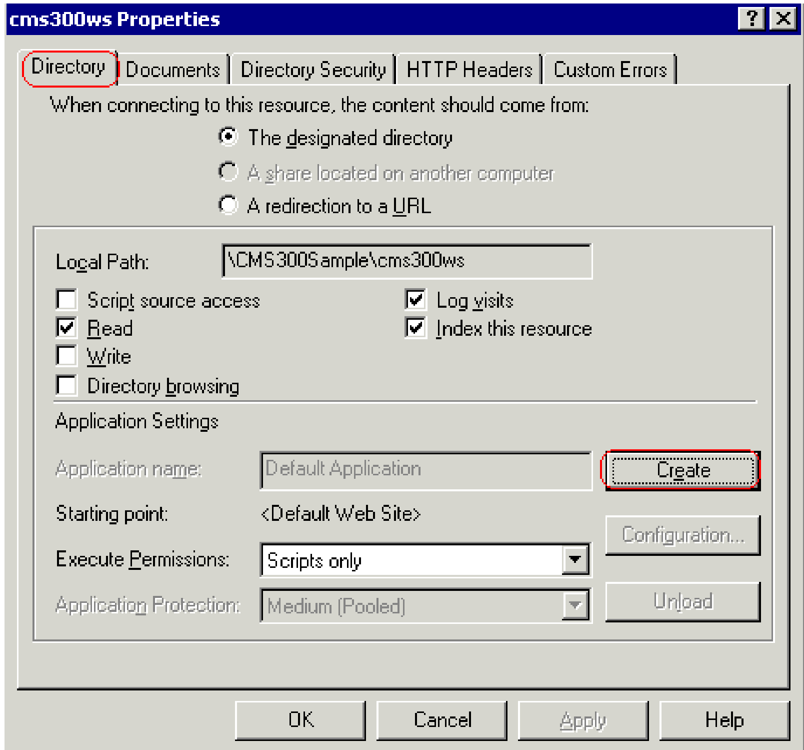
- `/CMS300sample/cmswsdemo`
- `/CMS300sample/cmsxmlwsdemo`

To make a folder an application, follow these steps.

1. Open IIS.
2. Right click one of the folders listed above.



3. Select **Properties**. The Properties dialog appears.



4. Make sure you are on the **Directory** tab, which is selected by default.
5. Press the **Create** button (circled above).
6. Assign the folder's name in the **Application name** field.
7. Press **OK**.

Providing Web Service Information in Your CMS

Ektron CMS300 Methods

Ektron CMS300 implements a single Web Service, cms300content.asmx, that exposes 13 methods for retrieving content. These methods mirror those in the "applicationApi.asp" file.

The methods determine the *kind* of content that is made available (for example, a content block, a collection of content blocks, a summary list) along with the *presentation* of that information (for example, an HTML string or an XML data structure representing content block information).

Below is a list of methods that cms300content exposes with a brief description of functionality and differences from the applicationAPI implementation.

All methods are demonstrated on the sample page `webroot/cms300sample/cms300ws/cms300content.asmx`. For more information, see ”The Ektron CMS300 Content Sample Page” on page 9.

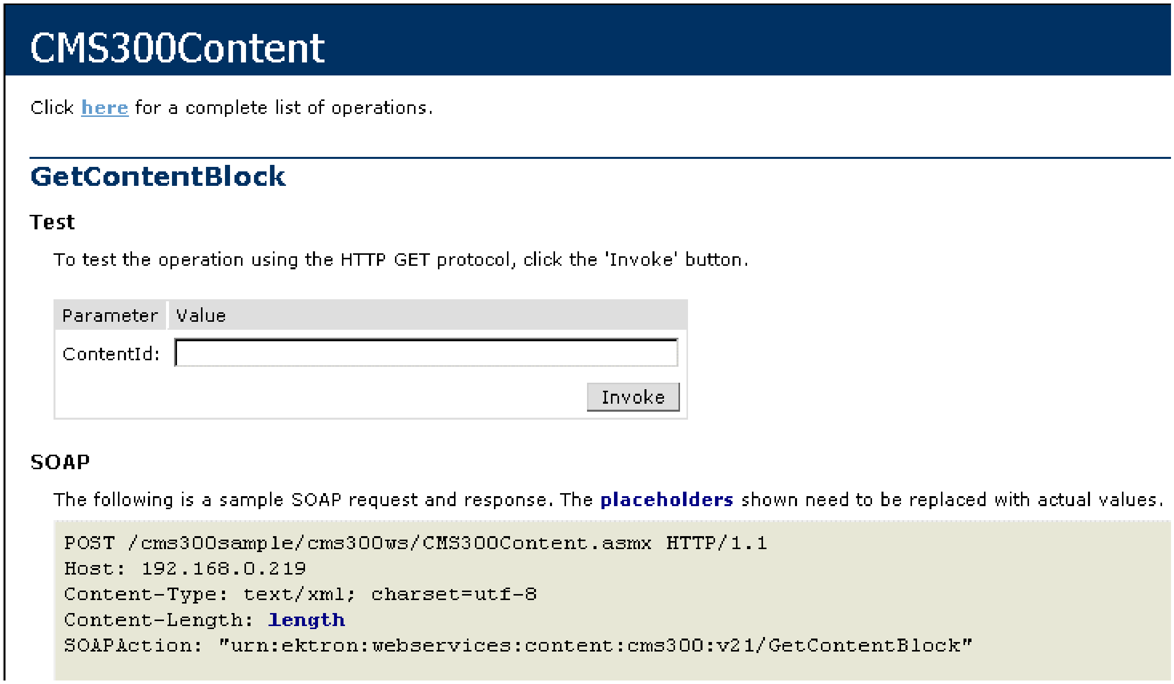
Method	Exposes this applicationApi.asp function as a Web Service Method	Returns	Changes to standard parameter values
ContentBlock	ecmContentBlock See also: ”Content Block Function” on page 49	The ContentBlock as an HTML string	
ContentBlockEx	ecmContentBlockEx See also: ”XML Content Block” on page 54	The ContentBlockEx as an HTML string. If necessary, performs XSLT transformation on content prior to its return.	
GetContentBlock	ecmContentBlock See also:”Content Block Function” on page 49	An XML data structure representing information in the ContentBlock	
Collection	ecmCollection See also: ”Custom API” on page 138	A Collection presented as an HTML string whose format is determined by the display function that you specify. You can create a custom display function in a separate .NET dll. Be sure to implement the IDisplayFormatter interface defined in the WSContentDisplay dll. Then, place the dll in the `CMS300Sample\cms300ws\plugins` directory so the Web Service code can locate it. To access a custom display function, use the syntax “Dllname.Classname”.	

GetCollection	ecmCollection See also: "Custom API" on page 138	an XML data structure representing information about a Collection	additional parameter available: GetHTML. Possible values: **1** -returns html content for each collection item **0** - does not return it
ListSummary	ecmListSummary See also: "List Summary Function" on page 80	List Summary information as an HTML string	
GetListSummary	ecmListSummary See also: "List Summary Function" on page 80	an XML data structure representing information about the List Summary	parameters ShowSummary, StyleInfo, ShowInfo not available
SingleSummary	ecmSingleSummary See also: "Single Summary Function" on page 89	Single Summary information as an HTML string	
GetSingleSummary	ecmSingleSummary See also: "Single Summary Function" on page 89	an XML data structure representing the Single Summary information	parameters StyleInfo, ShowSummary, ShowInfo not available
MetaData	ecmMetaData See also: "Custom API" on page 138	Meta Data information as an HTML string	does not have the unused spare parameter
GetMetaData	ecmMetaData See also:"Custom API" on page 138	An XML data structure representing Meta Data information	does not have the unused spare parameter
SearchDisplay	ecmSearchDisplay See also: "The Search Display Method Parameters" on page 11	Search Display information as an HTML string	
GetSearchDisplay	ecmSearchDisplay See also: "The Search Display Method Parameters" on page 11	An XML data structure representing the Search Display information	parameters StyleInfo and ShowDate not available

The Ektron CMS300 Content Sample Page

The content sample page (`webroot/cms300sample/cms300ws/CMS300Content.asmx`) lists the methods described in the table above. Click each method on the page to see sample calls and output using various protocols.

When you open the detail page, you see **Test** followed by parameters.



CMS300Content

Click here for a complete list of operations.

GetContentBlock

Test

To test the operation using the HTTP GET protocol, click the 'Invoke' button.

Parameter	Value
ContentId:	

Invoke

SOAP

The following is a sample SOAP request and response. The **placeholders** shown need to be replaced with actual values.

```
POST /cms300sample/cms300ws/CMS300Content.asmx HTTP/1.1
Host: 192.168.0.219
Content-Type: text/xml; charset=utf-8
Content-Length: length
SOAPAction: "urn:ektron:webservices:content:cms300:v21/GetContentBlock"
```

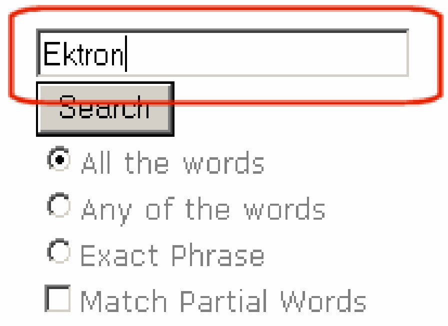
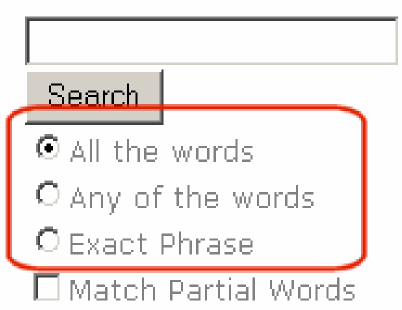
The top section of the page lets you test the method by using the HTTP Get protocol to retrieve data from the sample database. To do this, you must insert valid parameter values. (For documentation of a method's parameters, see the section listed after "see also" in the above table.)

The next section of the content sample page displays the following kinds of sample output.

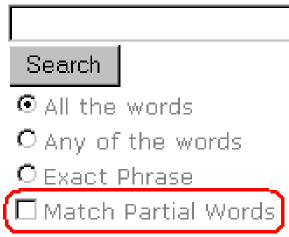
- A sample SOAP request and response
- A sample HTTP GET request and response
- A sample HTTP POST request and response

Review the test pages to learn the kind of content you can retrieve from this method.

The Search Display Method Parameters

<table>
<tr><th>Parameter</th><th>Where Defined in Application API.xxx</th><th>How Implemented by CMS</th></tr>
<tr><td>Search Text</td><td>n/a</td><td>Search text used in search function.

</td></tr>
<tr><td>Search Type</td><td>n/a</td><td>Type of search used in search function.


Options
and - all the words
or - any of the words
exact phrase - exact phrase
Note: This parameter is handled automatically by CMS when displayed on Web page. For Web Services, however, this needs to be defined.</td></tr>
<tr><td>Recursive</td><td>Search</td><td>Defines whether search is recursive .·
1 - recursive search
0 - non-recursive search
See Also: "Recursive" on page 67</td></tr>
</table>

Parameter	Where Defined in Application API.xxx	How Implemented by CMS
Starting Folder	Search	Describes path to folder in which search begins. · Here are some examples. • \ - root content folder • **\Products\RC Cars** - begins search in the RC Cars folder
Allow Fragments	n/a	Selected by user on page that performs search.  Options **0** (false) - do not allow fragments **1** (true) - allow fragments If fragments are allowed, and the user enters **AT** as the search string, the search returns topics with these words: pat, ate, hatter. If fragments are *not* allowed, and the user enters **AT** as the search string, the search only returns topics with the word: at. Note: This parameter is handled automatically by CMS when displayed on Web page. For Web Services, this needs to be defined.
Max Number	Search Display	Specify the maximum number of topics to display when a search is performed. For example: **0** - unlimited **1** - one result **7** - seven results

Parameter	Where Defined in Application API.xxx	How Implemented by CMS
Style Info	Search Display	Specify an inline style that is applied to the hyperlinked portion of topics that result from a search. For example: `"font-family:arial; font-weight:bold; backgroundcolor:#cccccc; border:solid blue 1pt; margin:2px; width:50%;"`
Show Date	Search Display	Specify whether last modified date is displayed with search results.· **0** - date is not displayed **1** - date is displayed

Sample Output from One Method

The following is an example of the content that can be retrieved from one of the methods, GetContentBlock. As you can see, the HTML content is provided within the `<ContentHtml>` XML element.

GetContentBlock

```
<?xml version="1.0" encoding="utf-8" ?>

<ContentBlockResult xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/
2001/XMLSchema-instance" xmlns="urn:ektron:webservices:content:cms300:v21">

  <ErrorString />

  <Item>

  <ContentTitle>Plastic Molder #123</ContentTitle>

  <ContentHtml><?xml version="1.0"?> <jobposting> <job-title>Plastics Molder</job-title> <job-
   number>123</job-number> <description><p>RC International, a leading supplier of consumer
   level radio controlled vehicles, is looking for an experienced plastics molder to join our
   team. The candidate will join our highly skilled team of enthusiastic molders to bring to
   life our next generation products. RC International is experiencing extremely rapid growth
   and offers many opportunities for advancement.</p></description> <qualifications> <ul>
   <li>3 years experience in commercial grade plastic molding technologies.</li> <li>Excellent
   written and oral communication skills.</li> <li>Ability to work with very little
   supervision.</li> <li>An AS degree in chemistry.</li> </ul> </qualifications> <offering>
   <p>First and second shift opportunities exist. RC International offers competitive pay, an
   extensive benefits package including a 401k plan, profit sharing, and health coverage.</p>
   </offering> <contact> <contact-name>Human Resources Manager</contact-name> <contact-
   email>jobs@cms300samplesite.com</contact-email> <contact-fax>1-555-555-5555</contact-fax>
   </contact> </jobposting></ContentHtml>
```

```
  <Xslt1>C:\Inetpub\wwwroot\CMS300Sample\XMLFiles\xslt\rc_jobs_display.xsl</Xslt1>

  <Xslt2 />

  <Xslt3 />

  <Xslt4 />

  <Xslt5 />

  <DefaultXslt>1</DefaultXslt>

 </Item>

</ContentBlockResult>
```

The News.aspx Sample (non-XML)

To help you understand how the samples work, this section explains the news sample .NET page, `news.aspx`, which is installed to *webroot*`/cms300sample/cmswsdemo/`. Specifically, four key sections of code are explained:

- Identifying the Code Behind File
- Setting Up an Instance of Web Services
- Retrieving the Web Service's URL
- Getting Content Blocks

Identifying the Code Behind File

Here is the first line in the news.aspx file:

```
<%@ Page CodeBehind="news.aspx.vb" Language="vb" AutoEventWireup="false"
Inherits="CmsXmlWsDemo.news" %>
```

This line indicates that the page's functionality is set up in the "CodeBehind" Visual Basic file, news.aspx.vb. The rest of the news.aspx file contains only page display information.

Setting Up an Instance of Web Services

The following code in news.aspx.vb sets up an instance of the Web Services. Every page that uses Web Services must contain such a declaration.

```
Dim wsCms300WebService As New localhost.CMS300Content()
```

Retrieving the Web Service's URL

Another noteworthy line of news.aspx.vb code, which follows the above line, is:

```
wsCms300WebService.Url = g_strWebServiceUrl
```

This line retrieves the URL of the Web Service pages from the web.config file in the `webroot/cms300sample/cmswsdemo/` folder. As a result, if someone changes the URL in web.config, the news.aspx page's address is automatically updated.

Getting Content Blocks

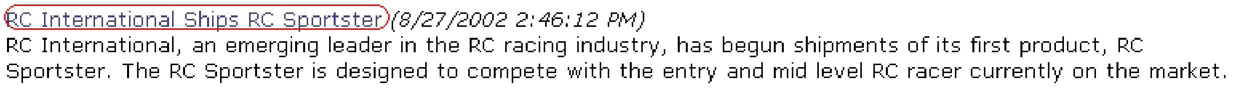
The following lines of news.aspx.vb code retrieve all content blocks in the sample database's news folder formatted as an HTML string.

```
If (iId > 0) Then

   strHTML = wsCms300WebService.ContentBlock(iId)

   strHTML = Replace(strHTML, ".asp", ".aspx")

   NewsInfo.InnerHtml = strHTML

Else

   strHTML = wsCms300WebService.ListSummary("\Marketing\News", 0, 1, "", "Title,asc", 
"DateModified", 0, "", "")

   strHTML = Replace(strHTML, "news.asp", "CmsWsDemo/news.aspx")

   NewsInfo.InnerHtml = strHTML

End If
```

NOTE This code converts the file types because the sample database was written for ASP pages, not ASP.NET pages. If the database were created with .NET, you could use this code to get the HTML for the requested ID:
`NewsInfo.InnerHtml = wsCms300WebService.ContentBlock(iId)`

As you can see, we are assigning to the variable NewsInfo.InnerHtml the Web service (wsCms300WebService) followed by the ContentBlock method. (For a list of methods, see "Ektron CMS300 Methods" on page 7.)

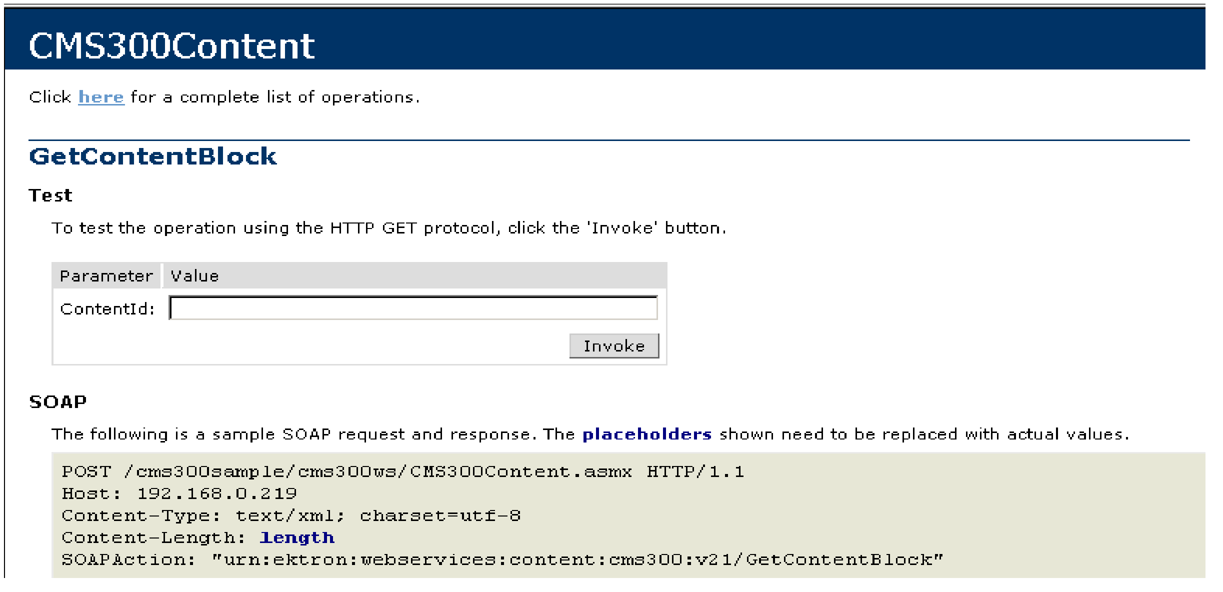
If the user selects a content block on the List Summary page (that is, clicks the blue text of the content title), that action passes an id value. The blue text is circled in the illustration below.



A new page appears, using the ContentBlock method to display the selected block.

```
If (iId > 0) Then

strHTML = wsCms300WebService.ContentBlock(iId)
```

The ContentBlock method retrieves the content block as an HTML string, so the result looks like this.



If the user does not select a content block (which is true when the page first appears), the page uses the ListSummary method to display all blocks in the `marketing/news` folder using the List Summary format.

```
Else

strHTML = wsCms300WebService.ListSummary("\Marketing\News", 0, 1, "", "Title,asc", "DateModified", 0, "", "")
```

The ListSummary method retrieves the content blocks as an HTML string, so the page looks like this.

Latest News

RC International Announces the RC Cheetah *(8/27/2002 2:43:01 PM)*
RC International, a leading RC racing company, has announced the availability of its new flagship product, the RC Cheetah.

RC International Hosts RC Conference *(8/27/2002 2:44:44 PM)*
RC International, the fastest growing company in the RC industry, announces plans to host the 3rd annual RC conference in Atlanta, Georgia.

RC International Ships RC Sportster *(8/27/2002 2:46:12 PM)*
RC International, an emerging leader in the RC racing industry, has begun shipments of its first product, RC Sportster. The RC Sportster is designed to compete with the entry and mid level RC racer currently on the market.

The News.aspx Sample (XML)

The news.aspx sample file in the `/cmd300sample/cmsxmlwsdemo` folder includes all elements described in "The News.aspx Sample (non-XML)" on page 14 *plus* demonstrations of how to retrieve XML content.

Setting Up Instances of Web Services

In addition to creating an instance of the Web Service, the XML version of news.aspx.vb creates instances of the ContentBlock and ListSummary methods, which are used on the page.

```
Dim wsCms300WebService As New localhost.CMS300Content()

Dim gcbCms300ContentXml As localhost.ContentBlockResult

Dim glsCms300ListSummaryResult As localhost.ListSummaryResult
```

Getting Content Blocks

Look at this code from news.aspx.vb.

```
        glsCms300ListSummaryResult = wsCms300WebService.GetListSummary("\Marketing\News", 
0, 1, "", "Title,asc", "DateModified", 0, "", "")

        If (Len(glsCms300ListSummaryResult.ErrorString) = 0) Then

strHTML = "<table><tr><td><b>Content Block Information Return from the      GetListSummary Web 
service call</b></td></tr>"

strHTML = strHTML & "<tr><td> </td></tr>"

For iLoop = 0 To (glsCms300ListSummaryResult.Item.Length - 1)
```

```
strHTML = strHTML & "<tr><td><b>Content ID: </b>" &
     glsCms300ListSummaryResult.Item(iLoop).ContentID & "</td></tr>"

strHTML = strHTML & "<tr><td><b>Content Title: </b>" &
     glsCms300ListSummaryResult.Item(iLoop).ContentTitle & "</td></tr>"

strHTML = strHTML & "<tr><td><b>Date Created: </b>" &
     glsCms300ListSummaryResult.Item(iLoop).DisplayDateCreated & "</td></tr>"

strHTML = strHTML & "<tr><td><b>Date Modified: </b>" &
      glsCms300ListSummaryResult.Item(iLoop).DisplayDateModified & "</td></tr>"

strHTML = strHTML & "<tr><td><b>Modified By: </b>" &
     glsCms300ListSummaryResult.Item(iLoop).EditorFname & " " &
     glsCms300ListSummaryResult.Item(iLoop).EditorLname & "</td></tr>"

strHTML = strHTML & "<tr><td><b>Content Teaser: </b></td></tr>"

     strHTML = strHTML & "<tr><td>" & glsCms300ListSummaryResult.Item(iLoop).ContentTeaser &
"</td></tr>"

strHTML = strHTML & "<tr><td> </td></tr>"

Next
```

This code loops through all content blocks in the `Marketing\News` folder. For each block, the page uses the Web Service method `glsCms300ListSummaryResult.Item(iLoop)` to display the following XML data.

- Content ID
- Content Title
- Date Created
- DateModified
- Modified By
- Content Teaser

The result looks like this.

Latest News

Content Block Information Return from the GetListSummary Web service call

Content ID: 11
Content Title: RC International Announces the RC Cheetah
Date Created: 25-Apr-2002 04:43:42 PM
Date Modified: 27-Aug-2002 02:43:01 PM
Modified By: Application Administrator
Content Teaser:
RC International, a leading RC racing company, has announced the availability of its new flagship product, the RC Cheetah.

Content ID: 10
Content Title: RC International Hosts RC Conference
Date Created: 25-Apr-2002 04:42:55 PM
Date Modified: 27-Aug-2002 02:44:44 PM
Modified By: Application Administrator
Content Teaser:
RC International, the fastest growing company in the RC industry, announces plans to host the 3rd annual RC conference in Atlanta, Georgia.

Content ID: 9
Content Title: RC International Ships RC Sportster
Date Created: 25-Apr-2002 04:42:10 PM
Date Modified: 27-Aug-2002 02:46:12 PM

The lower portion of the page also displays the content block in a ListSummary format, as described in "Getting Content Blocks" on page 15.

Latest News

RC International Announces the RC Cheetah *(8/27/2002 2:43:01 PM)*
RC International, a leading RC racing company, has announced the availability of its new flagship product, the RC Cheetah.

RC International Hosts RC Conference *(8/27/2002 2:44:44 PM)*
RC International, the fastest growing company in the RC industry, announces plans to host the 3rd annual RC conference in Atlanta, Georgia.

RC International Ships RC Sportster *(8/27/2002 2:46:12 PM)*
RC International, an emerging leader in the RC racing industry, has begun shipments of its first product, RC Sportster. The RC Sportster is designed to compete with the entry and mid level RC racer currently on the market.

If the user selects clicks the blue text of any title, a new page appears with

- information about the block (title and any XSLTs used for rendering)
- a demonstration of the GetContentBlock method to display the content block in “raw” HTML or XML format
- a demonstration of the ContentBlock method to display the content block in processed HTML or XML format

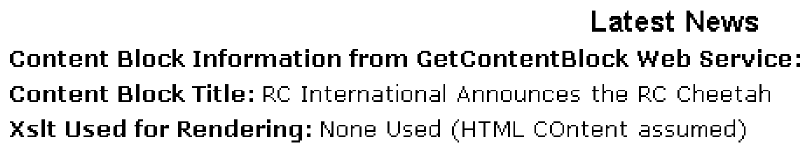
Here is the code that displays the top section of the page.

```
strHTML = "<table><tr><td><b>Content Block Information from GetContentBlock Web    Service: </
b></td></tr>"

strHTML = strHTML & "<tr><td><b>Content Block Title: </b>" &
    gcbCms300ContentXml.Item.ContentTitle & "</td></td>"

strHTML = strHTML & "<tr><td><b>Xslt Used for Rendering: </b>"

Select Case (gcbCms300ContentXml.Item.DefaultXslt)

    Case 1

        strTmp = gcbCms300ContentXml.Item.Xslt1

    Case 2

        strTmp = gcbCms300ContentXml.Item.Xslt2

    Case 3

        strTmp = gcbCms300ContentXml.Item.Xslt3

    Case 4

        strTmp = gcbCms300ContentXml.Item.Xslt4

    Case 5

        strTmp = gcbCms300ContentXml.Item.Xslt5

End Select



If (Len(strTmp) = 0) Then

    strTmp = "None Used (HTML Content assumed)"
```

This code uses the `gcbCms300ContentXml` Web Service to get the content title: `gcbCms300ContentXml.Item.ContentTitle`.

The code also uses the gcbCms300ContentXml Web Service to retrieve any XSLTs assigned to the content. If no XSLTs are assigned (as is the case with this sample page), the message "None Used (HTML Content assumed)" appears.

This code results in the following section of the page.



Next, the page uses the GetContentBlock method to display the content block in “raw” HTML or XML format. Here is the code that displays that section of the page.

```
strHTML = strHTML & "<tr><td><b>Raw HTML (or XML) from GetContentBlock Web Service: </b></td></
tr>"

strHTML = strHTML & "<tr><td> </td></tr>"

strHTML = strHTML & "<tr><td>" & strRawHtml & "</td></tr>"

strHTML = strHTML & "<tr><td> </td></tr>"
```

Earlier in the news.aspx.vb file, the `strRawHtml` variable was defined as `strRawHtml = gcbCms300ContentXml.Item.ContentHtml.` So, the `strRawHtml` variable uses the gcbCms300ContentXml Web Service to retrieve content in “raw” HTML format.

Here is the resulting section of that page. As you can see, HTML tags are embedded within the content.

Raw HTML (or XML) from GetContentBlock Web Service:

<h4>RC International Announces the RC Cheetah</h4> <p>January 14, 2001 - RC International, a leading RC racing company, has announced the availability of its new flagship product, the RC Cheetah. After nearly two years of development the RC Cheetah is designed to compete at the highest level in the RC racing arena. The excitement level of the hard core enthusiasts can be felt at all the demonstrations of the RC Cheetah.</p> <blockquote> <p>"The RC Cheetah price/performance ration is simply incredible", stated Bob Dickerson, RC International VP of engineering. "The RC Cheetah has been devastating its competition in all the pre-release races and we expect that to continue...".</p> </blockquote> <p>The major industry magazines are agreeing with Mr. Dickerson's assessment. RC Magazine has tested the RC Cheetah head-to-head with the competition's best and they concluded:
 </p> <blockquote>"There is no comparison between the RC Cheetah and its nearest competitor. In speed, handling, and price the RC Cheetah out shines them all".</blockquote> <p>The RC Cheetah is now available at all RC International distributors and major Hobby stores. Please contact RC International to locate a local dealer.</p>

Finally, the page uses the ContentBlock Web method to display the content block in “processed” format. Here is the code that displays that section of the page.

```
strHTML = strHTML & "<tr><td><b>Processed HTML (or XML) from ContentBlock Web Service: </b></
td></tr>"

      strHTML = strHTML & "<tr><td>" & strProcessedHtml & "</td></tr>"

      strHTML = strHTML & "</table>"
```

Earlier in the news.aspx.vb file, the `strProcessedHtml` variable was defined as `strProcessedHtml = wsCms300WebService.ContentBlock(iId)`. So, the `strProcessedHtml` variable uses the `wsCms300WebService.ContentBlock` method to retrieve content in processed format.

Here is the resulting section of that page. As you can see, the content appears as within a browser.

RC International Announces the RC Cheetah

January 14, 2001 - RC International, a leading RC racing company, has announced the availability of its new flagship product, the RC Cheetah. After nearly two years of development the RC Cheetah is designed to compete at the highest level in the RC racing arena. The excitement level of the hard core enthusiasts can be felt at all the demonstrations of the RC Cheetah.

> *"The RC Cheetah price/performance ration is simply incredible"*, stated Bob Dickerson, RC International VP of engineering. *"The RC Cheetah has been devastating its competition in all the pre-release races and we expect that to continue..."*.

The major industry magazines are agreeing with Mr. Dickerson's assessment. RC Magazine has tested the RC Cheetah head-to-head with the competition's best and they concluded:

> *"There is no comparison between the RC Cheetah and its nearest competitor. In speed, handling, and price the RC Cheetah out shines them all"*.

The RC Cheetah is now available at all RC International distributors and major Hobby stores. Please contact RC International to locate a local dealer.

Creating a Page that Provides a Web Service

Below are the typical steps you would follow to create your own page that provides a Web Service.

1. Decide which content blocks you want to provide. Here are some examples:
   - a specific content block (for example `wsCms300WebService.ContentBlock(2)` would display content block 2 regardless of the URL parameters)
   - all blocks in a folder (the GetListSummary method's first parameter is folder)
   - all blocks in a collection (the Collection method's first parameter is collection ID)
2. Decide what information you want to provide about those blocks, and how to present it. Review "Ektron CMS300 Methods" on page 7 to find the type of content and the kind of information that is available about it.

   For example, if you want to display XML data about content (such as content title, date modified, date created), use a method that begins with "Get," such as GetContentBlock, GetCollection, and GetListSummary.

3. Create a new folder within the CMS300sample folder. This folder and some of its subfolders have files that are needed to run Web Services. Place all of your files within the new folder.
4. Using a development tool that supports Web Service integration (for example, Visual Studio .NET), create a .NET (.aspx) file that manages page layout. The file must refer to a Visual Basic or C# file (via a `CodeBehind` command), which manages the page's functionality.

   Note: You can refer to the samples provided in `wwwroot/CMS300sample/cmswsdemo` and `wwwroot/CMS300sample/cmsxmlwsdemo` as examples. Rename and modify them as needed.
5. Add to each .NET project a Web Reference to the WSDL file. (by default, *`webroot`*`/cms300sample/cms300ws/cms300content.asmx?wsdl`). The environment then builds the appropriate proxy class to access the Web Service's methods. You can use the proxy class within the application to invoke those methods. **Ektron CMS300**'s sample .aspx pages demonstrate how to do this.
6. Provide to your consumers a URL to the .NET (.aspx) file.

Syndicating Web Content as RSS

This section explains how to add RSS syndication to Ektron CMS300 for ASP.NET. RSS syndication allows you to prepare Ektron CMS300 content for reading by RSS news feed aggregators.

To make this task easier, Ektron provides sample files to illustrate RSS syndication. You should customize the files to meet your needs.

What is RSS Syndication?

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 CMS300, 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/).

The RSS Specification

The RSS specification is a document: http://backend.userland.com/rss. Ektron has implemented the specification, but you can customize the RSS classes to support advanced features.

RSS Syndication in Ektron CMS300

Ektron CMS300 allows you to syndicate content by either using ASP or .Net. Syndicating via .Net requires that you have the Microsoft .Net framework installed on your computer.

With Ektron CMS300, you can syndicate a collection and a list summary via RSS.

The following sections explain how to configure Ektron CMS300 to syndicate content via ASP and .Net.

Syndicating via ASP

Syndicating via ASP requires you to create a news feed type file in ASP calling a RSS function defined in Ektron CMS300' applicationAPI.asp file.

The following section explains each of the RSS functions, as well as the steps required to syndicate your Web site content.

RSS Functions

The file ApplicationAPI.asp has included two additional functions used to syndicate collections and summary lists on your Web site.

The two functions are named:

- ecmRssCollection
- ecmRssSummary

By creating news feed files that call these two functions, you can easily syndicate content.

Explained in the following section are the functions.

ecmRssCollection

Displayed here is the function, ecmRssCollection:

```
Function ecmRssCollection(id)

    dim rssCont,dictobj,ErrorString

    dim rStr,srvName,scriptName,qStr

    Set dictobj = Server.CreateObject("Scripting.Dictionary")

    qStr = Request.ServerVariables("URL")

    srvName = Request.ServerVariables("SERVER_NAME")

    'scriptName = Request.ServerVariables("SCRIPT_NAME")
```

```
    dictobj.Add "Url", qStr

    dictobj.Add "ServerName", srvName

    dictobj.Add "ColId", id

    if (Request.ServerVariables("QUERY_STRING") <> "" ) then

        dictobj.Add "UrlParam", Request.ServerVariables("QUERY_STRING")

    else

        dictobj.Add "UrlParam",""

    end if

    Set rssCont = Server.CreateObject(CONTENT_OBJ)

    rStr = rssCont.GetRssCollectionByID(AppConfStr,
dictobj,Request.Cookies("ecm")("site_id"),ErrorString)

    ecmRssCollection = rStr

    Set dictobj = nothing

    Set rssCont = nothing

end function
```

When called, this function only required on parameter, the ID of the collection to be syndicated.

ecmRssSummary

Displayed here is the ecmRssSummary function:

```
Function ecmRssSummary(Folder, Recursive, OrderBy, MaxNumber)

    Dim ContentObj, SumObj, rStr, ErrorString

    dim srvName,url,qStr,order


    'UrlParam = Request.ServerVariables("QUERY_STRING")

    url = Request.ServerVariables("URL")

    srvName = Request.ServerVariables("SERVER_NAME")

    Set ContentObj = Server.CreateObject(CONTENT_OBJ)

    Set SumObj = Server.CreateObject("Scripting.Dictionary")

    SumObj.Add "Folder", Folder
```

```
    SumObj.Add "Recursive", Recursive

    SumObj.Add "MaxNumber", MaxNumber

    SumObj.Add "ObjType", "Folder"

    SumObj.Add "PreviewMode", false

    SumObj.Add "Url", url

    SumObj.Add "ServerName", srvName

    if (Request.ServerVariables("QUERY_STRING") <> "" ) then

        SumObj.Add "UrlParam", Request.ServerVariables("QUERY_STRING")

    else

        SumObj.Add "UrlParam",""

    end if

    if( lcase(OrderBy) = "date") then

        order = "DateModified"

    else

        order = "Title,asc"

    end if


    SumObj.Add "OrderBy", order

    rStr = ContentObj.GetRssSummary(AppConfStr,SumObj, Request.Cookies("ecm")("site_id"),
ErrorString)

    ecmRssSummary = rStr


End Function
```

Similar to the ecmRssCollection function, this function requires one parameter to be passed, “folder,” however, there are three additional parameters that can be used as well:

- Recursive
- OrderBy
- MaxNumber

Syndicating Collections

To syndicate a collection on your Web site, Ektron recommends that you create a new file in your Ektron CMS300 site root folder that contains all the information needed to syndicate the content.

Once the file is created, you may distribute the link to the newly created file where users may create new news channels in their news feeder programs to successfully display the content.

Example

Ektron CMS300 supplies a sample file, `/CMS300Sample/productsfeed.asp`, which syndicates a collection. The parameter for the collection is hard-coded within the file.

Displayed here is the file productsfeed.asp.

```
<%option explicit%>

<!-- #include file="site_scripts_path.asp" -->

<%

'Need to specify collection ID number in this file

dim cID,rssData

    'ecmRssCollection(1) will return collection id 1 from the CMS database

    rssData = ecmRssCollection(1)

    'write the data out to the port

    response.write(rssData)

%>
```

As you can see, a very minimal amount of code is needed to syndicate content. However, all of the displayed code is required within your news feed files to properly function.

Creating Your Own Collection News Feed Files

In the previous section, the code required to syndicate content using RSS was displayed.

To create your own news feed file to syndicate a collection on your Web site, perform the following steps;

1. Open your ASP editing tool
2. Enter the following text:

```
<%option explicit%>
<!-- #include file="site_scripts_path.asp" -->
```

   Be sure to specify the proper location of the file "site_scripts_path.asp" for the include file. For this example, we are saving this file in the same directory as the include file.

3. Enter the following ASP code:

```
<%
    dim cID,rssData
    rssData = ecmRssCollection(cID)
    response.write(rssData)
%>
```

   Replace the cID parameter with the ID of the collection you wish to syndicate (for example, "2").

NOTE For information about retrieving the ID number for a collection, refer to "Collections" in the Ektron CMS300 Administrator Manual.

   Displayed here is another example of a news feed file that syndicates a summary list:

```
<%option explicit%>
<!-- #include file="site_scripts_path.asp" -->
<%
    dim cID,rssData
    rssData = ecmRssCollection(2)
    response.write(rssData)
%>
```

   Using this example displays the collection ID=2 in the news feeder application.

4. Save the file as an ASP file in the same directory as the file "site_scripts_path.asp"

Now that the news feed file has been successfully created you may distribute the link to the file. When the file is called in the user’s news feeder application, the collection defined in the file will be displayed.

Configuring News Feed Application

Once you have created and configured your own news feed file, consumers may configure their news feed application to view the content.

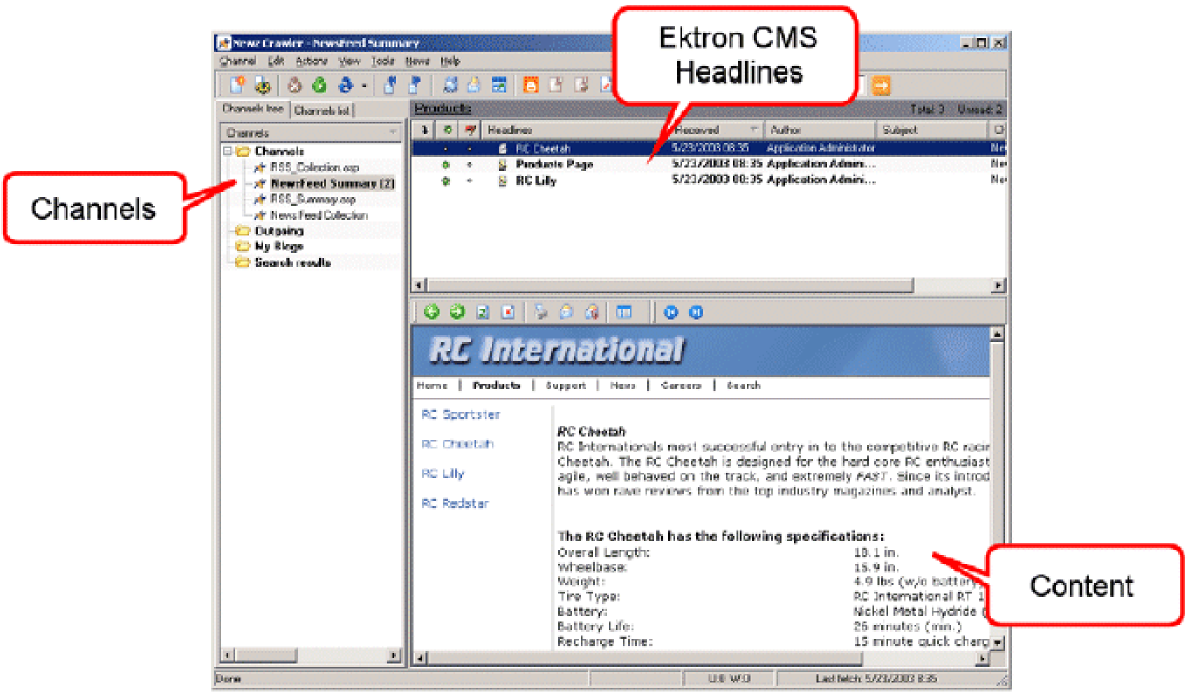
Simply send them the link to the news feed file, for example:

```
http://www.YourEktronWebSite.com/CMS300sample/productsfeed.asp
```

Once they have added the file as a new channel, the content is successfully syndicated to them.

Displayed here is the example displayed above in the news feed application, Newz Crawler.

NOTE Depending on news feed application, the display and format may appear different.



As you can see, each content that matches the criteria specified in your news feed file is displayed.

Alternate Dynamic Method

NOTE Ektron recommends that you use the previous method to syndicate content via RSS. Using the previous method gives you more control on what content is syndicated.

Instead of hard-coding the collection ID into the file, you may configure the file to allow consumers to specify any ID they desire. When the consumer adds the file to their news feed application, they simply specify the parameter within the URL.

Displayed here is sample code to allow this:

```
<%option explicit%>

<!-- #include file="site_scripts_path.asp" -->

<%

'this page expects one URL parameter which is cId. This cId is the collection ID.

dim cID,rssData

    'Get cID from URL

    cID = request.QueryString("cId")

    rssData = ecmRssCollection(cID)

    'write the data out to the port

    response.write(rssData)


%>
```

When this code is used in a news feed application, the user must add the URL parameter **?cid=#** to the end of the URL. Here is an example:

```
http://www.yourEktronwebsite.com/CMS300sample/productsfeed.asp?cID=1
```

This URL displays the collection with an ID of 1 in the news feeder application.

NOTE If this method is used, and no parameter is passed through the URL, the user may receive an error.

Syndicating Summary Lists

To syndicate a summary list on your Web site, Ektron recommends that you create a new file in your Ektron CMS300 site root folder that contains all the information needed to syndicate the content.

Once the file is created, you may distribute the link to the newly created file where users may create new news channels in their news feeder programs to successfully display the content.

Example

Ektron CMS300 supplies a sample file

/CMS300Sample/newsfeed.asp

which syndicates a summary list. The parameters for the summary list are hard-coded within the file.

Displayed here is the file newsfeed.asp.

```
<%option explicit%>

<!-- #include file="site_scripts_path.asp" -->

<%

    dim rssData

    rssData = ecmRssSummary("\Marketing\News", 1, "date",0)

    'write the data out to the port

    response.write(rssData)

%>
```

As you can see, a very minimal amount of code is needed to syndicate content. However, all of the displayed code is required within your news feed files to properly function.

Creating Your Own Summary News Feed Files

In the previous section, the code required to syndicate content using RSS was displayed.

To create your own news feed file to syndicate a summary list on your Web site, perform the following steps;

1. Open your ASP editing tool
2. Enter the following text:

```
<%option explicit%>

<!-- #include file="site_scripts_path.asp" -->
```

   Be sure to specify the proper location of the file “site_scripts_path.asp” for the include file. For this example, we are saving this file in the same directory as the include file.

3. Enter the following ASP code:

```
<%

    dim rssData

    rssData = ecmRssSummary(Folder, Recursive, OrderBy, MaxNumber)

    response.write(rssData)

%>
```

Use the following table as a guide to properly enter the correct parameters in the ecmRssSummary functions.

Parameter	Description	Options/Examples
Folder	Specify the content folder in Ektron CMS300 where the summaries will be called from.	“\” = Root content folder “\Products” = Products folder
Recursive	Specify whether summaries are called from the starting folder’s subfolders as well.	0 = Not Recursive 1 = Recursive
OrderBy	Specify the order in which the results are displayed in the news feeder application.	“Date” = chronologically “title” = alphabetically

Parameter	Description	Options/Examples
MaxNumber	Specify the maximum amount of results to display.	0 = All 4 = four 13 = thirteen

Displayed here is another example of a news feed file that syndicates a summary list:

```
<%option explicit%>

<!-- #include file="site_scripts_path.asp" -->

<%

    dim rssData

    rssData = ecmRssSummary("\Products", 1, "title", 3)

    response.write(rssData)

%>
```

This example has the following properties:

- Summaries in the \Products content folder, as well as its subfolders, are displayed
- The results are sorted alphabetically by title.
- Only the first three results are displayed.

4. Save the file as an ASP file in the same directory as the file “site_scripts_path.asp”

Now that the news feed file has been successfully created, you may distribute the link to the file. When the file is called in the user’s news feeder application, the summary list defined in the file will be displayed.

Configuring News Feed Application

Once you have created and configured your own news feed file, consumers may configure their news feed application to view the content.

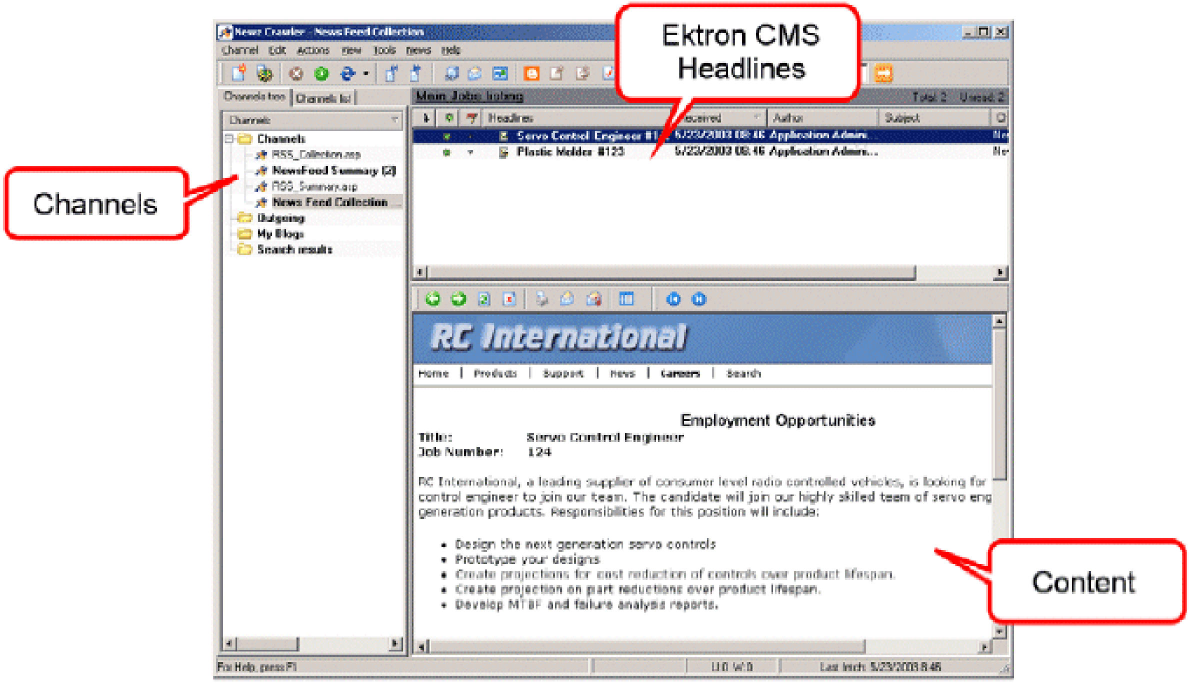
Simply send them the link to the news feed file, for example:

```
http://www.yourEktronwebsite.com/CMS300sample/newsfeed.asp
```

Once they have added the file as a new channel, the content is successfully syndicated to them.

Displayed here is the example displayed above in the news feed application, Newz Crawler.

NOTE Depending on news feed application, the display and format may appear different.



As you can see, each content that matches the criteria specified in your news feed file is displayed.

Alternate Dynamic Method

NOTE Ektron recommends that you use the previous method to syndicate content via RSS. Using the previous method gives you more control on what content is syndicated.

Instead of hard-coding the summary parameters into the file, you may configure the file to allow consumers to specify any parameters they desire. When the consumer adds the file to their news feed application, they simply specify the parameters within the URL.

Displayed here is sample code to allow this:

```
<%option explicit%>

<!-- #include file="applicationAPI.asp" -->

<%

dim Folder, Recursive, OrderBy, MaxNumber,rssData

    'Get parameters from URL

    Folder = request.QueryString("Folder")

    Recursive = request.QueryString("Recursive")

    OrderBy = request.QueryString("OrderBy")

    MaxNumber = request.QueryString("MaxNumber")

    'Call ecmRssSummary function

    rssData = ecmRssSummary(Folder, Recursive, OrderBy,MaxNumber)

    'write the data out to the port

    response.write(rssData)

%>
```

When this code is used in a news feed application, the user must also specify at least the folder parameter, and may also enter three others.

The following table explains each of the possible parameters.

Parameter	Description	Examples
Folder *Required!*	Specify the content folder in Ektron CMS300 From which the summaries will be called. IMPORTANT: Due to escaping issues, a backslash("\") must be replaced by "%5c" in the URL. for example, **%5cMarketing%5cNews** instead of **\marketing\news** This may not work in all news feed applications!	folder=%5cMarketing%5cNews folder=%5c

Parameter	Description	Examples
Recursive	Specify whether summaries are called from the starting folder's subfolders as well.	recursive=1 recursive=0
OrderBy	Specify the order in which the results are displayed in the news feeder application.	orderby=date orderby=title
MaxNumber	Specify the maximum number of results to display.	maxnumber=0 maxnumber=32

Here is an example of a URL string that contains all parameters:

```
http://www.yourEktronwebsite.com/CMS300sample/
newsfeed.asp?folder=%5cProducts&recursive=1&orderby=title&maxnumber=5
```

This example has the following properties:

- Summaries in the `\Products` content folder, as well as its subfolders, are displayed
- The results are sorted alphabetically by title
- Only the first five results are displayed

Syndicating via .Net

Architecture of RSS Syndication

aspx pages

You can use an aspx page as a URL to dynamically create and return RSS documents.To display an RSS feed on a Web site, the site administrator identifies the URL of the aspx page. The aggregator determines how to use the document's elements, such as <title>, <description> and <link>, to display the syndicated content.

Three sample aspx pages (news.aspx, jobs.aspx, and products.aspx) are installed by default to `webroot/CMS300Sample/CMS300WS/rss` folder. They use the CMS300WS class to retrieve the collection or list summary data. Then, they create CollectionToRSS20 or ListSummaryToRSS20. These classes fill the RSS 2.0 data classes and serialize them to an XML document, which can be returned as an HTTP response.

Since these pages are part of the sample, you should modify them or create your own aspx pages for your Web site. Place your custom pages in the `/cms300ws/rss/` or `/cms300ws/` folder so that the web.config file is within the path.

news.aspx

The news.aspx page is hardcoded to retrieve the `/Marketing/News` list summary in the sample.

The news.aspx page accepts one optional URL parameter, max, which specifies the maximum number of items to return. If the max parameter is missing or its value is zero (0), all items are returned.

Sample URLs:

```
http://localhost/cms300sample/cms300ws/rss/news.aspx
```

```
http://localhost/cms300sample/cms300ws/rss/news.aspx?max=10
```

jobs.aspx

The jobs.aspx page returns a list of job openings in the sample application. In the sample, collection id 2 is the list of job openings.

Sample URL:

```
http://localhost/cms300sample/cms300ws/rss/jobs.aspx
```

products.aspx

The products.aspx page returns a list of products in the sample application. In the sample, collection id 1 is the list of products.

Sample URL:

```
http://localhost/cms300sample/cms300ws/rss/products.aspx
```

Creating Your Own aspx Collection Page

To create your own collection page, copy the collection object to an RSS 2.0 object and serialize it. To accomplish this, use these methods.

```
ConvertToRSS(ByVal result CMS300WS.CollectionResult, ByVal

title As String, ByVal description As String) As RSS20.rss


Serialize(Optional ByVal stream As System.IO.Stream = Nothing,

Optional ByVal o As Object = Nothing)
```

Example

```
Dim objRSSConverter As New CollectionToRSS20(Request, Response)

objRSSConverter.ConvertToRSS(objResult,

objResult.CollectionTitle, objResult.CollectionDescription)

objRSSConverter.Serialize()
```

Remarks

The ConvertToRSS method returns the RSS 2.0 object so that you can fill in or modify additional fields as desired before calling Serialize. The Serialize method has optional parameters that let you send the RSS to a stream other than HttpResponse.

You can add code to serialize a different object (such as an RSS 1.0 data class) or to run an XSLT on the serialized XML document before returning it as the HTTP response.

Example

```
Dim objRSSConverter As New CollectionToRSS20(Request, Response)

Dim objRSS20 As rss.RSS20.rss =

objRSSConverter.ConvertToRSS(objResult,

objResult.CollectionTitle, objResult.CollectionDescription)

objRSS20.channel.language = "en-us"

objRSSConverter.Serialize()
```

Creating Your Own aspx List Summary Page

To create your own list summary page, copy a list summary object to an RSS 2.0 object and serialize it. To accomplish this, use these methods.

```
ConvertToRSS(ByVal result As CMS300WS.ListSummaryResult, ByVal

title As String, ByVal description As String) As RSS20.rss


Serialize(Optional ByVal stream As System.IO.Stream = Nothing,

Optional ByVal o As Object = Nothing)
```

Example

```
Dim objRSSConverter As New ListSummaryToRSS20(Request, Response)

objRSSConverter.ConvertToRSS(objResult, "News", "The latest news")

objRSSConverter.Serialize()
```

Remarks

The ConvertToRSS method returns the RSS 2.0 object so that you can fill in or modify additional fields as desired before calling Serialize. The Serialize method has optional parameters that let you send the RSS to a stream other than HttpResponse.

You can add code to serialize a different object (such as an RSS 1.0 data class) or to run an XSLT on the serialized XML document prior to returning it as the HTTP response.

Example

```
Dim objRSSConverter As New ListSummaryToRSS20(Request, Response)

Dim objRSS20 As rss.RSS20.rss =

objRSSConverter.ConvertToRSS(objResult, "Title", "Description")

objRSS20.channel.language = "en-us"

objRSSConverter.Serialize()
```

Custom ASP Functions

Ektron CMS300 displays content on your Web site through the use of custom Ektron ASP functions and ComObjects. Your template you must include the following file to be able to use the custom functions:

```
<!-- #include file="site_scripts_path.asp" -->
```

This file (**`site_scripts_path.asp)`** calls the file with the custom Ektron functions to allow the page to function properly. The `include` statement must appear at the top of every template file that uses an Ektron CMS300 custom function.

To customize Ektron CMS300, you need to be familiar with these tags.

Function	Description	More Information
Add Content	Programmatically add content	”Add Content” on page 58
Collection	Displays links generated by collections	”Collection Function” on page 94
Content Block	Displays and manages a content block	”Content Block Function” on page 49
DropHTMLMenu	Used to display a DHTML menu	”Menus” on page 130
Event Calendar	Displays an event calendar	”Event Calendar Function” on page 110
Form	Displays a content block associated with a form	”Form Function” on page 116
GenerateMenu	Works with DropHTML menu to display DHTML menus	”Menus” on page 130
List Summary	Displays a list of content block summaries	”List Summary Function” on page 80

Function	Description	More Information
Archive ListSummary	Displays summaries of archived content blocks	”Archive List Summary Function” on page 88
Login	Adds the login or logout button	”Login Function” on page 46
Metadata	Displays the metadata for the current Web page	”Metadata Function” on page 119
Menu	Customizes the DHTML menus feature	”Menus” on page 130
Multipurpose	Displays either a content block or a form	”MultiPurpose Function” on page 118
Random Content	Randomly displays the content of a collection item	”Random Content” on page 108
Random Summary	Randomly displays the summary of a collection item	”Random Summary” on page 109
Search	Inserts a text box with a search button	”Search Function” on page 64
Search Display	Creates an area to display search results	”Search Display Function” on page 74
Single Summary	Displays the summary for a content block	”Single Summary Function” on page 89
ShowSiteLanguage	Lets a site visitor select a language in which to view site.	”Show Site Language Function” on page 127

Login Function

The login function adds a login button on the template when displayed in a browser. Here it the format of the login function.

```
<% ecmLogin %>
```

This tag is responsible for displaying the following buttons on the Web page.

Button	Name	Description
	Login	When user is not logged into Ektron CMS300, this button appears. Click this button to let the user log in to the application.
	Logout	Once logged in, this button replaces the login button to allow the user to log out from the Ektron CMS300 Web site.
	Workarea	When logged in, this button appears under the logout button allowing the user to access their workarea.
	Preview On	Lets the user to preview the entire Web site as if all checked-in content was published.
	Preview Off	Turns off preview mode.

Login Tag Example

The following example places a login button in a table cell inside an asp template.

```
<tr>
    <td>
        <% ecmLogin %>
    </td>
</tr>
```

When inserted properly, a login button appears on the Web page.

Clicking the login button opens a login window in which a user enters the username and password. Upon successful completion, the user is logged in to the Ektron CMS300 Web site.

Placing Your Login Button

You can add as many login buttons to a template as you like. You might want to include a login button on each template, or have a special Web page called login.asp, from which users can log in without the public being able to access the login page.

Partner Login

NOTE As of Release 4.7, this function is no longer needed. Instead of having a separate login for partners, you can use the ecmLogin function. Then, add the partner as a membership user. Membership users see private contents after they log in.

Ektron CMS300 also includes a special login function that only displays a login or logout button on the template. Here is the format for this login function.

```
<% ecmLoginPartner %>
```

The following table displays how the function appears when the user is logged in or logged out.

Logged Out	Logged In
	

Content Block Function

The content block tag displays a content block on an Ektron CMS300 Web page. Here is the format for the content block function.

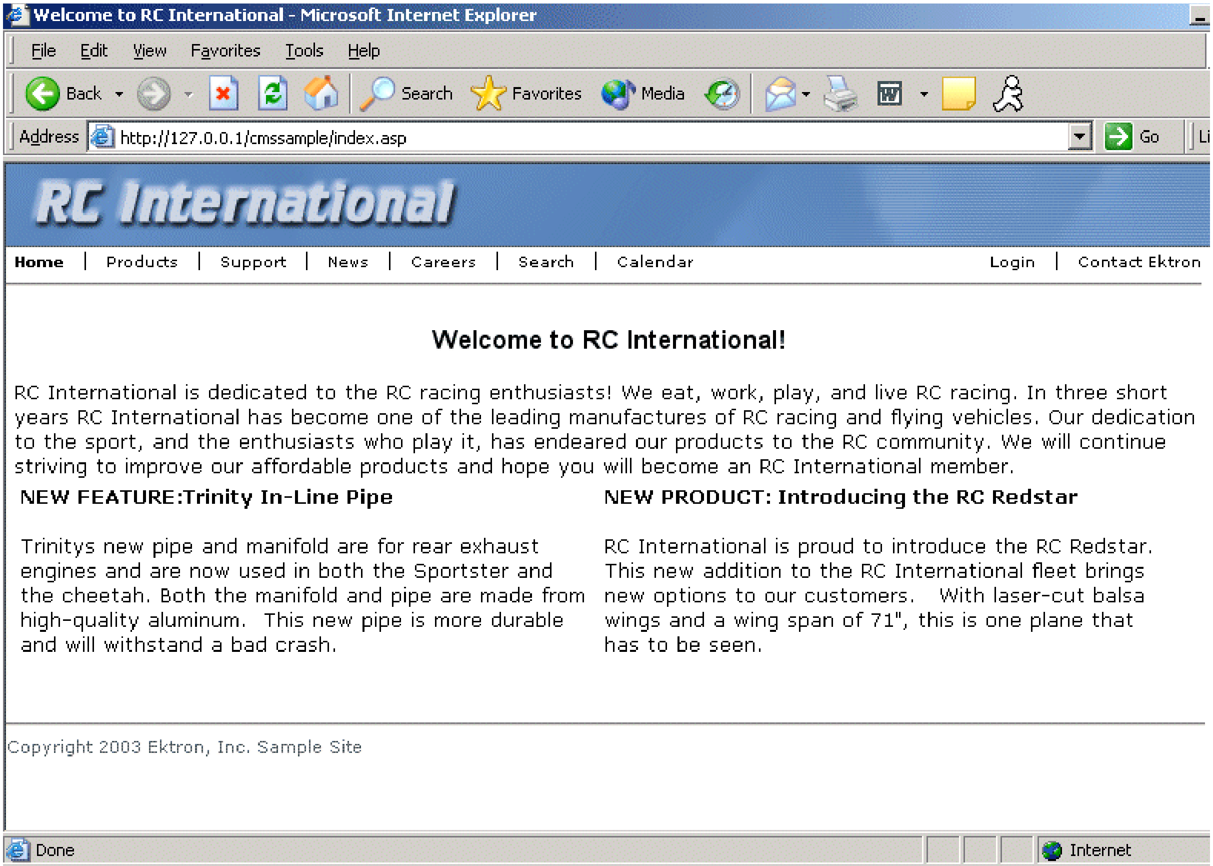
```
<% ecmContentBlock    ID,
                      "XSLT",
                      Override      %>
```

NOTE As an alternative, you can use the multipurpose function, which can display either a content block or a content block associated with a form. For more information, see "MultiPurpose Function" on page 118.

The table below explains the attributes of the content block function.

Attribute	Description	Required
ID	ID number assigned of the content block that will appear	Yes
XSLT	File name and path to a valid XSLT to transform the XML content. *See Also:* "The Function's Arguments" on page 55	No
Override	If no XSLT is specified, then enter 1 to use XSLT1, 2 for XSLT2, or 3 for XSLT3. *See Also:* "The Function's Arguments" on page 55	No

In normal view, this tag retrieves the content block from the database and displays it in the template.



If a user is logged into Ektron CMS300, the content block tag displays a border around the content block and provides a menu for managing it.

Content Block Examples

Ektron CMS300 has two types of content blocks.

Type	Displays	More information
Static	One content block on the Web page	"Static Content Block" on page 52
Dynamic	A content block whose ID is passed through the URL	"Dynamic Content Block" on page 53

In addition, a content block can contain XHTML or XML content. For more information, see "XML Content Block" on page 54.

Static Content Block

The following illustrates how to insert a static content block on a template.

```
<tr>
    <td>
        <% ecmContentBlock(1) %>
    </td>
</tr>
```

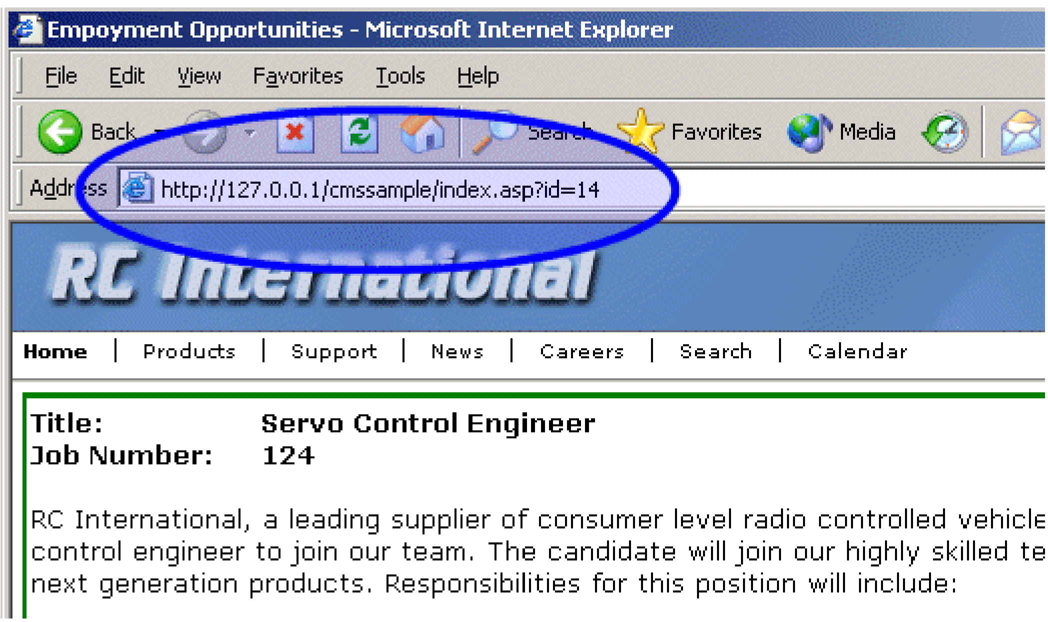
In the example above, the function retrieves the content block with an id of 1 from the database to the browser.

Dynamic Content Block

The following example shows the content block tag where the id is being passed as a URL parameter. Use this format with dynamic template.

```
<tr>

    <td>

        <% ecmContentBlock(request.QueryString("id")) %>

    </td>

</tr>
```

When a user accesses this page, it adds the content block ID number to the tag's template, and the content block with the corresponding ID appears on the Web page in the specified template.



The `id=` convention is used by **Ektron CMS300** to generate quicklinks when content blocks are created. (For more information, see the **Ektron CMS300** Administrator manual section “Managing Content” > “Forming URLs For Ektron CMS300 Documents.”)

The dynamic `ecmContentBlock` function is almost the same as the static one (see ”Static Content Block” on page 52). The only difference is the parameter, which makes the function dynamic. The parameter uses a query string call (`Request.QueryString`) to read the URL from the browser’s address bar. It treats everything after the question mark as a list of key/value pairs separated by ampersands. So, `Request.QueryString` passes the key as a parameter and returns its associated value. For example, in URL `<http://localhost/CMS300Sample/index.asp?id=1&LangType=1036>`, the following QueryString calls return these values.

QueryString Call	Return value
Request.QueryString(“id”)	1
Request.QueryString(“LangType”)	1036

XML Content Block

Here is an example of displaying an XML content block. Note that you specify a content block and an XSLT, which determines how the content block is displayed.

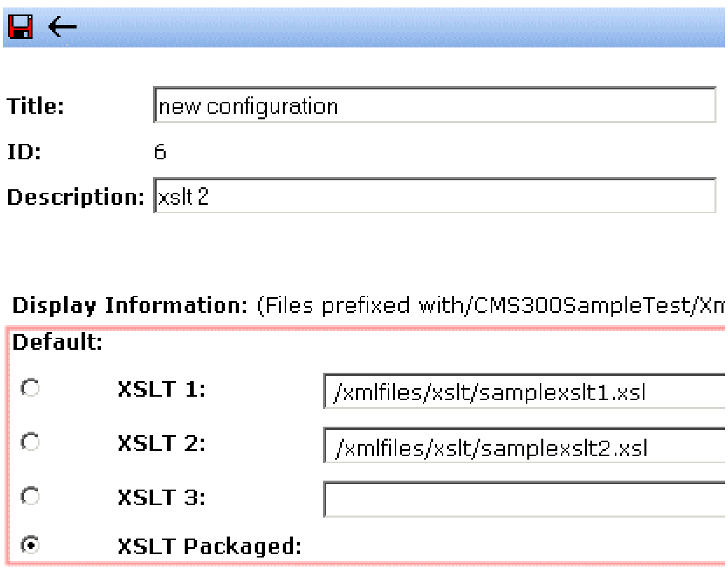
```
<tr>

    <td>

        <% ecmContentBlockEx 13, “”, 1 %>

    </td>

</tr>
```

This example displays the content block ID=13, using XSLT1 as the display XSLT.

The Function’s Arguments

The ecmContentBlockEx takes three arguments. The first argument identifies the content block to display. The second one is optional and, if used, specifies an external XSLT file.

If the second argument does not exist, the third argument specifies an XSLT identified in the Edit XML Configuration screen. The following table provides additional detail about the second and third arguments.

To use this display XSLT	Enter this for argument 2	Enter this for argument 3
The default XSLT specified in the Edit XML configuration screen (illustrated below). Note that, in this example, the **XSLT Packaged** option is the default XSLT since it is selected. 	““	none

To use this display XSLT	Enter this for argument 2	Enter this for argument 3
XSLT Packaged: from the Edit XML configuration screen (that is, the XSLT created in the Data Designer) Note: If an XSLT package has not been created, and zero (0) is the third argument, the default XSLT specified in the Edit XML configuration screen is used.	““	0
XSLT 1 from the Edit XML configuration screen	““	1
XSLT 2 from the Edit XML configuration screen	““	2
XSLT 3 from the Edit XML configuration screen	““	3
An absolute or relative path to an XSLT	An external XSLT file not specified in the Edit XML Configuration screen. For example `<% ecmContentBlockEx 13, "samplexslt.xsl"%>`	does not matter - if a value exists in argument 2, argument 3 is ignored

See Also: The “Managing XML” chapter of the **Ektron CMS300** Administrator manual

Dynamic and Static Combination

Here is an example of how you can use the two different content tags in the same table cell by using an IF statement

```
<tr>

    <td>

        <% if request.QueryString("id")<> "" then

            ecmContentBlock(request.QueryString("id"))else

            ecmContentBlock(14) end if %>

    </td>

<tr>
```

In this sample code, when a person accesses this page without passing through the content’s ID number, the content with an ID=14 will be displayed. If you pass a content id through the URL like **index.asp?id=4,** the content block ID=4 will be displayed.

Add Content

The add content function allows you to programmatically add a new content block to Ektron CMS300 without the need of logging in.

This function can be for several applications including, but not limited to:

- Applied to a Web form, allowing you to collect data from users about the content block
- Creating a loop function that moves information from a database to an Ektron CMS300 database

Here is the format for the add content function:

```
<% AddContent   Username,
                Password,
                Domain,
                content_title,
                content_comment,
                ContentHtml,
                SummaryHTML,
                MetaData Title
                MetaData Keyword
                ContentLanguage,
                FolderID,
                StartDate,
                EndDate,
                ErrString
                                        %>
```

Explained in the table below are the attributes for the add content block function.

Attribute	Description
Username	The username of the user to be authenticated for permissions to see whether the user is able to add a content block.
Password	The password for the username being authenticated.
Domain	If using Active Directory, specify the domain needed to authenticate the user.
Content_title	Specify a title for the content block being added.

Attribute	Description
Content_comment	Specify a historical comment for the content being added.
ContentHTML	Actual content for the content block.
SummaryHTML	Summary information about the content block.
Metadata_title	Specify a title for the metadata being added.
Metadata_keywords	Specify the information for the metadata which will be used as a reference point for finding other words or information.
ContentLanguage	Language of content.
FolderID	ID number of the content folder where the content block will be added to.
StartLive	Date and time the content will go live. Must match date/time format set in setup.asp.
EndDate	Date and time the content will expire. Must match date/time format set in setup.asp.
ErrString	String returned if the content fails to get added to Ektron CMS300.

Add Content Example

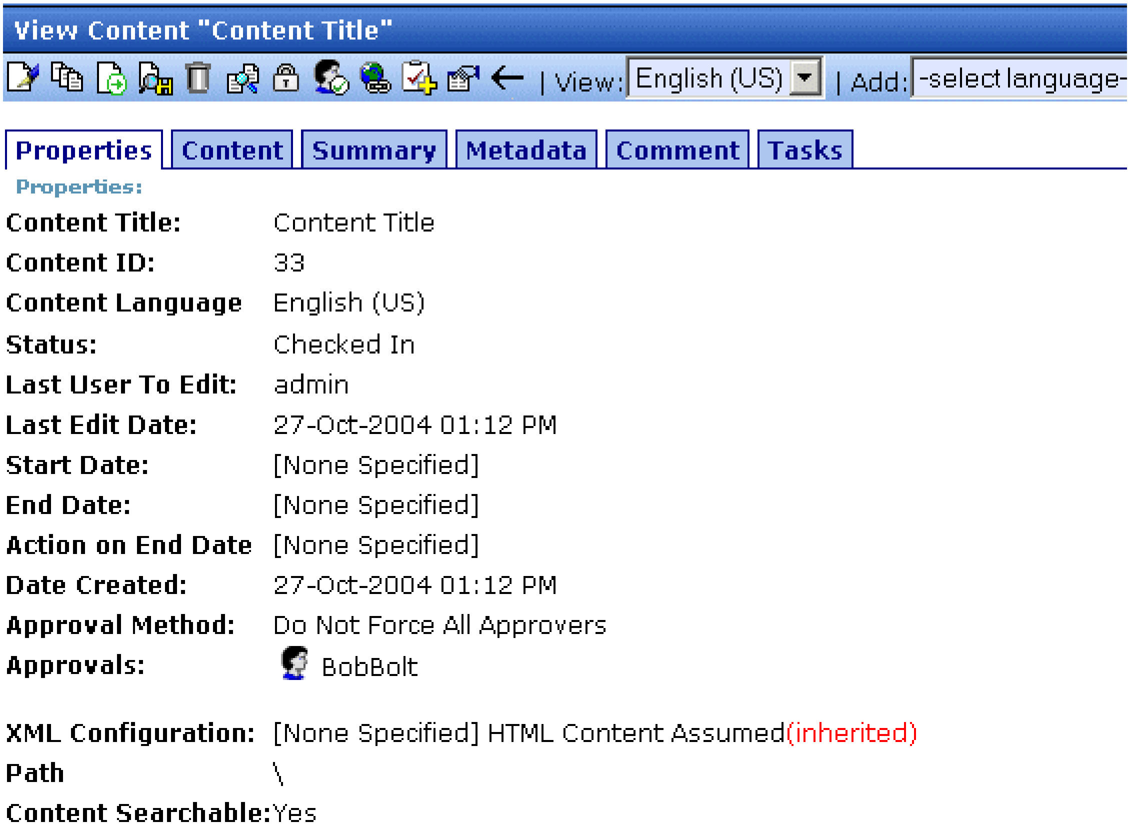
The following is an example of the add content function hard coded in a template:.

```
<tr>
    <td>
        <% AddContent "admin", "admin", "", "Content Title", "Comment",
            "This is the <b>body</b> of the content.",
            "This is the <i>summary</i> for the content.", 1, 33,
            "07-01-2004 10:35 AM", "",
            "<metadata><meta id=""3"">ContentTitle</meta></metadata>",
            "" %>
    </td>
</tr>
```

The previous example has the following properties:

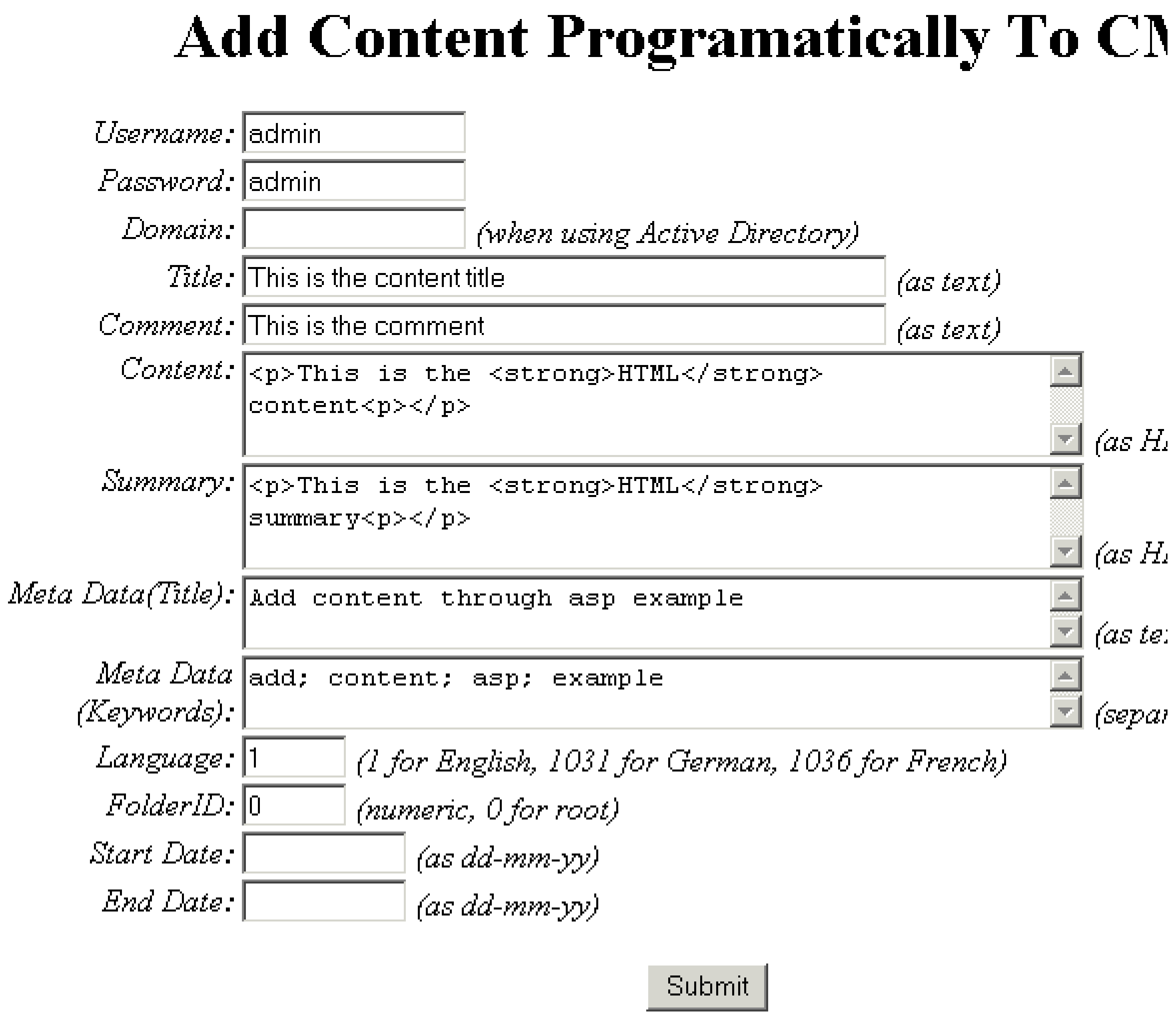
- The user admin is used to be authenticated.
- The title of the new content block is “Control Title”.
- The comment for the content is “Comment”.
- The body of the content is “This is the **body** of the content”.
- The summary of the content block is “This is the *summary* for the content.
- The language ID = 1, or English.
- The new content block, ID=33, is added to the content folder.
- Start date is July 1, 2004 at 10:35 a.m.
- No end date is specified.
- The metadata “Content title” is set for the metadata definition.

When this function is executed, the content is added to Ektron CMS300. Displayed here is the record of the content in the workarea.



Add Content Web Form Example

Displayed here is an example of a Web form that is included with Ektron CMS300. This form can be found by default in the Ektron CMS300 root directory.



Add Content Programatically To CM

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 HTML content<p></p> *(as H*

Summary: <p>This is the HTML summary<p></p> *(as H*

Meta Data(Title): Add content through asp example *(as te*

Meta Data (Keywords): add; content; asp; example *(sepa*

Language: 1 *(1 for English, 1031 for German, 1036 for French)*

FolderID: 0 *(numeric, 0 for root)*

Start Date: *(as dd-mm-yy)*

End Date: *(as dd-mm-yy)*

Submit

The form is set up to pass the data into the addcontent function.

Search Function

The search tag is used to display a text box, with a search button on the template. When seen on the template of a Web page, users can enter text and click on the search button to search through all the HTML content on the Web site.

NOTE This search only looks though HTML content

Shown here is the format for the ecmSearch tag:

```
<% ecmSearch    "Starting Folder",
                Recursive,
                "Target Page",
                Text Box Size,
                Maximum
                Characters,
                "Button Image
                Source",
                "Button Text",
                "Font Face",
                "Font Color",
                "Font Size",
                Horizontal,
                "Spare"
                                    %>
```

The following table provides information about all the attributes for the search tag.

Attribute	Description	Required ?	For more information, see
Starting Folder	The folder you wish to search.	Yes	"Starting Folder" on page 67
Recursive	Whether to search subfolders. 0=No, 1 = Yes	Yes	
Target Page	The Web page to output the search results.	Yes	"Target Page" on page 68
Text Box	The size of the text box for user input.	Yes	"Text Box" on page 68
Maximum Characters	The maximum number of characters that the input text box can accept.	No	"Maximum Characters" on page 69
Button Image Source	The image location for the search button. Blank ("") = standard submit button.	No	"Button Image Source" on page 69
Button Text	The text used for the button if the standard submit button is chosen, or alternative text for the button if an image is chosen.	No	"Button Text" on page 70
Font Face	The font of the search tag text.	No	"Font Face" on page 71
Font Color	The font color of the search tag text. Blank ("") = Black.	No	
Font Size	The font size of the search tag text.	No	"Font Size" on page 72
Horizontal	Determines if the search options are in a row or a column. 1 = horizontal, 0 = vertical	Yes	"Horizontal" on page 73
Spare1	Currently not used.	Must be ""	"Spare 1" on page 73

Search Tag Example

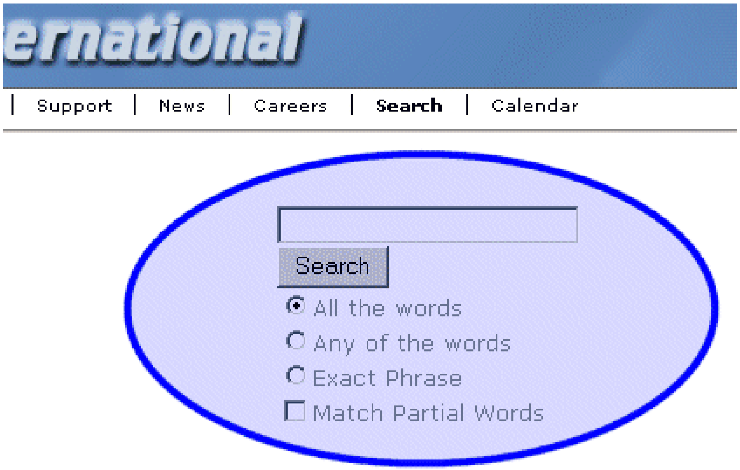
The following example places a text field and a search button in a table cell inside an ASP template.

```
<tr>

    <td>

        <% ecmSearch "\marketing",1,"search-

        display.asp",25,200,"","Search","Verdana",

        "#808080","2",0,"" %>

    </td>

</tr>
```

The previous example has the following properties:

- Searches the `\content\marketing` folder.
- Search is recursive.
- The target page is “search-display.asp”.
- The size of the text box is 25.
- The search text box allows up to 200 characters.
- No image is used for a button. Instead, a standard submit button is used.
- The text on the submit button is “Search”.
- The search options appear in Verdana with a color of #808080 and a size of 2pt.
- The search options are arranged vertically.

When added to a template, and visited, the search tag will appear similar to the following:



Search Tag Attributes

The search tag's attributes are described below.

Starting Folder

In this attribute, specify the content folder where the search begins. There are two options for this attribute.

Value	Search begins in
"\\"	root folder
"\folder path"	specified folder

Recursive

When you setup the search to be recursive, you are allowing the search to search all the sub-folders associated with the starting folder you had specified. You have two options for this attribute:

Value	Search begins in
1	Recursive search (will search sub-folders of the starting folder).
0	Non-Recursive search (will only search starting folder).

Target Page

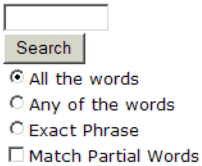
The page that displays the search results. You may enter any form of a URL for this page.

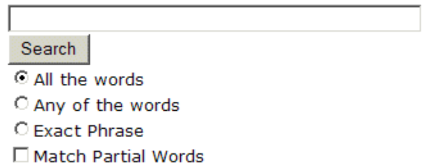
NOTE The target page *must* include the searchdisplay function to display search results.

To use the same page, enter a pound sign (#) into the field.

Text Box

This attribute sets the size of the search text box. It can be any number, depending on the size of the search text box that you want.

Text Box Size	Web Page View
10	

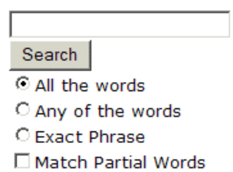
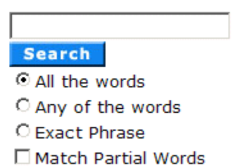
Text Box Size	Web Page View
50	

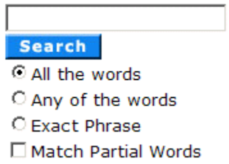
Maximum Characters

This attribute determines the maximum number of characters that a user can enter for search text.

Button Image Source

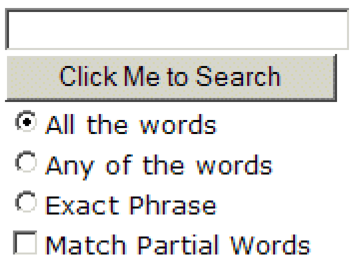
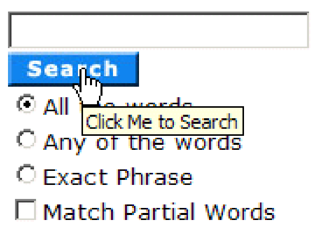
To use an image for the search button, enter the image's filename and path.

Button Image Source	Web Page View
““	
“search.jpg”	

<table>
<tr><th>Button Image Source</th><th>Web Page View</th></tr>
<tr><td>“http://www.ektron.com/images/
search.jpg”</td><td>
</td></tr>
</table>

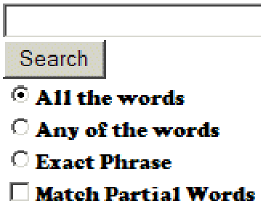
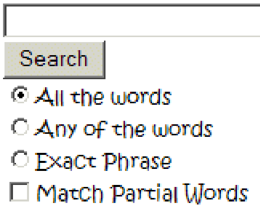
Button Text

If no search button image is specified, the text in this field appears on the button. If an image is being used for the search button, this text is the image’s alt text.

<table>
<tr><th>Button Text</th><th>Web Page View</th></tr>
<tr><td>“Click Me to Search”</td><td>
</td></tr>
<tr><td>“Click Me to Search”</td><td>
</td></tr>
</table>

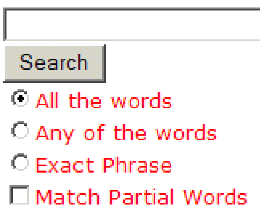
Font Face

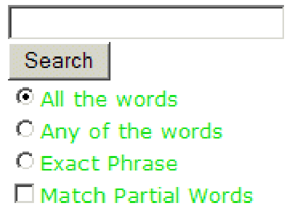
This font is used for the search options displayed on the Web page.

Font Face	Web Page View
Cooper Black	
Kristen ITC	

Font Color

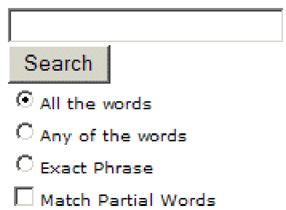
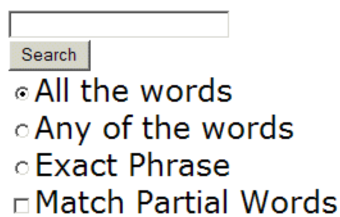
The color of the text in the search tag. You may enter the color name or a hexidecimal value of the color.

Font Color	Web Page View
Red	

Font Color	Web Page View
#14DA14	

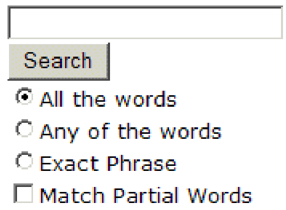
Font Size

This is the size of the text on the search tag.

Font Size	Web Page View
1	
5	

Horizontal

This attribute determines whether the search options are displayed vertically or horizontally.

Attribute	Web Page View
0 (vertical)	
1 (horizontal)	

Spare 1

At the end of the Search tag is a attribute called Spare 1. This attribute has not yet been assigned an function. As of now, when you enter a search tag, you must pass this attribute "".

Search Display Function

The search display custom tag creates the area where search results appear after a search is executed.

NOTE This search only displays HTML content.

Here is the format of the ecmSearchDisplay tag.

```
<% ecmSearchDisplay        "MaxNumberReturn",
                           "StyleInfo",
                           ShowDate              %>
```

Below is a description of the tag's attributes.

Attribute	Description	Required	For more information, see
Max Number of content blocks Returned	Maximum number of content blocks returned. (0=Unlimited)	Yes	"Max Number of Content Blocks Returned" on page 77
Style Info	An HTML style string used within the HTML "hyperlink" generated by the search output. Can control font, color, size, etc.	No	"Style Info" on page 78
ShowDate	Displays the last modified date of the content block. 0=No 1=Yes	No	"Show Date" on page 79

Search Display Example

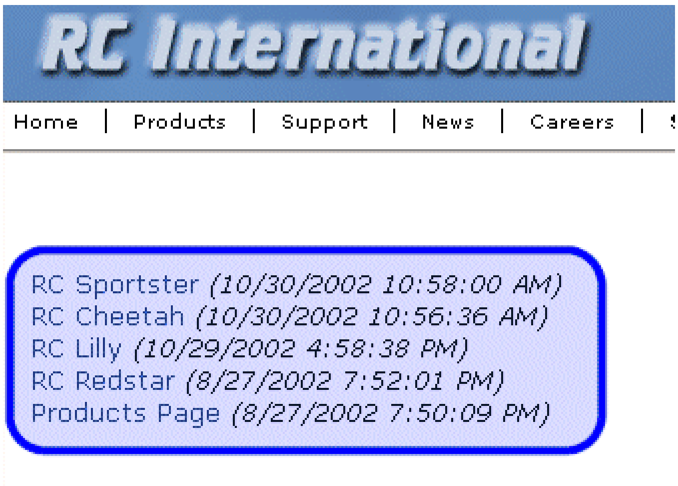
Insert the following on the page that displays search results. You may place it on the same page as the search tag or a separate page.

```
<tr>
    <td>
        <% ecmSearchDisplay 0,"","1" %>
    </td>
</tr>
```

This search display example has the following properties:

- Returns unlimited results when the search is performed.
- Contains no style information.
- Shows the last modified date of the content.

When the tag is added to a template, and a search is performed, the results appear similar to the following.



Search Display with Default Content

You can also set up the search display tag to display a default content block if a search is not performed. Then, if a search is performed, the results replace the content block. The sample code below does that:

```
<tr>
    <% if (Request.Form("ecmsearchtype") <> "") then %>
        <td>
            <% ecmSearchDisplay 0,"" %>
        </td>
    <% else %>
        <td>
            <% ecmContentBlock(1) %>
        </td>
    <% end if %>
</tr>
```

Search Display Attributes

Listed below are the attributes for the SearchDisplay tag.

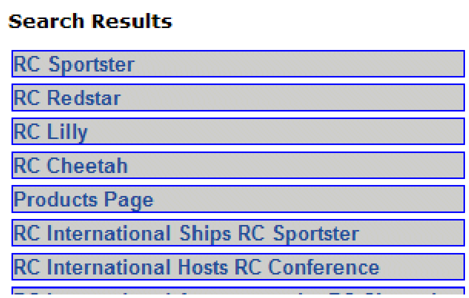
Max Number of Content Blocks Returned

This attribute determines the number of search results displayed on a page. You may enter any integer. To display unlimited results, enter 0 (zero).

Max Returns	Web Page View
0	**Search Results** RC Sportster RC Redstar RC Lilly RC Cheetah Products Page RC International Ships RC Sportster RC International Hosts RC Conference RC International Announces the RC Cheetal
3	**Search Results** RC Sportster RC Redstar RC Lilly

Style Info

An HTML style string used within the HTML “hyperlink” generated by the search output. Can control font, color, size, etc.

Style Info	Web Page View
““	
"font-family:arial; font-weight:bold; background-color:#cccccc; border:solid blue 1pt; margin:2px; width:50%;"	

Show Date

This attribute determines if the content block's last modified date appears next to the title. This is useful when determining which content block is the most recent. You have two choices.

Attribute	Web Page View
0	**Search Results** RC Sportster RC Redstar RC Lilly RC Cheetah Products Page RC International Ships RC Sportster RC International Hosts RC Conference RC International Announces the RC Che
1	**Search Results** RC Sportster *(8/27/2002 7:52:40 PM)* RC Redstar *(8/27/2002 7:52:01 PM)* RC Lilly *(8/27/2002 7:51:26 PM)* RC Cheetah *(8/27/2002 7:50:53 PM)* Products Page *(8/27/2002 7:50:09 PM)* RC International Ships RC Sportster *(8/27/2002 2:46:12 PM* RC International Hosts RC Conference *(8/27/2002 2:44:44 P* RC International Announces the RC Cheetah *(8/27/2002 2:4*

List Summary Function

The list summary function is used to display the list of content summaries on a Web page.

Shown here is the format of the list summary function:

```
<% ecmListSummary    "StartingFolder",
                     Recursive,
                     ShowSummary,
                     "StyleInfo",
                     "OrderBy, Asc/Desc",
                     "ShowInfo",
                     MaxNumber,
                     "Spare1",
                     "Spare2"                %>
```

A list and description of the attributes are shown in this table:

Attribute	Description	Options
Folder	This is the folder the summary information will come from.	Any folder
Recursive	Allow the tag to get summary info from the child folders.	0 = Not Recursive 1 = Recursive
ShowSummary	Do you want the content summary to be displayed?	0 = No 1 = Yes
StyleInfo	Inline style information for the generated text hyperlink.	Any string

Attribute	Description	Options
OrderBy, ASC/DESC	Order the hyperlinks by:	"Title" "DateModified" "DateCreated" "Startdate" "AuthorFname" "AuthorLname"
	Order the hyperlinks in ascending or descending order.	"Title,asc" "Title,desc"
ShowInfo	Information that will appear to the right of the hyperlink.	"DateModified" "DateCreated" "AuthorFname" "AuthorLname"
MaxNumber	Maximum number of summaries returned.	0 = Unlimited
Spare1	Not yet implemented	MUST BE ""
Spare2	Not yet implemented	MUST BE ""

List Summary Example

Shown below is an example of the ListSummary function in an ASP Web page.

```
<TR>
    <TD>
        <% ecmListSummary "\Marketing\News",0,1,"",
            "Title,asc","DateModified",0,"","" %>
    </TD>
</TR>
```

The previous example has the following properties:

- Displays summaries from the \Marketing\News folder.

- Not recursive.
- The summaries will be shown.
- No style was applied to the hyperlinks.
- The results will be displayed in ascending order by title.
- The date modified of each content block will be displayed.
- Unlimited results will be shown.

Here is how the summaries will appear on the web page.

List Summary Attributes

Listed below are all the different attributes and descriptions about them.

Starting Folder

In this attribute, you will need to specify which content folder you will want to get all the summaries from. There are two options for this attribute:

Value	Description
""	By leaving the value blank, all the summaries from the root content folder will be displayed.
"\Folder Path	You can specify a specific folder to display the summaries from by inserting the folder path

Recursive

When you setup the search to be recursive, you are allowing the search to search all the subfolders associated with the starting folder you had specified. You have two options for this attribute:

Value	Description
1	Recursive - summaries in the starting folder's subfolders will also be displayed.
0	Non-recursive - only summaries in the starting folder will be displayed.

Show Summary

The show summary attribute displays or suppresses the summary in the summary list. You have two options for this attribute.

Attribute	Web Page View
0	RC International Ships RC Sportster RC International Hosts RC Conference RC International Announces the RC Cheet
1	RC International Announces the RC Cheetah *(8/27/2002 2:43:01 PM)* RC International, a leading RC racing company, has announced the availability of its new flagship product, the RC Cheetah. RC International Hosts RC Conference *(8/27/2002 2:44:44 PM)* RC International, the fastest growing company in the RC industry, announces plans to host the 3rd annual RC conference in Atlanta, Georgia.

Style Info

In this field, you may enter inline style information for the generated text hyperlinks displayed on the screen.

<table>
<tr><th>Style Info</th><th>Web Page View</th></tr>
<tr><td>“”</td><td>
</td></tr>
<tr><td>"font-family:arial; font-weight:bold; background-color:#cccccc; border:solid blue 1pt; margin:2px; width:100%;"</td><td>
</td></tr>
</table>

Order By

This attribute will sort the summary results by different options. There are five different ways to sort the summaries:

Value	Summaries sorted by
Title	title
DateModified	date modified
Date Created	date created
Startdate	The Start Date assigned to the content block when created.

Value	Summaries sorted by
AuthorFname	author’s first names
AuthorLname	author’s last name

Ascending/Descending

This attribute is an addition to the previous OrderBy attribute. By default, the list of the summaries are descending, meaning they will follow the path of A-B-C, or 1-2-3. When set to ascending, they will order by Z-Y-X or 3-2-1.You will have the option to re arrange these to display either in ascending or descending order.

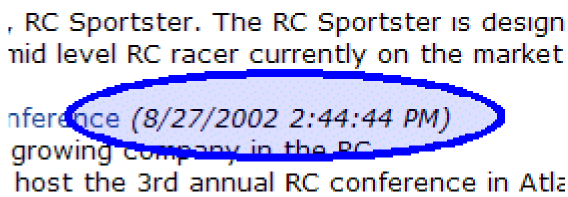
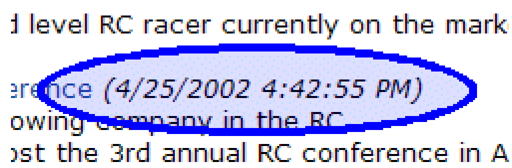
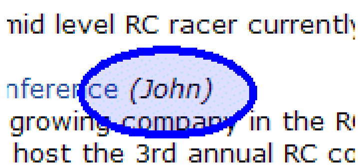
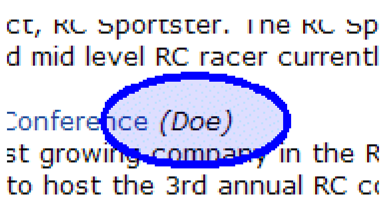
To do this, add the following to the OrderBy attribute:

Value	Description
asc, 1	This will order the Summaries in an ascending order
desc, 0	This will order the Summaries in a descending order. This is the default setting.

By using the ascending/descending option, you will have the option to set the order of content blocks from most recent to oldest, or vice versa. As well as ordering the list by the user’s first names or last names in ascending or descending order.

Show Info

The show info field determines what sort of information is displayed to the right of the hyperlinked title. There are four different options that you may choose from:

Value	Description	Web Page View
DateModified	Displays the date the content was last modified.	
DateCreated	Displays the date when the content was first created.	
AuthorFname	Displays the first name of the user who last edited the content block.	
AuthorLname	Displays the last name of the user who last edited the content block.	

Max Number

This attribute determines how many summaries appear on a page. Enter the number of summaries to be displayed. To display all summaries, enter 0 (zero) and you will display unlimited results.

Spare 1 & 2

These are attribute fields at the end that are currently not used. They are there for future scalability. When you insert a ListSummary tag into your template, you must leave those attributes as "".

Archive List Summary Function

The Archive list summary function displays on a Web page a list of content summaries for archived content blocks. For example, you might have a current news page and an archived news page. Use the List Summary Function to display current news, and this function to display older news stories.

On the Content Block **schedule** screen, the user must set an **End Date** then choose the Archive and Display option to have the content blocks appear via this function.

Shown here is the format of the Archive List Summary function:

```
<% ecmListArchiveSummary    "StartingFolder",
                            Recursive,
                            ShowSummary,
                            "StyleInfo",
                            "OrderBy, Asc/Desc",
                            "ShowInfo",
                            MaxNumber,
                            "Spare1",
                            "Spare2"          %>
```

This function has the same parameters as the List Summary Function. See ”List Summary Function” on page 80 for details.

Single Summary Function

The single summary tag is used to display the summary of one content block in the Ektron CMS300 Web site, instead of a list of all the summaries in a content folder. Seen below is the single summary tag:

```
<% ecmSingleSummary    "ContentID",
                       ShowSummary,
                       "StyleInfo",
                       "ShowInfo",
                       "Spare1"          %>
```

You can look at the single summary tag as just a simpler form of the List summary tag. The format for each of them is almost identical, but the single summary tag does not require as many attributes to be passed.

A list and description of the attributes are shown in this table:

Attribute	Description	Required?
Content ID	This is the ID number of the content block the summary information will come from.	Yes
ShowSummary	Do you want the content summary to be displayed?	Yes
StyleInfo	Inline style information for the generated text hyperlink.	No
ShowInfo	Information that will appear to the right of the hyperlink.	No
Spare1	Not yet implemented	MUST BE ““

Single Summary Example

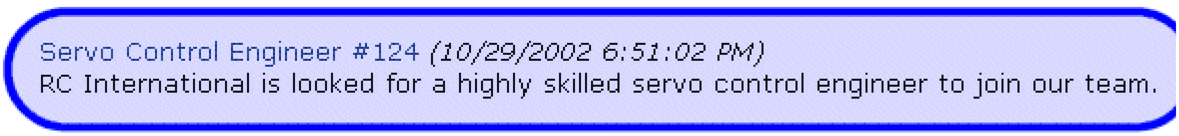
Shown below is an example of the single summary function in an ASP Web page.

```
<TR>
    <TD>
        <%  ecmSingleSummary "14",1,"","DateModified","" %>
    </TD>
</TR>
```

The previous example had the following properties:

- Displays the summary for the content block with an ID=14
- The summary will be shown
- No style was applied to the hyperlinks
- The last date the content was modified will be displayed

Here is how the summary will appear on the web page.



Single Summary Attributes

Listed below are all the different attributes and descriptions about them.

Content ID

In this attribute, you will need to specify which content block you will want the summary to be displayed from.

Show Summary

The show summary attribute will allow or disallow the summary to be displayed in the summary list. You have two options for this attribute:

Value	Web Page View
0	Servo Control Engineer #124
1	Servo Control Engineer #124 RC International is looked for a highly skilled servo control engineer to join our team.

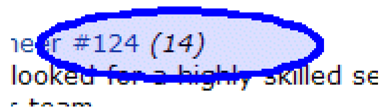
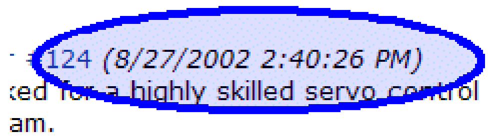
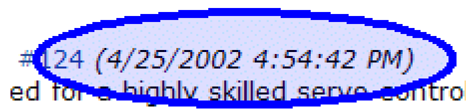
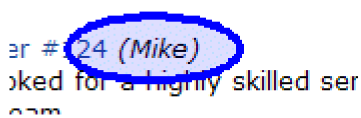
Style Info

In this field, you may enter inline style information for the generated text hyperlinks displayed on the screen.

Style Info	Web Page View
“”	Servo Control Engineer #124 RC International is looked for a highly skilled servo control engineer to join our team.
font-family:arial; font-weight:bold; background-color:#cccccc; border:solid blue 1pt; margin:2px; width:100%;	**Servo Control Engineer #124** RC International is looked for a highly skilled servo control engineer to join our team.

Show Info

The show info field determines what sort of information is displayed to the right of the hyperlinked title. There are five different options that you may choose from:

Value	Displays the...	Web Page View
ID	ID number for the content block.	
DateModified	date the content was last modified.	
DateCreated	date when the content was first created.	
AuthorFname	first name of the user who last edited the content block.	
AuthorLname	last name of the user who last edited the content block	

Spare 1

There is one attribute fields at the end that are currently not used. This is here for future scalability. When you insert a single summary tag into your template, you must leave this attributes as ""

Collection Function

The collection function is used to display the list of links that were created as a collection in the Ektron CMS300 Workarea. The ecmCollection function is highly customizable, allowing you to easily define how the collection data appears on the Web page.

Shown here is the format of the ecmCollection function.

```
<% ecmCollection      "id",
                      "Display Function"     %>
```

The ecmCollection function attributes are explained below.

Attribute	Description
id	The id of the collection that you would like to be displayed is defined here.
displayFunction	Specify a function that is defined in the API and determines how the appearance of the collection data on a Web page. The display function must also be defined in the ecmCollection function.

See Also: The **Ektron CMS300** User Manual Section “Working with Collections” > “Comparison of Collections, Menus, and the List Summary Features”

Collection Examples

The following are examples of the collection function in the Ektron CMS300 sample Web site. One example uses the `ecmNavigation` display function, and the other uses the `ecmTeaser` display function.

The `ecmNavigation` and `ecmTeaser` display functions are sample display functions included with Ektron CMS300. For information about creating your own custom display functions, see ”Creating Custom Display Functions” on page 99.

The ecmNavigation Display Function

The following sample collection function is being used as a navigation menu in the Ektron CMS300 sample Web site.

```
<% ecmCollection 1, "ecmNavigation" %>
```

In this example, the collection with an ID=1 is displayed, and the `ecmNavigation` function defines the appearance of the collection data on a Web page.

Here is how a collection might appear on a Web page.

Below is the source code for the `ecmNavigation` display function.

```
Function ecmNavigation(cInfo)

    dim html, info

    html = "<table border=""0"" cellspacing=""0"" cellpadding=""0""

                width=""100%"">"

    for each info in cInfo

        html = html & "<tr><td>  <a href="""

        html = html & info("ContentLinks")

        html = html & """>"

        html = html & Cstr(info("ContentTitle"))

        html = html & "</a></td></tr><tr><td> </td></tr>"

    next

    html = html & "</table>"

    ecmNavigation = html

end Function
```

As you can see, the `ecmNavigation` function is a simple ASP function that creates a table of the links to the specified collection. It displays the title of the content blocks by using the `info(“ContentTitle”))` building block. See ”Creating Custom Display Functions” on page 99 for more information.

The ecmTeaser Display Function

The following is an example of a collection function being used as a navigation menu in the Ektron CMS300 sample Web site.

```
<% ecmCollection 2, "ecmTeaser" %>
```

In this example, the collection with an ID=2 is displayed, and the `ecmTeaser` function defines the appearance of the collection data on the Web page. `ecmTeaser` displays the title and summary of each content block in the collection.

Here is how the collection might appear on a Web page.

The format of the collection on the Web page depends on the displayFunction that is used. Below is the source code for the display function `ecmTeaser`.

```
Function ecmTeaser(cInfo)

    dim html, info

    html = "<table border=""0"" cellspacing=""0"" cellpadding=""0""

               width=""100%"">"

    for each info in cInfo

        html = html & "<tr><td><a href="""

        html = html & CStr(info("ContentLinks"))

        html = html & """ >"

        html = html & Cstr(info("ContentTitle"))

        html = html & "</a> ("

        html = html & info("DateModified")

        html = html & ")</td></tr><tr><td>"

        html = html & Cstr(info("ContentTeaser"))

        html = html & "</td></tr><tr><td> </td></tr>"

    next

    html = html & "</table>"

    ecmTeaser = html

end Function
```

As you can see, the `ecmTeaser` function is an ASP function that creates a table of links to the specified collection. The `ecmTeaser` function displays the:

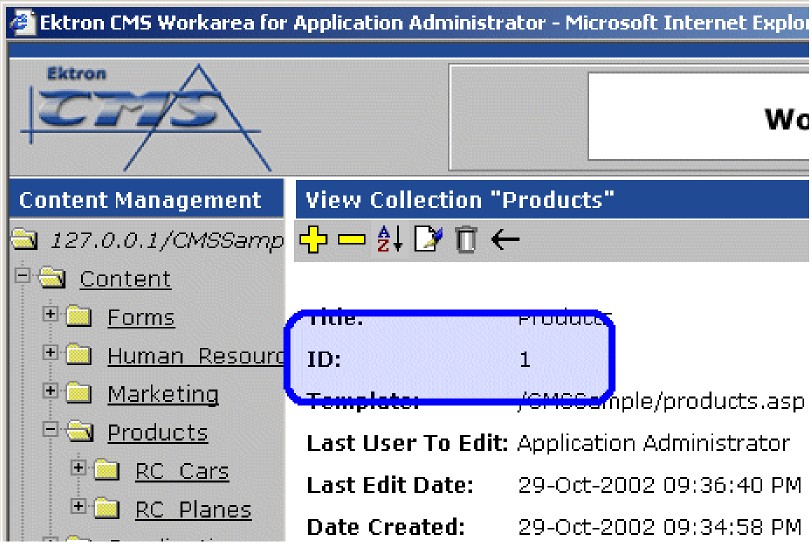
- Content title
- Date modified
- Content block summary

See "Creating Custom Display Functions" on page 99 for more information.

Collection Attributes

ID

The collection ID number is assigned to the collection when it is created.



DisplayFunction

A display function determines which elements of the content blocks in a collection appear on a Web page. Via ASP scripting, you can create display functions or use any of the three included functions. You must define the display function in two places.

- In the ecmCollection function as a case
- In the API file as a function

Creating Custom Display Functions

The following section explains how to create custom display functions for your ecmCollection function.

Function Structure

All display functions use a similar structure:

```
Function yourCollectionDisplayFunction(cInfo)

    dim html, info

    html = html & "<b>List of Content Titles:</b><br>"

    for each info in cInfo

        html = html & info("ContentTitle") & "<br>"

    next

    yourCollectionDisplayFunction = html

end Function
```

Creating a Basic Display Function

Explained below is a how to create a basic display function.

1. In the API file, define the display function.	`Function MyDisplayFunction(cInfo)`
	
	`end Function`

2. Declare any necessary attributes	`Function MyDisplayFunction(cInfo)`
	`  dim html, info`
	
	`end Function`

3. Add any html or text to apply to the collection data as a whole, not individually (for example, add a opening and closing html table tag)	`Function MyDisplayFunction(cInfo)`
	`  dim html, info`
	`  html = "<ul>"`
	
	`  html = html & "</ul>"`
	`end Function`

4. Add a `for` loop to cycle through each collection item, and apply the information defined	<pre>Function MyDisplayFunction(cInfo)
	  dim html, info
	  html = " "
	  for each info in cInfo
	
	  next
	  html = html & " "
	end Function</pre>

5. Inside the `for` loop, create the string to be applied to each item generated by the collection data.
 	
For information about the building blocks, see "Building Blocks" on page 103.
	<pre>Function MyDisplayFunction(cInfo)
	  dim html, info
	  html = " "
	  for each info in cInfo
	
	  next
	  html = html & " "
	end Function</pre>

This places an tag at the beginning and end of each item .	<pre>Function MyDisplayFunction(cInfo)
	  dim html, info
	  html = " "
	  for each info in cInfo
	    html = html & " "
	
	    html = html & " "
	  next
	  html = html & " "
	end Function</pre>

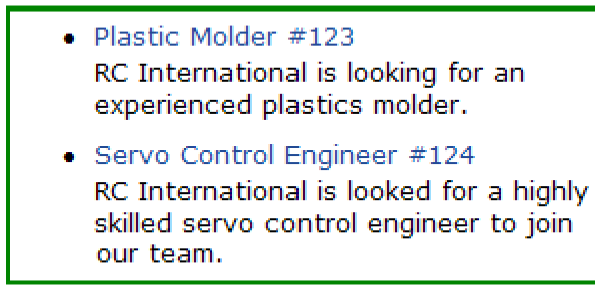
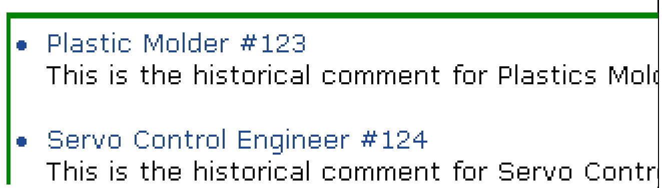
This creates the hyperlink for the collection item. When the collection item is generated on the Web page, the hyperlink sends the visitor to the corresponding content block.	`Function MyDisplayFunction(cInfo)`
	`  dim html, info`
	`  html = "<ul>"`
	`  for each info in cInfo`
	`    html = html & "<li>"`
	`    html = html & "<a href=" & info("ContentLinks") & ">" & Cstr(info("ContentTitle")) & "</a>"`
	
	`    html = html & "</li>"`
	`  next`
	`  html = html & "</ul>"`
	`end Function`

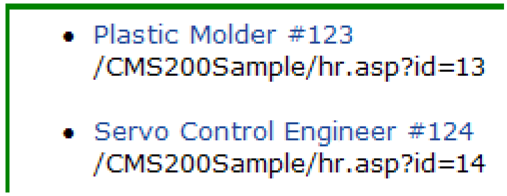
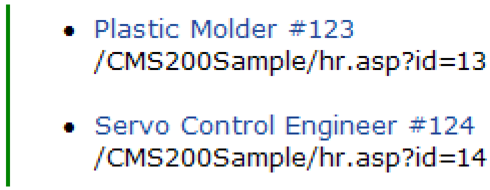
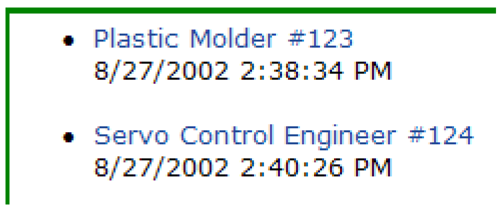
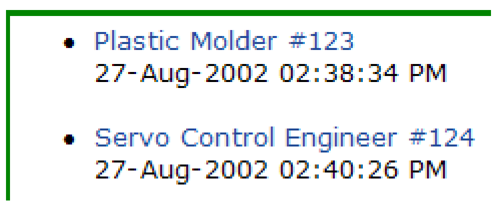
This displays the summary of the content block in the collection.	`Function MyDisplayFunction(cInfo)`
	`  dim html, info`
	`  html = "<ul>"`
	`  for each info in cInfo`
	`    html = html & "<li>"`
	`    html = html & "<a href=" & info("ContentLinks") & ">" & Cstr(info("ContentTitle")) & "</a>"`
	`    html = html & Cstr(info("ContentTeaser"))`
	`    html = html & "</li>"`
	`  next`
	`  html = html & "</ul>"`
	`end Function`

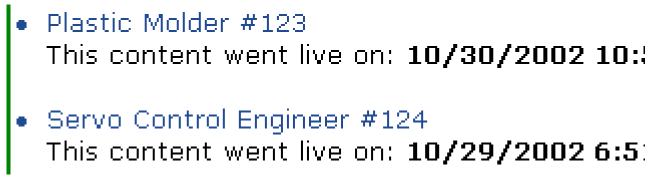
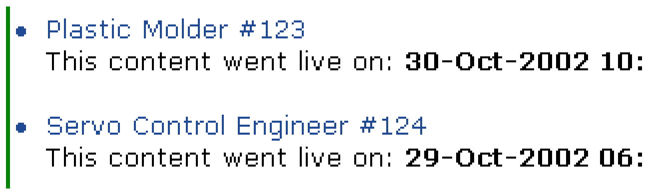
6. Add this line at the end of the function to return the HTML to be output to the ecmCollection function.	`Function MyDisplayFunction(cInfo)`
	`  dim html, info`
	`  html = "<ul>"`
	`  for each info in cInfo`
	`    html = html & "<li>"`
	`    html = html & "<a href=" & info("ContentLinks") & ">" & Cstr(info("ContentTitle")) & "</a>"`
	`    html = html & Cstr(info("ContentTeaser"))`
	`    html = html & "</li>"`
	`  next`
	`  html = html & "</ul>"`
	`  MyDisplayFunction = html`
	`end Function`

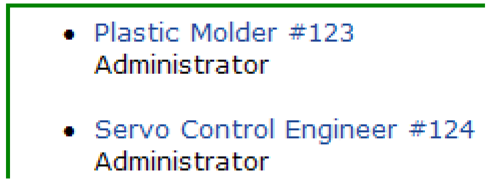
Building Blocks

The sample display function created above uses only two building blocks. This section explains all building block you can use within a custom display function.

<table>
<tr><th>Name</th><th>Description</th><th>Web Page View</th></tr>
<tr><td><code>info("ContentTeaser")</code></td><td>Displays content block summary</td><td>
</td></tr>
<tr><td><code>info("Comment")</code></td><td>Displays content block comment</td><td>
</td></tr>
<tr><td><code>info("ContentID")</code></td><td>Displays content block ID number</td><td>
</td></tr>
</table>

Name	Description	Web Page View
`info("ContentLinks")`	Displays content block path relative to your site’s root	
`info("ContentTitle")`	Displays content block title.	
`info("DateModified")`	Displays date and time content block was last modified.	
`info("DisplayDateModified")`	Displays date and time content block was last modified using the date/ time format specified in Setup.asp.	
`info("EndDate")`	End date and time for the content block	

Name	Description	Web Page View
`info("DisplayEndDate")`	Displays end date and time for content block using date/time format specified in Setup.asp.	
`info("GoLive")`	Start date and time for content block	
`info("DisplayGoLive")`	Displays start date and time for the content block using the date/ time format specified in Setup.asp.	
`info("EditorFname")`	First name of user who last edited content block.	

Name	Description	Web Page View
`info("EditorLname")`	Last name of user who last edited content block.	

Defining Display Functions

After you create a display function in the API, define it in the ecmCollection function as a new case.To do so, follow these steps.

1. Locate the ecmCollection function in the API file.
2. Find the line that contains `Select Case displayFunction`.
3. Under that line, insert the following, replacing `MyDisplayFunction` with the function you created.

```
Case "MyDisplayFunction"

    html = MyDisplayFunction(cInfo)
```

4. Save and close the file.

With the display function defined, and added to the ecmCollection function as a new case, you are ready to use the display function to define how collections look.

Using a Custom Display Function

To use a custom display function, follow these steps.

1. Add the ecmCollection function to a template.
2. Specify the ID of the collection to be displayed.
3. Add the display function to define the collection’s appearance.

```
<% ecmCollection “2”, “MyDisplayFunction” %>
```

When displayed on the Web site, the collection look like the following.

- Plastic Molder #123

  RC International is looking for an experienced plastics molder.

- Servo Control Engineer #124

  RC International is looked for a highly skilled servo control engineer to join our team.

Random Content

The random content function is used to randomly display the content of a content block that belongs in a specified collection.

Displayed here is the format for the random content function

```
<% ShowRandomContent “id”, XSLTId %>
```

Where the “**id**” represents the ID number of the collection the content blocks, that will be displayed, belong to.

And “**XSLTId**” is the ID number of the display XSLT that will be applied to the content blocks in the collections.

Random Summary

Similar to the random content function, the random summary function randomly displays a content block summary that belongs in a specified collection.

Here is the format for the random content function

```
<% ShowRandomSummary “id” %>
```

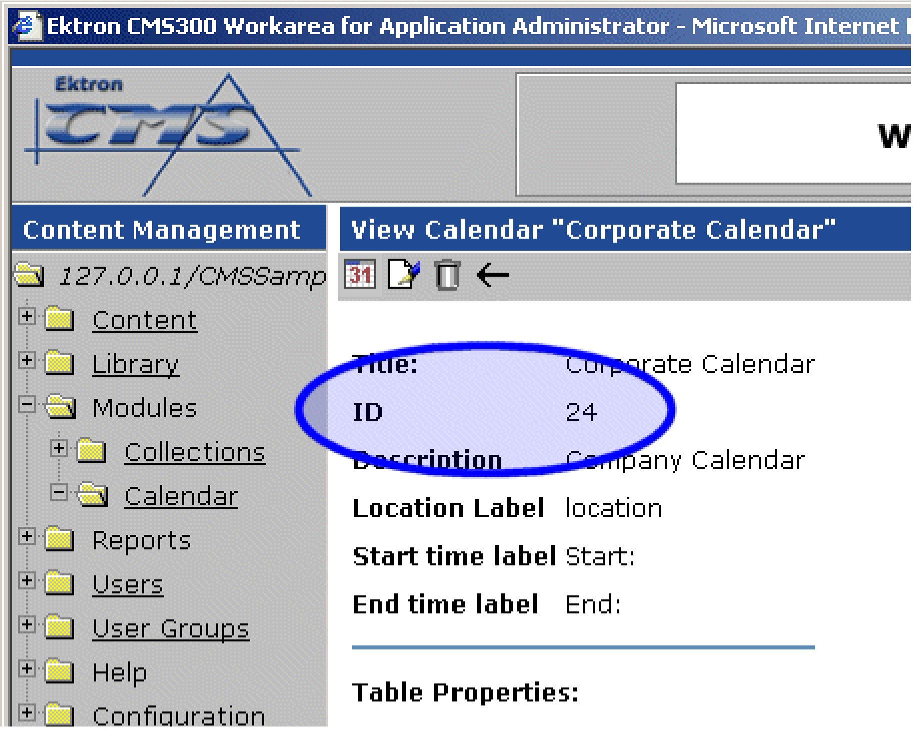
The “id” represents ID number of the collection to which the content blocks belong.

Event Calendar Function

The ecmEvtCalendar function displays an event calendar that has been created in Ektron CMS300. Here is the format for the event calendar custom function.

```
<% ecmEvtCalendar "id" %>
```

The **"id"** argument represents the ID number of the event calendar in the Workarea.



Event Calendar Style Sheet

Before you insert an event Calendar into your Ektron CMS300 template, you should make a reference to the style sheet,

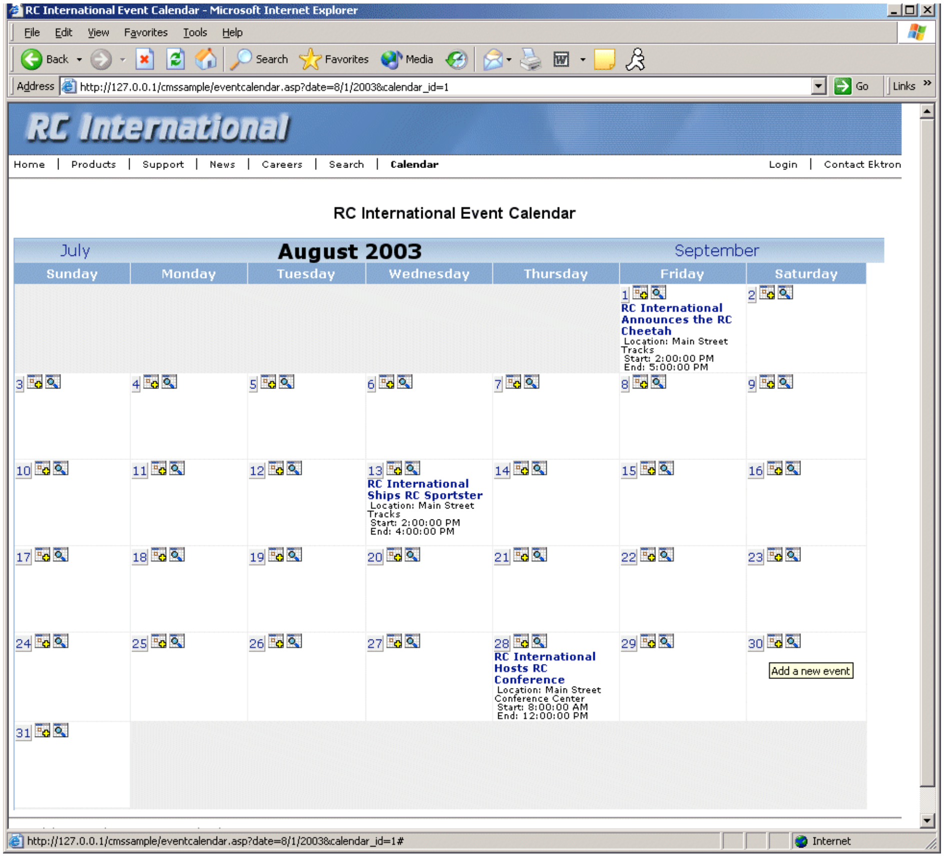
`\CMS300Sample\ekCalendar.css`, in your template. This style sheet contains styles that define the Calendar.

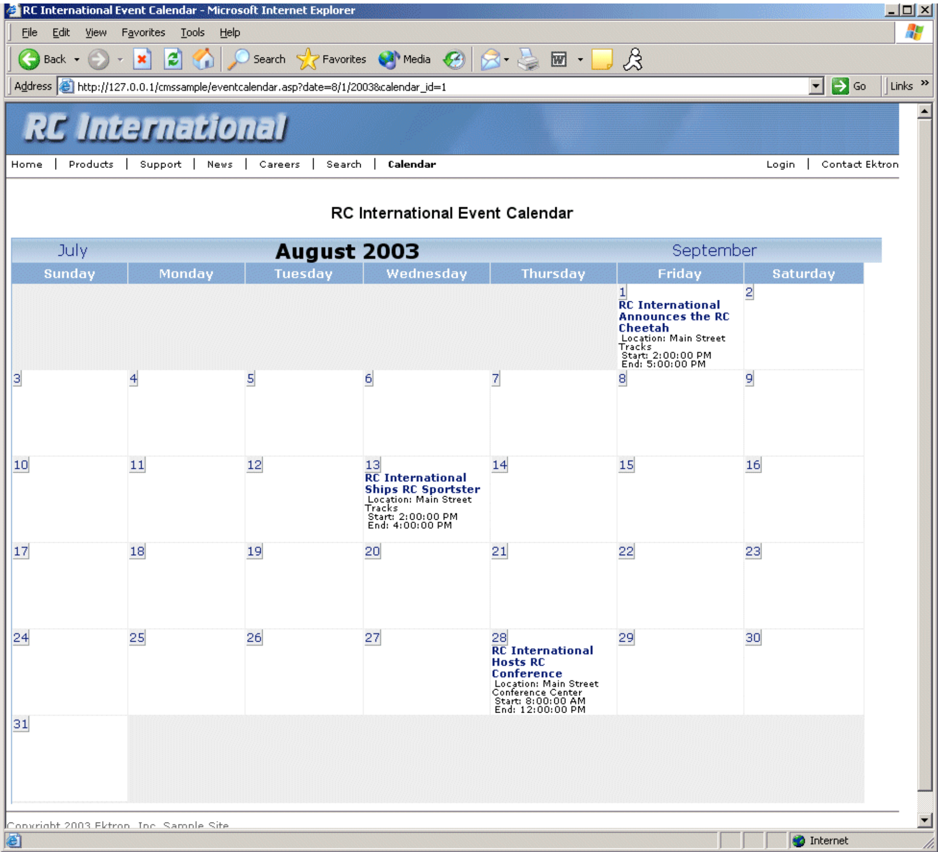
Event Calendar Sample

Here is an example of an event Calendar in an Ektron CMS300 template.

```
<tr>

    <td>

        <% ecmEvtCalendar "1" %>

    </td>

</tr>
```

When this code is displayed in a browser, the Calendar with an ID-1 is displayed. Here is the calendar displayed on a Web Page

If...	Calendar Display
Logged in	

If...	Calendar Display
Logged Out	

As you can see, when you are logged into the Web site, you can add and view Calendar events. When logged out, you can only view calendar events.

Abbreviating Day Names

To further customize the event calendar function, you may specify in ApplicationAPI.asp abbreviated day names (for example, Mon instead of Monday, Wed instead of Wednesday).

Here is an example of the ecmEvtCalendar using abbreviated day names.

Configuring ApplicationAPI.asp

To configure the ecmEvtCalendar function to display abbreviated day names, perform the following steps.

NOTE Before editing ApplicationAPI.asp, Ektron recommends copying it, referencing it in site_scripts_path.asp, and making changes to the new file. See ”Custom API” on page 129 for additional information.

1. Open the file that contains the ecmEvtCalendar function you want to edit.
2. Locate the ecmEvtCalendar function in the file.

```
Function ecmEvtCalendar(byVal cID)
    'check to see if we are logged in if we need some script
    if request.cookies("ecm")("user_id") <> "" then
        if (PopUpLoaded = 0) then
            Response.Write(ecmGetPopupScript())
            PopUpLoaded = 1
        end if
    end if
    dim CalendarObj,Arg,CalView
    Set CalendarObj = Server.CreateObject(MODULE_OBJ)
    Set Arg = Server.CreateObject("Scripting.Dictionary")
    if((request.QueryString("ekM") <> "") And (request.QueryString("ekY") <> "")
        Arg.Add "Month" , request.QueryString("ekM")
        Arg.Add "Year", request.QueryString("ekY")
    else
        Arg.Add "Month" , ""
        Arg.Add "Year", ""
    end if
    Arg.Add "ImagePath",AppImgPath
    Arg.Add "AppPath",AppPath
    Arg.Add "CallerID",request.cookies("ecm")("user_id")
    Arg.Add "Site",request.cookies("ecm")("site_id")
    Arg.Add "CalendarID",cID
    Arg.Add "WorkSpace",""
    Arg.Add "QueryString",Request.ServerVariables("Query_String")
    Arg.Add "URLfile",Request.ServerVariables("URL")
    Arg.Add "PathInfo",Request.ServerVariables("path_info")
```

3. Locate the line that reads
`Arg.Add "AbbreviateDayNames", true”`
4. On that line, change **false** to **true**. This causes the ecmEvtCalendar to use abbreviated day names.
5. Save and close the file.
6. View the Web page that contains the updated function.

Form Function

The ecmFormBlock function displays an HTML form content block. For more information about HTML forms, see the **Ektron CMS300** Administrator manual chapter “Working with HTML Forms.”

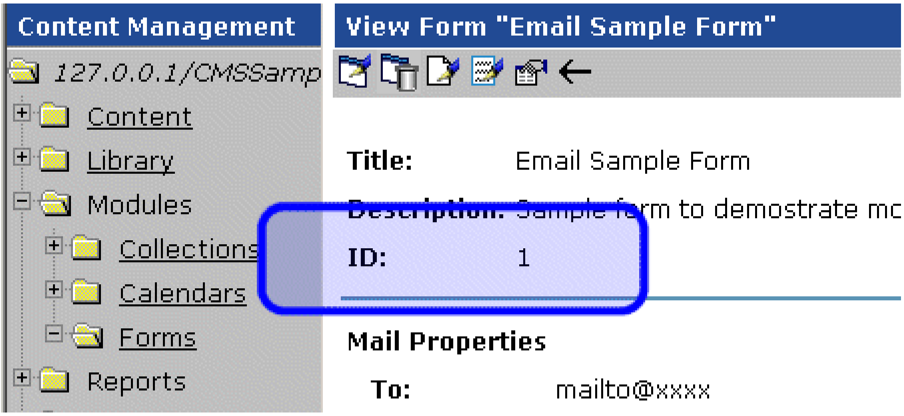
IMPORTANT! If you create a template for an existing form content block, you must manually change its quicklink to point to the new template. This change does not occur automatically. This procedure is described in the Ektron CMS300 Administrator manual chapter “Managing Library Assets”, section “Updating Default Template for Multiple Quicklinks.”

Here is the format for the form custom function.

```
<% ecmFormBlock “id” %>
```

NOTE As an alternative, you can use the multipurpose function, which can display either a content block or a content block associated with a form. For more information, see ”MultiPurpose Function” on page 118.

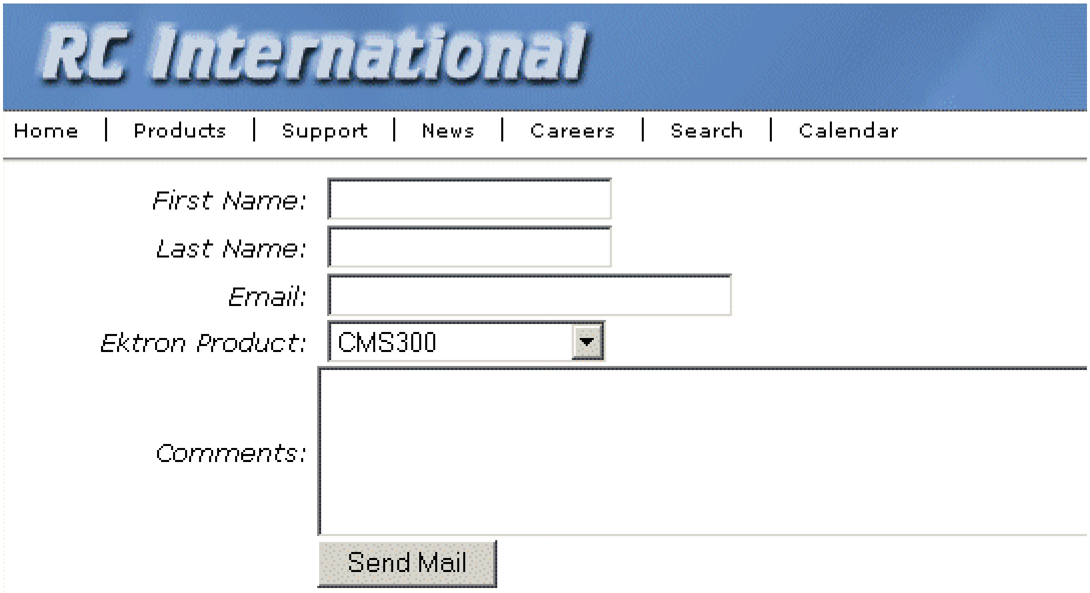
The “id” argument represents the form’s ID number, visible when viewing the form from the View Form screen.



Here is an example of a form content block in an Ektron CMS300 template.

```
<tr>
    <td>
        <% ecmFormBlock "1" %>
    </td>
</tr>
```

When this code is read by a browser, the following is displayed.



When a visitor to your site submits a form, the form uses the form information to process the data.

MultiPurpose Function

The ecmMultiPurpose function displays either a content block or an content block associated with a form. As a result, you can use one template to display both types of content block.

Here is the format for the Multipurpose function:

```
<% ecmMultiPurpose “id” %>
```

To pass in a standard content block, pass the id value in the url parameter, as illustrated below.

```
http://localhost/cms300sample/index.asp?id=2
```

To pass in a Form content block, pass the ekfrm value in the url parameter, as illustrated below.

```
http://localhost/cms300sample/index.asp?ekfrm=2
```

NOTE For more information about passing the id value as a url parameter, see ”Dynamic Content Block” on page 53.

If the id value or ekfrm value does not exist, a blank template appears.

If the url parameter is not passed in or recognized, the function calls ecmContentBlock and passes the DefaultID value as the id argument. If the DefaultID value is zero (0), ecmContentBlock is not called.

Metadata Function

The metadata tag is used to display the metadata for one or more content blocks in the Ektron CMS300 Web site. This custom tag lets you generate the list of metadata edited by the authors and insert it in the source of the Web page. Below is an example of the metadata custom tag.

```
<% ecmMetaData "ItemList","Spare1" %>
```

The attributes are described below.

Attribute	Description	Required?
ItemList	List of the content block ID numbers, and exclusions *See Also:* ”Creating an Item List” on page 119 and ”Item List” on page 124	No
Spare1	Not yet implemented *See Also:* ”Spare 1” on page 126	MUST BE ““

Creating an Item List

The Item List for the ecmMetadata tag has the following format.

```
“[content block id; Exclusion list]...[content block id; Exclusion list]”
```

Attribute	Description	Required?
[(left bracket)	Delineates the beginning of a content block id/exclusion list pair	Yes
Content Block ID	The ID of the content block whose metadata you want to retrieve	Yes

Attribute	Description	Required?
; (semicolon)	Separator: Separates content block id from the exclusion list	No (**Yes** if including an **exclusion** list)
Exclusion List	A comma delimited list of metadata you do not want to be retrieved for this content block.	No
] (right bracket)	Delineates the end of a content block id/exclusion list pair	Yes

ecmMetadata Example

For this example, our administrator has defined the following metadata types for Ektron CMS300.

Name	Style	Type	Editable	Required	Remove Dups	Case Sensitive
Title	n/a	HTML	Yes	Yes	No	n/a
Keywords	Name	Meta	Yes	Yes	Yes	No
Content-Type	http-equiv	Meta	No	Yes	Yes	n/a

Our example Web page has two content blocks displayed.

- content block 1, the company's home page introduction text
- content block 2, a sidebar containing the lead story for the week

The metadata entered by your content editors for these two content blocks are:

Content Block 1:
Title – "Welcome to Our Home Page"
Keywords – "Home; page; company; Welcome"
Content-Type -- "text/html; charset=iso-8859-1"

Content Block 2:
Title – “Announcing our New Product!”
Keywords – “Announce; company; product; widget”
Content-Type -- “text/html; charset=iso-8859-1“

To include both content blocks metadata in a Web page, the ecmMetadata call looks like this.

```
<html>

    <head>

        <% ecmMetadata “[1][2;Title,Content-Type]”, “” %>

        (rest of head)

    </head>

    <body>

        (rest of web page document)

    </body>

</html>
```

In the above example, the ecmMetadata call is contained in the `<head>` of the HTML document (since all HTML metadata is required to exist there). When the Web page is viewed, the Web page source contains the following information:

```
<html>

    <head>

        <Title>Welcome to Our Home Page</Title>

        <meta name=”Keywords” content= Home; page; company; Welcome; Announce;

        product; widget”>

        <meta http-equiv=”Content-Type” content=”text/html; charset=iso-8859-1”>

        (rest of head)

    </head>

    <body>

        (rest of web page document)
```

```
    </body>

</html>
```

The ecmMetadata constructed three HTML tags based on the administrator defined parameters and the ecmMetadata call.

The metadata tag was constructed in the page because:

- **[1]** - Displays all metadata content for the content block ID=1. In this example, the title, keywords, and content-type were defined, so they were displayed as:

```
<Title>Welcome to Our Home Page</Title>

    <meta name="Keywords" content= Home; page; company; Welcome;

        Announce; product; widget">

    <meta http-equiv="Content-Type" content="text/html;

        charset=iso-8859-1">
```

- **[2;title,content-type]** - Displays all metadata content for content block ID=2, *except* for its title and content-type definitions.

```
<Title>Welcome to Our Home Page</Title>

    <meta name="Keywords" content= Home; page; company; Welcome;

        Announce;  product; widget">

    <meta http-equiv="Content-Type" content="text/html;

        charset=iso-8859-1">
```

The next section provides more examples.

More ecmMetadata Examples

Shown below is an example of the metadata function in an ASP Web page.

```
<TR>

    <TD>

        <%  ecmMetaData "[1][2;title][14;keywords]","" %>
```

```
        </TD>

    </TR>
```

The previous example has the following properties:

- All metadata for content block ID=1 is inserted into the page
- All metadata for the content block ID=2 except for its title is inserted into the page
- All metadata for the content block ID=14 except for its keywords is inserted into the page

Using a Dynamic Metadata Tag

You can use a metadata tag in a template to define the metadata for a specific content block. However, you can also use a dynamic metadata tag combined with a content block tag to show the metadata for all content blocks on a Web page.

This allows you to create a template and not have to keep updating the tag by adding the new ID and exclusion list. Shown below is the sample code for this.

```
<!-- #include virtual="/CMS300sample/CMS300scripts/ektronAPI.asp" -->

<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">

<html>

    <head>

        <% Dim id

            if (request.QueryString("id")<> "") then

                id = request.QueryString("id")

            else

                id = 1

            end if

                ecmMetadata "[" & id & "]", ""

        %>

    </head>

    <body>
```

```
        <% ecmContentBlock(request.QueryString("id")) %>
    </body>
</html>
```

In this example, if you specify a content block in the URL and the page is displayed, the metadata takes that ID and displays the proper metadata in the source for the content block.

ecmMetadata Attributes

Below are the attributes and their descriptions.

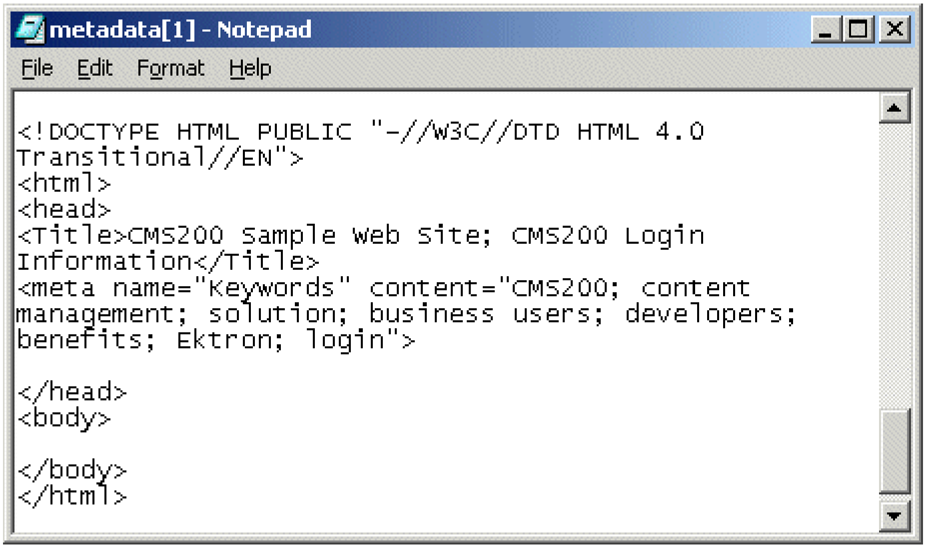
Item List

In this attribute of the ecmMetadata tag, you need to specify two values.

Value	Specifies
ID	The content block ID whose metadata will appear
Exclusion List	The metadata to be excluded. *See Also:* ”Creating an Item List” on page 119

Some examples might be:

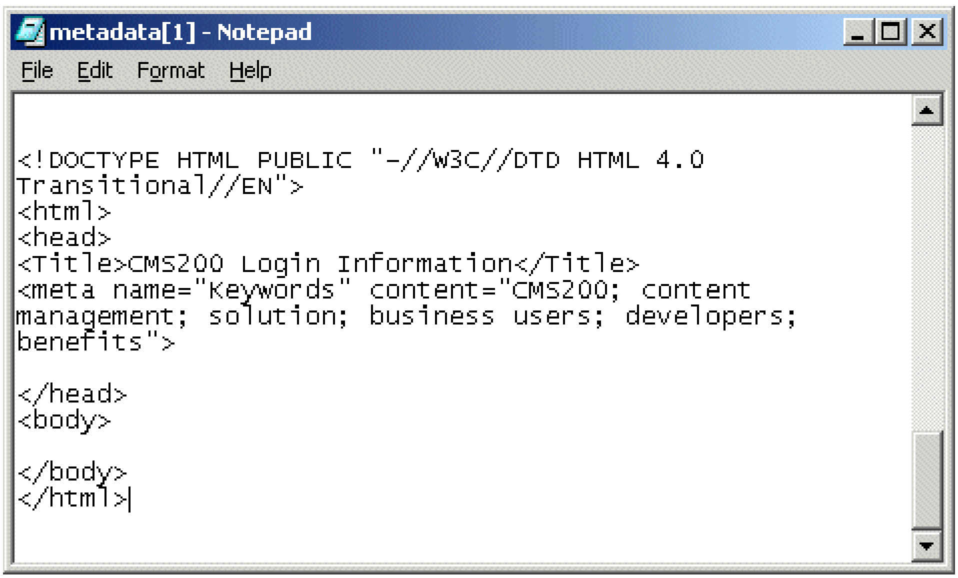
```
<%  ecmMetaData "[1][2]","" %>
```




```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0
Transitional//EN">
<html>
<head>
<Title>CMS200 Sample Web Site; CMS200 Login
Information</Title>
<meta name="Keywords" content="CMS200; content
management; solution; business users; developers;
benefits; Ektron; login">

</head>
<body>

</body>
</html>
```

In this example, all metadata from content block ID=1 and 2 is displayed.

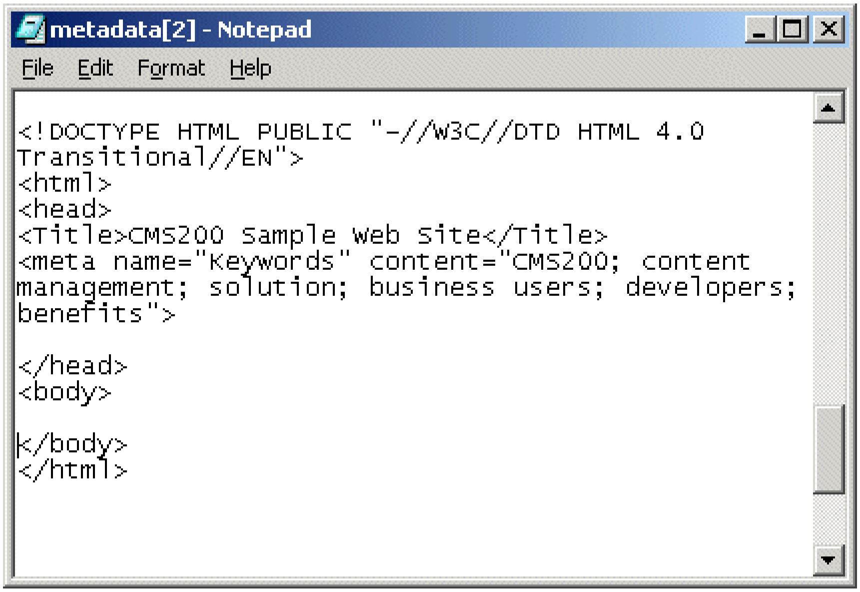
```
<%  ecmMetaData "[1;title][2;keywords]","" %>
```




```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0
Transitional//EN">
<html>
<head>
<Title>CMS200 Login Information</Title>
<meta name="Keywords" content="CMS200; content
management; solution; business users; developers;
benefits">

</head>
<body>

</body>
</html>
```

In this example, all the metadata from content block ID=1 will be displayed *except* for the title. Also, all the metadata for content block ID=2 is displayed *except* its keywords.

```
<%  ecmMetaData "[1][2;title,keywords]","" %>
```



In this example, all metadata from content block ID=1 is displayed, and all metadata from content block ID=2 is displayed *except* its title and keywords.

Spare 1

One attribute field at the end is currently not used. It is for future scalability. When you insert a single metadata tag into a template, you must leave this attributes as ““.

Show Site Language Function

This function lets a visitor to your Web site select a language in which to view the site. Here is what the function looks like when published on a Web page.

It lists all languages selected on the **Settings > Configuration > Language settings** screen. (For more information, see the “Multi-Language Support “chapter of the **Ektron CMS300** Administrator manual.)

Below is an example of the Show Site Language custom tag.

```
<% ecmShowSiteLanguage(FieldName)%>
```

You can place this function in any location of any page on your site. By default, it appears in the lower right corner of the home page.

NOTE This function only works with Asp and ASP.Net.

The attribute is described in this table.

Attribute	Description

FieldName	An optional argument. You can leave it blank and allow the drop-down list to be populated by the available languages for your Web site. For example:
	`<%=ecmShowSiteLanguage('')%>`
	Or you can pass in an argument such as:
	`<%=ecmShowSiteLanguage('mysitelanguage')%>`

Custom API

Formatting for custom ASP functions used in Ektron CMS300 is defined in the ApplicationAPI.asp file. As a developer, you may update this file to enhance the appearance of the custom functions on your Web site.

However, Ektron recommends creating a copy of the ApplicationAPI.asp file and renaming it, for example MyCustomAPI.asp. Then, include that file when creating Ektron CMS300 templates. This renaming ensures that your custom API is not overwritten when you upgrade your version of Ektron CMS300.

Menus

Ektron CMS300's Menu feature lets users create and maintain a dropdown menu system for your Web site. The Menu feature lets you display menu options that link to content blocks, library assets, external hyperlinks and submenus.

To learn more about menus, please refer to the "Menu Feature" chapter of the **Ektron CMS300** User Manual.

Additional Documentation in Ektron Knowledge Base

This chapter explains how to implement standard menus that ship with **Ektron CMS300**. Ektron's Web site also provides Knowledge Base articles that explain how to extend the standard menu features. Here are links to these articles.

Article link	Article summary
http://www.ektron.com/developers/cms_downloads.cfm?id=2065	An API function to output menus in an HTML format identical to CSS menus in CMS 400. You can use the same style sheets to develop dropdowns. For **Ektron CMS300**version 4.7
http://www.ektron.com/developers/cms_downloads.cfm?id=2066	Same as above for **Ektron CMS300**version 4.5
http://www.ektron.com/developers/cms_downloads.cfm?id=1712	Creates a bulleted list from the menu so that the code is easier to read.
http://www.ektron.com/developers/cms_downloads.cfm?id=2081	A technique for generating left-hand navigation and center column content on a Web site, based on a CMS menu.

Displaying a Menu on a Web Page

GenerateMenu and DropMenu

IMPORTANT! The menu functions described below are only one example of how to implement menus. The scripts reside in the Application API file. You can implement your own menu system using JavaScript.

Use the `GenerateNextGenMenu` and `DropNextGenMenu` custom functions to display a DHTML menu on a Web page. Place `GenerateNextGenMenu` once on the page to provide an infrastructure for `DropNextGenMenu`. Then, place `DropNextGenMenu` as needed to implement individual menus.

Follow these steps to display a menu on a Web template.

1. Place the following code directly after the page's `<body>` tag.

```
<%=(ecmDHTML_GenerateNextGenMenu("menu id number"))%>
```

   For example:

```
<%=(ecmDHTML_GenerateNextGenMenu("1"))%>
```

   To display more than one menu, separate each id number with a comma. For example:

```
<%=(ecmDHTML_GenerateNextGenMenu("1,2,3"))%>
```

2. If the user clicks *text* to display the menu, place the following code within the template file where the text would appear.

```
<%= ecmDHTML_DropNextGenMenu(menu id number,"text user clicks to display menu")%>
```

   For example:

```
<%= ecmDHTML_DropNextGenMenu(1,"Products")%>
```

   If the user clicks *a graphic* to invoke the menu, use this syntax:

```
<%= ecmDHTML_DropNextGenMenu(menu id number,'<img src=graphic file name>')%>
```

For example:

```
<%= ecmDHTML_DropNextGenMenu(1,'<img src=mymenugraphic.jpg>')%>
```

Displaying Menus in a Multi-language System

If your Web site supports multiple languages, and the user selects a language before viewing the menu, if an edition of the menu is available in that language, it appears. If not, nothing appears.

For more information, see the **Ektron CMS300** Administrator Manual section “Multi-Language Support “> “Working with Multi-Language Content” > “Working with Menus in a Multi-Language System.”

Customizing the Menu’s Appearance

You can customize a menu’s appearance, such as the font style, color, and size. So, you have the flexibility to coordinate a menu with the design your Web site.

There are two ways to customize a menu in **Ektron CMS300**. You can change:

- ”ek_Menu.js” on page 132
- ”Application API” on page 135

While you can update either file, realize that

- ek_Menu.js has more customizable attributes
- Changes made in ApplicationAPI file override values set in ek_Menus.js

ek_Menu.js

You can change the look and feel of a menu by changing the ek_menu.js file. If you used the default settings when installing **Ektron CMS300**, this file is in `webroot/CMS300Sample/CMS300Scripts/Java/`.

Use the following table to help you change menu attributes.

Attribute name	Specifies the	Default value
fontSize	Size of menu text	14
fontWeight	Thickness of menu text You can set FontWeight by name (`Bold` or `Plain`) or value. Values range from 0 -1000.	Plain
fontFamily	Font style of menu text *See Also:* "FontFamily" on page 134	arial,helvetica,espy, sans-serif
fontColor	Color of menu text Note: When changing the color, you can specify the color name or code.	#000000
fontColorHiLite	Color of text when menu item is highlighted	#ffffff
bgColor	Color of border between menu items	#555555
menuBorder	Width (in pixels) of border around main menu	1
menuItemBorder	Width (in pixels) of border around each menu item	1
menuItemBgColor	Background color of menu items	#6699ff
menuLiteBgColor	Color of main menu border highlight *See Also:* "menuLiteBgColor" on page 134	#ffffff
menuBorderBgColor	Color of the main menu border	#6699ff
menuHiLiteBgColor	Background color of highlighted menu item	#000084
menuContainerBgColor	Background color of the *container* Note: The container is like a <div> tag that displays the menu. When you set the container color, it appears at the top and left side of the menu frame only.	#6699ff

Attribute name	Specifies the	Default value
childMenuIcon	Path to the submenu icon (the image used to indicate that a submenu is available from this menu item).  To display a different image, either provide an external path to it or upload the image to Ektron CMS300 then provide a local path.	`./cms300scripts/images/application/arrows.gif`
childMenuIconHiLite	The path to the icon that appears when you hover the mouse over a menu item that leads to a submenu. To display a different image, either provide an external path to it or upload the image to Ektron CMS300 then provide a local path.	`./cms300scripts/images/application/arrows2.gif`

FontFamily

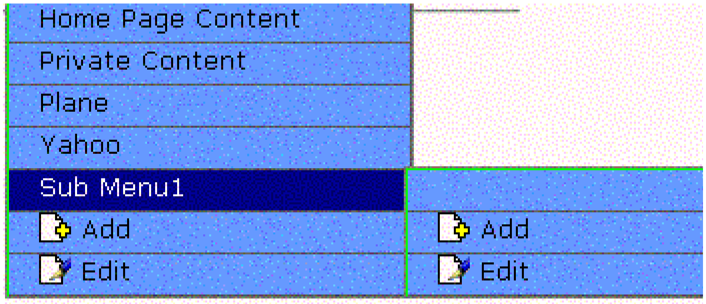
Use the fontFamily attribute to specify the menu font. It must be supported by the browser.

You can assign to this property several, comma-separated values.

NOTE To display a font family other than the browser default, specify only the font name and no other comma-separated values. If you specify more than one value for the font family, Ektron CMS300 uses the default IE settings.

menuLiteBgColor

Example



Application API

You can also customize a menu by changing the ApplicationAPI file. Begin by navigating to ApplicationAPI file. If you used the default settings during installation, it is installed to *`webroot/`* `CMS300Sample/CMS300Scripts/`.

Two sections within ApplicationAPI let you customize menus.

- ”SubMenu” on page 135
- ”Main Menu” on page 136

Changes made to ApplicationAPI are reflected in the ek_menu.js file.

SubMenu

Within ApplicationAPI, scroll to the section beginning with `Function AddSubMenu`. Under this function is code that changes the “look and feel” of a submenu.

```
'html = html & "Menu" & Menu_ID & ".menuItemBgColor = 'red';" & VbCrLf

'html = html & "Menu" & Menu_ID & ".menuLiteBgColor = '#6699ff';" & VbCrLf

'html = html & "Menu" & Menu_ID & ".menuBorderBgColor = 'red';" & VbCrLf

'html = html & "Menu" & Menu_ID & ".menuHiliteBgColor = '#6699ff';" & VbCrLf

'html = html & "Menu" & Menu_ID & ".menuContainerBgColor = 'red';" & VbCrLf
```

Uncomment this code and modify the submenu attributes. For example, to change the `menuItembgColor` from red to lime green, change the code like this.

```
html = html & "Menu" & Menu_ID & ".menuItemBgColor = 'limegreen';" & VbCrLf

            or

html = html & "Menu" & Menu_ID & ".menuItemBgColor = '#00FF00';" & VbCrLf
```

For a description of menu attributes, see "ek_Menu.js" on page 132.

Main Menu

Within ApplicationAPI, scroll to the section beginning with `Function ecmDHTML_GenerateMenu`. Under this function is code that changes the "look and feel" of a submenu.

```
'html = html & "Menu" & menu_id & ".menuItemBgColor = 'white';" & VbCrLf

'html = html & "Menu" & menu_id & ".menuLiteBgColor = '#6699ff';" & VbCrLf

'html = html & "Menu" & menu_id & ".menuBorderBgColor = 'white';" & VbCrLf

'html = html & "Menu" & menu_id & ".menuHiliteBgColor = '#6699ff';" & VbCrLf

'html = html & "Menu" & menu_id & ".menuContainerBgColor = 'white';" & VbCrLf
```

Uncomment this code and modify the menu attributes. For a description of menu attributes, see "ek_Menu.js" on page 132.

Custom ASP.Net Functions

Ektron CMS300 maintains and displays content through the use of custom ASPX functions and ComObjects. To use the custom functions, you must include the following code in every template:

```
<!-- #include file="site_scripts_path.aspx" -->
```

This include command references the file with the custom Ektron functions, which allows the page to function properly. It *must* appear at the top of the template.

To customize Ektron CMS300, become familiar with these tags. Since these functions match the ASP functions, they are documented in the ASP chapter.

Tag	Description	More Information
Add Content	Programmatically adds content block(s) to Ektron CMS300	"Add Content" on page 58
Collection	Displays the links generated by collections.	"Collection Function" on page 94
Content Block	Displays and manages a content block.	"Content Block Function" on page 49
Event Calendar	Displays an event calendar	"Event Calendar Function" on page 110
Form	Displays a content block associated with a form.	"Form Function" on page 116
List Summary	Displays the list of the content block summaries.	"List Summary Function" on page 80
Archive ListSummary	Displays summaries of archived content blocks.	"Archive List Summary Function" on page 88

Tag	Description	More Information
Login	Paints the login or logout button which allows the user to login and use the Ektron CMS300 application.	"Login Function" on page 46
Metadata	Displays the metadata in the source of the Web page the content is displayed on.	"Metadata Function" on page 119
MultiPurpose	Can display either a content block or a form.	"MultiPurpose Function" on page 118
Random Content	Randomly displays the body content of a collection item.	"Random Content" on page 108
Random Summary	Randomly displays the summary content of a collection item.	"Random Summary" on page 109
Search	Inserts a text box on the template with a search button. A user can enter text and click the search button to search the Web site.	"Search Function" on page 64
Search Display	Creates area where search results display.	"Search Display Function" on page 74
Single Summary	Displays the summary for a single content block.	"Single Summary Function" on page 89
Show Site Language Function	Lets user select language in which to view Web site.	"Show Site Language Function" on page 127

Custom API

Formatting for the custom functions is defined in the ApplicationAPI.aspx file. You may customize this file to enhance your Web site's appearance. However, Ektron recommends

- creating a copy of the file
- giving the copy an arbitrary name, such as MyCustomAPI.aspx
- including that file when creating Ektron CMS300 templates.

This ensures that your custom API is not overwritten when you upgrade Ektron CMS300.

Custom ColdFusion Functions

Ektron CMS300 maintains and display content through the use of custom Ektron ColdFusion functions and ComObjects.

To customize you Ektron CMS300 application, you will need to be familiar with these tags

Tag	Description	More Information
Collection	Displays the links generated by collections.	”Collection Function” on page 147
Content Block	Displays and manages a content block.	”Content Block Function” on page 141
Event Calendar	Displays the calendar defined in the workarea.	”Event Calendar Function” on page 153
Form	Displays an HTML form content block.	”Form Function” on page 154
List Summary	Displays the list of the content block summaries.	”List Summary Function” on page 145
Archive ListSummary	Displays a summaries of archived content blocks.	”Archive List Summary Function” on page 146
Login	Paints the login or logout button which allows the user to login and use the Ektron CMS300 application.	”Login Function” on page 141
Metadata	Displays the metadata in the source of the Web page the content is displayed on.	”Metadata Function” on page 156
MultiPurpose	Can display either a content block or a form	”MultiPurpose Function” on page 155
Random Content	Randomly displays the body content of a collection item.	”Random Content” on page 143

Tag	Description	More Information
Random Summary	Randomly displays the summary content of a collection item.	"Random Summary" on page 143
Search	Inserts a text box on the template with a search button.	"Search Function" on page 143
Search Display	Creates area where search results will be displayed.	"Search Display Function" on page 145
Single Summary	Displays the summary for a single content block.	"Single Summary Function" on page 147

Login Function

This tag is responsible for displaying the following buttons on the Web page.

This function is basically the same as the Login function in ASP. See "Login Function" on page 46 for details. The only difference is the syntax used to implement the function. This is listed below.

Login Tag Example

```
<tr>

    <td>

        <cfmodule template="#request.ecm.AppPath#ecmLogin.cfm">

    </td>

</tr>
```

Content Block Function

The content block tag is used to display a content block on an Ektron CMS300 Web page.

Shown here is the format for the content block function:

```
<CFMODULE template="#request.ecm.AppPath#ecmContentBlockEx.cfm"

            ID=""
```

```
            XSLT=""

            Override=""

>
```

This function is basically the same as the Content Block function in ASP. See "Content Block Function" on page 49 for details.

The only differences between the Coldfusion function and the ASP one is the syntax for implementing it. The ColdFusion examples are below.

Static Content Block

```
<tr>

   <td>

      <CFMODULE id="1" template="#request.ecm.AppPath#ecmContentBlock.cfm">

    </td>

</tr>
```

Dynamic Content Block

```
<tr>

  <td>

      <CFMODULE id="#id#" template="#request.ecm.AppPath#ecmContentBlock.cfm">

  </td>

</tr>
```

XML Content Block

```
  <tr>

    <td>

      <CFMODULE id="13" XSLT= “” override= “1”

      template="#request.ecm.AppPath#ecmContentBlockEx.cfm">

    </td>

  </tr>
```

Random Content

The random content function is used to randomly display the content of a content block that belongs in a specified collection. Below is the format for the random content function:

```
<CFMODULE template="#request.ecm.AppPath#ecmShowRandomContent.cfm"
                   ID=""
                   XSLT=""
                   Override=""
        >
```

This function is basically the same as the Random Content function in ASP. See "Random Content" on page 108 for details.

Random Summary

SImilar to the random content function, the random summary function can randomly display a content block summary that belongs in a specified collection. Here is the format for the random content function

```
    <CFMODULE template="#request.ecm.AppPath#ecmShowRandomSummary.cfm"
                   ID=""
    >
```

This function is basically the same as the Random Summary function in ASP. See "Random Summary" on page 109 for details.

Search Function

The search tag is used to display a text box, with a search button on the template. When seen on the template on the Web page, the users will be allowed to enter text and click on the search button to search through all the content on the Web site.

Shown here is the format for the ecmSearch tag.

```
        <CFMODULE template="#request.ecm.AppPath#ecmSearch.cfm"
```

```
                StartingFolder=""
                Recursive=""
                TargetPage=""
                TextBoxSize=""
                MaxCharacters=""
                ButtonImageSrc=""
                ButtonText=""
                FontFace=""
                FontColor=""
                FontSize=""
                Horizontal=""
    >
```

This function is basically the same as the Search function in ASP. See ”Search Function” on page 64 for details.

The only difference between the Coldfusion function and the ASP one is the syntax for implementing it. The ColdFusion example is below.

Search Tag Example

```
<tr>
    <td>
        <CFMODULE template="#request.ecm.AppPath#ecmSearch.cfm"
            StartingFolder="\marketing" Recursive="1" TargetPage="search-
            display.cfm" TextBoxSize="25" MaxCharacters="200"
            ButtonImageSrc="" ButtonText="Search" FontFace="Verdana"
            FontColor="##808080" FontSize="2" Horizontal="0">
    </td>
</tr>
```

Search Display Function

The search display custom tag created the area where all the search results show after the search has been executed.

Shown here is the format of the ecmSearchDisplay tag:

```
<CFMODULE template="#request.ecm.AppPath#ecmSearchDisplay.cfm"

            MaxNumber=""

            StyleInfo=""

            ShowDate=""

>
```

This function is basically the same as the Search Display function in ASP. See "Search Display Function" on page 74 for details.

The only difference between the Coldfusion function and the ASP one is the syntax for implementing it. The ColdFusion example is below.

Search Display Example

```
<tr>

    <td>

        <CFMODULE template="#request.ecm.AppPath#ecmSearchDisplay.cfm"

        MaxNumber="0" StyleInfo="" ShowDate="1">

    </td>

</tr>
```

List Summary Function

The list summary function is used to display the list of content summaries on a Web page. Shown here is the format of the list summary function:

```
<CFMODULE template="#request.ecm.AppPath#ecmListSummary.cfm"

            Folder=""

            MaxNumber=""
```

```
            Recursive=""

            ShowSummary=""

            StyleInfo=""

            OrderBy=""

            ShowInfo=""

>
```

This function is basically the same as the List Summary function in ASP. See ”List Summary Function” on page 80 for details.

The only difference between the Coldfusion function and the ASP one is the syntax for implementing it. The ColdFusion example is below.

List Summary Example

```
<TR>

    <TD>

        <CFMODULE template="#request.ecm.AppPath#ecmListSummary.cfm"

        Folder="\Marketing\News" MaxNumber="0" Recursive="0"

        ShowSummary="1" StyleInfo="" OrderBy="Title,asc" ShowInfo="" >

    </TD>

</TR>
```

Archive List Summary Function

The Archive list summary function displays on a Web page a list of content summaries for archived content blocks. For example, you might have a current news page and an archived news page. Use the List Summary Function to display current news, and this function to display older news stories.

On the Content Block **schedule** screen, the user must set an **End Date** then choose the Archive and Display option to have the content blocks appear via this function.

This function has the same parameters as the List Summary Function. See ”List Summary Function” on page 145 for details.

Single Summary Function

The single summary tag is used to display the summary of one content block in the Ektron CMS300 Web site, instead of a list of all the summaries in a content folder. Seen below is the single summary tag:

```
<cfmodule template="#request.ecm.AppPath#ecmSingleSummary.cfm"

           ContentID=""

           ShowSummary="1"

           StyleInfo=""

           ShowInfo=""

>
```

This function is basically the same as the Single Summary function in ASP. See "Single Summary Function" on page 89 for details.

The only difference between the Coldfusion function and the ASP one is the syntax for implementing it. The ColdFusion example is below.

Single Summary Example

```
<TR>

    <TD>

        <cfmodule template="#request.ecm.AppPath#ecmSingleSummary.cfm"

        ContentID="14" ShowSummary="1" StyleInfo=""

        ShowInfo="DateModified">

    </TD>

</TR>
```

Collection Function

The collection function is used to display the list of links that were created as a collection in the Ektron CMS300 Workarea. The ecmCollection function is highly customizable, allowing you to easily define how the collection data will be displayed on the Web page.

Shown here is the format of the ecmCollection function.

```
<CFMODULE template="#request.ecm.AppPath#ecmCollection.cfm"

          id="2"

          displayFunction="ecmTeaser"

>
```

This function is basically the same as the Collection function in ASP. See "Collection Function" on page 94 for details.

The only difference between the Coldfusion function and the ASP one is the syntax for implementing it. The ColdFusion example is below.

Example Using the ecmNavigation Display Function

The following is an example of a collection function being used as a navigation menu in the Ektron CMS300 sample Web site.

```
<CFMODULE id="1" displayFunction="ecmNavigation"

template="#request.ecm.AppPath#ecmCollection.cfm">
```

As stated earlier, the format of the collection on the Web page depends on the displayFunction that is used. Below is the source code for the display function "ecmNavigation".

```
<cfparam name="Attributes.nId" default="">

<cfparam name="Attributes.href" default="">

<cfparam name="Attributes.target" default="">

<cfparam name="Attributes.startStyle" default="">

<cfparam name="Attributes.endStyle" default="">

<cfset LocalError = "">

<cfobject class="CMS300ContentBrv2.CMS300Content" Action="Create" name="cmsObj">

<cfset cNavs =
cmsObj.GetEcmCollectionItems(request.ecm.AppConfStr,Attributes.nId,0,request.ecm.cmsPreview,r
equest.ecm.user_id,request.ecm.site_id,LocalError)>

<cfif cNavs.Count()>

    <cfset nString = "">
```

```
<cfloop collection=#cNavs# Item=nav>

    <cfset nString = nString & "<a href=""">

    <cfif len(Attributes.href)>

        <cfif FindNoCase("?", Attributes.hrefs)>

            <cfset nString = nString & Attributes.href & "&id=" &

            nav.Item("ContentID")>

        <cfelse>

            <cfset nString = nString & Attributes.href & "?id=" &

            nav.Item("ContentID")>

        </cfif>

    <cfelse>

        <cfset nString = nString & nav.Item("ContentLinks")>

    </cfif>

    <cfset nString = nString & """ ">

    <cfif len(Attributes.target)>

        <cfset nString = nString & "target=""" & Attributes.target & """ ">

    </cfif>

    <cfset nString = nString & ">">

    <cfif len(Attributes.startStyle)>

        <cfset nString = nString & Attributes.startStyle>

    </cfif>

    <cfset nString = nString & nav.Item("ContentTitle")>

    <cfif len(Attributes.endStyle)>

        <cfset nString = nString & Attributes.endStyle>

    </cfif>

    <cfset nString = nString & "</a>">

</CFLOOP>

    <cfmodule str="#nString#" nId="#Attributes.nId#"
template="#request.ecm.AppPath#ecmshowCollectionsContent.cfm">
```

```
</cfif>

<cfset nNavs = "Nothing">

<cfset cmsObj = "Nothing">
```

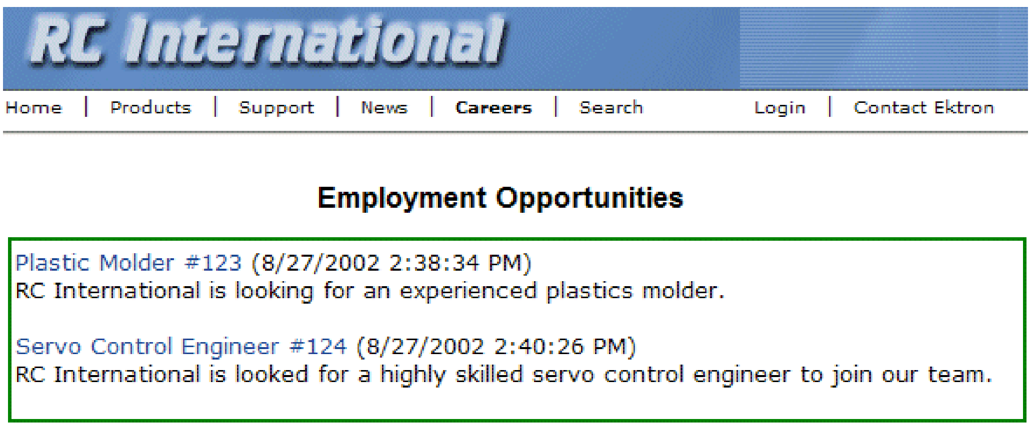
As you can see, the ecmNavigation function is a simple ASP function that creates a table of the links that belong to the collection specified. The function also displays the title of the content blocks by using the “info(“ContentTitle”)) building block.

Example Using the ecmTeaser Display Function

The following is an example of a collection function being used as a navigation menu in the Ektron CMS300 sample Web site.

```
<CFMODULE id="2" displayFunction="ecmTeaser"

template="#request.ecm.AppPath#ecmCollection.cfm">
```

In this example, the collection with an ID=2 is displayed, and the function “ecmTeaser” defines how to display the collection data on a Web page. Here is how the collection would appear on a Web page.



As stated earlier, the format of the collection on the Web page depends on the displayFunction that is used. Below is the source code for the display function “ecmTeaser”.

```
<cfparam name="Attributes.nID" default="">
```

```
<cfparam name="Attributes.href" default="">

<cfparam name="Attributes.ShowSummary" default="">

<cfparam name="Attributes.StyleInfo" default="">

<cfparam name="Attributes.target" default="">

<cfset ErrorString = "">

<cfobject class="CMS300ContentBrv2.CMS300Content" Action="Create" name="tObj">

<cfset cTeasers = tObj.GetEcmCollectionItems(request.ecm.AppConfStr, Attributes.nId, 0,
request.ecm.cmsPreview, request.ecm.user_id, request.ecm.site_id, ErrorString)>

<cfset tString = "<table border=""0"" cellspacing=""0"" cellpadding=""0"" width=""100%"">">

<cfif cTeasers.Count()>

    <cfloop collection=#cTeasers# Item=cT>

        <cfset tString = tString & "<tr><td>">

        <cfset tString = tString & "<a href=""">

        <cfif len(Attributes.href)>

            <cfif FindNoCase("?", Attributes.hrefs)>

                <cfset tString = tString & Attributes.href & "&id=" &

                cT.Item("ContentID")>

            <cfelse>

                <cfset tStringi = tString & Attributes.href & "?id=" &

                cT.Item("ContentID")>

            </cfif>

        <cfelse>

            <cfset tString = tString & cT.Item("ContentLinks")>

        </cfif>

        <cfset tString = tString & """ ">

        <cfif len(Attributes.target)>

            <cfset tString = tString & "target=""" & Attributes.target & """ ">

        </cfif>

        <cfset tString = tString & ">">
```

```
        <cfset tString = tString & cT.Item("ContentTitle") & "</a>" & " (" &

        DateFormat(cT.Item("DateModified"), "mm/dd/yyyy") & " " &

        TimeFormat(cT.Item("DateModified"), "h:mm:ss tt") & ")</td></tr><tr><td>" &

        cT.Item("ContentTeaser")>

        <cfset tString = tString & "</td></tr><tr><td> </td></tr>">

    </cfloop>

    <cfset tString = tString & "</table>">

        <cfmodule str="#tString#" nId="#Attributes.nId#"
template="#request.ecm.AppPath#ecmshowCollectionsContent.cfm">

</cfif>
```

As you can see, the ecmTeaser function is a simple ASP function that creates a table of the links that belong to the collection specified.

The ecmTeaser function also displays the:

- Content Title
- Date Modified
- Content Teaser

Collection Variables

See ”Collection Attributes” on page 99

DisplayFunction

The display function defines how collection data appears on a Web page. Using ColdFusion scripting, you can create your own display functions, or use the three included functions.

Building Blocks

See ”Building Blocks” on page 103

Event Calendar Function

The ecmEvtCalendar function is used to display an event calendar that has been created in the Ektron CMS300 Workarea.

Displayed here is the format for the event calendar custom function:

```
<CFMODULE template="#request.ecm.AppPath#ecmEvtCalendar.cfm" Calendar_ID="" >
```

This function is basically the same as the Event Calendar function in ASP. See ”Event Calendar Function” on page 110 for details.

The only difference between the Coldfusion function and the ASP one is the syntax for implementing it. The ColdFusion example is below.

Event Calendar Sample

```
<tr>

   <td>

         <CFModule template="#request.ecm.AppPath#ecmEvtCalendar.cfm" calendar_id="24">

   </td>

</tr>

              <cfset x=infoObj.Add("AbbreviateDayNames", FALSE)>
```

Form Function

The ecmFormBlock function displays an HTML form content block. For more information about HTML forms, see the **Ektron CMS300** Administrator manual chapter “Working with HTML Forms.”

IMPORTANT! If you create a template for an existing form content block, you must manually change its quicklink to point to the new template. This change does not occur automatically. This procedure is described in the Ektron CMS300 Administrator manual chapter “Managing Library Assets”, section “Updating Default Template for Multiple Quicklinks.”

Here is the format for the form custom function

```
<CFMODULE template="#request.ecm.AppPath#ecmFormBlock.cfm" ID="" >
```

This function is basically the same as the Form function in ASP. See ”Form Function” on page 116 for details.

The only difference between the Coldfusion function and the ASP one is the syntax for implementing it. The ColdFusion example is below.

Here is an example of a form content block in an Ektron CMS300 template.

```
<tr>
      <td>
            <CFModule template="#request.ecm.AppPath#ecmFormBlock" calendar_id="1">
      </td>
</tr>
```

MultiPurpose Function

The ecmMultiPurpose function displays either a content block or an content block associated with a form. As a result, you can use one template to display both types of content block.

Here is the format for the Multipurpose function

```
<CFMODULE template="#request.ecm.AppPath#ecmMultiPurpose.cfm"  DefaultID="" >
```

To pass in a standard content block, pass the id value in the url parameter, as illustrated below.

```
http://localhost/cms300sample/index.asp?id=2
```

To pass in a Form content block, pass the ekfrm value in the url parameter, as illustrated below.

```
http://localhost/cms300sample/index.asp?ekfrm=2
```

NOTE For more information about passing the id value as a url parameter, see "Dynamic Content Block" on page 142.

If the id value or ekfrm value does not exist, a blank template appears.

If the url parameter is not passed in or recognized, the function calls ecmContentBlock and passes the DefaultID value as the id argument. If the DefaultID value is zero (0), ecmContentBlock is not called.

Metadata Function

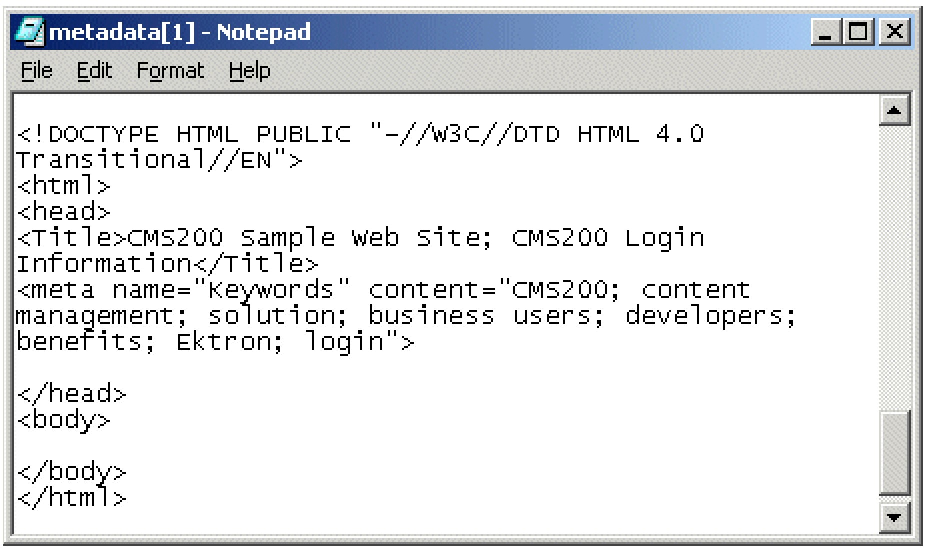
The metadata tag is used to display the metadata for one or more content blocks in the Ektron CMS300 Web site. Inserting this custom tag will allow you to generate the list of metadata that is edited by the authors, and insert it in the source of the Web page. Shown below is an example of what the metadata custom tag looks like.

```
<cfmodule template="#request.ecm.AppPath#ecmMetadata.cfm" ItemList="" >
```

This function is basically the same as the Metadata function in ASP. See "Metadata Function" on page 119 for details.

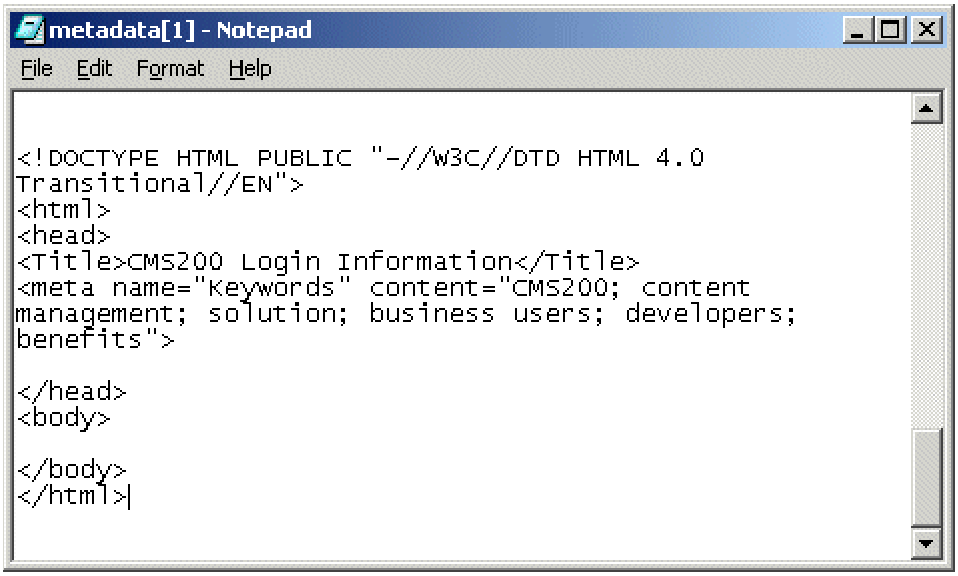
The only difference between the Coldfusion function and the ASP one is the syntax for implementing it. The ColdFusion examples are below.

```
<cfmodule template="#request.ecm.AppPath#ecmMetadata.cfm" ItemList="[1][2]">
```



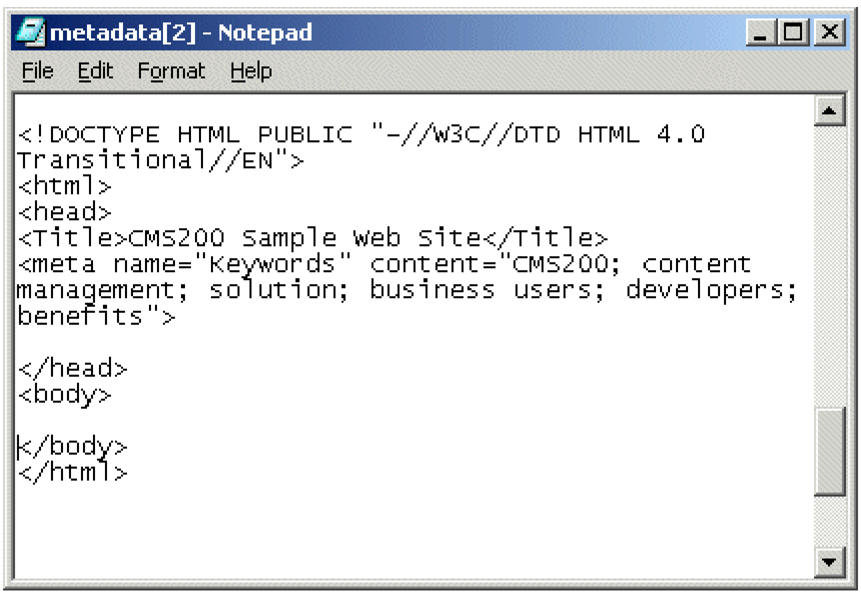

```
<cfmodule template="#request.ecm.AppPath#ecmMetadata.cfm"
```

```
ItemList="[1;title][2;keywords]>
```



```
metadata[1] - Notepad
File Edit Format Help

<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0
Transitional//EN">
<html>
<head>
<Title>CMS200 Login Information</Title>
<meta name="Keywords" content="CMS200; content
management; solution; business users; developers;
benefits">

</head>
<body>

</body>
</html>
```

```
<cfmodule template="#request.ecm.AppPath#ecmMetadata.cfm"

    ItemList="[1][2;title,keywords]>
```



```
metadata[2] - Notepad
File Edit Format Help
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0
Transitional//EN">
<html>
<head>
<Title>CMS200 Sample Web Site</Title>
<meta name="Keywords" content="CMS200; content
management; solution; business users; developers;
benefits">

</head>
<body>

</body>
</html>
```

Custom ColdFusion Tags

As you have seen, the formatting for the custom ColdFusion functions used in Ektron CMS300 for ColdFusion are defined in the following files:

- /CMS300Sample/CMS300scripts/ecmLogin.cfm
- /CMS300Sample/CMS300scripts/ecmContentBlock.cfm
- /CMS300Sample/CMS300scripts/ecmSearch.cfm
- /CMS300Sample/CMS300scripts/ecmSearchDisplay.cfm
- /CMS300Sample/CMS300scripts/ecmListSummary.cfm
- /CMS300Sample/CMS300scripts/ecmSingleSummary.cfm
- /CMS300Sample/CMS300scripts/ecmNavigation.cfm
- /CMS300Sample/CMS300scripts/ecmTeaser.cfm
- /CMS300Sample/CMS300scripts/ecmMetadata.cfm

As a developer, you may make changes to this file to further enhance how the custom functions appear on your Web site.

However, if you choose to extend the custom functions, Ektron recommends

- creating a copy of the file
- renaming it to an arbitrary name, for example, MySearch.cfm
- including that file when adding Ektron CMS300 tags to your templates

This procedure prevents your custom from being overwritten if you upgrade your version of Ektron CMS300.

Custom PHP Functions

Ektron CMS300 maintains and displays content via custom Ektron PHP functions and ComObjects. On your template, include the following file:

```
<?php include 'site_scripts_path.php'; ?>
```

This file calls the Ektron custom functions file to allow the page to function properly. It *must* appear at the top of the template file.

To customize you Ektron CMS300 application, you need to be familiar with these tags.

Tag	Description	More Information
Collection	Displays the links generated by collections.	”Collection Function” on page 165
Content Block	Displays and manages a content block.	”Content Block Tag” on page 161
Event Calendar	Displays an event calendar defined in the Workarea.	”Event Calendar Function” on page 171
Form	Displays an HTML form	”Form Function” on page 172
List Summary	Displays the list of the content block summaries.	”List Summary Tag” on page 163
Archive ListSummary	Displays a summaries of archived content blocks.	”Archive List Summary Tag” on page 164
Login	Paints the login or logout button which allows the user to login and use the Ektron CMS300 application.	”Login Tag” on page 160
Metadata	Displays the metadata in the source of the Web page the content is displayed on.	”Metadata Tag” on page 175

Tag	Description	More Information
MultiPurpose	Displays either a content block or a content block associated with a form	"MultiPurpose Function" on page 174
Random Content	Randomly displays the body content of a collection item.	"Random Content Function" on page 170
Random Summary	Randomly displays the summary content of a collection item.	"Random Summary Function" on page 171
Search	Inserts a text box on the template with a search button.	"Search Tag" on page 162
Search Display	Creates area where search results will be displayed.	"Search Display Tag" on page 163
Single Summary	Displays the summary for a single content block.	"Single Summary Tag" on page 165

Login Tag

This tag is responsible for displaying the following buttons on the Web page.

This function is basically the same as the Login function in ASP. See "Login Function" on page 46 for details. The only difference is the syntax used to implement the function. This is listed below.

Login Tag Example

```
<tr>

    <td>

        <?php ecmlogin(); ?>

    </td>

</tr>
```

Content Block Tag

The content block tag is used to display a content block on an Ektron CMS300 Web page.

NOTE As an alternative, you can use the multipurpose function, which can display either a content block or a content block associated with a form. For more information, see ”MultiPurpose Function” on page 174.

Here is the format for the content block function:

```
<?php ecmContentBlockEx (ID, “XSLT”, Override) ?>
```

This function is basically the same as the Add Content function in ASP. See ”Content Block Function” on page 49 for details.

The only differences between the PHP function and the ASP one are the examples of implementing it. The PHP examples are below.

Static Content Block

```
<tr>

   <td>

      <?php  ecmContentBlock(1) ?>

   </td>

</tr>
```

Dynamic Content Block

```
<tr>

   <td>

      <?php  ecmContentBlock($id) ?>

   </td>

</tr>
```

XML Content Block

```
<tr>

    <td>

       <?php ecmContentBlockEx (13, “”, 1) ?>

    </td>

</tr>
```

Search Tag

The search tag is used to display a text box with a search button on the template. When seen on the template on the Web page, a user can enter text and click the search button to search through all the content on the Web site.

Here is the format for the ecmSearch tag.

```
<?php ecmSearch( “StartingFolder”,

        Recursive,

        "targetpage",

        textbox,

        MaxCharacters,

        "ButtonImgSrc",

        "ButtonText",

        "FontFace",

        "FontColor",

        "FontSize",

        Horizontal,

        "Spare" );

?>
```

This function is basically the same as the Search function in ASP. See ”Search Function” on page 64 for details.

The only difference between the PHP function and the ASP one is the syntax for implementing it. The PHP example is below.

Search Tag Example

```
<TR>

 <TD>

  <?php ecmSearch("\\Marketing",1,"search-
  display.php",25,200,"","Search","Verdana","#808080","2",0,""); ?>

 </TD>

</TR>
```

Search Display Tag

The search display custom tag created the area where all the search results show after the search has been executed.

Here is the format of the ecmSearchDisplay tag:

```
<?php ecmSearchDisplay( MaxNumbers,"StyleInfo", ShowDate ); ?>
```

This function is basically the same as the Search Display function in ASP. See ”Search Display Function” on page 74 for details.

The only difference between the PHP function and the ASP one is the syntax for implementing it. The PHP example is below.

Search Display Tag Example

```
<tr>

   <td>

      <?php ecmSearchDisplay( 0,"",1); ?>

   </td>

</tr>
```

List Summary Tag

The list summary function is used to display the list of content summaries on a Web page. Here is the format of the list summary function.

```
<?php ecmListSummary ( "Folder",
```

```
        Recursive,
        ShowSummary,
        "StyleInfo",
        "OrderBy",
        "ShowInfo",
        MaxNumber,
        "Spare 1",
        "Spare2");
?>
```

This function is basically the same as the List Summary function in ASP. See "List Summary Function" on page 80 for details.

The only difference between the PHP function and the ASP one is the syntax for implementing it. The PHP example is below.

List Summary Example

```
<TR>
    <TD>
        <?PHP ecmListSummary ("\Marketing\News",0,1,"",
        "Title,asc","DateModified",0,"",""); ?>
    </TD>
</TR>
```

Archive List Summary Tag

The Archive list summary function displays on a Web page a list of content summaries for archived content blocks. For example, you might have a current news page and an archived news page. Use the List Summary Function to display current news, and this function to display older news stories.

On the Content Block **schedule** screen, the user must set an **End Date** then choose the Archive and Display option to have the content blocks appear via this function.

This function has the same parameters as the List Summary Function. See ”List Summary Tag” on page 163 for details.

Single Summary Tag

The single summary tag is used to display the summary of one content block in the Ektron CMS300 Web site, instead of a list of all the summaries in a content folder. Seen below is the single summary tag:

```
<?php ecmSingleSummary( “ContentID”,

        ShowSummary,

        “StyleInfo”,

        “ShowInfo”,

        “Spare1”);

?>
```

This function is basically the same as the Single Summary function in ASP. See ”Single Summary Function” on page 89 for details.

The only difference between the PHP function and the ASP one is the syntax for implementing it. The PHP example is below.

Single Summary Example

```
<TR>

   <TD>

       <?PHP ecmSingleSummary ("14",1,"","DateModified",""); ?>

   </TD>

</TR>
```

Collection Function

The collection function is used to display the list of links that were created as a collection in the Ektron CMS300 Workarea. The ecmCollection function is highly customizable, allowing you to easily define how the collection data will be displayed on the Web page.

Shown here is the format of the ecmCollection function.

```
<?PHP ecmCollection( “id”,

    “displayFunction”;

?>
```

This function is basically the same as the Collection function in ASP. See ”Collection Function” on page 94 for details.

The only difference between the PHP function and the ASP one is the syntax for implementing it. The PHP example is below.

Collection Examples

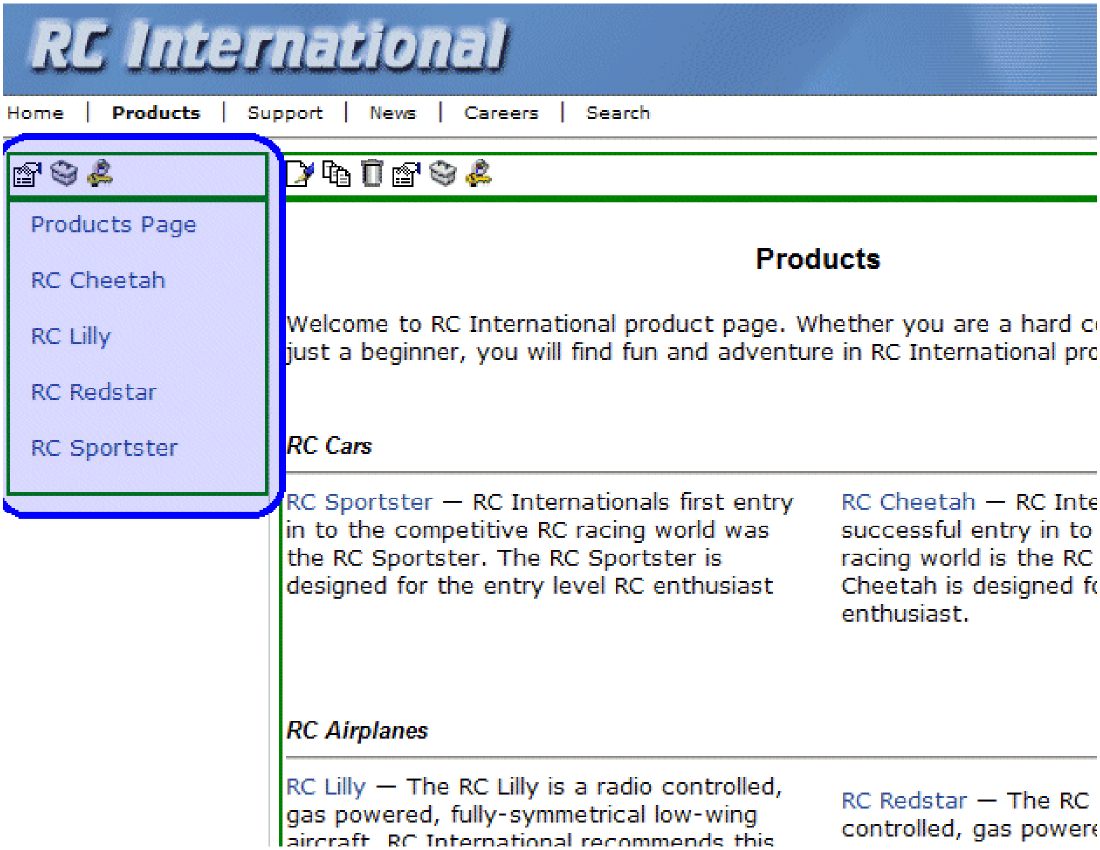
Example Using the ecmNavigation Display Function

The following is an example of a collection function being used as a navigation menu in the Ektron CMS300 sample Web site.

```
<?php ecmCollection(1, "ecmNavigation") ?>
```

In this example, the collection with an ID=1 is displayed, and the function “ecmNavigation” is used to define how the collection data is displayed on the Web page.

Here is how the collection would appear on the Web page.



The format of the collection on the Web page depends on the displayFunction that is used.

Below is the source code for the display function “ecmNavigation”.

```
Function ecmNavigation($cInfo){

    global $html, $info;

    $html = "<table border=\"0\" cellspacing=\"0\" cellpadding=\"0\"

        width=\"100%\">";

    $mycount = $cInfo->count();

    for ($iloop=0; $iloop < $mycount; ++$iloop) {

        $info = $cInfo->Item($iloop+1);

        $html = $html."<tr><td>  <a href=\"";

        $html = $html.$info->Item("ContentLinks");

        $html = $html."\">";

        $html = $html.$info->Item("ContentTitle");

        $html = $html."</a></td></tr><tr><td> </td></tr>";

    }

    $html = $html."</table>";

    return $html;

}
```

As you can see, the ecmNavigation function is a simple PHP function that creates a table of the links that belong to the collection specified.

The ecmNavigation function also displays the title of the content blocks by using the “info(“ContentTitle”)) building block.

Example Using the ecmTeaser Display Function

The following is an example of a collection function being used as a navigation menu in the Ektron CMS300 sample Web site.

```
<?php ecmCollection (2, "MyDisplayFunction"); ?>
```

In this example, the collection with an ID=2 is displayed, and the function “ecmTeaser” is used to define how the collection data is displayed on the Web page.

Shown here is how the collection would appear on the Web page.

As stated earlier, the format of the collection on the Web page depends on the displayFunction that is used.

Shown below is the source code for the display function “ecmTeaser”

```
Function ecmTeaser($cInfo){

    global $html, $info;

    $html = "<table border=\"0\" cellspacing=\"0\" cellpadding=\"0\" width=\"100%\">";

    $mycount = $cInfo->count();

    for ($iloop=0; $iloop < $mycount; ++$iloop) {

        $info = $cInfo->Item($iloop+1);

        $html = $html."<tr><td><a href=\"";

        $html = $html.$info->Item("ContentLinks");

        $html = $html."\" >";

        $html = $html.$info->Item("ContentTitle");

        $html = $html."</a> (";

        $html = $html.date("m/d/Y g:i:s A", $info->Item("DateModified"));

        $html = $html.")</td></tr><tr><td>";

        $html = $html.$info->Item("ContentTeaser");

        $html = $html."</td></tr><tr><td> </td></tr>";

    }
```

```
    $html = $html."</table>";

    return $html;

}
```

As you can see, the ecmTeaser function is a simple ASP function that creates a table of the links that belong to the collection specified.

The ecmTeaser function also displays the:

- Content Title
- Date Modified
- Content Teaser

Collection Variables

See "Collection Attributes" on page 99

DisplayFunction

As explained earlier, the display function is a function that you create that will define how the collection data will be displayed on the Web page.

By using simple PHP scripting, you can create your own display functions, or use the three included functions.

Building Blocks

See "Building Blocks" on page 103

Random Content Function

The random content function is used to randomly display the content of a content block that belongs in a specified collection.

Displayed here is the format for the random content function

```
<?php ShowRandomContent (id); ?>
```

This function is basically the same as the Random Content function in ASP. See ”Random Content” on page 108 for details.

Random Summary Function

SImilar to the random content function, the random summary function is used to randomly display the summary of a content block that belongs in a specified collection.

Displayed here is the format for the random content function

```
<?php ShowRandomSummary (id); ?>
```

This function is basically the same as the Random Summary function in ASP. See ”Random Summary” on page 109 for details.

Event Calendar Function

The ecmEvtCalendar function is used to display an event calendar that has been created in the Ektron CMS300 Workarea.

This function is basically the same as the Event Calendar function in ASP. See ”Event Calendar Function” on page 110 for details.

The only difference between the PHP function and the ASP one is the syntax for implementing it. The PHP example is below.

```
<?php ecmEvtCalendar(id); ?>
```

Event Calendar Sample

Here is an example of the event Calendar in an Ektron CMS300 template.

```
<tr>
    <td>
        <?php ecmEvtCalendar(24); ?>
    </td>
</tr>
```

Form Function

The ecmFormBlock function displays an HTML form content block. For more information about HTML forms, see the**Ektron CMS300** Administrator manual chapter “Working with HTML Forms.”

IMPORTANT! If you create a template for an existing form content block, you must manually change its quicklink to point to the new template. This change does not occur automatically. This procedure is described in the Ektron CMS300 Administrator manual chapter “Managing Library Assets”, section “Updating Default Template for Multiple Quicklinks.”

Here is the format for the form custom function

```
<?php ecmFormBlock(id); ?>
```

This function is basically the same as the Form function in ASP. See ”Form Function” on page 116 for details.

The only difference between the PHP function and the ASP one is the syntax for implementing it. The PHP example is below.

```
<tr>
      <td>
            <?php ecmFormBlock(1); ?>
```

```
    </td>
</tr>
```

NOTE As an alternative, you can use the multipurpose function, which can display either a content block or a content block associated with a form. For more information, see "MultiPurpose Function" on page 174.

MultiPurpose Function

The ecmMultiPurpose function displays either a content block or a content block associated with a form. As a result, you can use one template to display both types of content block.

Here is the format for the Multipurpose function

<?php ecmMultiPurpose(ID); ?>

To pass in a standard content block, pass the id value in the url parameter, as illustrated below.

```
http://localhost/cms300sample/index.asp?id=2
```

To pass in a Form content block, pass the ekfrm value in the url parameter, as illustrated below.

```
http://localhost/cms300sample/index.asp?ekfrm=2
```

NOTE For more information about passing the id value as a url parameter, see ”Dynamic Content Block” on page 161.

If the id value or ekfrm value does not exist, a blank template appears.

If the url parameter is not passed in or recognized, the function calls ecmContentBlock and passes the DefaultID value as the id argument. If the DefaultID value is zero (0), ecmContentBlock is not called.

Metadata Tag

The metadata tag is used to display the metadata for one or more content blocks in the Ektron CMS300 Web site. Inserting this custom tag will allow you to generate the list of metadata that is edited by the authors, and insert it in the source of the Web page. Shown below is an example of what the metadata custom tag looks like.:

```
<?php ecmMetaData ("ItemList","Spare1";) ?>
```

This function is basically the same as the Metadata function in ASP. See ”Metadata Function” on page 119 for details.

The only difference between the PHP function and the ASP one is the syntax for implementing it. The PHP examples are below.

To include both content blocks metadata in the web page, a ecmMetadata call would look like this.

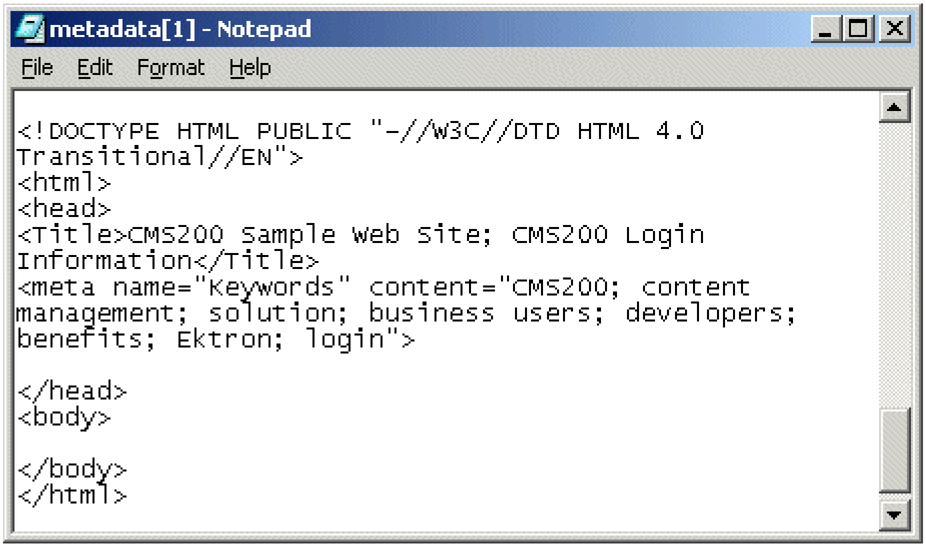
```
<html>

    <head>

        <?php ecmMetadata (“[1][2;Title,Content-Type]”, “”); ?>

        (rest of head)

    </head>

    <body>

        (rest of web page document)

    </body>

</html>
```

In the above example the ecmMetadata call is contained in the <head> of the HTML document (since all HTML metadata is required to exist there). Once the Web page is viewed the Web page source will contain the following information:

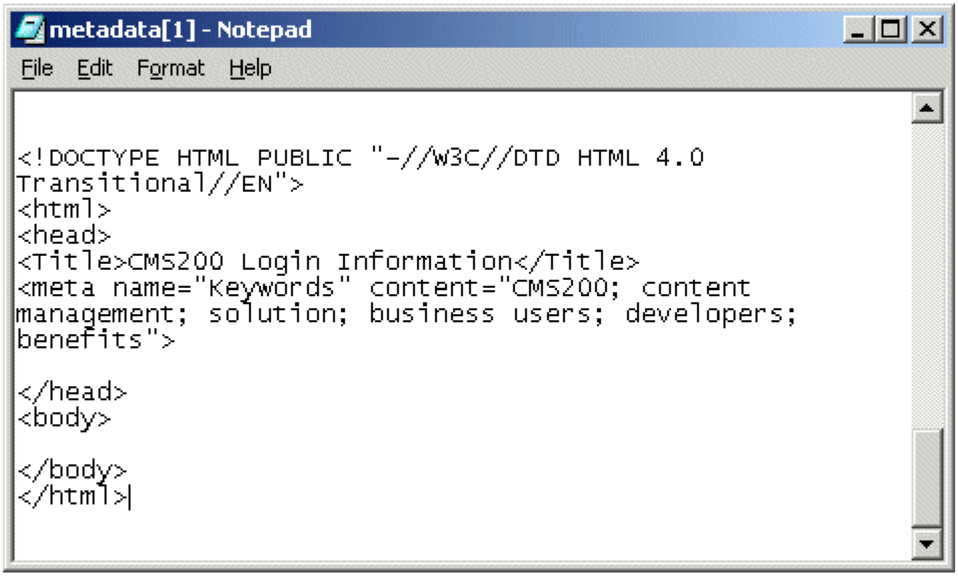
```
<html>
```

```
    <head>
        <Title>Welcome to Our Home Page</Title>
        <meta name="Keywords" content= Home; page; company; Welcome; Announce;
        product; widget">
        <meta http-equiv="Content-Type" content="text/html; charset=iso-8859-1">
        (rest of head)
    </head>
    <body>
        (rest of web page document)
    </body>
</html>
```

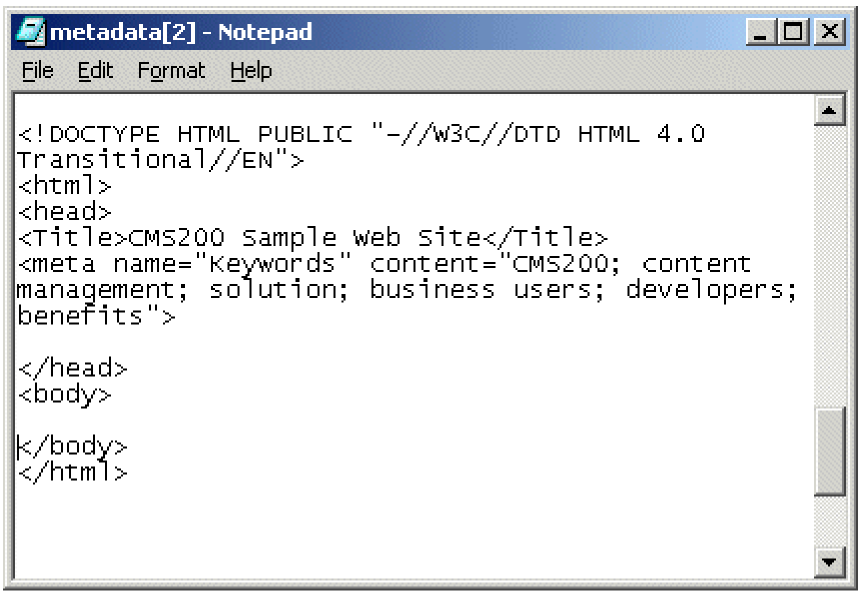
```
<?PHP ecmMetaData ("[1][2]","") ?>
```



```
<?PHP ecmMetaData ("[1;title][2;keywords]","") ?>
```




```
<?PHP ecmMetaData ("[1][2;title,keywords]","") ?>
```



Custom API

As you have seen, the formatting for the custom functions used in Ektron CMS300 for PHP are defined in the file ApplicationAPI.php. As a developer, you may make changes to this file to further enhance how the custom functions appear on your Web site.

However, Ektron recommends creating a copy of the file, and renaming it to an arbitrary name, for example, MyCustomAPI.php, and including that file when creating Ektron CMS300 templates. This ensures that your custom API will not be overwritten if you upgrade to another version of Ektron CMS300.

Dreamweaver Extension Support

Ektron CMS300 has a custom Macromedia® Extension Package which allows you to not only create your templates in Dreamweaver® or UltraDev™, but also to insert the custom functions through Dreamweaver®.

To do this, all you need is Ektron CMS300, Dreamweaver®/ UltraDev™, and to keep reading.

Requirements

To use the Dreamweaver extension supplied by Ektron, you will need to have Dreamweaver 4.0 or higher installed, as well as Ektron CMS300.

Installing the Extension

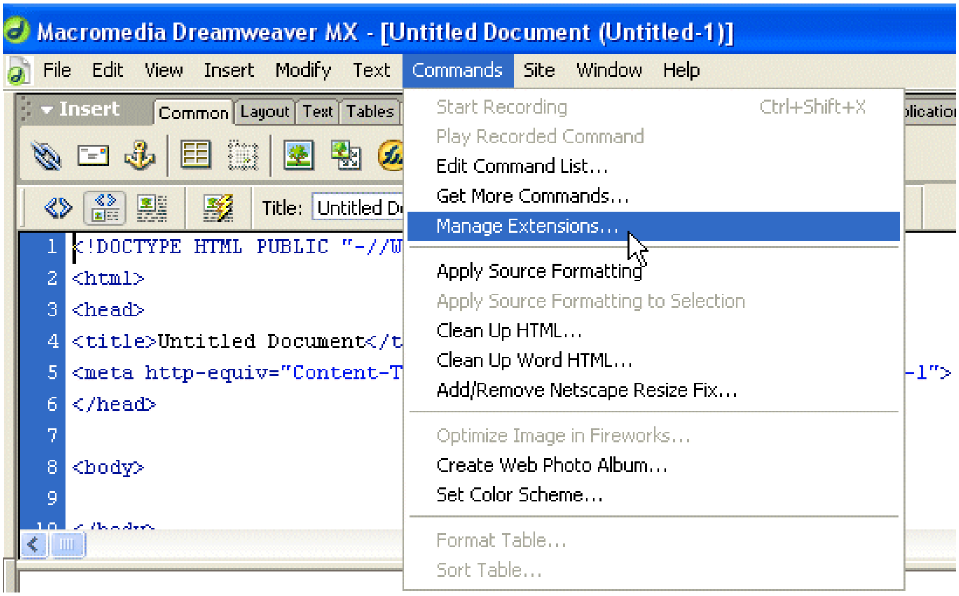
Before you can insert the Ektron CMS300 custom functions through Dreamweaver®, you must install the extension. Listed below are the steps to install the extension.

NOTE For more information about installing an extension, refer to your Dreamweaver® Manual.

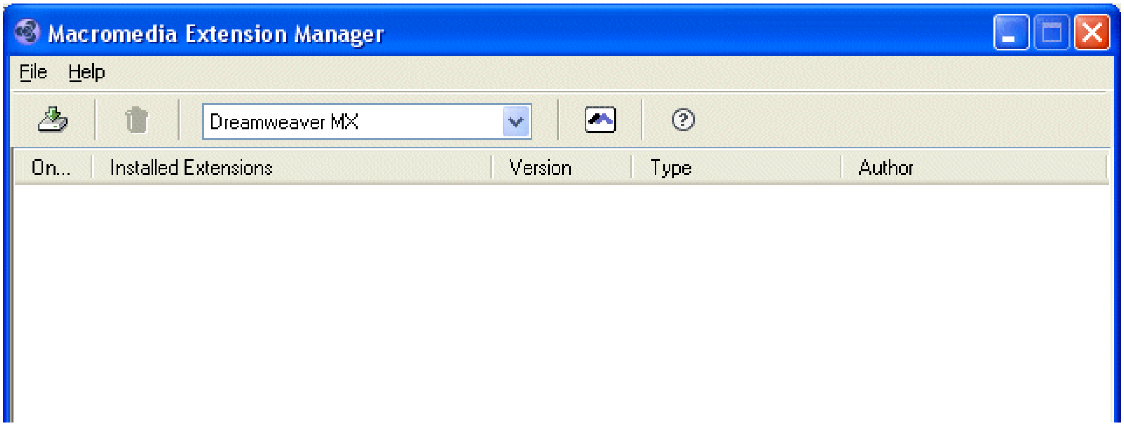
To Install the Extension

1. Begin by following the path in Dreamweaver:

   Commands > Manage Extensions...



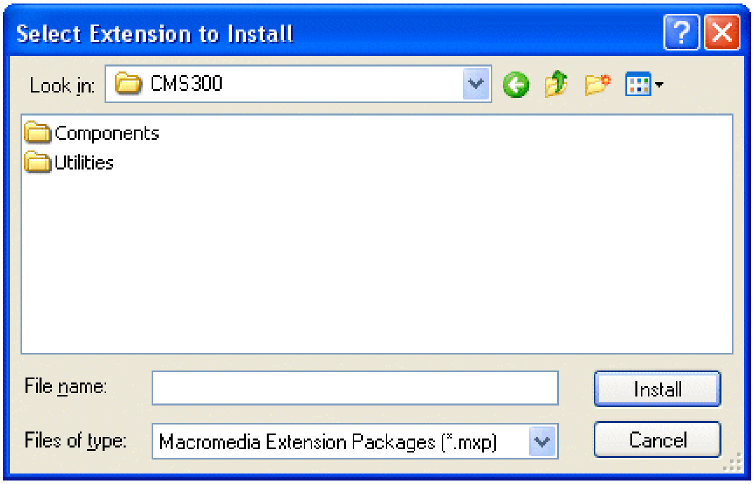
The Macromedia Extension Manager is displayed.



2. From this dialog box, follow the path:

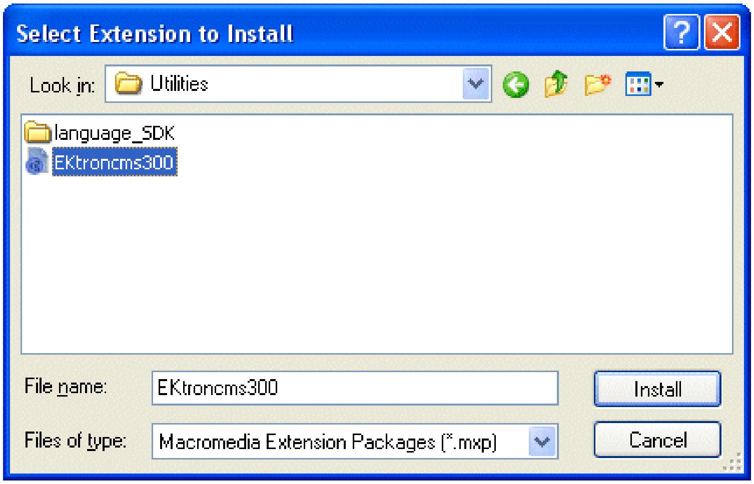
   File > Install Extension...

3. The Select Extension to Install window opens.



4. You need to locate the Macromedia® Extension Package (.mxp) file that corresponds to Ektron CMS300. By default, the file gets installed to the following directory:

   C:\Program Files\Ektron\CMS300\Utilities

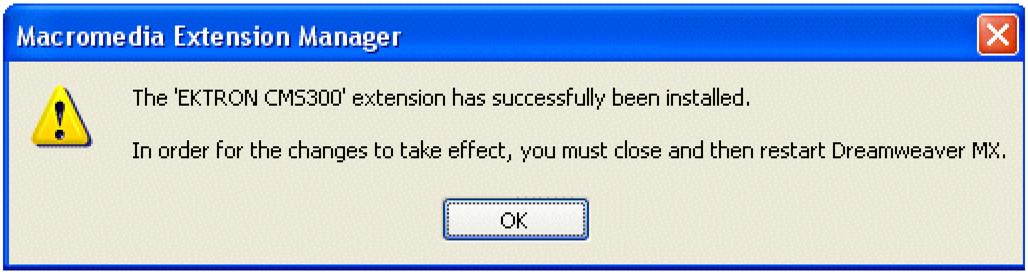


5. When you have selected the file, click the **Install** button.

   The installation will begin with the Macromedia® Extensions Disclaimer.

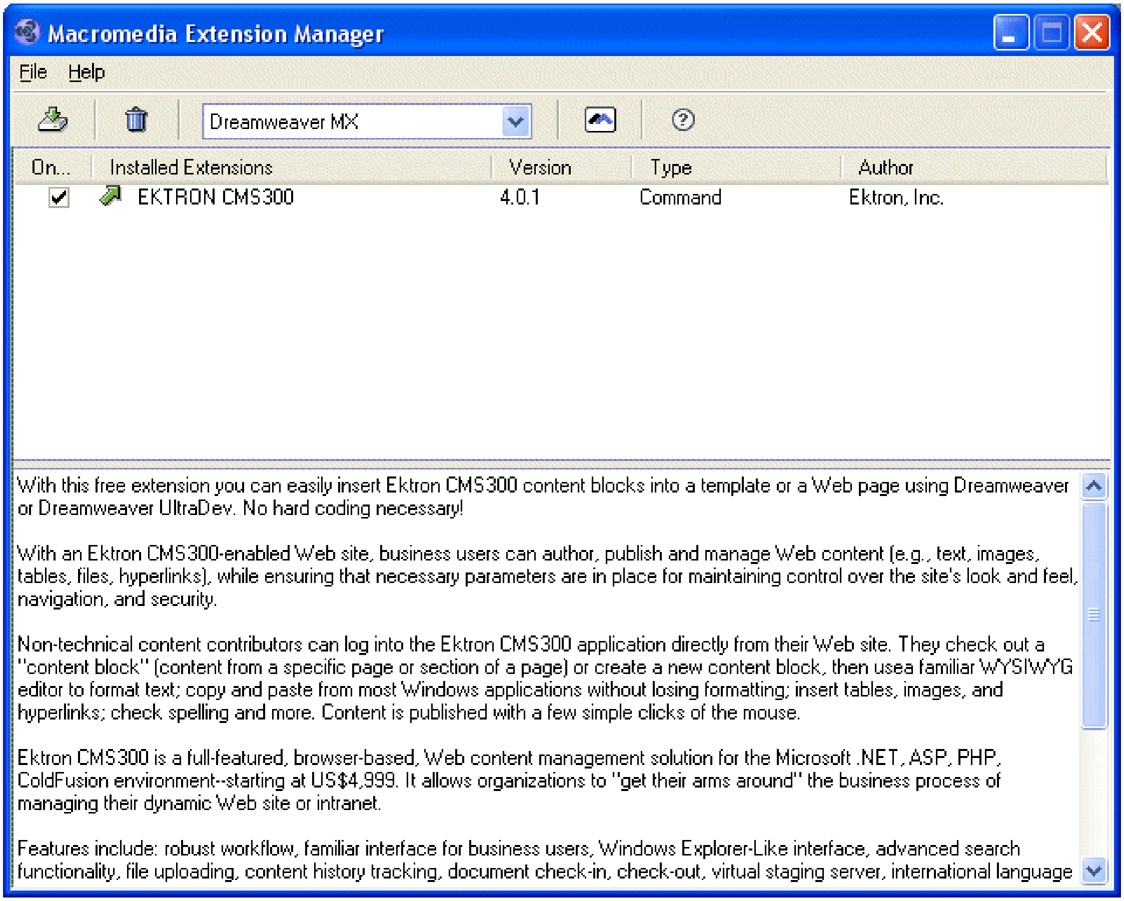
6. Click **Accept** to accept the disclaimer and install the extension.

   The extension begins to install. Once installed, you see a confirmation box.



7. Click **OK** to continue.

   The Macromedia Extension Manager is again displayed, but with the added extension.



8. If needed, exit Dreamweaver®, then start it back up.

Now you can use the Ektron CMS300 Extension Pack.

Refer to "Using the Ektron CMS300 Extension" on page 189 for more information on using Dreamweaver® to create and edit templates for Ektron CMS300.

Setup

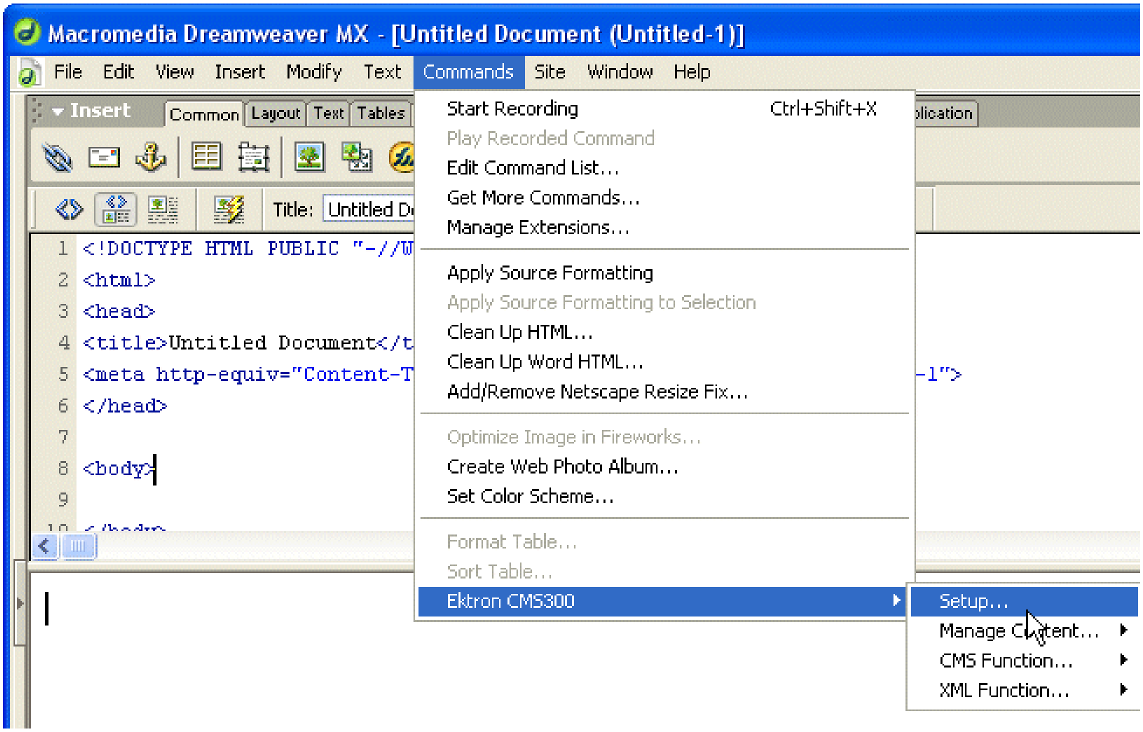
Before you can use Dreamweaver®/UltraDev™ to create and edit your templates for Ektron CMS300, you should configure the Ektron CMS300 Extension. Listed below are the configurative options for the extension in Dreamweaver:

- Username
- Password
- Domain
- Server File
- Server
- Work Online
- Include
- Check for Include

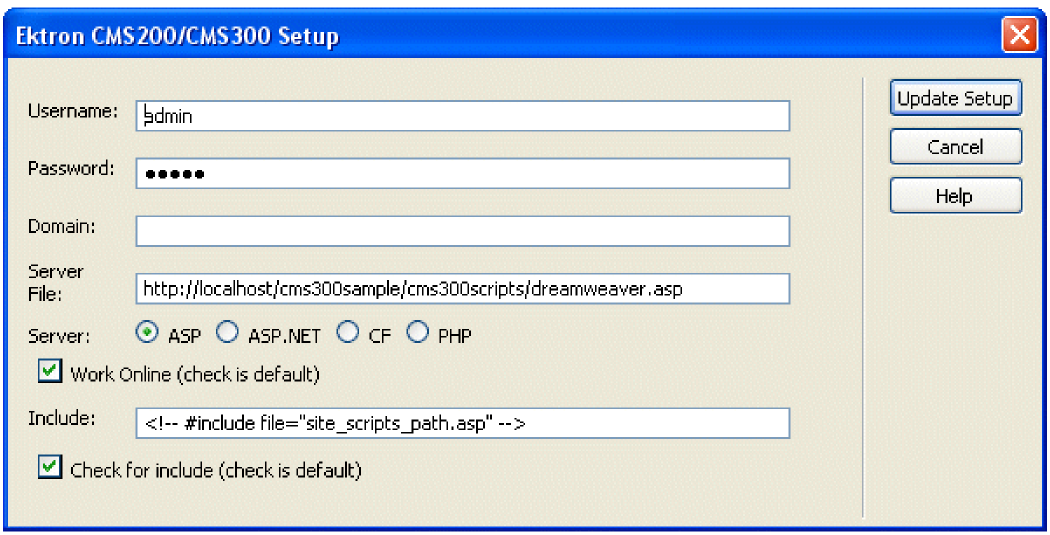
To change these options

1. Follow the path:

   Commands > Ektron CMS300 > Setup...



The Ektron CMS300 Setup dialog box is displayed on the screen.

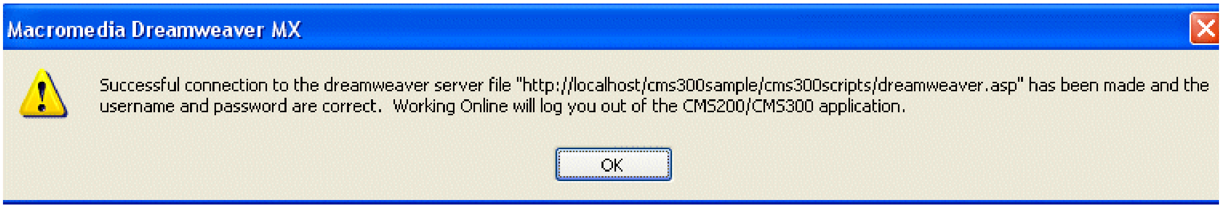


2. Use the following table to assist you with updating your setup information.

Field	Description
Username	Valid username of a user of your Ektron CMS300 Web site. When using the extension, the username will be used to log into the database to retrieve information about content blocks and other Web site information.
Password	Enter the password for the user into this field.
Domain	Only required in Active Directory has been enabled for your Web site. Enter the domain corresponding to the username entered.
Server File	Specify the location and file name for the dreamweaver.asp file needed for the extension to properly work and make connection with your Ektron CMS300 database.
Server	Select the type of application server you are creating templates for.
Work Online	By default, you will be checked off to work online. If you decide to work offline, you can no longer get data from the database in regards to the drop down list content block names for assigning content to a static content block.
Include	Since each Ektron CMS300 template requires an include file to point to the API with the definitions for the custom functions, you may specify the include file in this text box. If you have selected a server other than the default ASP server, be sure that you update this text box to use the correct include file. Note: If you are using ColdFusion as your application server, you will not need to include any file on the .cfm templates.
Check for Include	To avoid having two include files on the same template which could cause the template to not properly display in the browser, the check for include option will check the template for the include file specified in the include field. If the template does not have the include file referenced, then upon insertion of a custom function in Dreamweaver, the include file will automatically be added to the template.

3. Once you have completed editing your setup information, click Update Setup to save and update the settings.

   A message similar to the following is displayed;



NOTE A message other than this is probably due to an incorrect server file, username, or password. Recheck your settings and try again.

4. Click **OK** to continue.

   The setup dialog box closes, and you are now ready to create templates using Macromedia Dreamweaver.

Using the Ektron CMS300 Extension

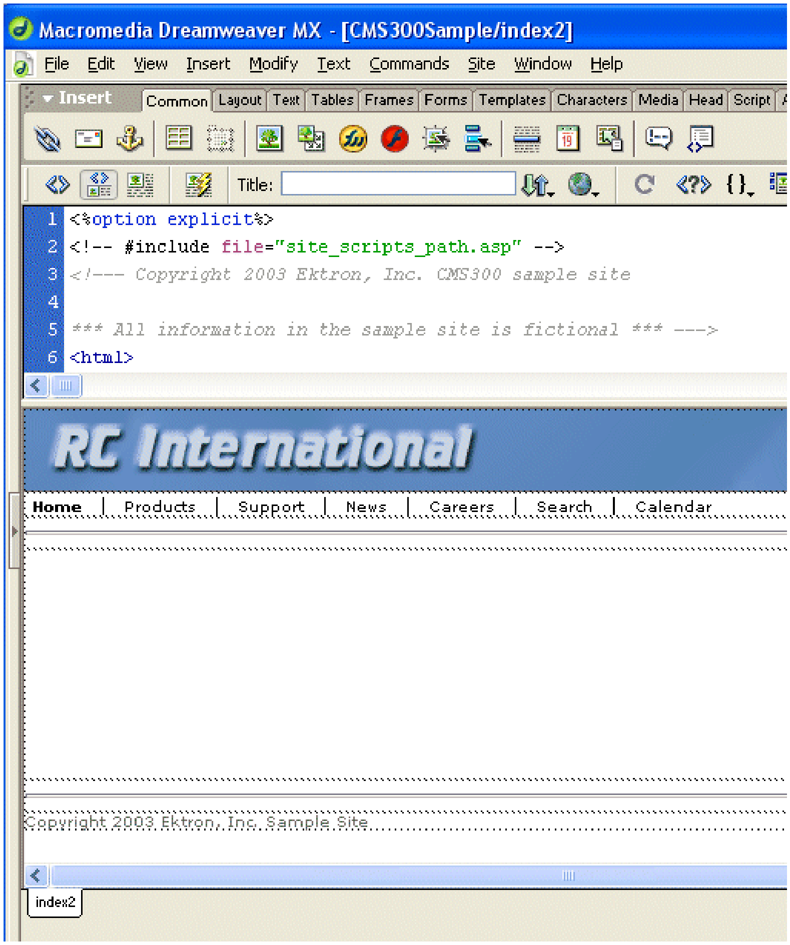
Now that the Macromedia® Extension Package has been installed for Dreamweaver, you can create and edit templates for Ektron CMS300.

To explain how to use this, we will begin by using a template that is in the Ektron CMS300 installation, index.asp, but with all of the custom tags stripped out.

NOTE You can also create your own templates instead of using the ones in the Ektron CMS300 installation.

In Dreamweaver, begin by opening the file:

C:\Inetpub\wwwroot\CMS300Sample\index.asp



NOTE The custom ASP function that is inserted into this template by default has been stripped out.

Custom Function Symbols

During the process of inserting functions, 17 symbols are used to represent the custom display functions. The following table explains each symbol.

Symbol	Represents	More Information
	Login/Logout button	”Insert a Login Tag...” on page 208
	Partner Login	”Inserting a Partner Login Tag” on page 209
	Static content block.	”Inserting a Static Content Block” on page 211
	Dynamic content block	”Inserting a Dynamic Content Block” on page 212
	Search tag	”Inserting a Search Function” on page 221
	Search display function	”Inserting a Search Display Function” on page 224
	List Summary	”Inserting a List Summary Function” on page 216
	Single Summary	”Inserting a Single Summary Function” on page 225

Symbol	Represents	More Information
	Metadata	"Inserting a Metadata Function" on page 219
	Collection	"Inserting a Collection Tag" on page 215
	Collection XSLT	
	Event Calendar	"Inserting an Event Calendar Function" on page 231
	XML Content Block *Used to insert an XML content block with an XSLT other than the default applied to it.*	
	Form Content Block	"Inserting a Form Content Function" on page 233
	Metadata XSLT	
	Random Content	"Inserting a Random Content Function" on page 227
	Random Summary	"Inserting a Random Summary Function" on page 229

Ektron CMS300 Commands Menu

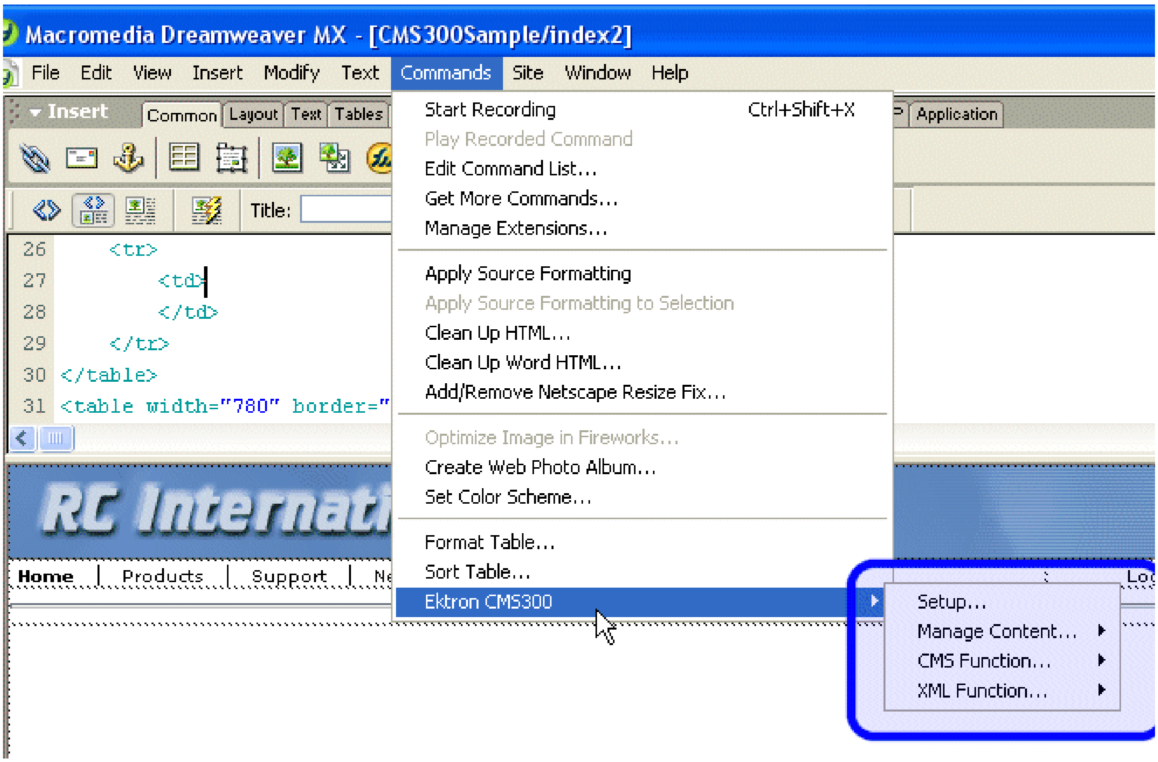
The following section explains how to locate Ektron CMS300 commands in Dreamweaver.

To locate the command menu in Dreamweaver, perform the following steps:

1. Open Dreamweaver.
2. In the top menu, follow the path:

   Commands > Ektron CMS300

   The Ektron CMS300 commands menu is displayed.



3. Click on the command for the task you would like to perform.

   The following table explains each of the commands:

Command	Description	More Information
Setup	Opens Ektron CMS300 Setup information dialog for Dreamweaver.	”Setup” on page 185

Command	Description	More Information
Manage Content...		
Edit Content...	Allows you to edit Ektron CMS300 content within Dreamweaver.	"Edit Content" on page 197
Save Content...	Allows you to save content created in Dreamweaver to Ektron CMS300	"Save Content" on page 199
Create Folder...	Allows you to create a new Ektron CMS300 content folder within Dreamweaver.	"Create Folder" on page 204
CMS Function...		
Insert Login Tag...	Inserts an Ektron CMS300 login function into the template.	"Insert a Login Tag..." on page 208
Insert Partner Login Tag...	Inserts an Ektron CMS300 partner login function into the template.	"Inserting a Partner Login Tag" on page 209
Insert Content Tag...	Inserts an Ektron CMS300 content block function into the template.	"Inserting a Static Content Block" on page 211
Insert Dynamic Tag...	Inserts an Ektron CMS300 dynamic content block placeholder function into the template.	"Inserting a Dynamic Content Block" on page 212
Insert Collection Tag...	Inserts an Ektron CMS300 collection function into the template.	"Inserting a Collection Tag" on page 215
Insert List Summary Tag...	Inserts an Ektron CMS300 list summary function into the template.	"Inserting a List Summary Function" on page 216
Insert Metadata Tag...	Inserts an Ektron CMS300 metadata function into the template.	"Inserting a Metadata Function" on page 219
Insert Search Tag...	Inserts an Ektron CMS300 search function into the template.	"Inserting a Search Function" on page 221
Insert Search Display Tag...	Inserts an Ektron CMS300 search display function into the template.	"Inserting a Search Display Function" on page 224

Command	Description	More Information
Insert Single Summary Tag...	Inserts an Ektron CMS300 single summary function into the template.	”Inserting a Single Summary Function” on page 225
Insert Random Content Tag...	Inserts an Ektron CMS300 random content function into the template.	”Inserting a Random Content Function” on page 227
Insert Random Summary Tag...	Inserts an Ektron CMS300 random summary function into the template.	”Inserting a Random Summary Function” on page 229
Insert Calendar Tag...	Inserts an Ektron CMS300 event calendar function into the template.	”Inserting an Event Calendar Function” on page 231
Insert Form Tag...	Inserts an Ektron CMS300 form content block into the template.	”Inserting a Form Content Function” on page 233
XML Function...		
Insert Content XSLT Tag...	Inserts an XML content block with your choice of XSLT in the template. NOTE: Used to insert an XML content block with an XSLT other than the default applied to it.	
Insert Meta XSLT Tag...	Inserts an Ektron CMS300 content block with an XSLT applied to it forcing it to only display Metadata information.	
Insert Collection XSLT Tag...	Inserts an Ektron CMS300 content block with an XSLT applied to it forcing it to only display summary information.	

Each of these functions are explained in the following sections.

Inserting Custom Functions

The following section explains the steps required to insert each of Ektron CMS300's functions into your Web templates.

Manage Content...

Making the process of setting up and managing your Web site, the Ektron CMS300 Dreamweaver extension allows you to perform content related tasks directly from Macromedia Dreamweaver saving you time and effort.

Through Dreamweaver, you can perform the following tasks:

- Add new content blocks to Ektron CMS300
- Edit existing Ektron CMS300 content block
- Create new content folders

The following sections explain how to perform these tasks.

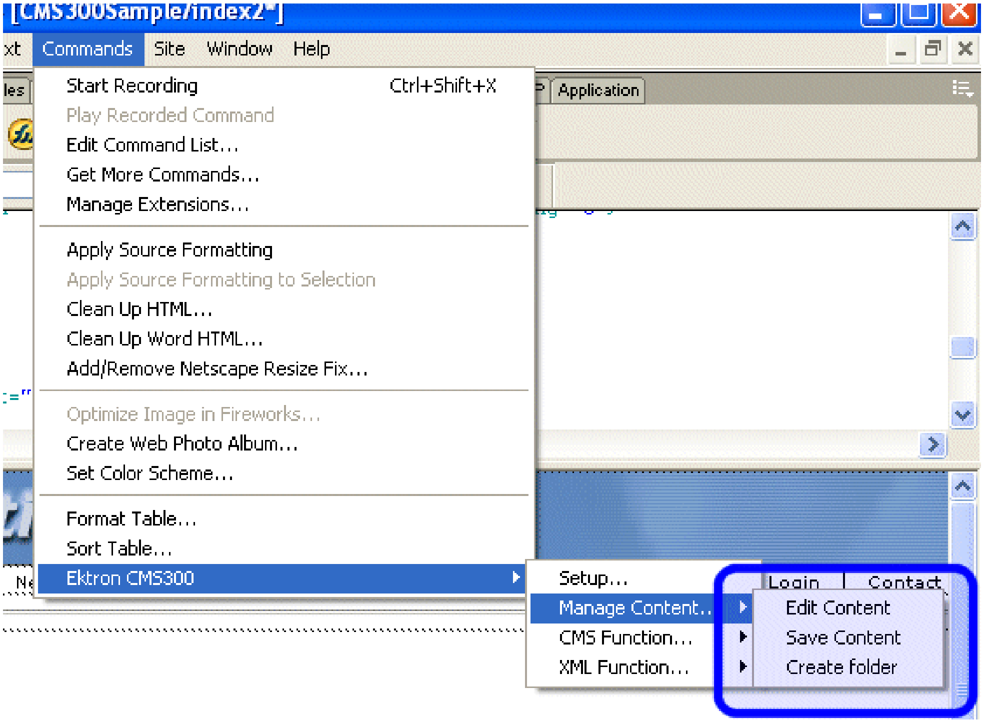
NOTE The user specified in the setup information for the extension will only be able to perform tasks they have permissions to in Ektron CMS300.

Accessing Manage Content Commands...

To access the CMS Manage commands menu, follow this path:

Commands > Ektron CMS300... > Manage Content...

A list of all CMS Manage Content commands that can be performed is displayed.



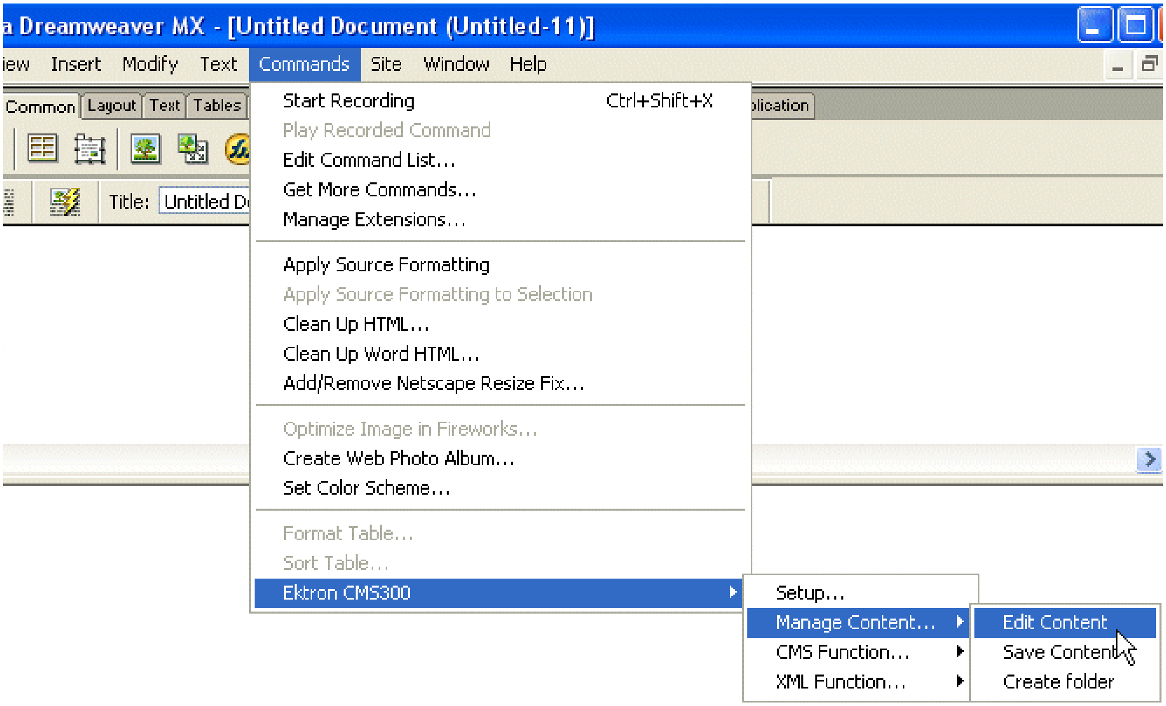
The following sections explain how to use the manage content commands.

Edit Content

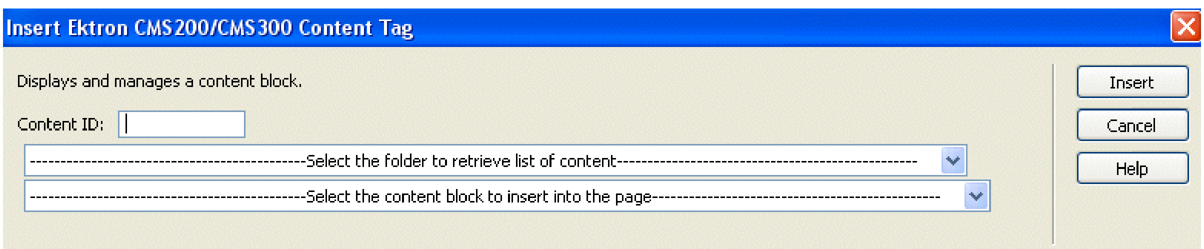
The edit content command allows you to get a content block from the Ektron CMS300 Web site, and edit it within Dreamweaver.

To edit a content block within Dreamweaver, perform the following steps:

1. Create a new HTML document in Dreamweaver.
2. In the Ektron CMS300 Manage Content menu, click on Edit Content.



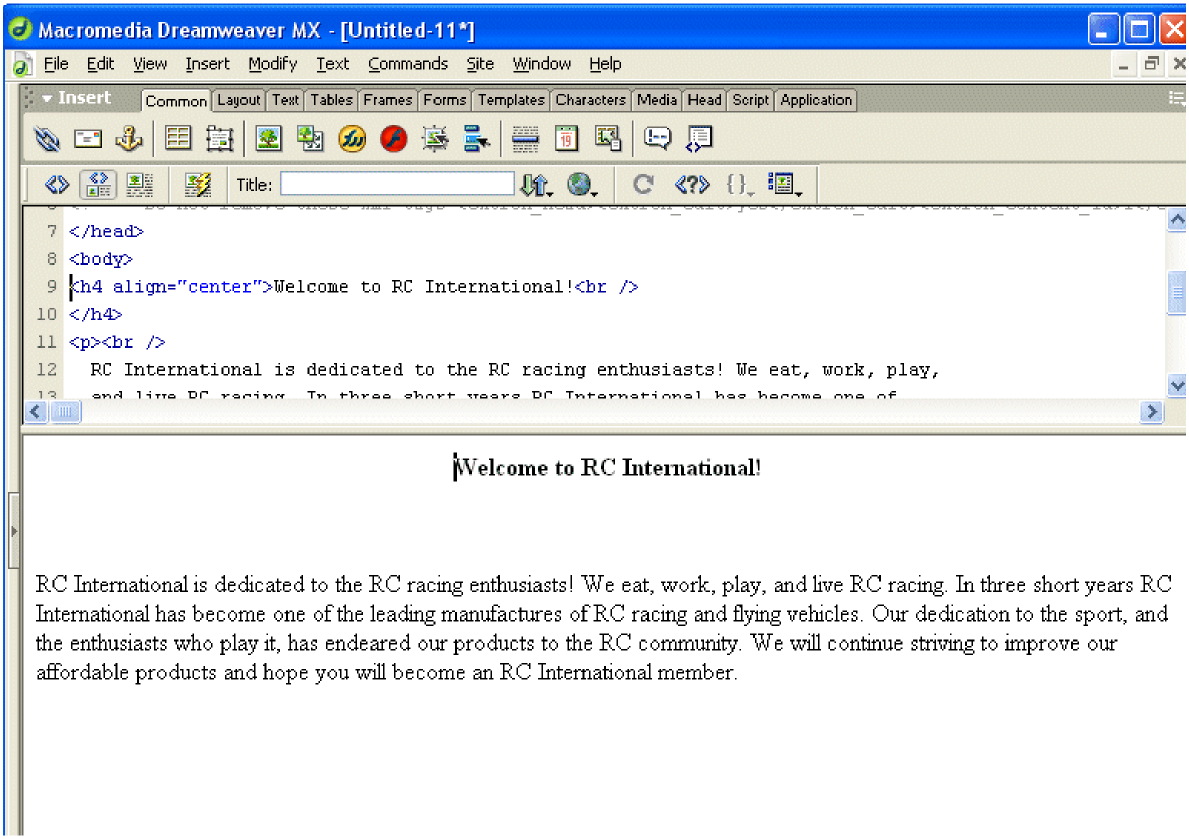
The Insert Content tag dialog box is displayed.



3. Choose the Ektron CMS300 content block you would like to edit by:
   - Typing the ID number of the content
   - Using the drop down lists to locate the content folder and content block

4. Click **Insert** when you have chosen the content block.

   The content block is inserted into Dreamweaver.



5. Make the necessary changes to the content block using Dreamweaver's editing capabilities.

   See "Saving Existing Ektron CMS300 Content" on page 203 for information about saving the content back to Ektron CMS300.

Save Content

Content that has been created, or edited, in Dreamweaver can be saved to your Ektron CMS300 Web site by using the Save Content command.

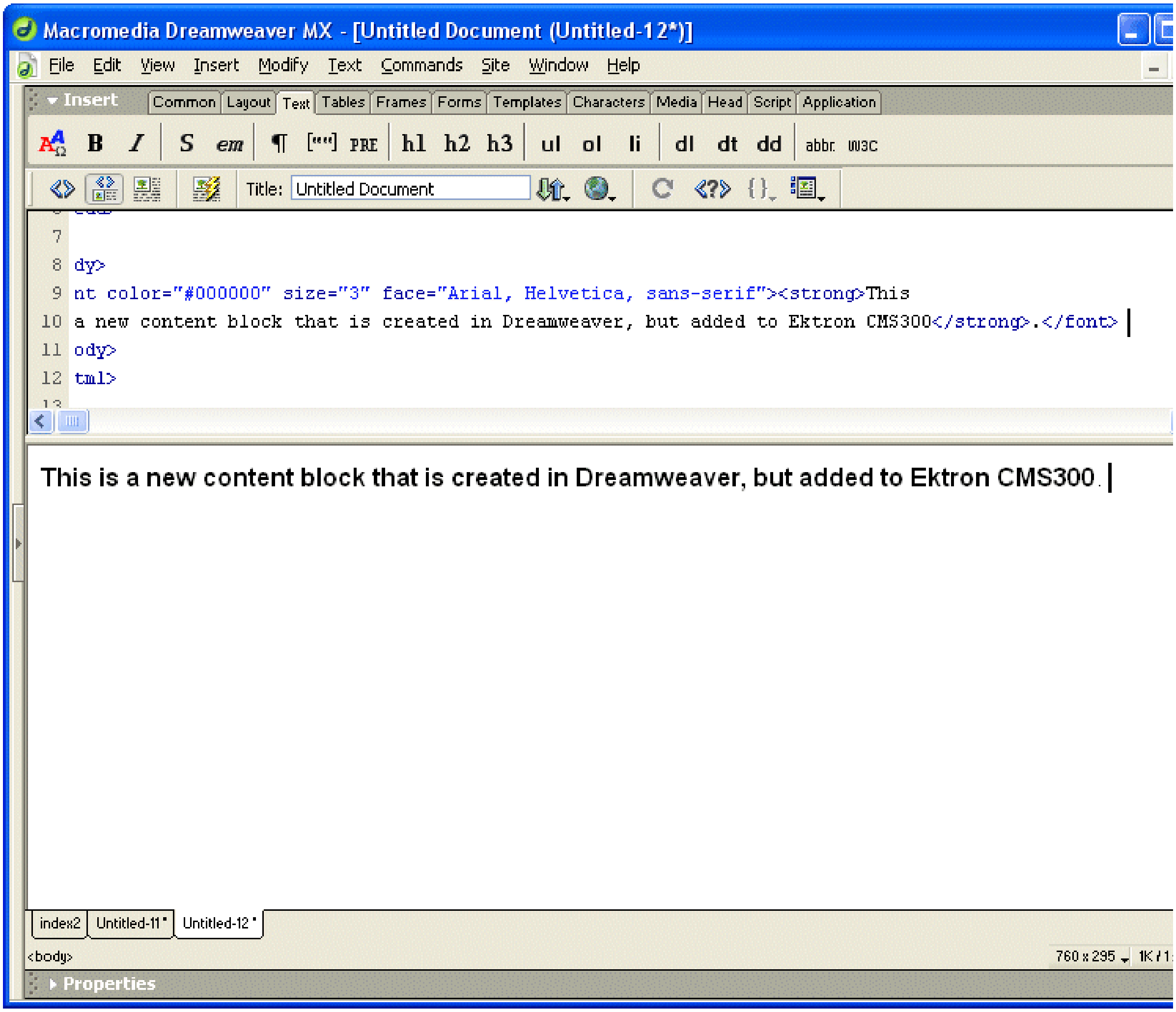
The following section explains how to save content created, and edited, to Ektron CMS300.

Saving New Content

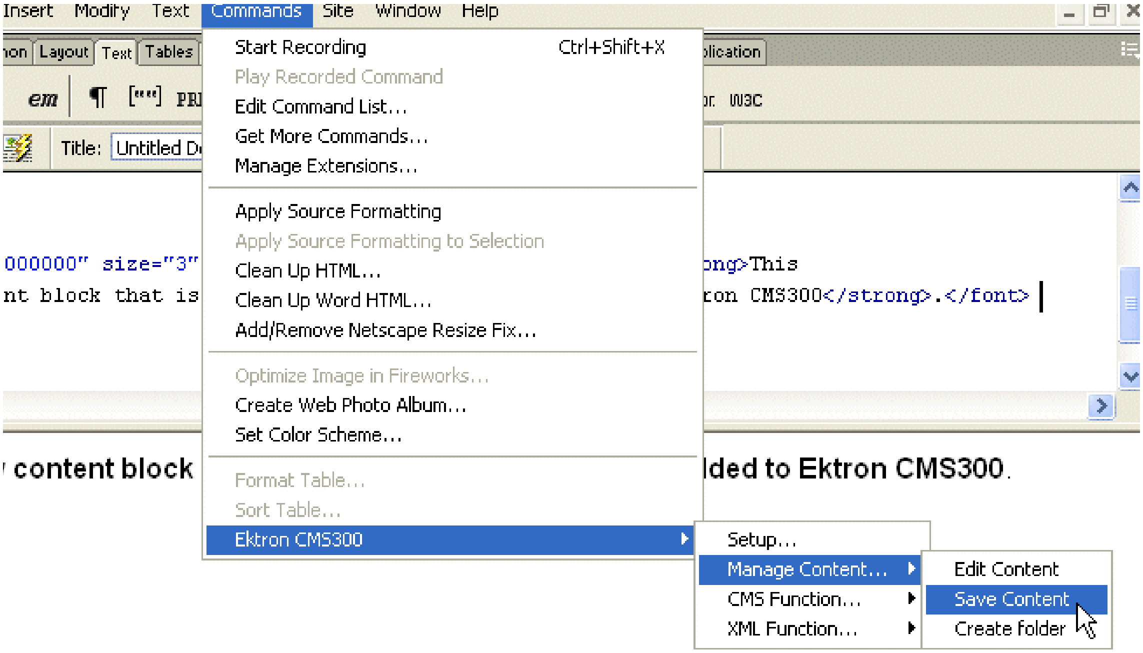
Content can be created in Dreamweaver, then saved to Ektron CMS300.

To save a content block that was created in Dreamweaver, perform the following steps:

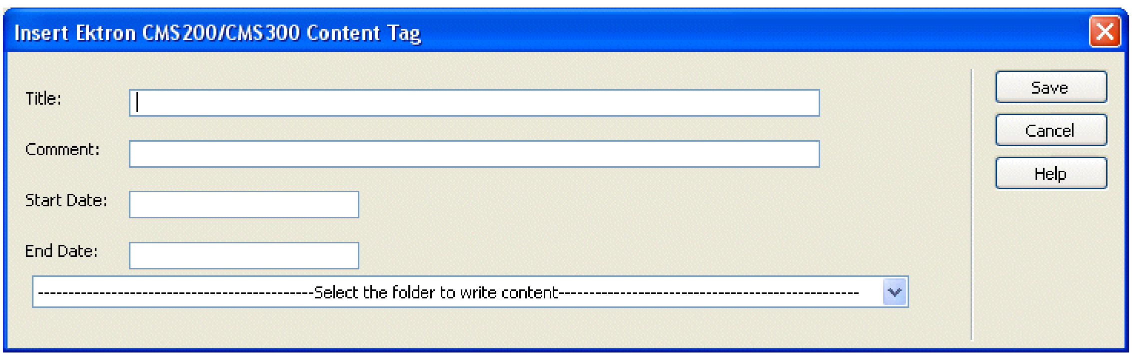
1. If you haven't already, create the new content in Dreamweaver.



2. In the Ektron CMS300 Manage Content menu, click on **Save Content.**



The Save Content dialog box is displayed.

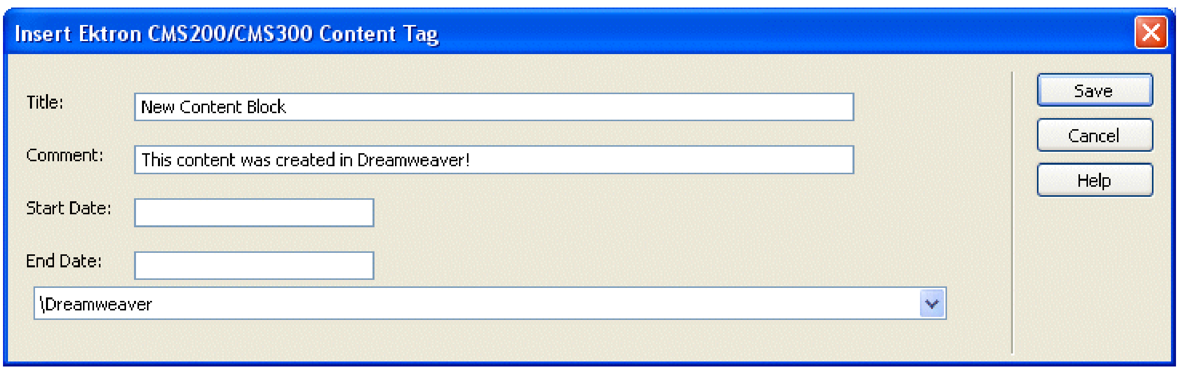


3. Using the following table, enter the necessary information to complete the form.

Field	Description
Title	Type a unique title for the content block.
Comment	Enter a comment for the content block.

Field	Description
Start Date	If desired, type in a start date for the content block. NOTE: Date format MUST match what is set in /cms300scripts/setup.asp. By default, this is **dd-mmm-yyyy hh:mm AM/PM** (for example, 24-Dec-2005 10:15 AM)
End Date	If desired, type in an end date for the content block. NOTE: Date format MUST match what is set in /cms300scripts/setup.asp. By default, this is **dd-mmm-yyyy hh:mm AM/PM** (for example, 24-Dec-2005 10:15 AM)
Content Folder	Select the content folder you would like to save the new content block to.

Here is an example of this form filled out.

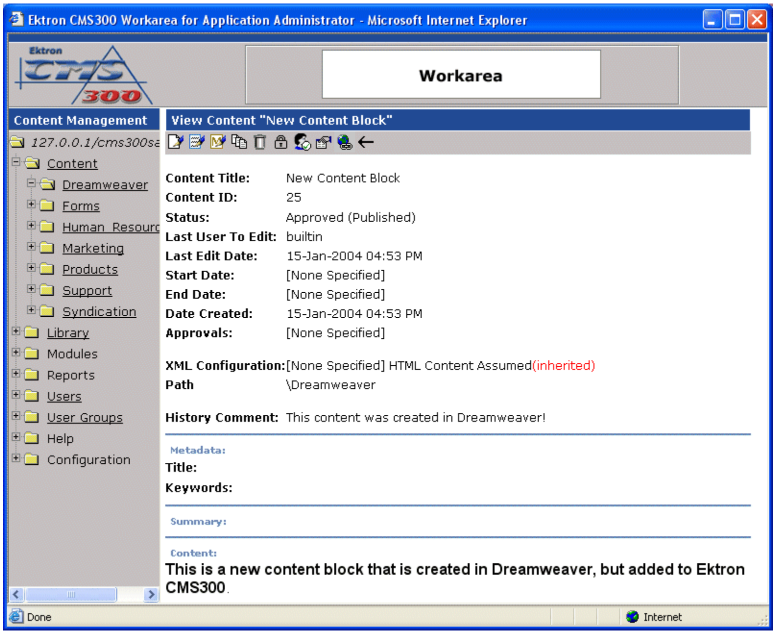


4. Click **Save** to save and add the new content block the selected content folder in Ektron CMS300.

   The content block is added, and the following confirmation message is displayed.

NOTE If you receive a message other than the one displayed above, check your settings and try again.

Here is the new content block in the Ektron CMS300 Workarea.



Saving Existing Ektron CMS300 Content

When Ektron CMS300 content has been edited in Dreamweaver, you can use the save content command to save your changes back to Ektron CMS300.

To save existing Ektron CMS300 content, perform the following steps.

1. Make changes to an existing Ektron CMS300 content block as described in ”Edit Content” on page 197.
2. In the Ektron CMS300 Manage Content Menu, click on **Save Content.**
3. The Save Ektron Content dialog box is displayed.
4. Use the following table to complete the form.

Field	Description
Title	Editing this field will rename the content block in Ektron CMS300.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Comment</td><td>Enter a comment for the content block.</td></tr>
<tr><td>Start Date</td><td>If desired, type in a start date for the content block.

NOTE: Date format MUST match what is set in /cms300scripts/setup.asp.
By default, this is dd-mmm-yyyy hh:mm AM/PM (for example, 24-Dec-2005 10:15 AM)</td></tr>
<tr><td>End Date</td><td>If desired, type in an end date for the content block.

NOTE: Date format MUST match what is set in /cms300scripts/setup.asp.
By default, this is dd-mmm-yyyy hh:mm AM/PM (for example, 24-Dec-2005 10:15 AM)</td></tr>
<tr><td>Content Folder</td><td>Disabled.</td></tr>
</table>

5. Click **Save** to save the changes made to the content.

   The content is saved, and a confirmation message is displayed.

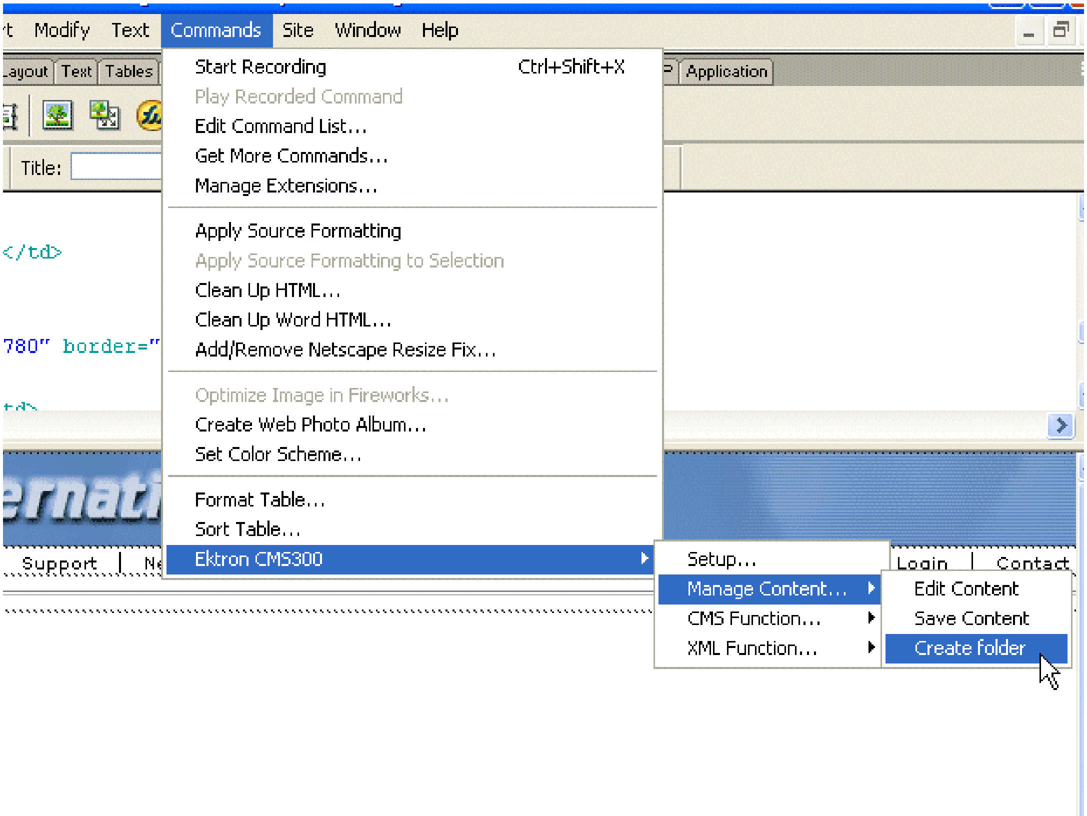
NOTE If you receive a message other than the one displayed above, check your settings and try again.

Create Folder

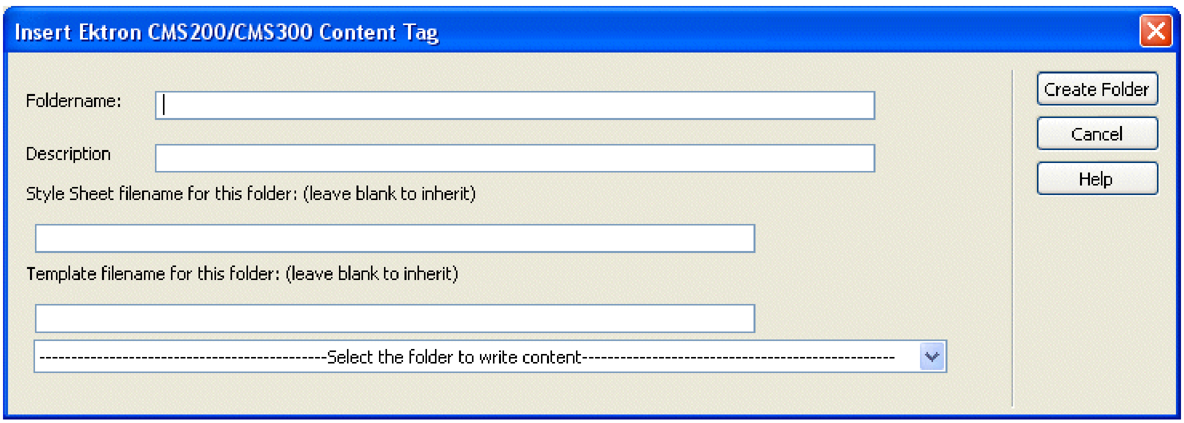
To allow you to easily organize your Web content from Dreamweaver, the Ektron CMS300 extension allows you to create new content folders.

To create a new content folder from Dreamweaver, perform the following steps:

1. In the Ektron CMS300 Manage Content command menu, click on **Create Folder.**



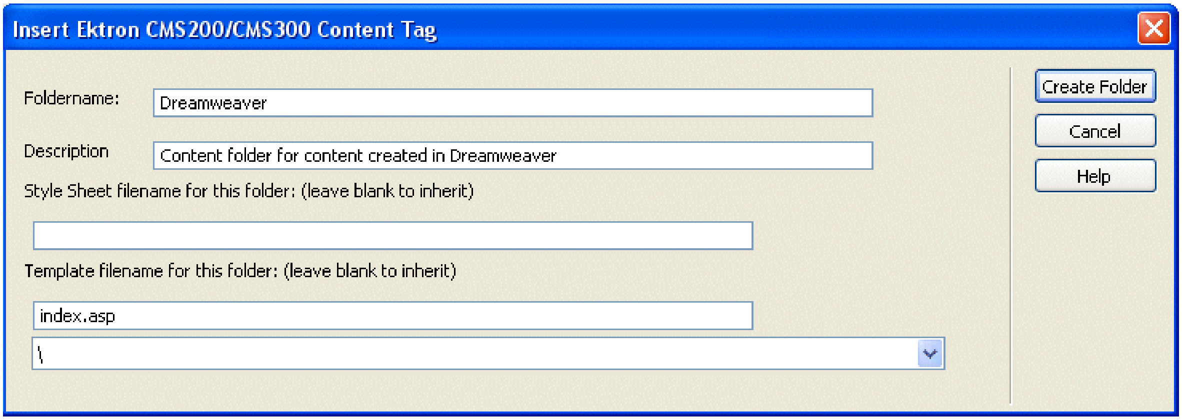
The Create Ektron Content Folder dialog box is displayed.



2. Using the following table, enter the necessary information to create the content folder.

Field	Description
Foldername	Type in a name for the content folder to be created.
Description	Enter a description for the new content folder.
Style Sheet	Type in the path and filename, relative to your Ektron CMS300 site root, of a style sheet to be applied to content that will belong to the folder. NOTE: Leave blank to inherit the settings of the parent folder.
Template	Type in the path and filename, relative to your Ektron CMS300 site root, of a template to be applied to content that will belong to the folder. NOTE: Leave blank to inherit the settings of the parent folder.
Select Folder	From the drop down list, select the existing content folder the new folder will belong to.

Here is an example of a completed form.



3. Click **Create Folder** to add the new content folder to Ektron CMS300.

   The content folder is added and a confirmation message is displayed.

NOTE If a message other than this is displayed, check your settings and try again.

CMS Content...

The CMS Content commands allow you to insert standard Ektron CMS300 display functions into your template.

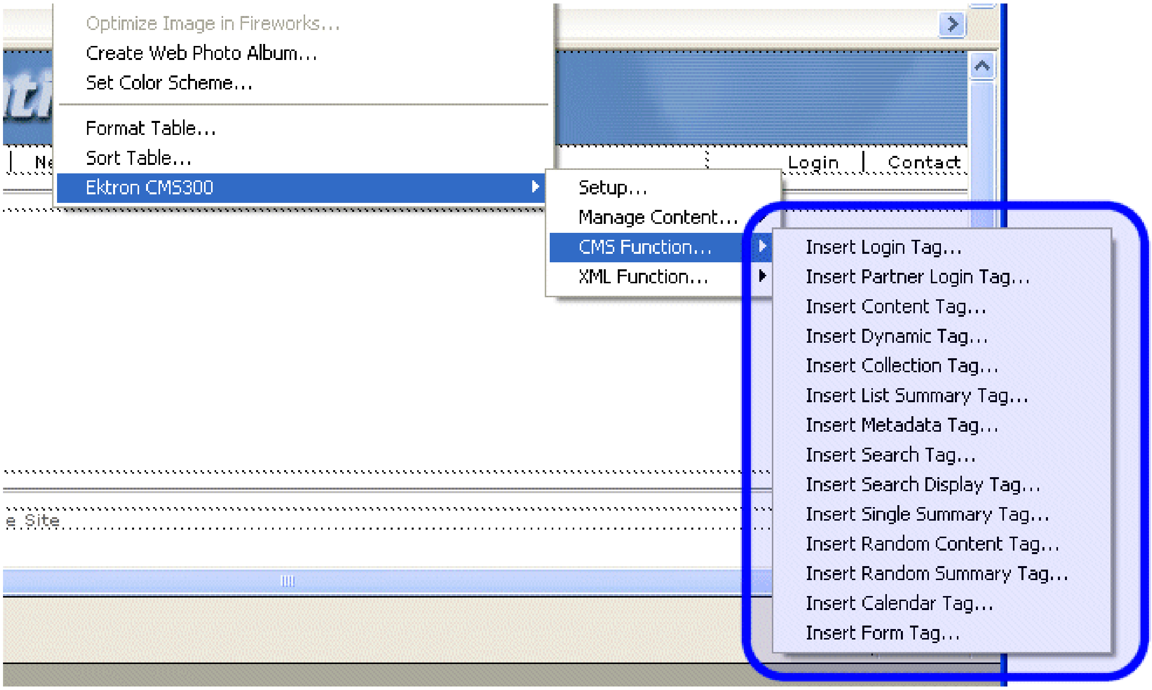
The following sections explain how to insert each function.

Accessing CMS Content Commands...

To access the CMS Content commands menu, follow this path:

Commands > Ektron CMS300... > CMS Content...

A list of all CMS Content functions that can be inserted is displayed.



The following sections explain how to insert each of the available functions.

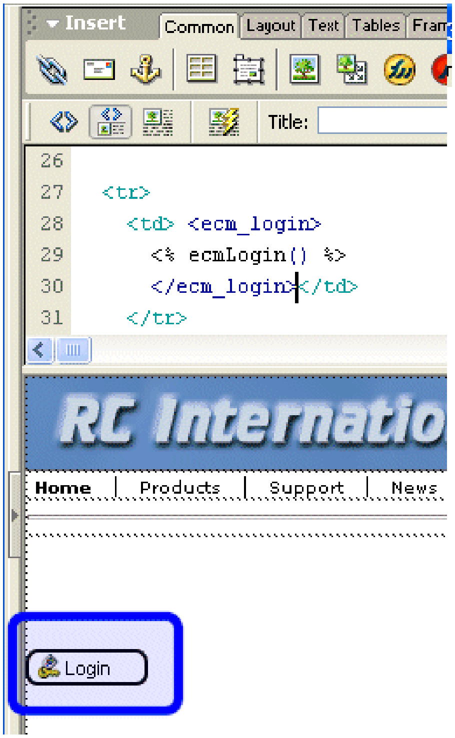
Insert a Login Tag...

To insert a login tag:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content commands, click on **Insert Login Tag...**
3. The Insert Ektron CMS300 Login Tag box appears.

4. Click **insert**.

   A login icon indicates where the login button will appear on the template.



Below is the code that will be inserted according to the platform specified in the setup:

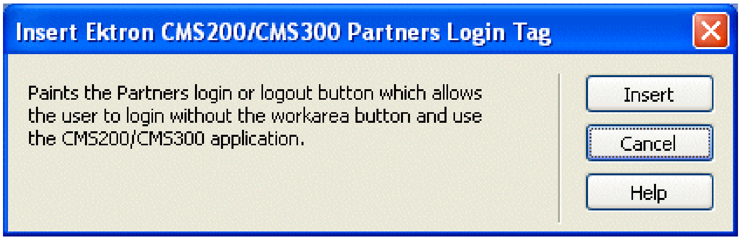
Platform	Code View
ASP	<% ecmlogin %>
ColdFusion	<cfmodule template="#request.ecm.AppPath#ecmLogin.cfm”>
.NET	<% ecmlogin() %>
PHP	<?php ecmlogin() ?>

Inserting a Partner Login Tag

To insert a partner login tag, which only displays a login and logout button on the Web page, perform the following steps:

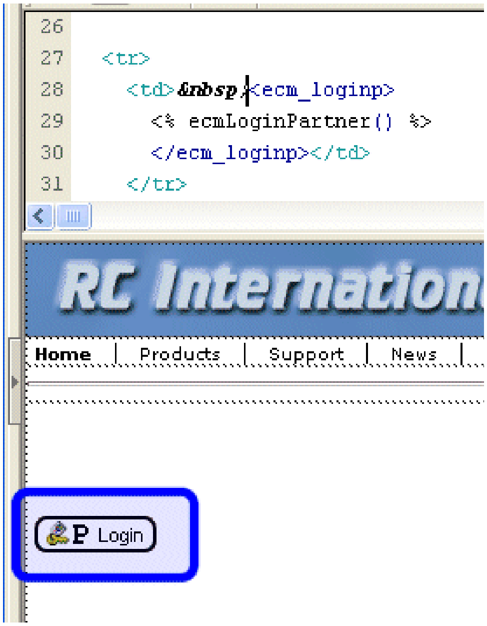
1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content commands, click on **Insert Partner Login Tag...**

   The Insert Ektron CMS300 Partners Login Tag box appears.



3. Click **insert**.

   A login icon indicates where the partner login button will appear on the template.



Shown below is the code that will be inserted according to the platform that has been specified in the setup:

Platform	Code View
ASP	<% ecmLoginPartner %>
ColdFusion	<cfmodule template=”#request.ecm.AppPath#ecmLoginPartner.cfm”>

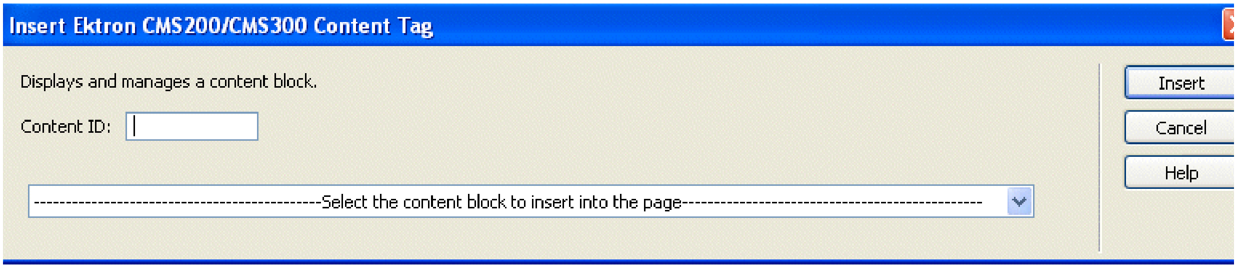
Platform	Code View
.NET	<% ecmLoginPartner() %>
PHP	<?php ecmLoginPartner() ?>

Inserting a Static Content Block

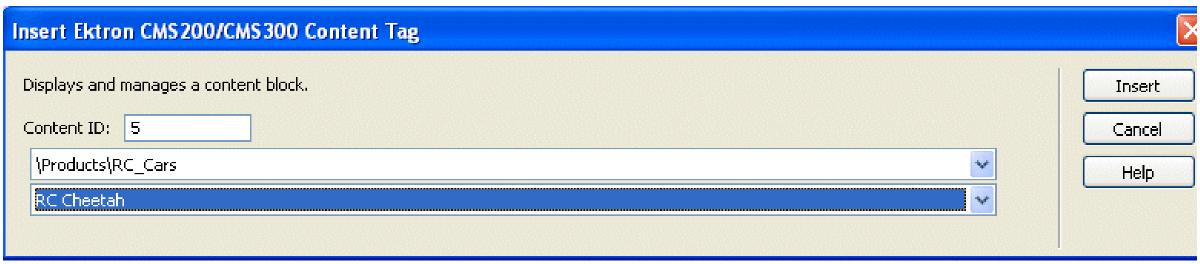
To insert a static content block tag:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content functions, click on **Insert Content Tag...**

   The Insert Content Tag box is displayed



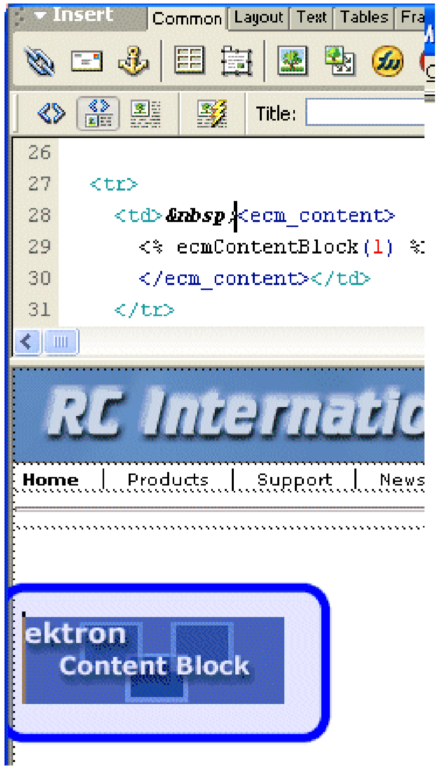
- If you know the ID of the content or you want to insert a static content block for a document that doesn't exist yet, enter the ID in the content ID field.
- Click on the field below the Content ID box, and select a content block from the drop down box:



NOTE You see only the list of Ektron CMS300 content blocks if you are working online.

3. Click **insert**.

   A graphic indicates the static content block's location on the template.



The code below is inserted according to the platform that has been specified in the setup:

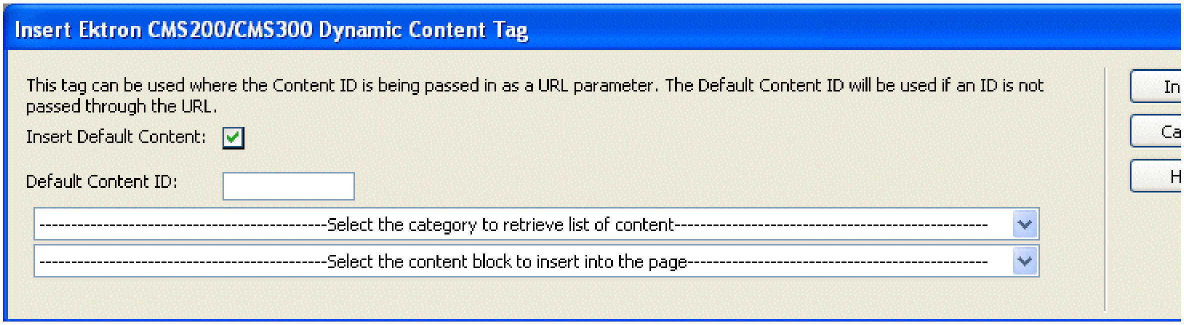
Platform	Code View
ASP	<% ecmContentBlock(1) %>
ColdFusion	<cfmodule id="1" template="#request.ecm.AppPath#ecmContentBlock.cfm">
.NET	<% ecmContentBlock(1) %>
PHP	<?php ecmContentBlock(1); ?>

Inserting a Dynamic Content Block

To insert a dynamic content block tag:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content functions, click on **Insert Dynamic Tag...**

   The Insert Ektron Dynamic Tag box is displayed

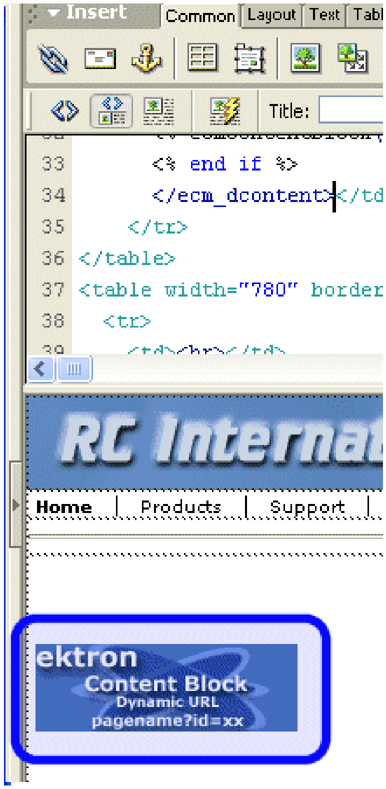


3. Use the following table to assist you will inserting a dynamic content block function.

Field	Description
Insert Default Content	If you want a static content block to be displayed if no ID is passed through the URL, check off this box.
Default Content ID	Specify the ID number of the content block that you wish to use as a default content block on the Web page.
Select Content	If you are working online, you may select the content block to use as a default content block from the list.

4. When completed, click **insert**.

   A graphic to define where the dynamic content block has been placed on your template is inserted.



Shown below is the code that will be inserted according to the platform that has been specified in the setup:

Platform	Code View

ASP	`<% if request.QueryString("id")<> "" then`
	`ecmContentBlock(request.QueryString("id")) else ecmContentBlock(1) end if`
	`%>`

ColdFusion	`<cfif isdefined("url.id")>`
	`<cfmodule id="#url.id#"`
	`template="#request.ecm.AppPath#ecmContentBlock.cfm">`
	`<cfelse>`
	`<cfmodule id="1"`
	`template="#request.ecm.AppPath#ecmContentBlock.cfm">`
	`</cfif>`

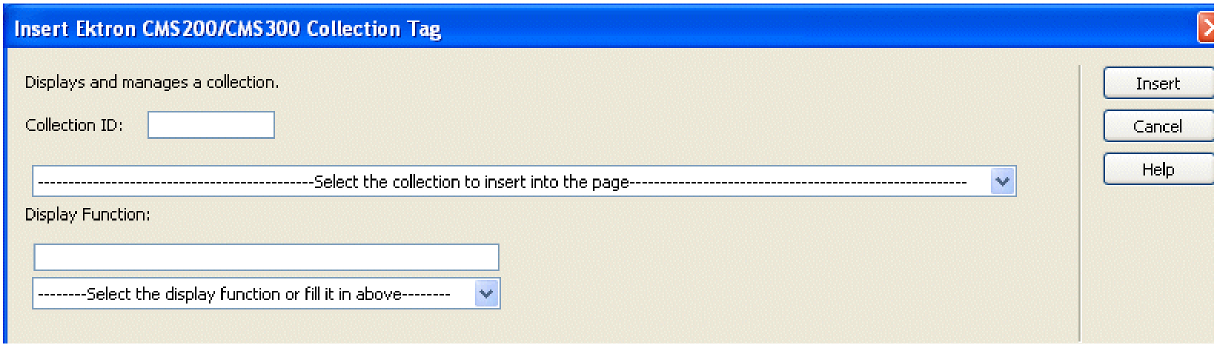
Platform	Code View
.NET	`<% if request.QueryString("id")<> "" then ecmContentBlock(request.QueryString("id")) else ecmContentBlock(1) end if %>`
PHP	`<?php $id =GetURL_Id(1); ecmContentBlock($id); ?>`

Inserting a Collection Tag

To insert a collection tag:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content functions, click on **Insert Collection Tag...**

   The Insert Ektron Collection Tag box is displayed.



3. Use the following table to assist you will inserting a navigation tag.

Field	Description
Collection ID	• Working Offline - If you are working offline, you can enter a Collection ID into the textbox. • Working Online - If you are working online, the top drop-down list will be filled with a list of categories that you have privileges to. After choosing a category, the bottom drop-down box will be filled with a list of all the Collection titles within that category. When a title is selected, the Collection ID textbox will be filled with that Collection's id number.
Display Function	Either choose from the provided list of display functions or fill in one of your own

4. When completed, click **insert**.

   A graphic to define where the collection tag will appear on your template is inserted.

Shown below is the code that will be inserted according to the platform that has been specified in the setup:

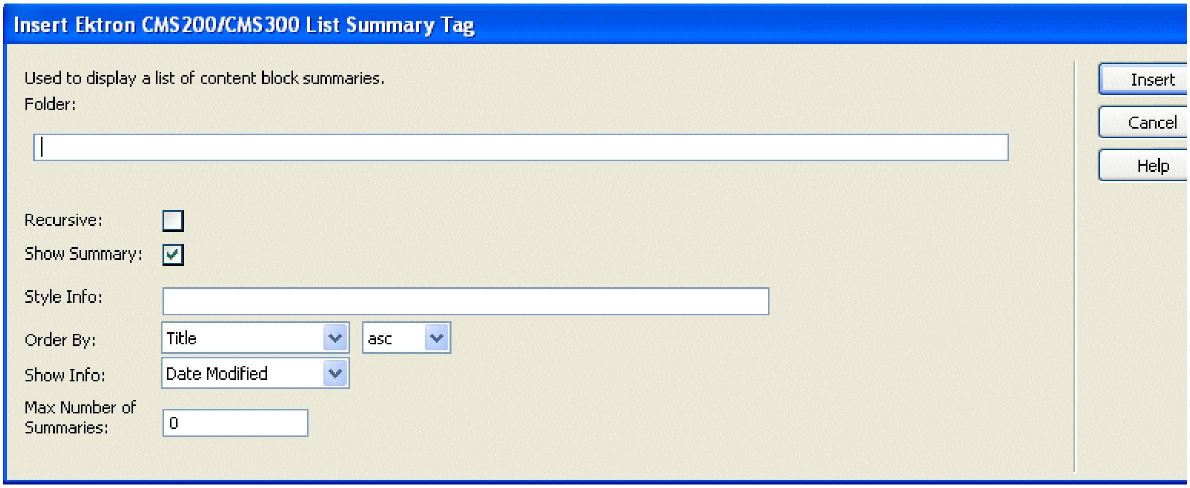
Platform	Code View
ASP	`<% ecmCollection 1,"ecmNavigation" %>`
ColdFusion	`<cfmodule id="1" displayFunction="ecmNavigation" template="#request.ecm.AppPath#ecmCollection.cfm">`
.NET	`<% ecmCollection(1,"ecmNavigation") %>`
PHP	`<?php ecmCollection(1,"ecmNavigation"); ?>`

Inserting a List Summary Function

To insert a list summary function:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content functions, click on **Insert List Summary Tag...**

   The Insert Ektron List Summary Tag box is displayed.

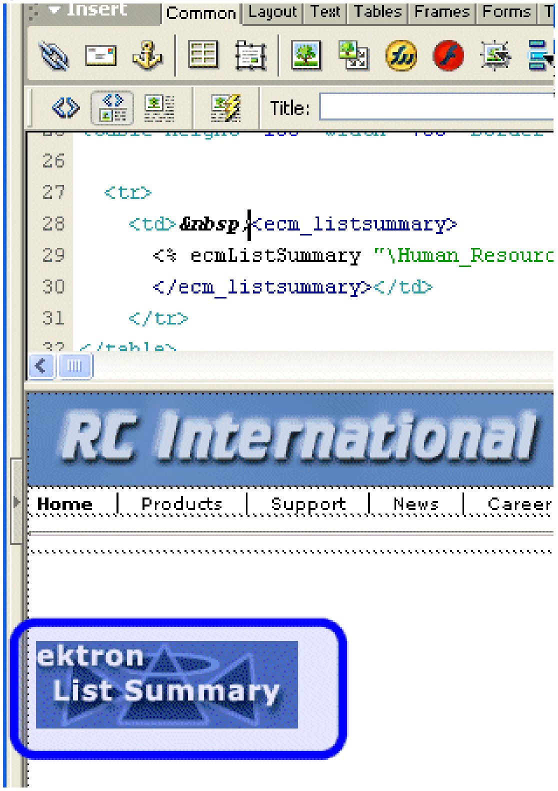


3. Use the following table to assist you will inserting a metadata tag.

Field	Description
Folder	Select the folder the summary information will come from. If you are working online, the folder drop-down contains folders from your site. Either enter the folder name manually or select it from the list. The default is the root or "\".
Recursive	If checked, summary information will be gathered from the folder selected and all of it's child folders.
ShowSummary	If checked, content summaries will be displayed.
StyleInfo	Insert any inline style information, which will be applied to the generated text hyperlink, here.
OrderBy	Specify how the summaries are ordered.
ShowInfo	Select the type of information that will be displayed next to the generated hyperlinks.
Max Number of Summaries	Enter a number to specify how may summaries will be displayed on the page (0=unlimited).

4. When completed, click **insert**.

   A graphic to define where the list summary tag will appear on your template is inserted.



Shown below is the code that will be inserted according to the platform that has been specified in the setup:

Platform	**Code View**
ASP	`<% ecmListSummary "\Human Resources",1,1,"","DateModified,desc", "DateCreated",0,"","" %>`
ColdFusion	`<cfmodule template="#request.ecm.AppPath#ecmListSummary.cfm" Folder="\Human Resources" MaxNumber="0" Recursive="1" ShowSummary="1" StyleInfo="" OrderBy="DateModified,desc" ShowInfo="DateCreated">`
.NET	`<% ecmListSummary( "\Human Resources",1,1,"","DateModified,desc", "DateCreated",0,"","" )%>`
PHP	`<?php ecmListSummary("\Human Resources",1,1,"", "DateModified,desc","DateCreated",0,"",""); ?>`

Inserting a Metadata Function

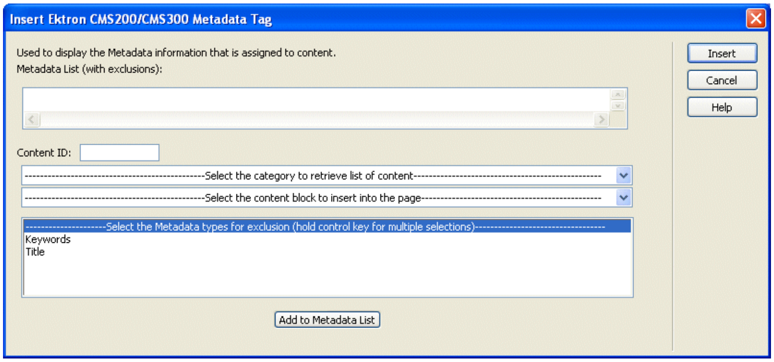
To insert a metadata function:

1. Move the blinking cursor to the area that you want to place it.

NOTE The Ektron CMS300 Metadata function should be inserted within the <head> tags of your template to work properly.

2. From the list of Ektron CMS300 Content functions, click on **Insert Metadata Tag...**

   The Insert Ektron Metadata Tag box is displayed.



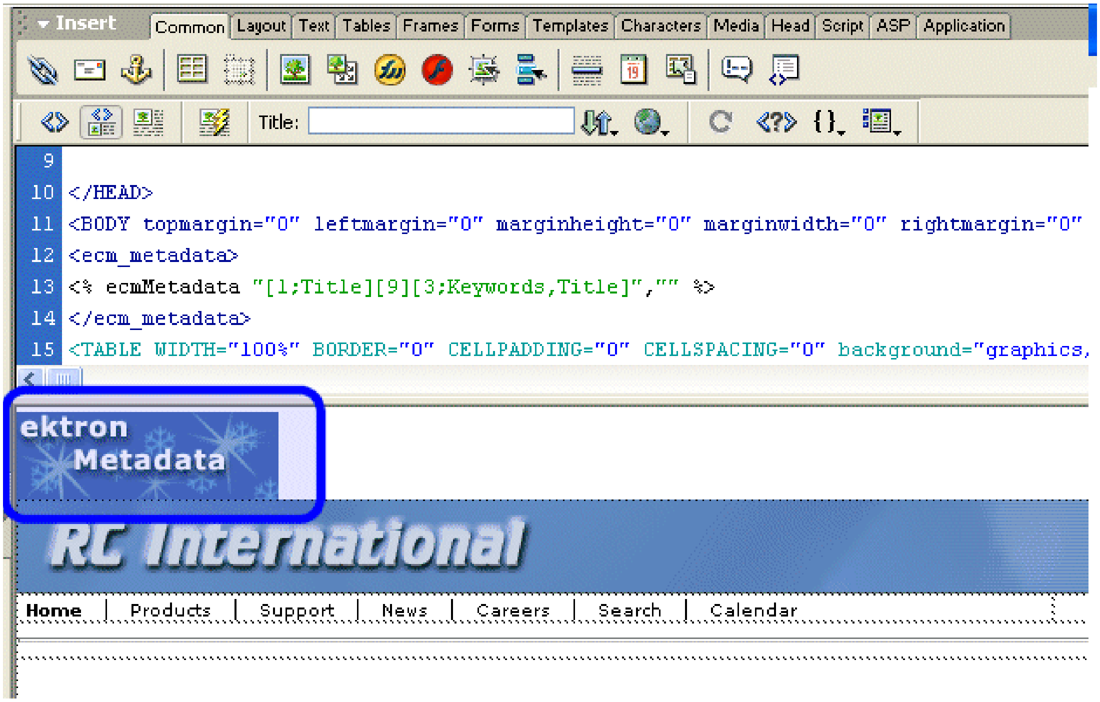
3. Use the following table to assist you will inserting a metadata tag.

Field	Description
Metadata List (with exclusions)	This is the list of content ids which you want to show the assigned Metadata of. The syntax is [id, exclusion list][id, exclusion list]. An example would be [1][2;title, keywords]. The exclusion list is a comma delimited list.
Content ID	• Working Offline - Enter a valid content ID in the Content ID text-box. • Working Online - The top drop-down list contains a list of content folders that you have privileges to. After choosing a content folder, the bottom drop-down box is populated with a list of all the content block titles within that folder. When a title is selected, the content ID textbox will be filled with that content block's id number.

Field	Description
Exclusion List	This is the list of Metadata tags that will be displayed with for the content id. By selecting one or many of the types in this list, you can exclude them from being displayed. An example of an exclusion would be if you wanted to display meta information for 2 content blocks and they both had the same title. You would want to exclude the title for 1 of the content blocks so only 1 title would be displayed.

4. When completed, click **insert**.

   A graphic to define where the metadata tag will appear on your template is inserted.



Shown below is the code that will be inserted according to the platform that has been specified in the setup:

Platform	Code View
ASP	`<% ecmMetadata "[1;Title][9][3;Keywords,Title]","" %>`
ColdFusion	`<cfmodule template="#request.ecm.AppPath#ecmMetadata.cfm" ItemList="[1;Title][9][3;Keywords,Title]">`

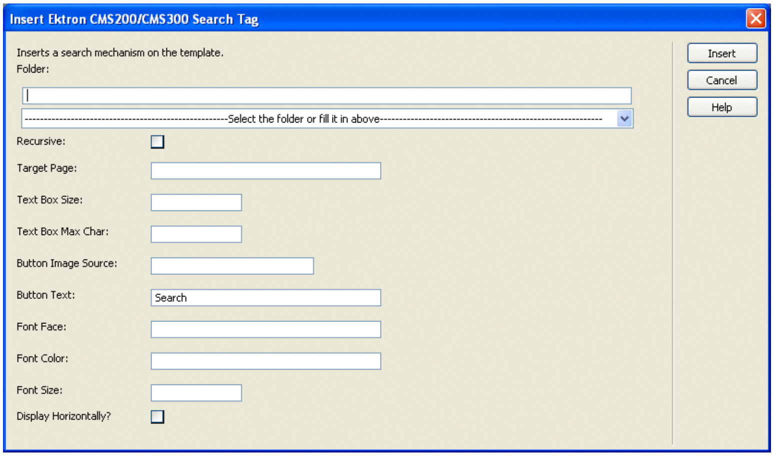
Platform	Code View
.NET	<% ecmMetadata("[1;Title][9][3;Keywords,Title]","")%>
PHP	<?php ecmMetadata("[1;Title][9][3;Keywords,Title]",""); ?>

Inserting a Search Function

To insert a search function:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content functions, click on **Insert Search Tag...**

   The Insert Ektron Search Tag box is displayed.



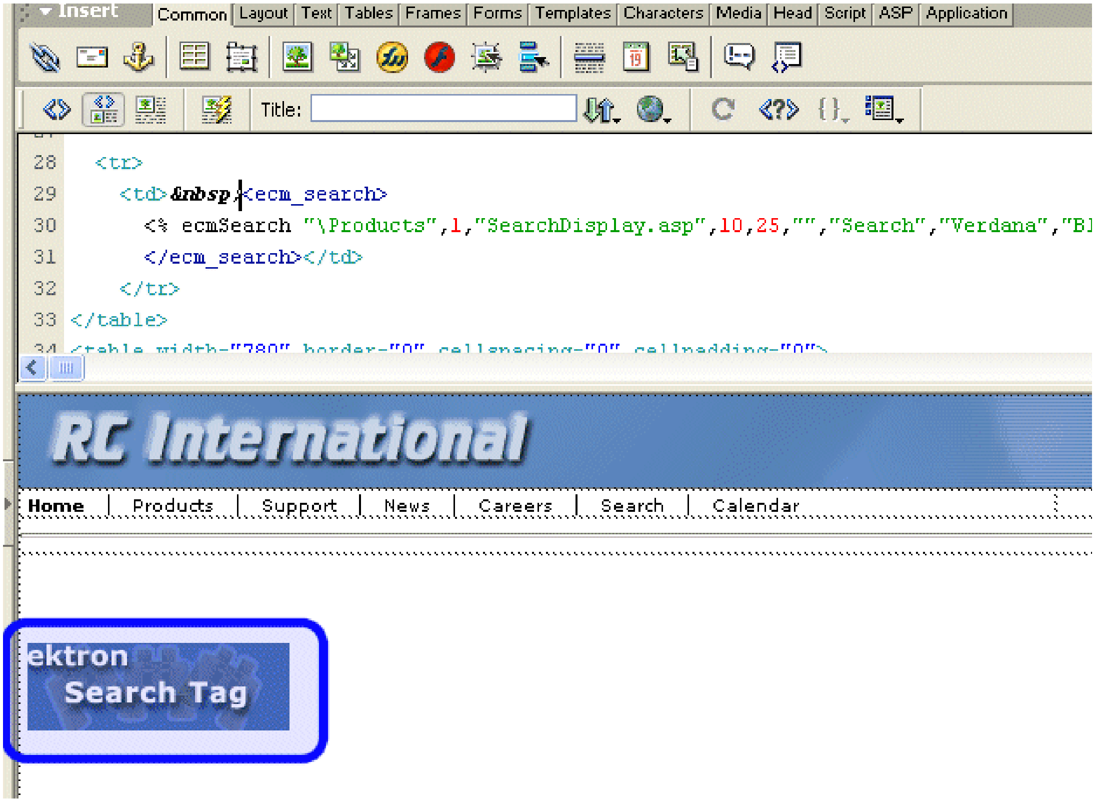
3. Use the following table to assist you will inserting a search tag.

Field	Description
Order By	Specify how you want to order the search results that are generated when a search is performed on you Web site. Also specify if you want the results in ascending or descending order.
Target Page	Specify the Web page where the search results will be displayed. Note: The target page MUST include the search display function
Text Box Size	Specify the size of the text box that will be displayed on the Web page for users to enter the search keywords.

Field	Description
Text Box Max Char	Specify the maximum amount of characters that will accepted in the text box.
Button Image Source	If you wish to use an image for the search button, insert the location of the image in this field. If no image is specified, a standard submit button will be used.
Button Text	The button text is the text that will be displayed on the standard submit button, or the alt text of a search button image.
Font Face	Enter the font face that you would like the search options to appear in on your Web page.
Font Color	Enter the font color that you would like the search options to appear in on your Web page.
Font Size	Enter the font size that you would like the search options to appear in on your Web page.
Display Horizontally	The search tag can be displayed either vertically or horizontally on your Web page. Check off this box if you want it to appear horizontally.

4. When completed, click **insert**.

   A graphic to define where the search tag will appear on your template is inserted.



Shown below is the code that will be inserted according to the platform that has been specified in the setup:

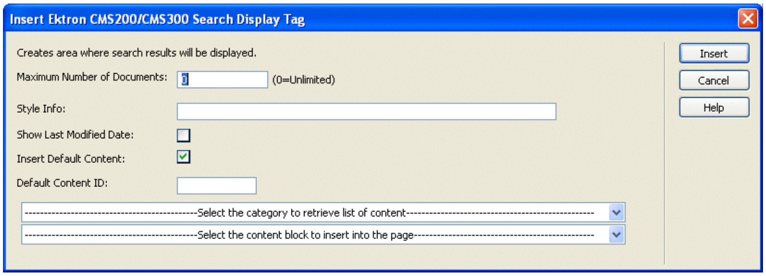
Platform	Code View
ASP	`<% ecmSearch "\Products",1,"SearchDisplay.asp",10,25,"","Search", "Verdana","Blue","2",0,"" %>`
ColdFusion	`<CFMODULE template=”#request.ecm.AppPath#ecmSearch.cfm” StartingFolder=”\Products” Recursive="1" TargetPage="SearchDisplay.cfm" TextBoxSize="10" MaxCharacters="25" ButtonImageSrc="" ButtonText="Search" FontFace="Verdana" FontColor="Blue" FontSize="2" Horizontal="0">`
.NET	`<% ecmSearch( "\Products",1,"SearchDisplay.aspx",10,25,"","Search", "Verdana","Blue","2",0,"") %>`
PHP	`<?php ecmSearch("\Products",1,"SearchDisplay.php",10,25,"","Search", "Verdana","Blue","",0,""); ?>`

Inserting a Search Display Function

To insert a search display function:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content functions, click on **Insert Search Display Tag...**

   The Insert Ektron Search Display Tag box is displayed.

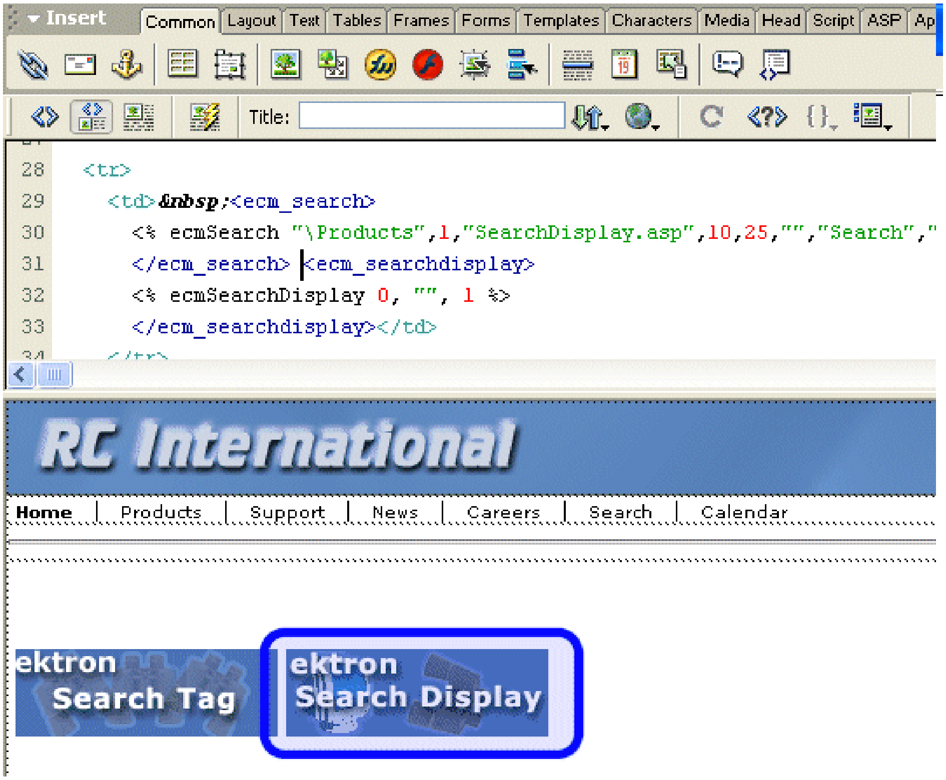


3. Use the following table to assist you will inserting a search display function.

Field	Description
Maximum Number of Documents	Specify the maximum amount of results that will be returned to the user when a search is performed.
Style Info	Insert an inline style sheet that will be used to format all the hyperlinks that are returned.
Show Last Modified Date	Check off this box to show the last modified date with the search result. This allows users to distinguish between updated and old content.
Insert Default Content	Specify the ID number of the content block that you wish to use as a default content block on the Web page when no search is executed.
Default Content ID	If you are working online, you may select the content block to use as a default content block from the list.

4. When completed, click **insert**.

   A graphic to define where the search display tag has been placed on your template is inserted.



Shown below is the code that will be inserted according to the platform that has been specified in the setup:

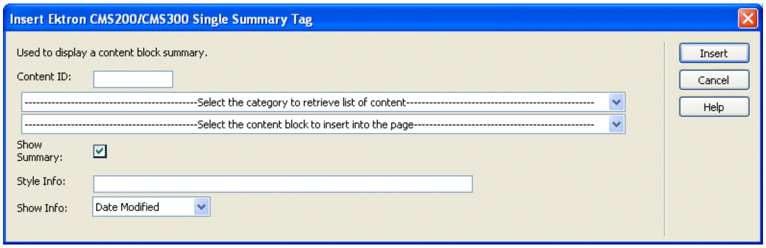
Platform	Code View (with no default content block set)
ASP	`<% ecmSearchDisplay 0, "", 1 %>`
ColdFusion	`<cfmodule template="#request.ecm.AppPath#ecmSearchDisplay.cfm" MaxNumber="0" StyleInfo="" ShowDate="1">`
.NET	`<% ecmSearchDisplay( 0, "", 1) %>`
PHP	`<?php ecmSearchDisplay(0, "", 1)?>`

Inserting a Single Summary Function

To insert a single summary function:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content functions, click on **Insert Single Summary Tag...**

   The Insert Ektron Single Summary Tag box is displayed.

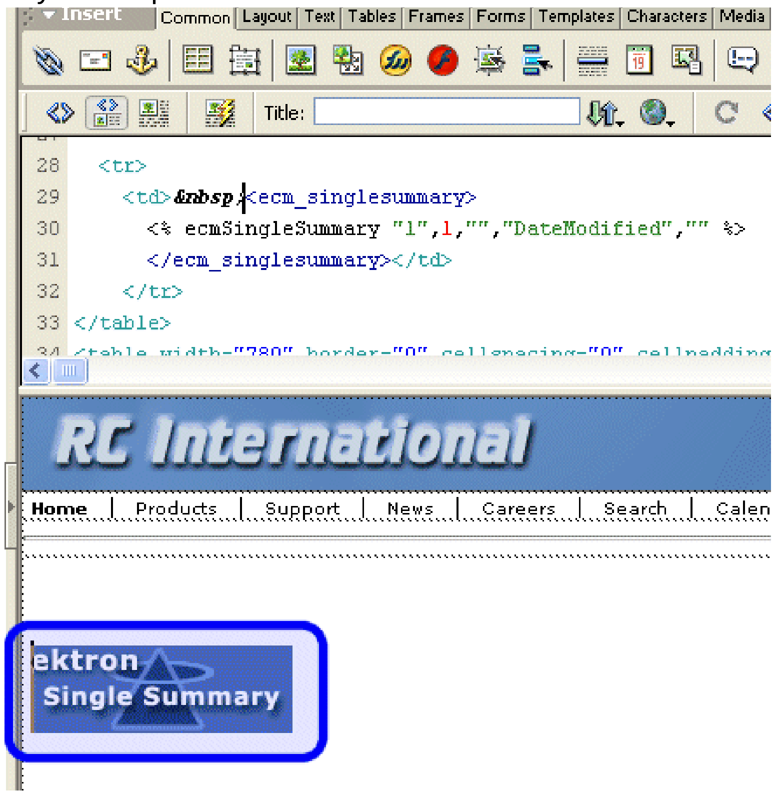


3. Use the following table to assist you will inserting a single summary tag.

Field	Description
Content ID	• Working Offline - Enter a valid content ID into the Content ID textbox. • Working Online - The top drop-down list will be filled with a list of content folders that you have privileges to. After choosing a content folder, the bottom drop-down box will be filled with a list of all the content block titles within that category. When a title is selected, the content ID textbox will be filled with that content block's id number.
Show Summary	If checked, content summaries will be displayed.
Style Info	Insert any inline style information, which will be applied to the generated text hyperlink, here.
Show Info	Select the type of information that will be displayed next to the generated hyperlinks.

4. When completed, click **insert**.

   A graphic to define where the single summary tag will appear on your template is inserted.



Shown below is the code that will be inserted according to the platform that has been specified in the setup:

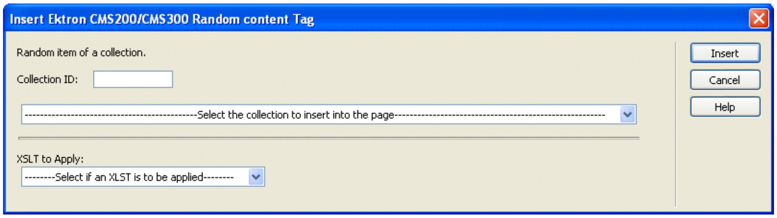
Platform	Code View
ASP	<% ecmSingleSummary "1",1,"","DateModified","" %>
ColdFusion	<cfmodule template="#request.ecm.AppPath#ecmSingleSummary.cfm" ContentID="1" ShowSummary="1" StyleInfo="" ShowInfo="DateModified">
.NET	<% ecmSingleSummary("1",1,"","DateModified","")%>
PHP	<?php ecmSingleSummary("1",1,"","DateModified","") ?>

Inserting a Random Content Function

To insert a random content function:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content functions, click on **Insert Random Content Tag...**

   The Insert Random Content Tag box is displayed.

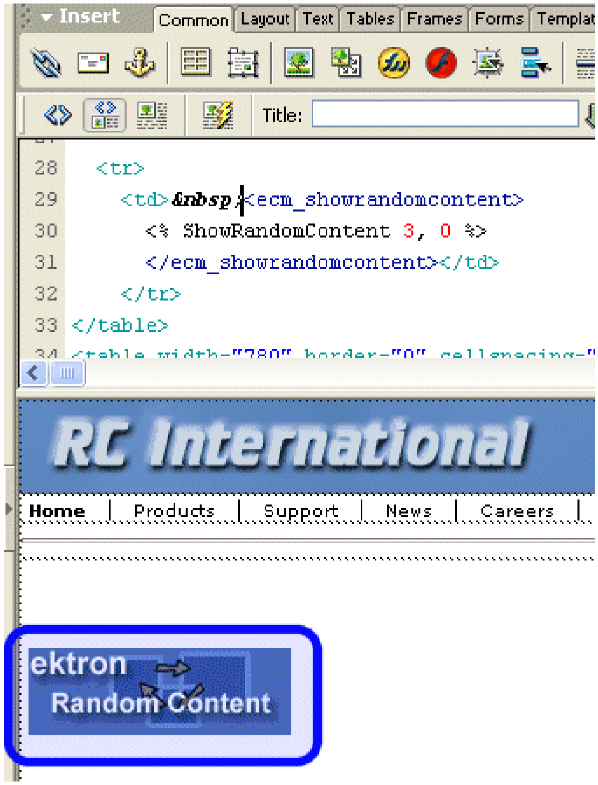


3. Use the following table to assist you will inserting a random content tag.

Field	Description
Collection ID	Type in the collection ID, or select it from the drop down list, of the collection where the random content function will retrieve content from.
XSLT to apply *XML Content only*	If desired, you may specify an XSLT to apply to the content that gets displayed.

4. When completed, click **insert**.

   A graphic to define where the random content tag will appear on your template is inserted.



Shown below is the code that will be inserted according to the platform that has been specified in the setup:

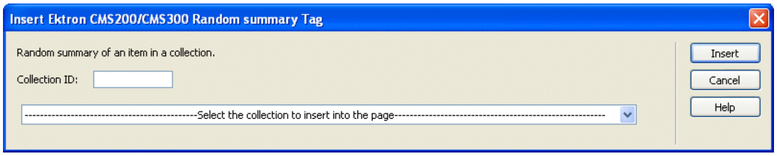
Platform	Code View
ASP	`<% ShowRandomContent 3, 0 %>`
ColdFusion	`<cfmodule id="3" displayFunction="0" template="#request.ecm.AppPath#ecmShowRandomContent.cfm">`
.NET	`<% ShowRandomContent (3, 0) %>`
PHP	`<?php ShowRandomContent(3, 0); ?>`

Inserting a Random Summary Function

To insert a random summary function:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content functions, click on **Insert Random Summary Tag...**

   The Insert Ektron CMS300 Random Summary Tag box is displayed.



3. Use the following table to assist you will inserting a random content tag.

Field	Description
Collection ID	Type in the collection ID, or select it from the drop down list, of the collection where the random summary function will retrieve summaries from.

4. When completed, click **insert**.

   A graphic to define where the random summary tag will appear on your template is inserted.

Shown below is the code that will be inserted according to the platform that has been specified in the setup:

Platform	**Code View**
ASP	`<% ShowRandomSummary (2) %>`
ColdFusion	`<cfmodule id="2" template="#request.ecm.AppPath#ecmShowRandomSummary.cfm">`
.NET	`<% ShowRandomSummary (2) %>`
PHP	`<?php ShowRandomSummary (2); ?>`

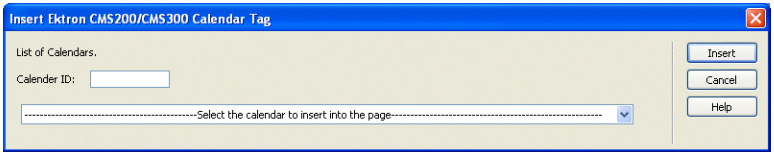
Inserting an Event Calendar Function

To insert an event calendar function:

NOTE Inserting a calendar function does not add a reference to a calendar style sheet. This step must be performed manually.

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content functions, click on **Insert Calendar Tag...**

   The Insert Calendar Tag box is displayed.

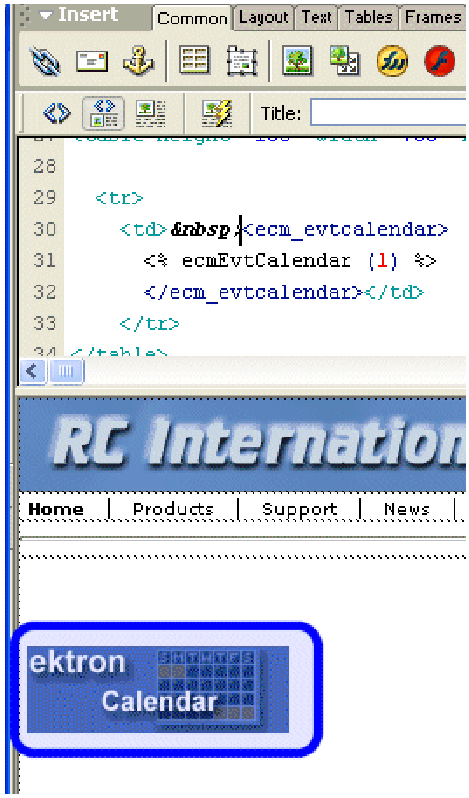


3. Use the following table to assist you will inserting a random content tag.

Field	Description
Calendar ID	Type in the calendar ID, or select it from the drop down list, of the calendar that you want to insert.

4. When completed, click **insert**.

   A graphic to define where the event calendar will appear on your template is inserted.



Shown below is the code that will be inserted according to the platform that has been specified in the setup:

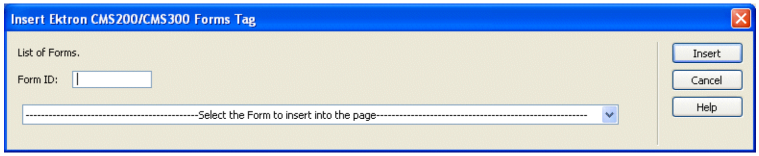
Platform	Code View
ASP	<% ecmEvtCalendar (1) %>
ColdFusion	<cfmodule Calendar_id="1" template="#request.ecm.AppPath#ecmEvtCalendar.cfm">
.NET	<% ecmEvtCalendar (1) %>
PHP	<?php ecmEvtCalendar (1); ?>

Inserting a Form Content Function

To insert a form content function:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 Content functions, click on **Insert Form Content Tag...**

   The Insert Form Tag box is displayed.

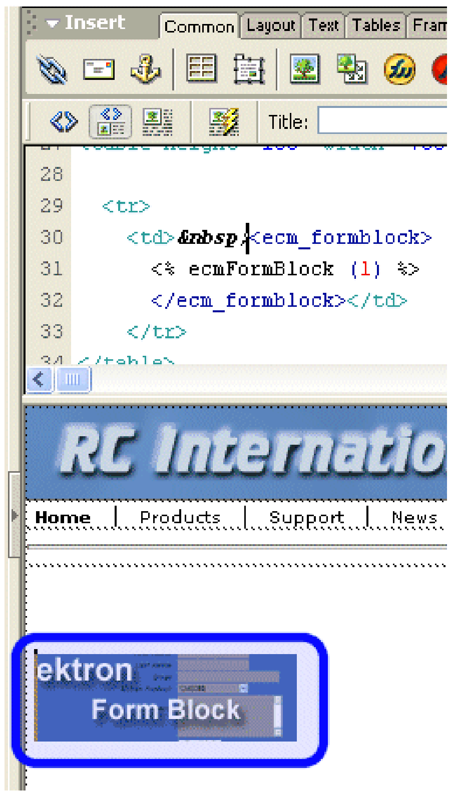


3. Use the following table to assist you will inserting a form tag.

Field	Description
Form ID	Type in the form ID, or select it from the drop down list, of the Ektron CMS300 form you would like to insert.

4. When completed, click **insert**.

   A graphic to define where the form content tag will appear on your template is inserted.



Shown below is the code that will be inserted according to the platform that has been specified in the setup:

Platform	Code View
ASP	`<% ecmFormBlock (1) %>`
ColdFusion	`<cfmodule id="1" template="#request.ecm.AppPath#ecmFormBlock.cfm">`
.NET	`<% ecmFormBlock (1) %>`
PHP	`<?php ecmFormBlock (1); ?>`

XML Functions...

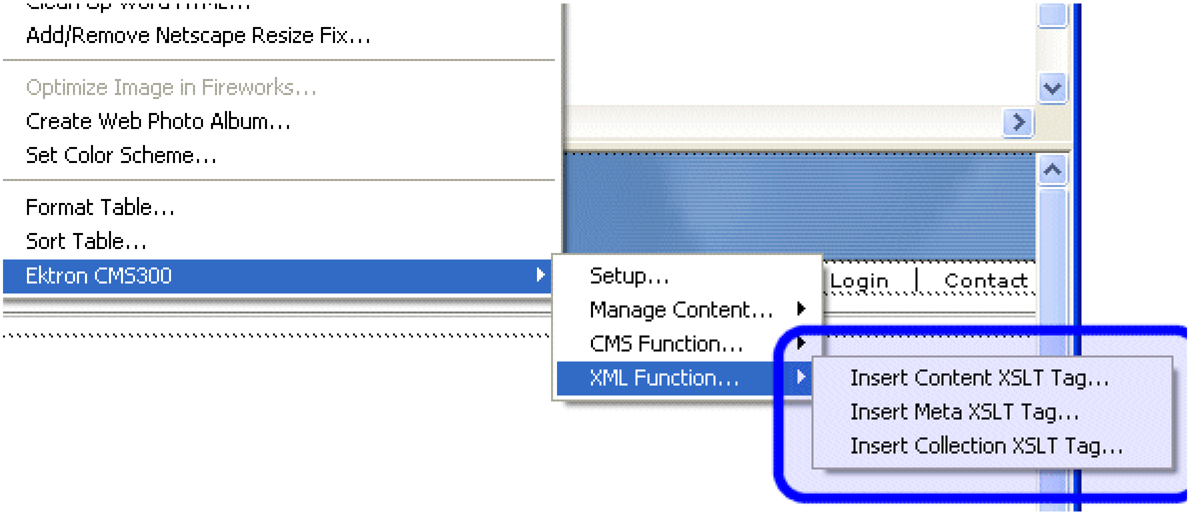
In addition to the many CMS functions, three additional XML related functions that may be inserted into your Web site templates. The following section explains each of these functions.

Accessing XML Function Commands

To access the CMS XML Functions command menu, follow this path:

Commands > Ektron CMS300... > XML Functions...

A list of all CMS XML Functions that can be inserted is displayed.



The following sections explain how to insert each of the available XML functions.

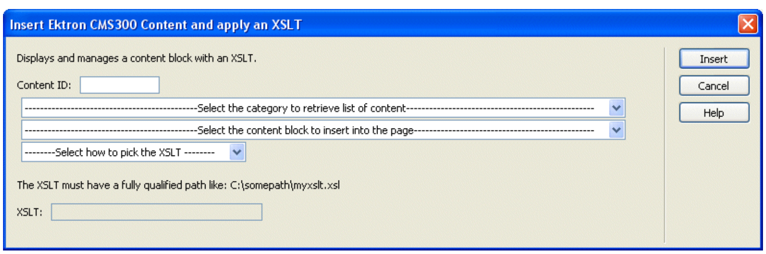
Insert Content XSLT Tag...

The insert content XSLT command allows you to insert an XML content block, and specify an XSLT (other than the default) to be applied to it.

To insert a content XSLT tag, perform the following steps:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of Ektron CMS300 XML functions, click on **Insert Content XSLT Tag...**

   The Insert Ektron CMS300 Content and Apply an XSLT Tag box is displayed.



3. Use the following table to assist you with this form.

Field	Description
Content ID	Either type in, or select from the drop down lists, the ID number of the XML content to insert.
Select XSLT	From the drop down list, select the XSLT you would like to apply to the XML content block.
Enter XSLT	If “Enter XSLT” is selected, you can insert the path and file name of the XSLT to apply to the content.

4. Click **insert**.

   A graphic showing you where the XML content block will be placed on the template is inserted.

Shown below is the code that will be inserted according to the platform that has been specified in the setup:

Platform	Code View
ASP	<% ecmContentBlockEx 5, "", 1 %>
ColdFusion	<cfmodule id="5" xsltpath="" xslttype="1" template="#request.ecm.AppPath#ecmContentBlockEx.cfm">
.NET	<% ecmContentBlockEx (5, "", 1) %>
PHP	<?php ecmContentBlockEx (5, ““, 1); ?>

Insert Meta XSLT Tag...

The sample multi-language XML configuration in the Ektron CMS300 RC International sample Web site contains options to edit metadata for the content block within the editor (instead of the usual metadata area).

A sample XSLT strips out all XML content, with the exception of the metadata information.

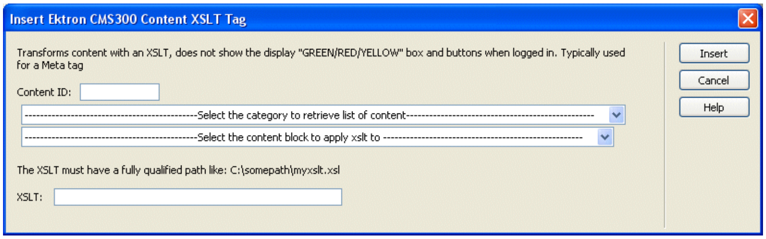
To insert a meta XSLT tag, perform the following steps:

1. Move the blinking cursor to the area that you want to place it.

NOTE SInce the inserted content is metadata, the location of the function should be in the <head> tags of the template.

2. From the list of Ektron CMS300 XML functions, click on **Insert Meta XSLT Tag...**

   The Insert Ektron CMS300 Meta XSLT Tag box is displayed.



3. Use the following table to assist you with this form.

Field	Description
Content ID	Either type in, or select from the drop down lists, the ID number of the XML content to insert.
XSLT File	Enter a fully qualified path to the XSLT that contains the information to strip out all XML content except for metadata information. For example, `C:\Inetpub\wwwroot\CMS300Sample\XMLFILES\xslt\i18lcontent_meta_en.xsl`

4. Click **insert**.

   A graphic showing you where the XML content block will be placed on the template is inserted.

Shown below is the code that will be inserted according to the platform that has been specified in the setup:

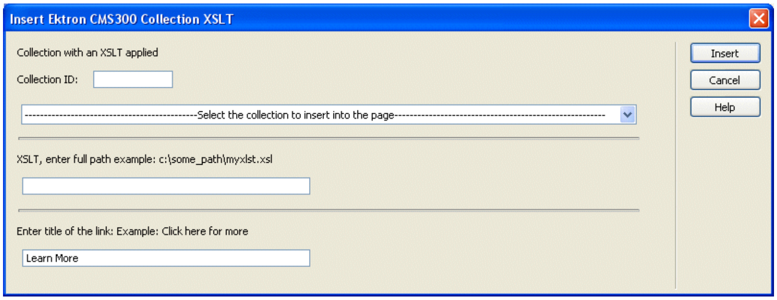
Platform	Code View
ASP	`<% ecmMetaEx 19, "C:\Inetpub\wwwroot\CMS300Sample\XMLFILES \xslt\i18lcontent_meta_en.xsl" %>`
ColdFusion	`<cfmodule id="19"  xsltpath=" C:\Inetpub\wwwroot\CMS300Sample\XMLFILES\ xslt\i18lcontent_meta_en.xsl" template="#request.ecm.AppPath#ecmMetaEx.cfm">`
.NET	`<% ecmMetaEx (19, "C:\Inetpub\wwwroot\CMS300Sample\XMLFILES \xslt\i18lcontent_meta_en.xsl") %>`
PHP	`<?php ecmMetaEx (19, “C:\Inetpub\wwwroot\CMS300Sample\XMLFILES \xslt\i18lcontent_meta_en.xsl“); ?>`

Insert Collection XSLT Tag...

The collection XSLT allows you to insert a collection into your Web template, then assign an external XSLT to it.

To insert a Collection XSLT tag, perform the following steps:

1. Move the blinking cursor to the area that you want to place it.
2. From the list of XML functions, click on **Insert Collection XSLT Tag...**
3. The Insert Ektron CMS300 Collection XSLT Tag box is displayed.

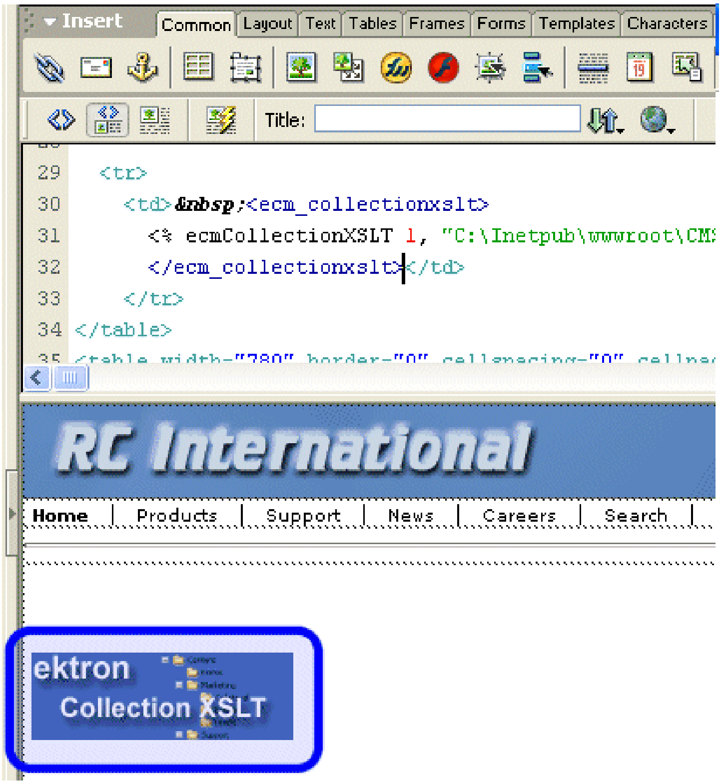


4. Use the following table to assist you with this form.

Field	Description
Collection ID	Either type in, or select from the drop down lists, the ID number of the XML collection to insert.
XSLT File	Enter a fully qualified path to the XSLT that contains the information to strip out all XML content except for metadata information. For example, `C:\Inetpub\wwwroot\CMS300Sample\XMLFILES\xslt\i18lsummary_en.xsl`
Link Title	Enter a title for a link which is used as a “Click Here to Read Full Text” type of hyperlink.

5. Click **insert**.

6. A graphic indicating the XML content block’s location on the template is inserted.



Shown below is the code that will be inserted according to the platform specified in the setup:

Platform	**Code View**
ASP	<% ecmCollectionXSLT 1, "C:\Inetpub\wwwroot\CMS300Sample\XMLFILES \xslt\i18lsummary_en.xsl", "Click here to learn more..." %>
ColdFusion	<cfmodule id="1" xslt="C:\Inetpub\wwwroot\CMS300Sample\XMLFILES \xslt\i18lsummary_en.xsl" anchorTitle="Click here to learn more..." template="#request.ecm.AppPath#ecmCollectionXSLT.cfm">
.NET	<% ecmCollectionXSLT (1, "C:\Inetpub\wwwroot\CMS300Sample\XMLFILES\ xslt\i18lsummary_en.xsl", "Click here to learn more...") %>
PHP	<?php ecmCollectionXSLT (1, "C:\Inetpub\wwwroot\CMS300Sample\XMLFILES\ xslt\i18lsummary_en.xsl", "Click here to learn more..."); ?>

Additional Information

Supporting Documents

You can find more detailed information about Ektron CMS300 in the following manuals:

- Ektron CMS300 Administrator Manual
- Ektron CMS300 User Manual
- Ektron CMS300 Quick Start Manual
- Ektron CMS300 Setup Manual

Support

If you are experiencing trouble with any aspect of Ektron CMS300, please contact the Ektron Support Team via our Web Site at

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For questions and answers about purchasing Ektron CMS300 from Ektron, contact the sales department by sending an e-mail to sales@ektron.com.

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Ektron

Redefining Web Content Management

Ektron CMS300 User Manual

Version 4.8, Revision 7

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Table of Contents

What's New in the 4.8 Release i

Introduction to Ektron CMS300.......................................1
- **What is a Content Block? 1**
  - The Floating Toolbar 3
- **Workflow in Ektron CMS300 ....5**
- **Editing a Content Block 5**
- **The Lifecycle of a Content Block 6**

Logging In and Out 8
- **Prerequisites 8**
- **Logging into the Sample Web Site...8**
- **Site Preview...10**
  - Toggling Site Preview 10
- **Logging Out of the Sample Site 11**

The Workarea and Smart Desktop..................................13
- **Accessing the Workarea 13**
- **Understanding the Smart Desktop..14**
- **Navigating Within the Smart Desktop....................................17**
  - Modify the Display of Top Level Folders...18
  - Hide the Left Panel of the Workarea 20
- **Sending Instant Email 22**
  - Conditions for Instant eMail 23
  - Where Instant email is Available 24
  - Modifying Instant eMail...24

Working with Folders and Content Blocks 26
- **Workarea Toolbar Buttons 28**
- **Viewing a Folder 31**
- **Viewing a Content Block..33**
  - Properties 36
- **Adding a Content Block...37**
- **Editing a Content Block 40**
  - Translating a Content Block to Another Language 41
- **Expanding the Content Area...42**
- **Deleting a Content Block 44**
- **Search Content Folder 45**

The Noise Files ... 48
Specifying Match Criteria ... 49
Search Data ... 50
Tips on Responding to Search Criteria Fields ... 53
Adding Sub-Folders ... 54
Deleting Folders ... 55

Scheduling Content to Begin and End ... 57
Setting a Start Date ... 57
Setting an End Date on a Content Block ... 60
Setting Archive Options ... 61

Adding a Content Block Summary ... 64
Creating Summaries ... 65
Editing a Summary ... 66

Adding or Editing Search Data ... 68
Entering Custom Search Data ... 69
Entering Title and Keywords ... 71
Entering or Editing Search Data ... 72

Approving/Declining Content Blocks ... 76
Approve/Decline One Content Block ... 77
Approve/Decline Several Content Blocks ... 79
Example of an Approval Chain ... 79
Creating a Content Block ... 80
First Approver ... 81
Second Approver ... 83

Comparing Versions of a Content Block ... 87
When Can I Compare Content? ... 87
The Compare Content Window ... 88
Toolbar ... 89
First Use of the View Content Difference Feature ... 93

Viewing and Restoring Previous Content Blocks ... 94
Accessing Content History ... 94
The Content History Window ... 96
Viewing a Historical Version of a Content Block ... 97
Restoring a Previous Version ... 99
Comparing Historical Versions ... 99
Removing Applied XSLT ... 99

Content Workflow Reports 101
Sorting and Filtering Content Reports 103
Approvals Reports 105
Checked In Report 107
Checked Out Report 108
New Content Report 109
Submitted Report 109
Content Pending Start Date Report 111
Refresh Reminder Report 111
Expired Content Report 112
Content to Expire Report 113

Library Folder 115
Terms Used in this Chapter 115
Accessing The Library 116
Library Folder Properties 117
Searching the Library 119
Files 120
Copying Files to the Library 120
Viewing Files 123
Editing a File 125
Overwriting Files 126
Library Link Searching 129
Deleting Library Items 129
Adding a Library File to Content 130
Hyperlinks 133
Images 134
Quicklinks and Forms 135

Working with Collections 138
Finding Collections 139
Finding a Collection Using the Collections Folder 141
Viewing a Collection 142
Creating a Collection 144
Adding a Collection 144
Assigning Content Blocks to the Collection 147
Editing Content Blocks in a Collection 150
Reordering Collections List 151
Editing Collection Information 152
Deleting a Collection 152
Working with Collections in a Multi-Language System 153
Creating a Language-Specific Collection if Another Edition Exists 154
Creating a Language-Specific Collection if Another Edition Does Not Exist 154

Comparison of Collections, Menus, and the List Summary Features ... 155

Working with Menus ... 157
The Structure of Menus and Menu Items ... 158
Access to the Menus Feature ... 159
Managing Menus ... 160
Adding a New Menu ... 160
Adding a Menu Item ... 164
Adding a New Content Block to a Menu via Navigation Link on a Web Page ... 171
Editing a Menu ... 172
Editing a Menu Item ... 173
Editing Types of Menu Items ... 176
Viewing a Menu ... 179
Reordering Menu Items ... 184
Deleting a Menu ... 185
Deleting a Menu Item ... 186
Working with Menus in a Multi-Language System ... 187

Working with Calendars ... 190
Understanding Calendars ... 191
Accessing the View Calendar Screen ... 193
Viewing a Calendar ... 197
Adding a Calendar Event ... 199
Understanding Event Types ... 203
Adding a Recurring Event ... 203
Adding a New Content Block for a Calendar Event ... 205
Viewing a Calendar Event ... 208
Editing Calendar Events ... 209
Deleting Calendar Events ... 211

Managing Tasks ... 213
Creating a Task via the Task Folder ... 214
Accessing the Tasks Folder ... 214
Creating the Task via the Task Folder ... 215
Adding a Task Category and Task Type ... 220
Creating a Task via a Content Block ... 224
Viewing a Task ... 224
Task View Options ... 225
Sorting Tasks By Task Type ... 228
Sorting Tasks By Column ... 229
Editing a Task ... 230
Adding Comments to Tasks ... 230

Deleting a Task 233
Viewing a Task's History 234
Task Module Toolbar 235

Using the Asset Management System 236

Supported Types of Assets 237
Security 239
Working with Office Documents 239
Notes on Working with Office Documents 240
Creating a New Office Document 240
Importing One Office Document into the AMS 245
Importing Several Office Documents into the AMS 247
Importing Files Individually vs. Several at Once 249
The Work Offline Option 250
Editing an Office Document 250
Working with Managed Files 252
Creating a New Managed File 252
Importing One Managed File 252
Importing Several Managed Files 254
Editing a Managed File 257
Asset Workflow 259
Viewing AMS Assets within the CMS 259
Deleting an AMS Asset 260
Approving AMS Assets 260
Adding Assets to Collections and Menus 260
Asset Reports 260
Using the CMS/AMS Search 261

Updating Your User Profile 262

Accessing Online Help 267

Introduction to eWebEditPro+XML 270

Using eWebEditPro+XML 271
Organization of this Documentation 271

Creating a Simple Web Page 272

Your Finished Web Page 272
Creating the Sample Web Page 273

Toolbar Buttons 276

Selecting Text 276
Applying Formatting Attributes to Text 277

Table of Toolbar Buttons and Drop-Down Lists 277
Position Objects Options 283
Text Direction Options 283
Form Elements Toolbar 284
Buttons of the Form Elements Toolbar 286

Customizing Your Toolbar 291
Removing Or Adding Menus 292
Removing or Adding Menu Items 293
Restoring Toolbars 295
Rearranging the Menus on a Toolbar 295
Creating a New Menu 296
Moving a Menu Off the Toolbar 297
Changing the Menu's Orientation 298

The Context Sensitive Menu 299

Using eWebEditPro+XML's Advanced Features 302
Copying from Other Applications 303
Finding and Replacing Text 304
Finding Text 304
Finding and Replacing Text 304
Additional Options on the Dialog Box 305
Specifying a Search Direction 305
Considering the Case of a Search Term 306
Whole Word Match 307
Checking Spelling 308
Disabling Script Blocking 308
Checking Spelling as You Type 308
Checking Spelling Upon Demand 309
Spell Checking Selected Text 310
Setting Spell Check Options 311
Editing in Microsoft Word 313
See Also: Uploading an Image in a Microsoft Word Document . 314
Editing XML Documents 314
Inserting Images 316
Using the First Picture Properties Dialog Box 317
Inserting a Picture from the Server 318
Inserting a Picture from Your Computer 319
Using the Second Media Selection Dialog Box 321
Adjusting a Picture 322
Pixels 323

Setting a Border 324
Aligning the Picture 325
Resetting Width, Height, Border Thickness, and Alignment 326
Adding Space around the Picture 327
Editing the Picture's Title 328
The Options Button 328
Moving an Image to the Server 329
Deleting a Picture 329
Editing Images 331
Using WebImageFX 331
Saving the Image 333
Toolbar Buttons and Menu Commands 333
Blur 337
Brightness 338
Choose Color 339
Choose Font 340
Color Depth 341
Contrast 342
Copy 343
Create New 343
Crop 344
Delete 344
Dimensions 345
Exit 346
Exit without Save 346
Freehand 347
Horizontal Flip 347
Image Info 348
Line 348
Open 349
Oval 350
Paste as New Image 351
Pointer Selection 351
Polygon 352
Rectangle 353
Redo 353
Reset Zoom Ratio 354
Rotate 354
Save 355
Save As 356
Select 357
Sharpen 357
Text 358
Thumbnail 360
Twain Acquire 361
Twain Source 361
Undo 362

Vertical Flip 362
Zoom In 363
Zoom Out 363
Specifying Color Depth 363
Introduction to Tables 365
Creating a Table 366
Deleting a Table 367
Inserting a Table within a Table 367
Table Dialog Boxes and Menus 369
The Insert Table Menu 369
The Table Properties Dialog Box 371
The Cell Properties Dialog Box 373
The Table Context Sensitive Menu 375
Manipulating Your Table's Format 376
Choosing the Number of Rows and Columns 376
Specifying Table Width 378
Specifying Table Width by Percentage 379
Specifying Table Width by Pixels 381
Specifying Horizontal Alignment 382
Table Backgrounds 384
Specifying a Table's Background Color 384
Specifying a Background Image for a Table 386
Setting Table Borders 387
Assigning Border Color 387
Assigning Border Size 389
Working with Table Cells 391
Specifying the Width of a Cell 391
Inserting a Cell 392
Deleting a Cell 393
Setting a Cell's Border Color 394
Specifying a Cell's Background Color 395
Specifying a Background Image for a Cell 397
Using the Color Box 398
Spanning Rows or Columns 399
Spanning More than One Row or Column 400
Aligning Text Within a Cell 401
Setting Horizontal Alignment 401
Setting Vertical Alignment 403
Splitting a Cell 404
Merging Two Cells 405
Word Wrap 406
Setting Cell Padding and Spacing 407
Using Bookmarks 409
Creating a Bookmark 409
Changing the Destination Window 411

Using Hyperlinks 413
Creating a Hyperlink 413
Using a Quicklink 414
Entering a Hyperlink Manually 415
Testing a Hyperlink 416
Creating a Hyperlink to a Location Within a Web Page 417
Editing a Hyperlink 418
Removing a Hyperlink 418
Preventing a URL from Becoming a Hyperlink 418
Working with HTML 419
Viewing and Editing HTML 419
Editing a Section of a Page 420
Inserting Source 420
Cleaning Source Code 421
Inserting Content from MS Office 2000 421

Section 508 Compliance 422
Moving the Cursor into eWebEditPro+XML 422
Using eWebEditPro+XML without a Mouse 423
Section 508 Tables 425

Editing XML Web Pages 429
A Typical XML Screen 429
Custom Tag Menu Options 431
Inserting XML Tags 432
The Custom Tag Attributes Dialog 433
The Insert Custom Tag Dialog Box 436
Inserting a New Tag 436
Inserting Comments within Content 438
Adding Comments to Content 439
Viewing a Comment 440
Adding Another Comment 440
Updating a Comment 441

Appendix A: Content Statuses 442
Active Content 443
Checked-In Content 444
Checked Out Content 446
Submitted Content 446
Marked for Deletion Content 448
Pending Start Date Content 448
Staged Content 449

What’s New in the 4.8 Release

- Tasks can now have categories and types. For more information, see ”Adding a Task Category and Task Type” on page 220
- The Asset Management System is available as a separate, add-on module that requires a separate license. For more information, see ”Using the Asset Management System” on page 236.
- A new advanced search screen provides more fields for finding information within the Workarea. For more information, see ”Search Content Folder” on page 45.

Introduction to Ektron CMS300

Using **Ektron CMS300** to manage Web content is easy once you know the basics of setting up and maintaining your site. This documentation explains how to maintain an **Ektron CMS300** site from a user's point of view. By reading this documentation, you will gain an understanding of how **Ektron CMS300** works.

This section introduces basic concepts that you should understand when beginning to work with **Ektron CMS300** through the following subtopics.

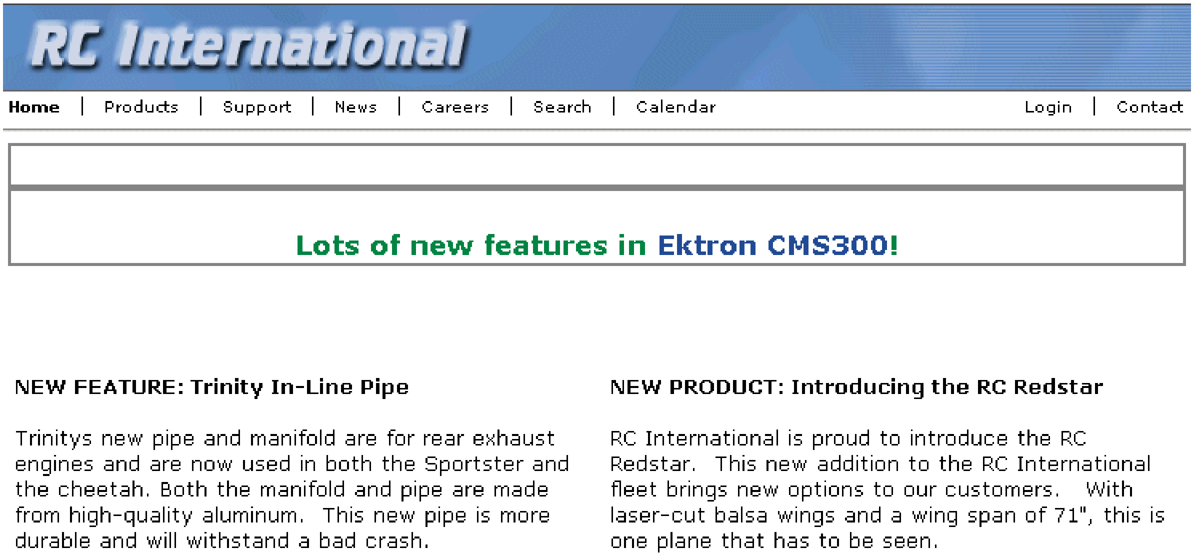
- ”What is a Content Block?” on page 1
- ”Workflow in Ektron CMS300” on page 5
- ”Editing a Content Block” on page 5
- ”The Lifecycle of a Content Block” on page 6

What is a Content Block?

Any Web site consists of several pages. Each page is made up of one or more *blocks* of content. For example, the home page of the sample Web site that is installed with **Ektron CMS300** is below.

After you sign in, notice that, as you move the cursor, colored borders appears around one or more areas of the page. Each surrounded area is a *content block* that can be edited independently. The border disappears when you move the cursor out of the area. Your system administrator controls the design of each page and determines where the content blocks appear.

NOTE The colored borders appear when you are not in site preview mode. *See Also:* "Site Preview" on page 10. Also, your administrator can set up your system so that the borders always appear on a page, instead of appearing only when you move the mouse over them.



The advantage of this feature is that you can see a Web page as it will appear to visitors to your site. Continue editing until you are satisfied with its appearance.

To learn what the border color indicates, see "Appendix A: Content Statuses" on page 442.

The Floating Toolbar

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

NOTE Your administrator can set up your system to have borders always appear on a page. In that case, the toolbar always appears in the content block -- you don't need to click the mouse to make it appear. For information on the classic user interface, see The Administrators Manual > "Introduction to Ektron CMS300" > "Getting Started" > "Recognizing Content Blocks" > "The Floating Toolbar" > "Returning to the Classic User Interface"

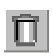
On the horizontal toolbar, you must move the cursor over the button to see its tooltip text.

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

If granted permission by your administrator, you can create new content blocks, and edit or delete existing ones. Most of your work with **Ektron CMS300** involves working with content blocks.

Buttons on the Menu

The following table describes each button that may appear.

Button	Name	Description	More Information
	Approve	Approve or decline a request to publish or delete a content block	"Approving/Declining Content Blocks" on page 76
	Assign Task	Assign a task to a user	"Managing Tasks" on page 213
	Delete	Open content block's View Content page	"Viewing a Content Block" on page 33
	Edit	Check out content block for editing	"Editing a Content Block" on page 40
	Logout	Log out of **Ektron CMS300** view of Web site	"Logging Out of the Sample Site" on page 11
	Preview	Preview content block before it is published	
	Properties	Open content block's View Content page	"Viewing a Content Block" on page 33
	View Content Difference	Display differences between a previous and published version of content block	"Comparing Versions of a Content Block" on page 87

Button	Name	Description	More Information
	View History	Open View History area, where you can view previous versions of content block	"Viewing and Restoring Previous Content Blocks" on page 94
	Workarea	Opens Workarea, from which you can perform all **Ektron CMS300** tasks	"The Workarea and Smart Desktop" on page 13

Workflow in Ektron CMS300

Organizations typically want a Web site that is updated frequently with the latest information. They also want to decentralize the updating process, so that non-technical users from any department can make changes. Further, organizations want oversight over those changes to ensure the accuracy of the information, that the content adheres to corporate guidelines, etc.

Ektron CMS300 manages the lifecycle of a content block, from creation through approval and publication. It helps your organization set up a process for overseeing changes to a Web site, indicate a content block's status within that lifecycle, and inform the next approver that it is their turn to review a content block.

Editing a Content Block

Finding a Content Block

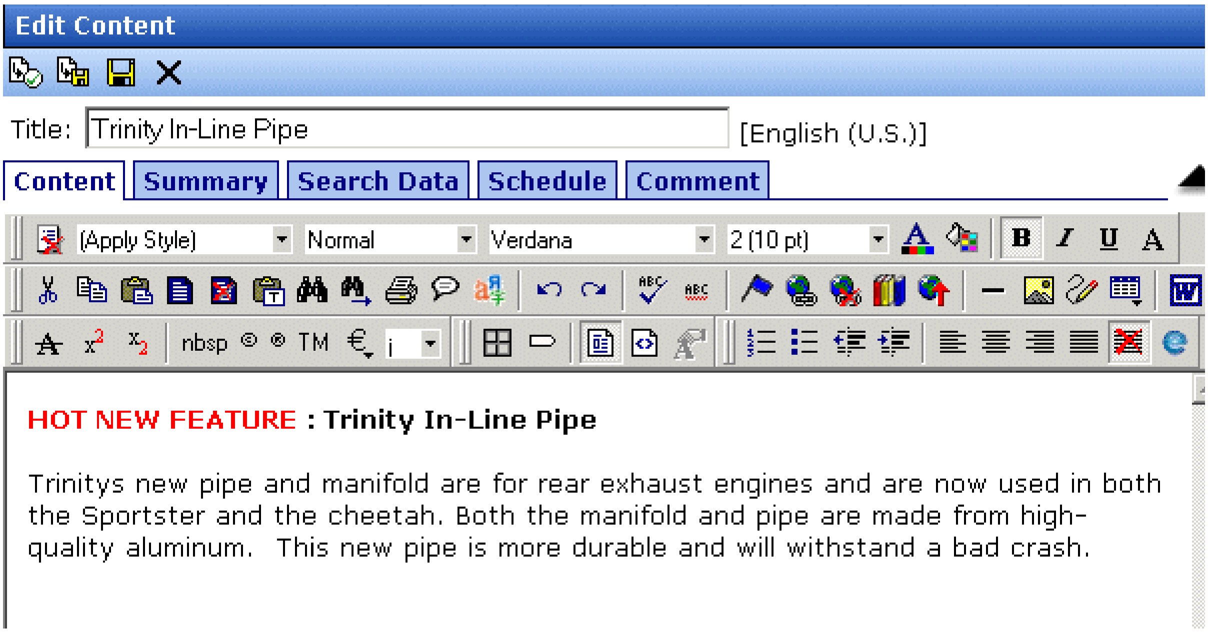
Much of your work involves editing existing content or creating new content. **Ektron CMS300** provides three methods for finding content to be updated. You can use whichever method is easiest.

- Navigate through your Web site to the content block you want to edit
- Find the content block through the *Workarea*, which resembles Windows Explorer and lets you find a content block by navigating through a folder tree. *See Also:* "The Workarea and Smart Desktop" on page 13

- Use the Search button ( ), which appears on many screens. When clicked, a screen prompts you to enter keywords and then finds content blocks containing the keywords.

The Editing Process

After you find a content block, click the Edit button ( ) to open it in an editor. Below is an example of a content block in the editor.



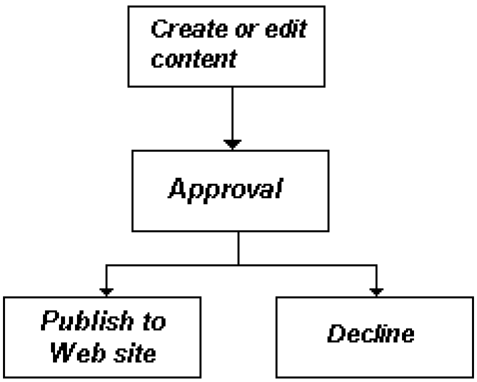
The editor resembles popular word processing software. You can enter text, then select it and click a button to change its display properties. For example, you can make text bold, change the color, or copy and paste it. You can also insert images, tables, links to other Web pages, and check spelling,

The Lifecycle of a Content Block

After you edit the content block, you typically submit it for approval to one or more individuals who oversee changes to your Web site. These people can review, edit and approve the change. When the last approver signs off, the new content becomes available on the Web site.

In some cases, you are one of the content approvers. In this case, you receive an email notifying you that a content block needs approval. You look it over, change it as needed, then pass it on to the next approver. If you do not agree with the changes, you can *decline* the request. In this case, the user who made the edits is informed that the change is not approved.

The following graphic illustrates the content approval cycle.



To help track a content block's position in this workflow, **Ektron CMS300** assigns a status to each content block. The status determines what you can do with a content block, and indicates what must occur in order for it to get published to the web site. For more information, see "Appendix A: Content Statuses" on page 442.

Logging In and Out

This section explains how to log in and out of **Ektron CMS300**, and to use the site preview feature through the following subtopics.

- "Prerequisites" on page 8
- "Logging into the Sample Web Site" on page 8
- "Site Preview" on page 10
- "Logging Out of the Sample Site" on page 11

Prerequisites

Once your Webmaster or administrator installs Ektron CMS300, you need the following items before you can use it.

- URL (Web address) of Ektron CMS300 Web site
- Username and password

Once you acquire both, you can log into Ektron CMS300 and begin managing Web site content.

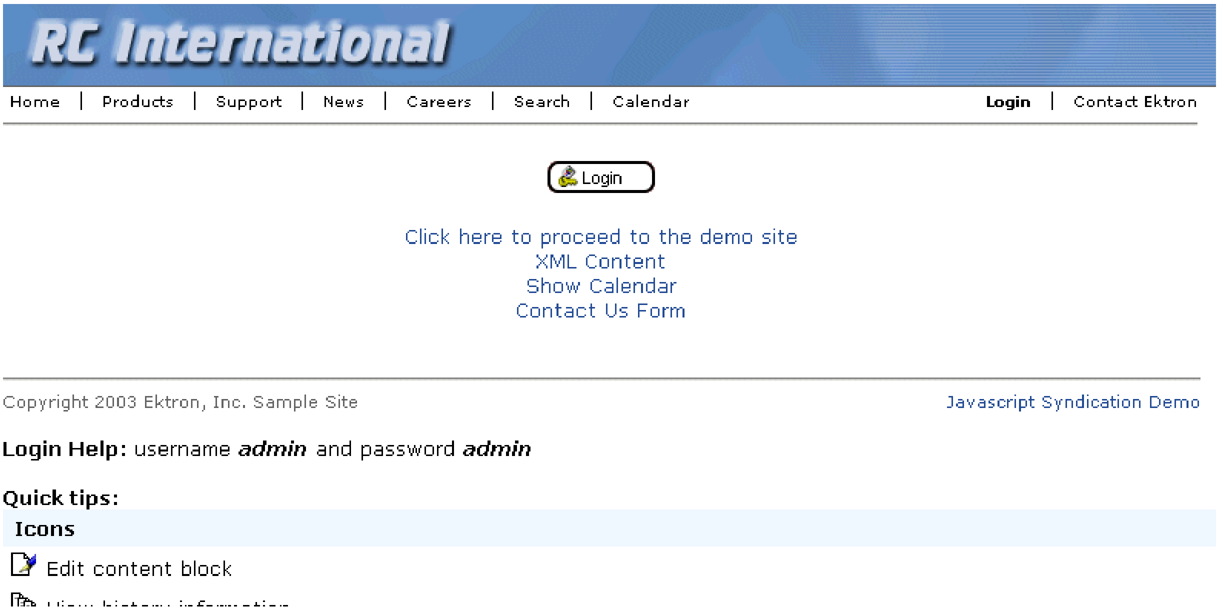
NOTE This documentation uses the Ektron CMS300 sample Web site to demonstrate the product.

Logging into the Sample Web Site

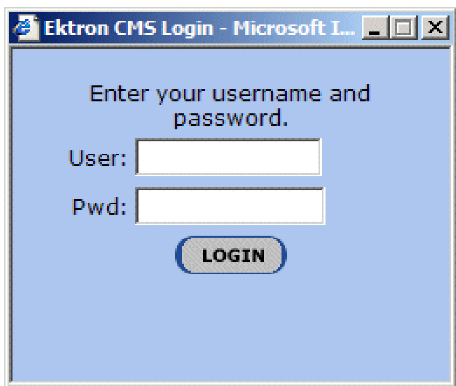
To access the Ektron CMS300 sample site:

1. In your Web browser, navigate to the URL of your Ektron CMS300 Web site. Your system administrator provides this.
2. Click **Login** at the top right corner of the screen.

3. The login screen appears.



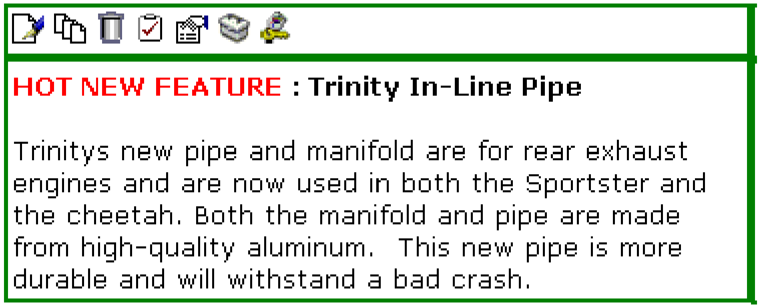
4. Click the **Login** button.
5. The login dialog box appears.



6. Enter your username and password.
7. Click the **Login** button.

8. The Web page appears.

You can navigate around your Web site as you could before signing in. But now, the content is surrounded by a colored box when you move the cursor over it (illustrated below).



Site Preview

While logged into Ektron CMS300, you can preview the Web site as it would appear to visitors, or view it in regular view.

Button Appearance	Status	Description
	Preview Mode	Content blocks appear as last *edited*. The advantage of this mode is that you can see a Web page as it will appear to on your site. Continue editing until you are satisfied with its appearance. In Preview mode, click the **Preview** button to switch to regular mode.
	Regular View	The most recently *published* versions of content blocks appear. In this mode, colored borders surround content blocks when you move the cursor over them. In regular view, click the **Preview** button to switch to preview mode.

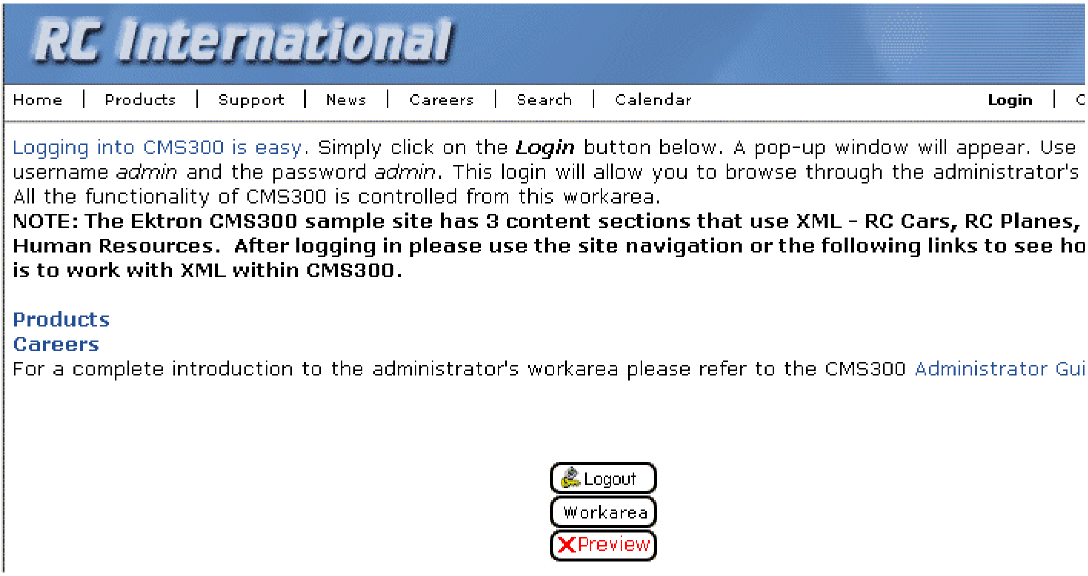
Toggling Site Preview

To toggle site preview on and off, follow these steps.

1. Navigate to a page that includes the login/logout button.

2. Click the **Preview** button.

3. The Web site is now in preview mode.

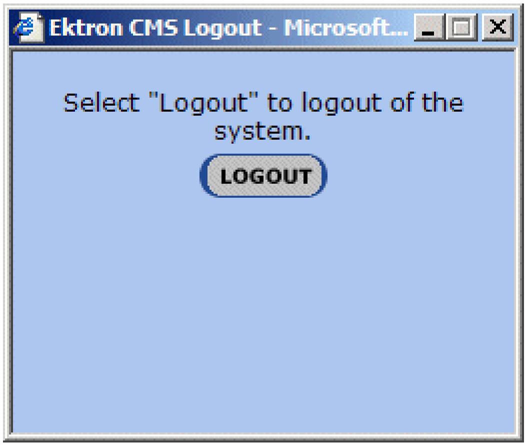


4. To turn preview mode off, click the () button on the login screen.

Logging Out of the Sample Site

To log out of Ektron CMS300, follow these steps.

1. Click the **Logout** button ( ) in a content block's floating toolbar, or click the **Logout** button ( ) on the Web page.
2. The Logout confirmation box appears.



3. Click the **Logout** button.
4. You return to the Web page from which you logged out. However, it is in standard view, not Ektron CMS300 view.

The Workarea and Smart Desktop

The Workarea is a central screen from which you can perform all activities within **Ektron CMS300**. From it, you can

- access the Smart Desktop
- view the system's top level folders
- navigate through the folder structure
- perform actions on content blocks

This chapter describes using the Workarea and Smart Desktop through the following subtopics.

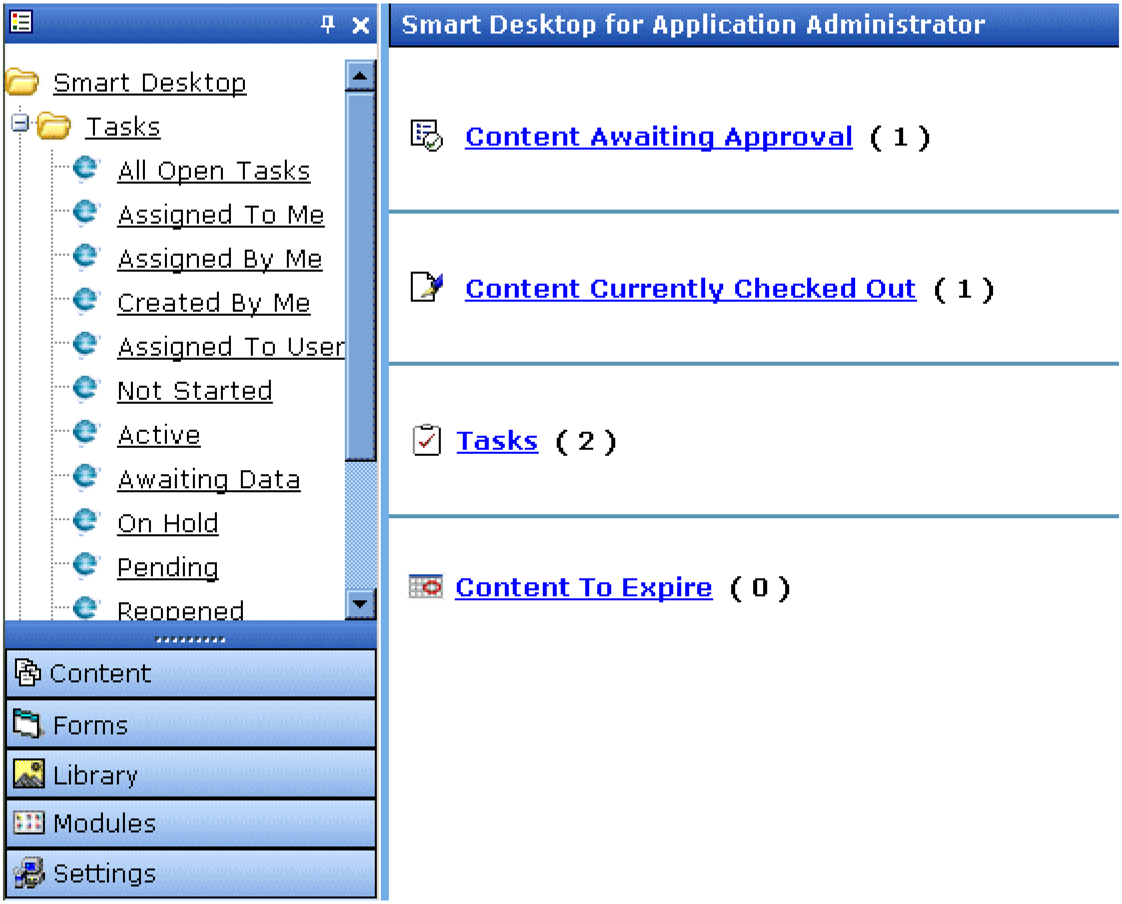
- "Accessing the Workarea" on page 13
- "Understanding the Smart Desktop" on page 14
- "Navigating Within the Smart Desktop" on page 17
- "Sending Instant Email" on page 22

Accessing the Workarea

To access your Workarea, follow these steps.

1. Click the Workarea button at the bottom of the screen (

) or the Workarea button () in a content block's floating toolbar.
2. The Workarea appears.
3. The following illustrates one of several screens that may appear in the Workarea. Your system administrator determines which screen appears for you.

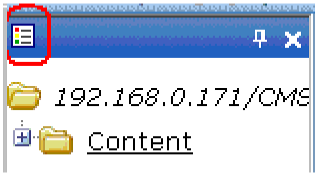


Closing the Workarea

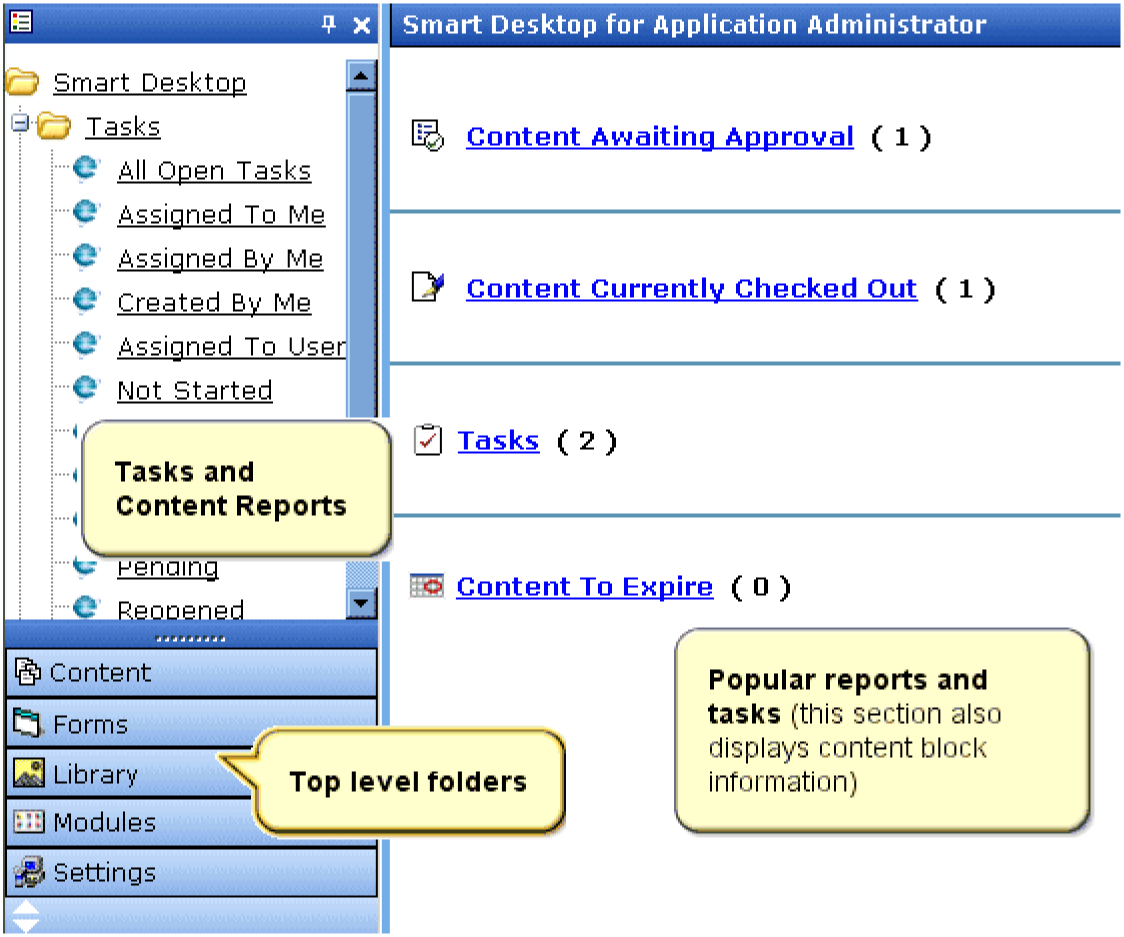
To close the Workarea, click in the upper right corner of the window. When you close the Workarea, you return to the Ektron CMS300 view of your Web site. You do not exit Ektron CMS300.

Understanding the Smart Desktop

The *Smart Desktop* is one of **Ektron CMS300**'s main screens. To access it from wherever you are working in **Ektron CMS300**, click the button in the top left corner (circled below).



The Smart Desktop consists of three sections, illustrated below.



- The right frame displays
  - **Content awaiting approval** - content blocks that you need to approve before they proceed to the next approver or be published if you are the final approver. *See Also:* "Approvals Reports" on page 105

- **Content currently checked out** - all content in a checked-out status. This content cannot be edited by other users until the user who checked it out or the system administrator checks it in. *See Also:* ”Checked Out Report” on page 108
- A list of **tasks** assigned to you *See Also:* ”Managing Tasks” on page 213
- The **Content to Expire Report** - see ”Content to Expire Report” on page 113

NOTE The number to the right of each category lists the quantity of content blocks in that category for you. When you click an item, up to five content blocks in a category appear. To perform tasks on those content blocks, and to view additional blocks in that category, click the category.

If you select a folder from the left frame, the right frame displays content blocks in that folder. If you select a content block from the list, information about it fills the right frame.

- The top left frame displays the folder tree for the Smart Desktop folder, which has two sub-folders
  - Tasks (See ”Managing Tasks” on page 213)
  - Content Reports (see ”Content Workflow Reports” on page 101)
- The bottom left frame displays the top-level folders in **Ektron CMS300**. Your display may be different depending on whether you are an administrator.
  - Content folder (see ”Working with Folders and Content Blocks” on page 26)
  - Forms folder (see the **Ektron CMS300** Administrator Manual chapter “Special Features,” section “Working with HTML Forms”)
  - ”Library Folder” on page 115
  - Modules (see ”Working with Collections” on page 138, ”Working with Menus” on page 157, ”Working with Calendars” on page 190, and “Private Content & Memberships” section of the “Managing Users & User Groups” chapter of the **Ektron CMS300** Administrtor manual)

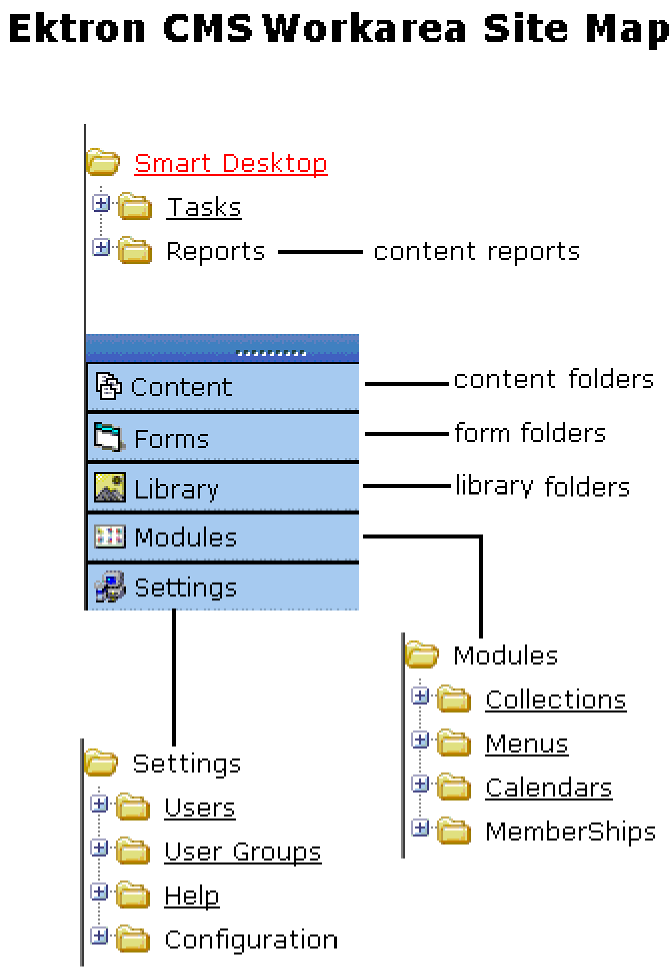
- Settings folder, which includes "Updating Your User Profile" on page 262 and "Accessing Online Help" on page 267

Navigating Within the Smart Desktop

Ektron CMS300's top level folders appear in the lower left corner of the Smart Desktop. Use them to access all other folders.

To open any top level folder, click it. When you do, it appears in the frame above. Typically, you would a click top-level folder to see its sub-folders, then click a sub-folder to see its content blocks.

The following graphic illustrates the location of **Ektron CMS300**'s major features from the Smart Desktop.

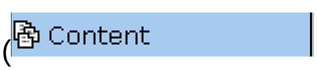


From the Smart Desktop, you can also:

- ”Modify the Display of Top Level Folders” on page 18
- ”Hide the Left Panel of the Workarea” on page 20

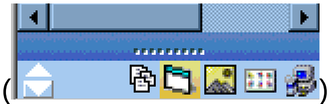
Modify the Display of Top Level Folders

The display of top level folders can appear in two formats:

- a full button with an icon and text (

)

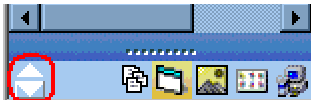
- just an icon on the bottom of the left frame

()

The full display is easier to see, but the icon format allows more space for the folder structure. You can decide which option best suits your needs.

Switching Between Full Buttons and Icons

By default, top-level folders appear as full buttons. To switch the display of all folders to icons, double click the down arrow circled below.

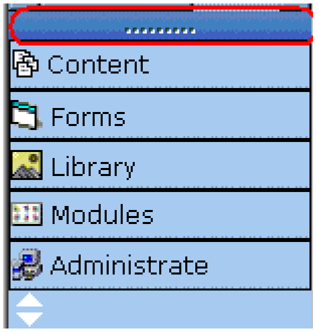


To switch back to full buttons, double click the up arrow circled above.

You can also switch the display of the folders one at a time by clicking the up or down arrow.

As an alternative method of switching the display, you can

1. Place the cursor on the bar above the display of top-level folders. (The bar has several dots in the middle.)

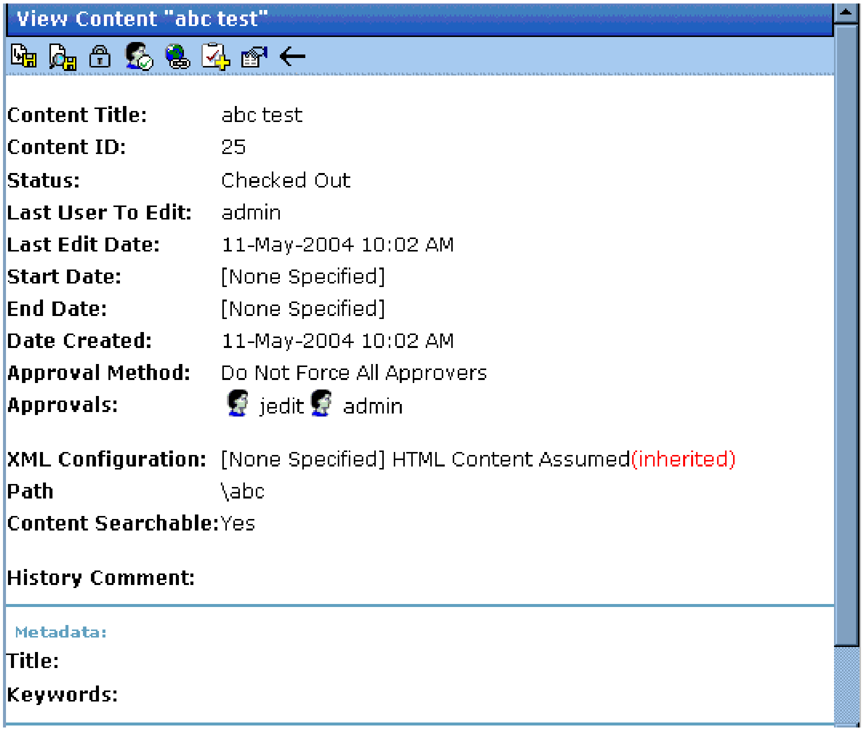


2. When the cursor turns to a double headed arrow, drag it to the bottom bar.

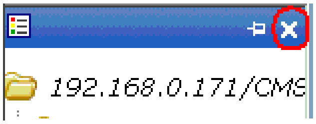
To return the display to full buttons, drag the same bar above.

Hide the Left Panel of the Workarea

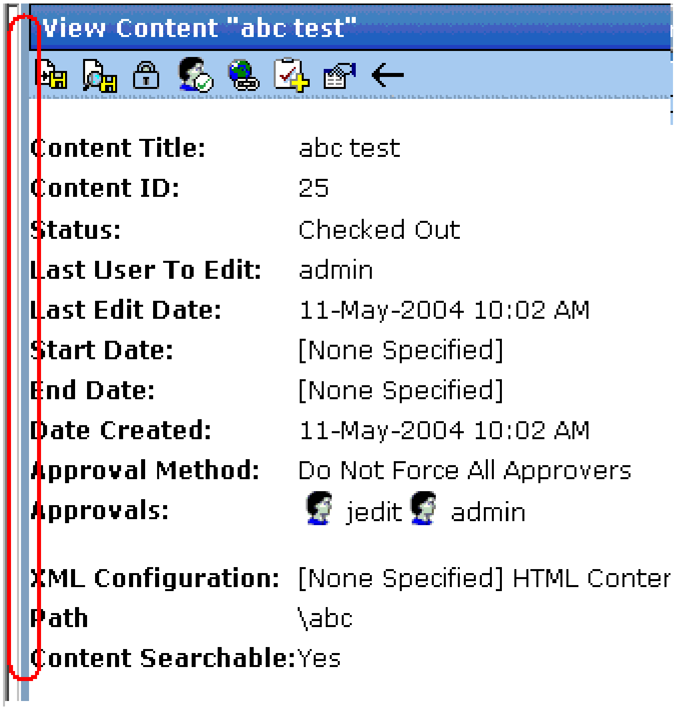
You can hide the left frame of the Workarea to provide more space for working in the right frame. Below is an example of the Workarea with a minimized left frame. Note that you cannot see the folder display in the left frame.



To minimize the left frame, click the white X near the top of the left frame.



The left frame remains minimized until you move the cursor to the left of the bar circled below.

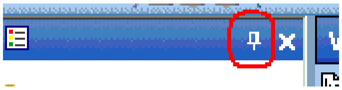


Using Auto Hide

The Workarea screen also provides an *autohide* feature, which quickly switches between full right frame view and combination right-left frame view.

When autohide is turned on, the left frame is minimized unless you place the cursor to the left of the bar circled above. If you place the cursor there, the left frame appears. As soon as you move the cursor back to the right frame, the left frame disappears.

To turn on the autohide feature, click the push pin icon near the top of the left frame.



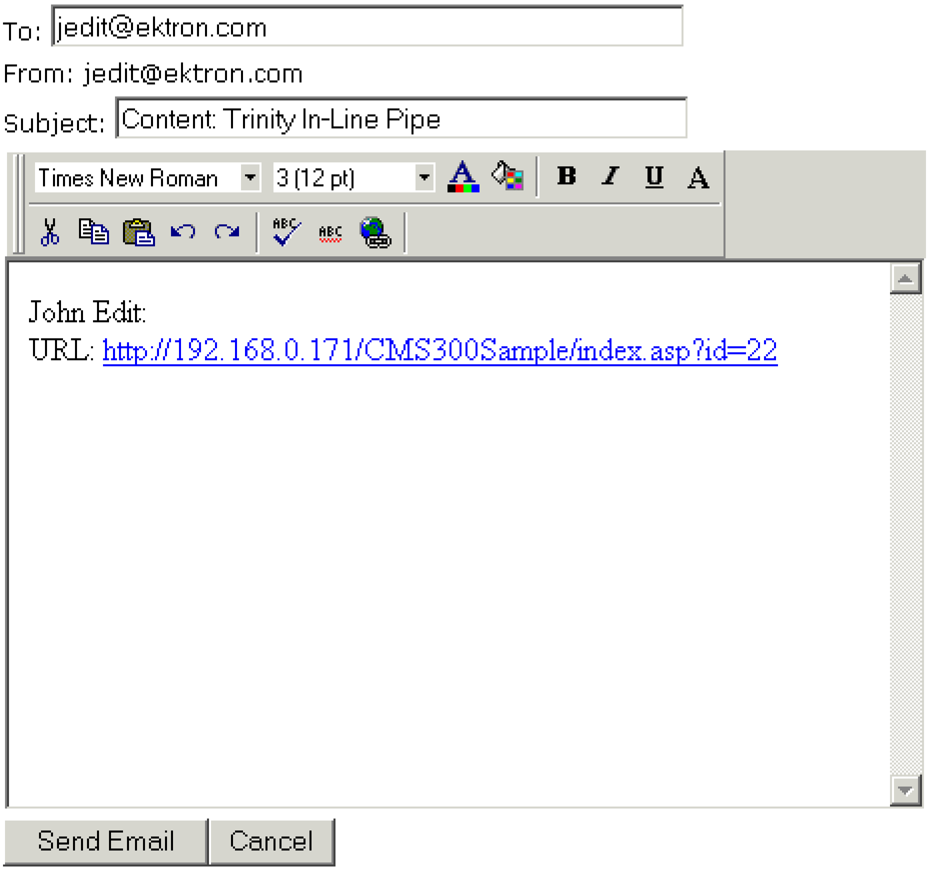
When you do, the push pin turns 90 degrees to indicate autohide is on.

To turn off autohide, move the cursor to the left frame and click the push pin icon. When you do, the push pin returns to its original position.

Sending Instant Email

Ektron CMS300 lets you send email instantly to a user or user group from many screens available from the Smart Desktop. Your ability to send instant mail is indicated by a small mail icon next to a user or group name (indicated in red below).

When you click 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.



The following sections explain how to set up and use Instant email.

- ”Conditions for Instant eMail” on page 23
- ”Where Instant email is Available” on page 24
- ”Modifying Instant eMail” on page 24

Conditions for Instant eMail

- You must have a valid email address set up in the user profile. If not, email icons do not appear in **Ektron CMS300**. *See Also:* ”Updating Your User Profile” on page 262
- Your system administrator must enable the feature.

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 CMS300** features support instant email.

- Smart Desktop
- Tasks
- Approvals
- Reports
- User and user group setup

Wherever instant email is available, one of the email icons appears.

Modifying Instant eMail

When the email screen appears, the following information is copied from **Ektron CMS300** into the email.

<table>
<tr><th>Field</th><th>Source of Default Information</th><th>Editable?</th></tr>
<tr><td>To</td><td>User you selected to receive the email. If the user does not have valid email address, an error message appears on the screen (see below). 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.</td><td>Yes.
If desired, you can add recipients by typing them into this field.</td></tr>
<tr><td>From</td><td>You</td><td>No</td></tr>
<tr><td>Subject</td><td>If the email message is linked to a content block, its title appears.</td><td>Yes</td></tr>
</table>

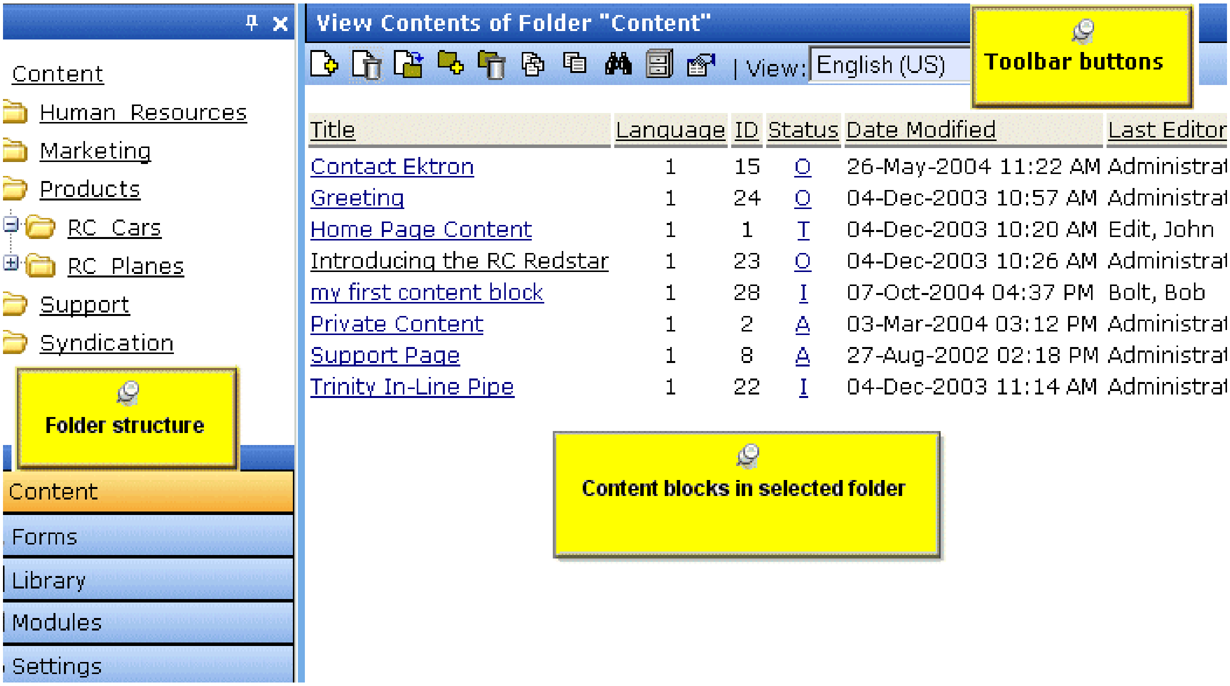
Field	Source of Default Information	Editable?
Body of message	If the email message is linked to content block, a link to the content block appears.	Yes

Working with Folders and Content Blocks

Every content block resides in the Content folder or one of its sub-folders. So, to work with an existing content block or create a new one, you must first navigate to its folder.

A typical content folder screen appears below. It consists of three sections:

- The top left frame shows the folder structure. You can click any folder to display its content blocks in the right frame, while its sub-folders appear below it.
- The right frame shows content blocks in the currently selected folder. Above the right frame is a toolbar of buttons that represent tasks you can perform on a selected content block.
- The lower left frame shows **Ektron CMS300**'s top level folders



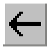
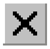
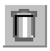
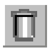
In this chapter, you learn about adding, editing, publishing, and deleting content blocks through the following subtopics. (Permissions and Approvals are discussed in later chapters.)

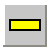
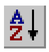
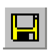
- ”Workarea Toolbar Buttons” on page 28
- ”Viewing a Folder” on page 31
- ”Viewing a Content Block” on page 33
- ”Adding a Content Block” on page 37
- ”Editing a Content Block” on page 40
- ”Deleting a Content Block” on page 44
- ”Search Content Folder” on page 45
- ”Adding Sub-Folders” on page 54
- ”Deleting Folders” on page 55

Workarea Toolbar Buttons

The top of many Workarea screens feature a toolbar that contains buttons for performing actions. This section explains the buttons' functions.

Button	Name	Description
	Add	Adds items in several places.
	Add Calendar Event	Accesses the add calendar event screen in the Workarea.
	Add Content Block	In a content folder, opens the editor and allows you to create a new content block. *See Also:* "Adding a Content Block" on page 37
	Add Content Folder	In a content folder, allows you to create a sub-folder to further organize your content blocks. *See Also:* "Adding Sub-Folders" on page 54
	Add Library Item	In the library folder, allows you to upload an image or file, or add a hyperlink or quicklink to use in content. *See Also:* "Library Folder" on page 115
	Add Task	Assign task to a user. *See Also:* "Managing Tasks" on page 213
	Approvals	View approval chain for folder or content block. *See Also:* "Approving/Declining Content Blocks" on page 76
	Approve	Approve content that awaits your approval.
	Approve All	In the approvals folder, approves all content awaiting your approval with one click.
	Archived Content	If current content is being displayed, switch to display archived content. If archived content is being displayed, switch to display current content. *See Also:* "Setting Archive Options" on page 61

Button	Name	Description
	Back	Return to previous screen.
	Calendar	Lets you choose when content will go live. *See Also:* "Working with Calendars" on page 190
	Cancel	Cancels action you are performing without saving the information.
	Check-in	Saves and checks in content block you are working on. *See Also:* "Checked-In Content" on page 444
	Check-out	Checks out a content block to edit; prevents others from simultaneously working on it. "Checked Out Content" on page 446
	Collection	Accesses the collection area for a content block; lets you create, edit, and delete collections. *See Also:* "The screen is refreshed, and the folder is deleted." on page 56
	Decline	Declines an approval request submitted to you.
	Delete	Deletes selected item.
	Delete Content	Deletes multiple content blocks at once.
	Delete Folder	Deletes current content folder.
	Do Not Apply XSLT	Removes XSLT applied to XML content viewed in the content history area.
	Edit	Edits content or specific criteria in the Workarea.
	Insert Library Item	Inserts selected library item into your content block. *See Also:* "Library Folder" on page 115

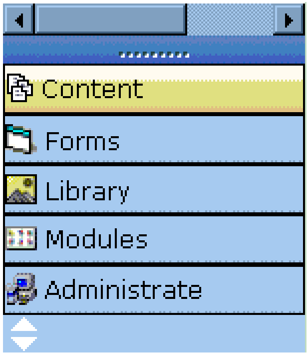
Button	Name	Description
	Link Check	Identifies content blocks or assets with a hyperlink to the current content block. You would typically use this feature to remove the links before deleting a content block. If you do not remove the links, they are inoperative after the content block is deleted.
	Overwrite	Replaces an image or file with a newer version. *See Also:* ”Overwriting Files” on page 126
	Preview	Previews item that was or will be added.
	Publish	Save and publish the content block.
	Remove	Removes items from folders and lists in the Workarea.
	Reorder	Changes the sequence of links in a collection. *See Also:* ”The screen is refreshed, and the folder is deleted.” on page 56
	Restore	Restores previously published content block. *See Also:* ”Viewing and Restoring Previous Content Blocks” on page 94
	Save	Saves content that was modified.
	Search	Searches content and library folder screens. *See Also:* ”Searching the Library” on page 119
	Show Calendar	Displays the calendar in the Workarea.
	Submit	Saves and submits content to next approver in the approval chain.
	Update	Changes are saved and content is updated.

Button	Name	Description
	View Date	View all calendar events for a selected day.
	View Difference	Opens the View Content Difference feature. *See Also:* ”Comparing Versions of a Content Block” on page 87
	View History	View history of selected content block. *See Also:* ”Viewing and Restoring Previous Content Blocks” on page 94
	View Published	Displays currently published version of content block.
	View Staged	Displays staged content. *See Also:* ”Staged Content” on page 449
	Select language	Selects the language of the content blocks being displayed.

Viewing a Folder

To view any folder under the content folder, follow these steps.

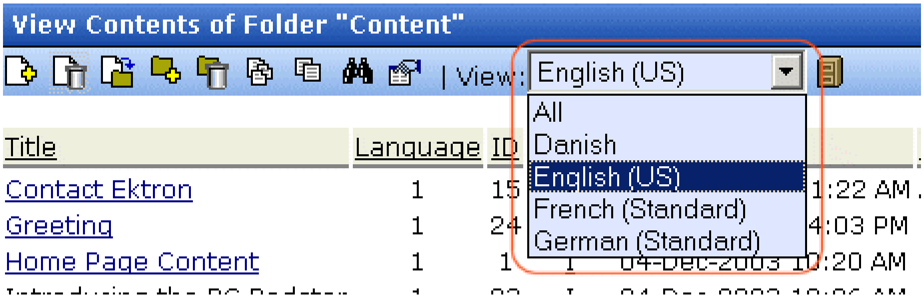
1. Access the Workarea, as described in ”Site Preview” on page 10.
2. Click **Content** from the left lower side of the Workarea.



3. All content blocks in the content folder and the selected language appear on the right side of the screen. Sub-folders appear in the upper left frame.
4. To work with any folder or its content blocks, click the folder. When you do, its content blocks appear in the right frame.

NOTE You can only view folders for which your system administrator has granted permission.

5. If your system supports more than one language, you can select content blocks for a particular language or all languages using the language dropdown list (illustrated below).

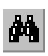


Each folder lists the following information about its content blocks.

Field	Description
Title	The name of the content block.
Language	The language of the content block.
ID	The number assigned to the content block by Ektron CMS300. It is used to retrieve the content block from a database.
Status	The status of the content block. *See Also:* ”Appendix A: Content Statuses” on page 442
Date Modified	The most recent date the content block was added, edited, or published.
Last Editor	The last user who accessed the content block.

Each folder also provides the following toolbar options.

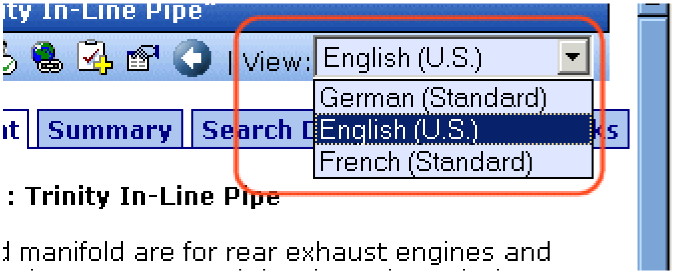
NOTE Depending on your permissions, you may not see all toolbar buttons.

Button	Name	Description	More Information
	Add Content	Opens the editor and creates a new content block in the current folder	"Adding a Content Block" on page 37
	Add Folder	Adds a sub-folder to the current folder	"Adding Sub-Folders" on page 54
	Archived Content	If current content is being displayed, switch to display archived content. If archived content is being displayed, switch to display current content.	"Setting Archive Options" on page 61
	Delete Folder	Deletes the current folder Note: You cannot delete the **Content** folder.	"Deleting Folders" on page 55
	Collections	Adds, edits, or deletes a collection from the current folder	"Working with Collections" on page 138
	Menus	View and work with menus assigned to this content block	"Working with Menus" on page 157
	Search	Look for content in the folder	"Search Content Folder" on page 45
	View Properties	View the folder's properties	"Properties" on page 36

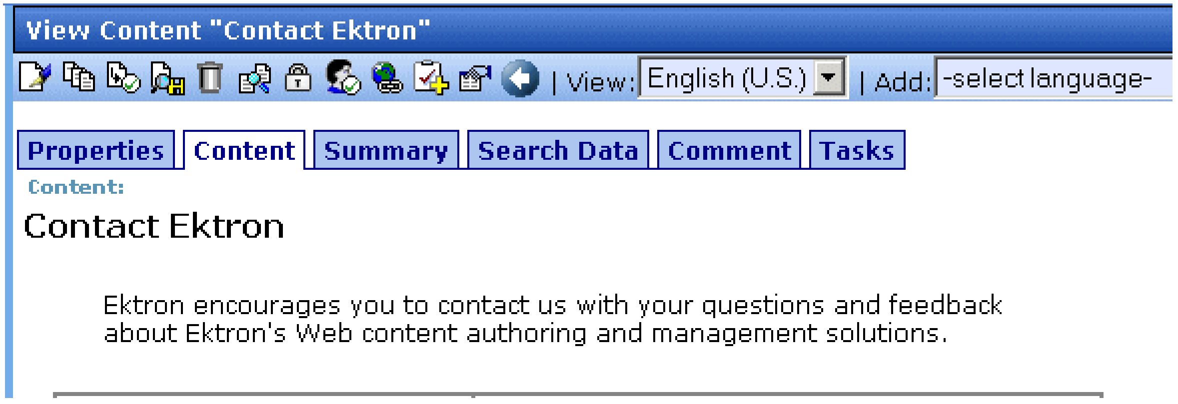
Viewing a Content Block

You can view all content blocks in your Ektron CMS300 Web site. Viewing content blocks allows you to view the content, search data, summaries, and other information. To view a content block in Ektron CMS300, follow these steps.

1. Navigate to the folder that contains the content block, as explained in "Viewing a Folder" on page 31.
2. If your system supports more than one language, you can select an edition of the content block in a particular language via the language dropdown list (illustrated below).



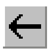
3. Click a content block.
4. The view content screen appears.



After you enter the content, you have the following options.

NOTE Your options may vary according to your permissions and the status of the content block.

Button or Tab	Name	Description	For more information, see
Content	View Content Block	Displays content block	
Summary	Edit Summary	Edit content block's summary.	"Adding a Content Block Summary" on page 64
Search Data	Edit Search Data	Edit content block's Search Data	"Adding or Editing Search Data" on page 68
Properties	Content Properties	View the content block's properties	"Properties" on page 36
Comment	View Comment	View comments on changes made when editing a content block. The history comment also appears on the View Content and Content History screens.	
	Edit Content Block	Open content block for editing	"Editing a Content Block" on page 40
	View History	View all available older versions of the content block; restore older version	"Viewing and Restoring Previous Content Blocks" on page 94
	View Staged	Displays staged content	"Staged Content" on page 449
	View Difference	Compares current version with earlier version of content	"Comparing Versions of a Content Block" on page 87
	Delete	Delete content block	"Deleting a Content Block" on page 44
	Move Content	Move content block to another folder	This button is only available to administrators. To learn more about is, see the **Ektron CMS300** Administrator Manual.

Button or Tab	Name	Description	For more information, see
	Check for content linked to this content	Identify all content blocks with quicklinks to this content block	”Checking for Broken Quicklinks” on page 44
	Add Task	Attach a task to a content block	”Task Module Toolbar” on page 235
	Properties	View and modify these settings • XML Configuration • Content Searchable	• The “Managing XML” chapter of the **Ektron CMS300** Administrator manual • Check this box if the content should be found when someone searches your Web site.
	Return	Go back to previous menu	
View (language)	View	If you can view content blocks in more than one language, select a language from the drop down list.	
Add **-select language-**	**Add** **-select language-**	Lets you copy current content block into new block and translate it to selected language.	”Translating a Content Block to Another Language” on page 41

Properties

The content properties screen contains information about the content block.

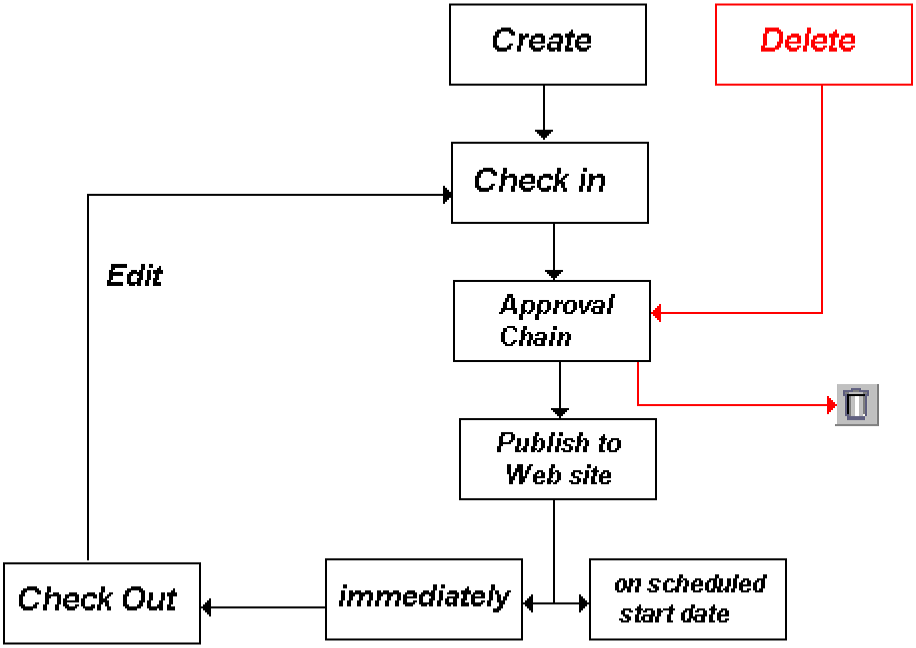
Field	Description
Content Title	The title assigned to the content block
Content ID	The ID number assigned to the content block. The ID number is used to retrieve content from a database.
Content language	The content block’s language

Field	Description
Status	The current status of the content block *See Also:* ”Appendix A: Content Statuses” on page 442
Last User to Edit	The last user to edit this content block
Last Edit Date	When the content block was last edited
Start Date	When the content block will go live on the Web site
End Date	When the content will be removed from the Web site
Action on End Date	What happens to the content block when its end date and time are reached. *See Also:* ”Setting Archive Options” on page 61
Date Created	When the content block was created
Approval Method	Whether all approvers must sign off on content block before it is published; managed by your system administrator
Approvals	The users in the approval chain for this content block. *See Also:* ”Approving/ Declining Content Blocks” on page 76
XML Configuration	The XML Configuration applied to the content block. This is typically managed by your system administrator.
Path	The folder path to the content’s folder. A slash (\) represents the Content folder.
Content Searchable	**Yes** appears if the content will be found when someone searches your Web site.

Adding a Content Block

If you have permission to add a content block to a folder, you can create content blocks for that folder. After you create the content block, your system administrator must insert in onto a page on your Web site.

The following flowchart illustrates a typical sequence of events when working with content blocks.



To add a content block, follow these steps.

1. Browse to the folder where you want to create the new content block.
2. Select a language from the language dropdown list.
3. Click the Add button ( ).
4. The Add Content window opens.
5. Create content in the editor using the following tables.

Responding to the Fields on the Add Content Screen

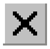
Field	Description
Title	Enter a title for the content block.

Field	Description
Add to Quicklinks Table	Check if you want to save a Quicklink to this content block. "A quicklink is a special kind of hyperlink that jumps to another content block on your Web site. (A regular hyperlink jumps to a Web page on the internet.)"
Content Searchable	Check this box if the content should be found when someone searches your Web site.

After you respond to the above fields, the following options are available.

Options on the Add Content Screen

Button or Tab	Name	Description
Content	Add/edit content	Insert content for the content block. For more information about using **Ektron CMS300**'s editor, see "Introduction to eWebEditPro+XML" on page 270.
Summary	Edit Summary	Enter or edit the summary for the content block *See Also:* "Adding a Content Block Summary" on page 64
Search Data	Edit Search Data	Enter or edit this content block's search data. Note: All required search data needs to be added before the content block can be submitted into the approval chain. *See Also:* "Adding or Editing Search Data" on page 68
Comment	Add Comment	Briefly describe the content, or comment on changes made when editing a content block. The history comment appears on the View Content and Content History screens.

Button or Tab	Name	Description
Schedule	Add Start and End dates	If you do not want to submit the content block to the approval chain immediately, enter when it will be submitted. *See Also:* ”Scheduling Content to Begin and End” on page 57 If appropriate, enter a date when the content will no longer be viewable on the Web site. *See Also:* ”Setting an End Date on a Content Block” on page 60
	Submit	Submit the content block into the approval chain. This action also returns the changed content to the database and exits the editor. *See Also:* ”Approving/Declining Content Blocks” on page 76
	Publish	Publish the content to the Web site. Note: Only the last approver in the approval chain sees this button. *See Also:* ”Approving/Declining Content Blocks” on page 76 This action also returns the changed content to the database and exits the editor.
	Check In	Save and check-in the document. This action returns the changed content to the database and exits the editor. It does *not* submit the content into the approval chain. Rather, it allows you and other users to continue changing it.
	Save	Save the content without leaving the editor. It is a good idea to save your work frequently.
	Cancel	Close the editor without saving changes.

Editing a Content Block

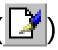
Ektron CMS300 content can be in any of several statuses, as described in ”Appendix A: Content Statuses” on page 442. You can only edit a content block for which you have permission and in one of the following statuses:

- published
- checked in
- checked out by you

- submitted for your approval

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

Steps in Editing a Content Block

1. Access the View Content screen for the content block you want to edit, as described in "Viewing a Content Block" on page 33.
2. Select the language whose content blocks you want to view.
3. Click the Edit button ().
4. The editor opens with the content block inserted.
5. From the edit content window, you can:
   - Edit content
   - Create or edit a summary
   - Specify search data for the content
   - Enter or update a comment
   - Enter or update start and end dates
   - Save changes
   - Check in the content
   - Submit the content for approval
   - Publish a content block to the Web site
   - Access the Library
6. Make the necessary edits to the content block. For a description of the fields on the screen, see "Responding to the Fields on the Add Content Screen" on page 38
7. Choose a toolbar option or tab from the top of the Edit Content window. These options are described in "Options on the Add Content Screen" on page 39.

Translating a Content Block to Another Language

Use this procedure when you want to initialize a new foreign language content block with content from a source language. This copying should facilitate the translation.

For example, an editor is translating content from French to German. The editor copies the French edition to a new content block 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.

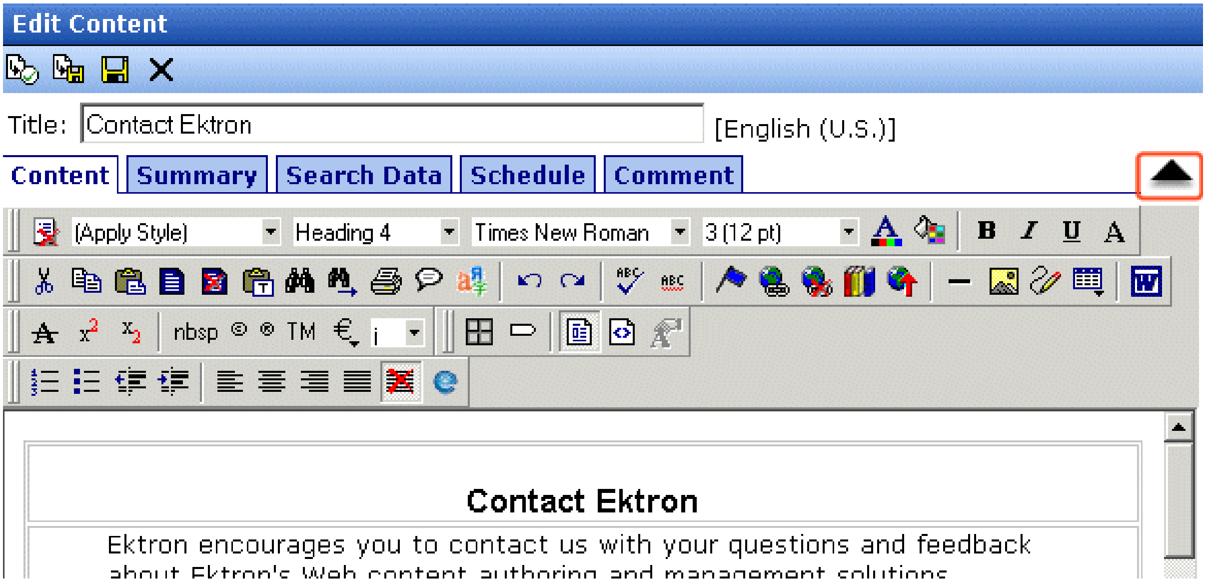
To copy a content block into a new content block of a different language, follow these steps.

1. Go to the View Content screen for the content block you want to translate.
2. From the View drop-down list, select a original language.
3. Click the content block that 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.

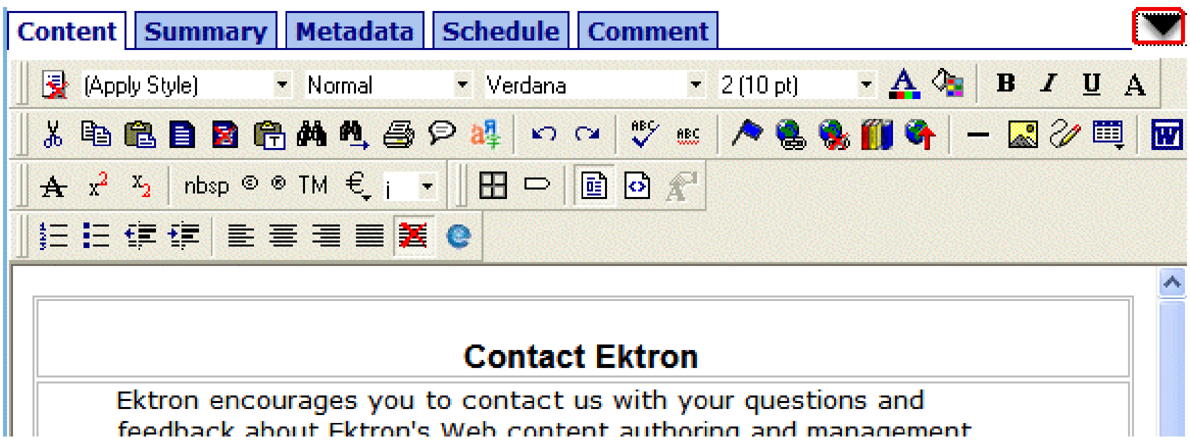
6. The original language content appears. Translate into the new language then delete the original content.
7. When you save the content block, it is saved as the edition of that content block in the selected language.

Expanding the Content Area

While working with content in **Ektron CMS300**, it is possible to expand the content area of the screen vertically. This gives you more space to work on content. You can expand the content portion of the Workarea by clicking the up arrow (). The arrow's screen location is shown below.



Once the content area is expanded, the tooltips bar and toolbar are not visible.



Click the down arrow () to return the content area to normal size. The tooltips bar and toolbar also return to the screen.

Deleting a Content Block

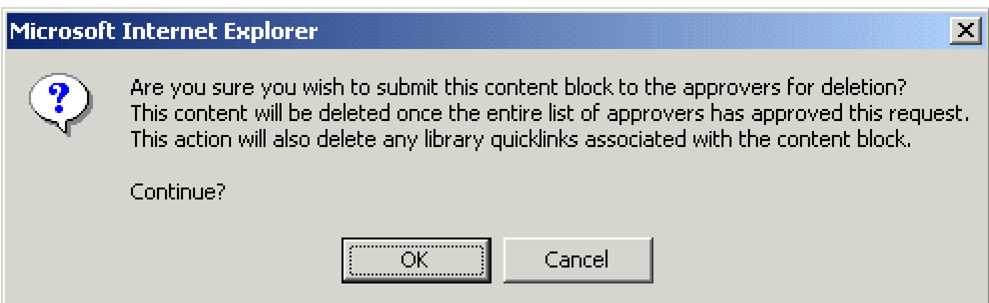
NOTE The ability to delete a content block is a privilege granted by the system administrator. If you do not see a Delete button ( ) on the View Content History screen, you do not have permission to do so.

The Delete command lets you permanently delete obsolete content blocks from your Web site. Like publishing, a deleted content block must go through the approval chain before it is removed.

You can only delete a content block if its status is Checked In or Approved.

To delete a content block, follow these steps.

1. Access the View Content screen for the content block you want to delete, as described in ”Viewing a Content Block” on page 33.
2. Click the Delete button ( ).
3. The following message appears.



4. Click **OK** to delete the content block.

When the content block goes through the approval chain, it is deleted from **Ektron CMS300**. If you are the last approver in the approval chain, the content block is deleted immediately.

See Also: ”Approving/Declining Content Blocks” on page 76

Checking for Broken Quicklinks

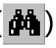
The Check Links button ( ) locates all content blocks that include a quicklink to the displayed content block. This feature is useful when deleting a content block, because it informs you of every content block that will include a “dead” link after you delete the selected content. You should then edit those content blocks and remove or change the obsolete quicklinks.

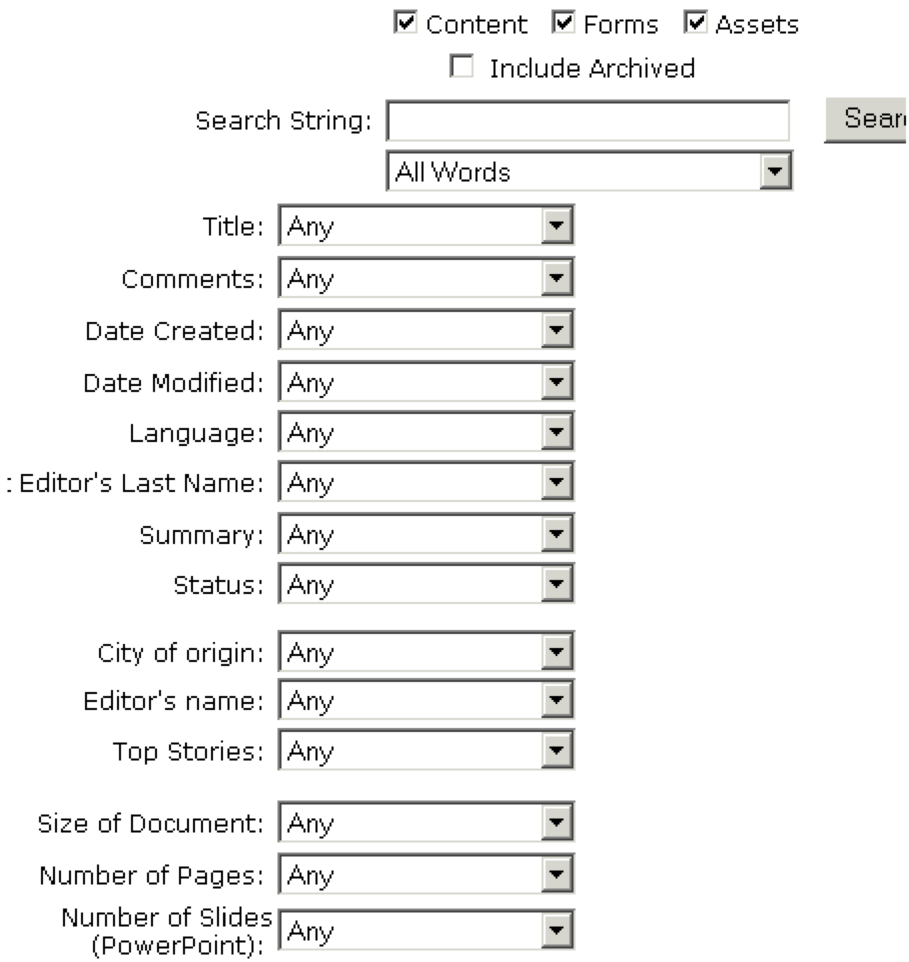
To use the link checker, follow these steps.

1. Access the View Content page for the content block whose links you want check, as described in ”Viewing a Content Block” on page 33.
2. Click the Check Links button ().
3. A page lists each content block that links to the current content block.

Click the title to access the View Content page for the selected content block. From there, you can remove or change the quicklink.

Search Content Folder

If a content contributor logs into the Workarea and clicks the search button (), the following screen appears.



Search Screen

The search screen prompts you to specify

- the kind of content you want to search (for example, HTML content blocks)
- a search word or words
- how the search words must match the content in order for an asset to be found by the search
- *search data* criteria. The search only returns content that meets your criteria.

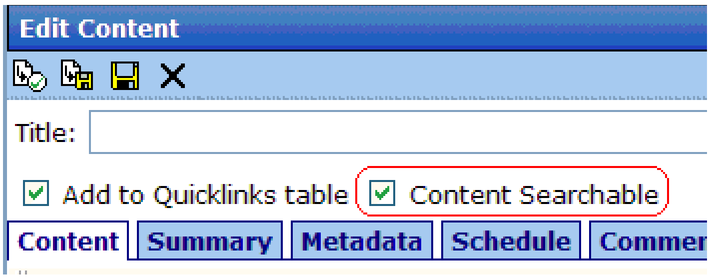
Each feature is explained below.

Specifying the Kind of Content to Search

Near the top of the screen, four check boxes let you determine the kinds of content to search.

Check this box	To search
Content	HTML content blocks
Forms	HTML forms
Assets	Assets. *See Also:* "Using the Asset Management System" in the **Ektron CMS300** User Manual
Include Archived	Any of the above file types that have been archived. *See Also:* "Setting Archive Options" on page 61

IMPORTANT! The search only considers content whose **Content Searchable** box is checked. The **Content Searchable** box appears on the Edit Content screen above the editor. Also, the status of the content must be Approved.



Specifying the Search Word or Phrase

In the text field, enter one or more words that you want to find within the selected file types. The search uses these words to find and return content.

Entering one or more words here is optional. That is, you can use fields on the lower portion of the screen to find content without knowing any words contained in the assets. For example, you can find every HTML content block that was modified by a certain user within the last 30 days.

If you check off HTML and Form content, you can enter no search criteria and get a list of all HTML and Form content blocks on your site.

IMPORTANT! The asset search requires *at least one* criterion. As examples, you could enter text into the **Search Text** field, some characters contained in the **Title**, or a minimum **Document Size** of 1000 kilobytes.

See Also:

- ”The Noise Files” on page 48
- ”Specifying Match Criteria” on page 49
- ”Search Data” on page 50
- ”Tips on Responding to Search Criteria Fields” on page 53

The Noise Files

If you are searching for assets, Windows has a *noise* file that screens from the search every single letter of the alphabet as well as common words. Examples of common words are **about**, **after**, **all**, and **also**. Avoid entering such words into the **Search Text** field, because the search ignores them.

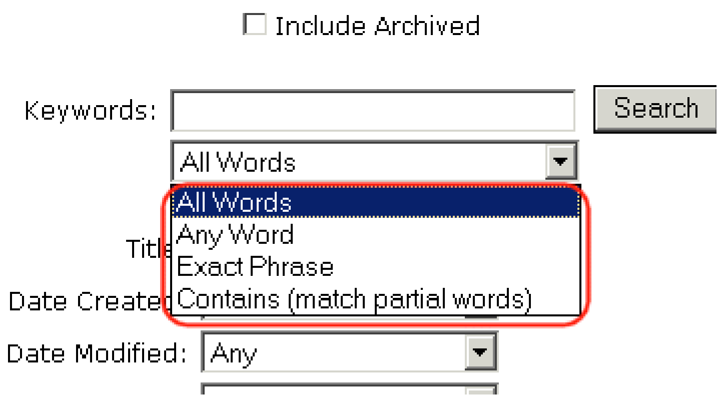
To find the list of noise words, search your computer for files named noise.*xxx*, where xxx is a three-letter abbreviation for the language. For example, noise.eng lists English noise words.

You can open a noise file with a simple word processor program, such as Notepad, to view any language’s noise words. You can also edit the file. For example, you can remove words that users should be able to search on.

Specifying Match Criteria

NOTE This field is only applicable if you entered one or more words in the text field.

From this dropdown list, select criteria for how the search word or words must appear within the content of the files being searched.



Your choices are described below.

Choice	A search returns content that has
All Words	all words in the search field
Any Word	any word in the search field
Exact Phrase	all words in the order specified in the search field
Contains (match partial words)	any part of any word in the search field

Match Criteria Examples

The examples below assume you entered these words into the search text field.

- partners
- content
- Monday

- employee
- green

All Words

All Words works like an “and” function. The search returns only content that has the words partners *and* content *and* Monday *and* employee *and* green. The words can be in any order within the file.

Any Word

Any Word is almost the opposite of All of the Words. It works like an “or” function.

When you select this option, the search returns all files that have *at least one* of the words entered in the search text field. In other words, it returns files with the word partners *or* content *or* Monday *or* employee *or* green.

Exact Phrase

Exact Phrase returns content blocks that have all five words in the order specified in the search text field.

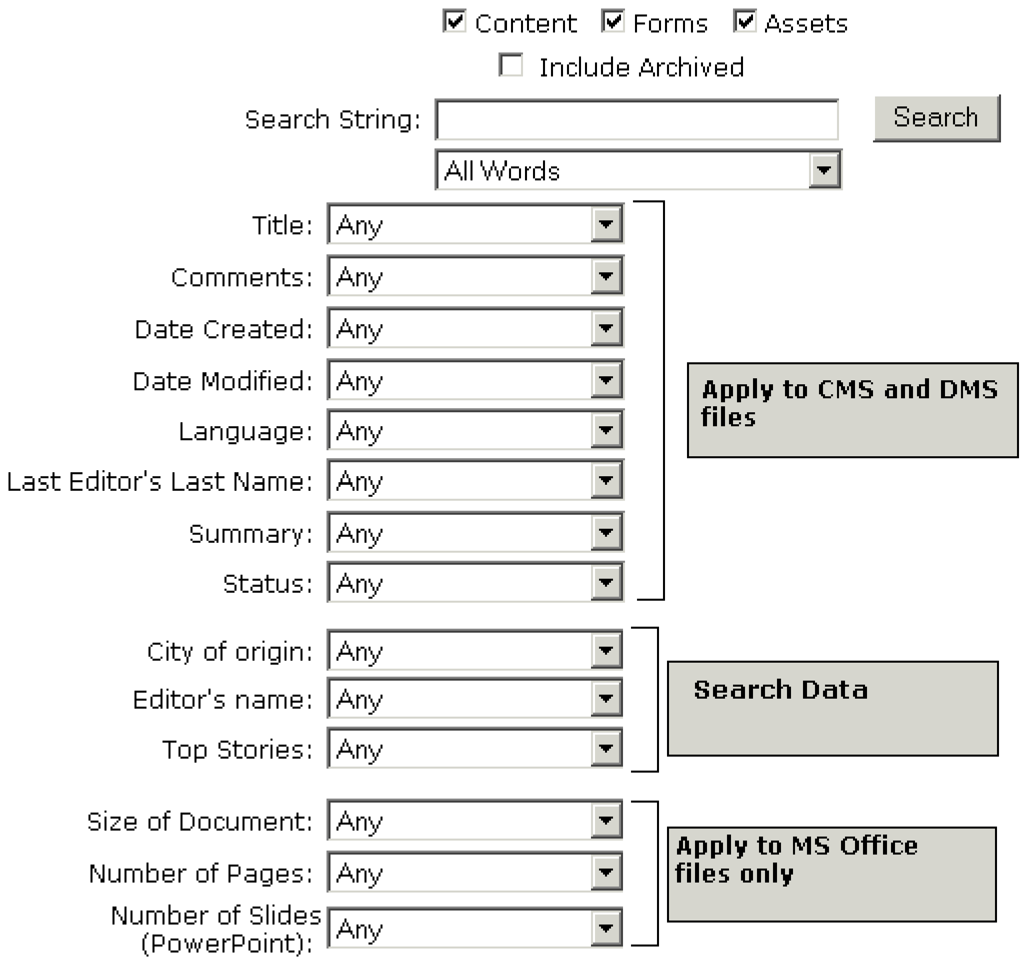
A better example would be to search for a phrase, such as Content Management Solution. The search yields only content blocks with that exact phrase.

Contains (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 select Match Partial Words. The search returns all content with the letters **at**, finding words such as **At**, B**at**, Ch**at**ter, **At**oll, **AT**M, etc.

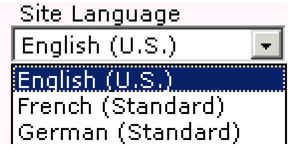
Search Data

The next section of the search screen lets you choose one or more customized search criteria.



As you can see, the top group of fields applies to all file types. The next group is search data applied to any content in the selected folder. (For more information, see ”Adding or Editing Search Data” on page 68.) The last group applies to Microsoft Office files only.

Fields that Apply to CMS Content and Assets

Search criterion	Description
Title	In CMS, the content block or form title. In AMS, the Title field in the file's Properties window.
Comments	In CMS, the content block or form's comments, which can be inserted via the **Comment** tab. In AMS, comments are inserted in the file's Properties window's **Summary** tab.
Date Created	The file's creation date.
Date Modified	The late date when the file was modified.
Language	Each file in CMS and AMS is assigned a language property when it is created or imported. Note: This field determines the language of the content being searched. The language dropdown list (shown below), which appears on every standard template supplied by Ektron, has no effect on which content is searched. 
Last Editor's Last Name	The last name (surname) of the user who most recently changed the content or form block.
Summary	The content block summary. *See Also:* "Adding a Content Block Summary" on page 64
CMS Status	The content block status. *See Also:* "Appendix A: Content Statuses" on page 442 Note: Although you can search for content blocks by any status, when the search results appear and you click a content block to view it, only the most recently published version appears. If a version has never been approved, nothing appears.

Search Data Fields

Search data fields are defined by your system administrator and applied to content by its author or editor. They are custom-defined, so would be different for every site.

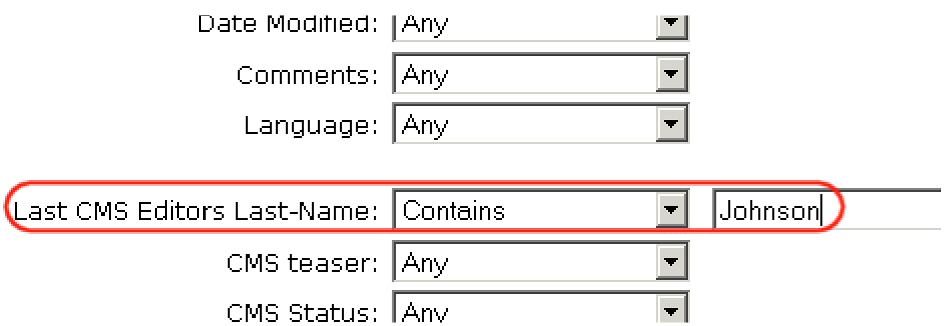
The search data fields in the sample illustration (above) are only an example of what they might look like.

Fields that Apply to MS Office Files Only

Search criterion	Description
Size of Document	As displayed on the read-only **Size** field on the File Properties window's **General** tab.
Number of pages	As displayed on the read-only **Statistics: Pages** field on the File Properties window's **Statistics** tab.
Number of slides (PowerPoint)	As displayed on the read-only **Statistics: Slides** field on PowerPoint's File Properties window's **Statistics** tab.

Tips on Responding to Search Criteria Fields

- If the search field is a text field, you specify **contains** or **not contains**. Then, a text field appears to the right.



Here, enter the search text for that field. For example, if the field is **Last CMS Editors Last-Name**, and you insert **Johnson** into the text field, the search finds all files authored by anyone whose last name is **Johnson**.

- If the search field is a date field, the dropdown list lets you choose **Before**, **Between**, or **After**.
  - Use **Before** to select all dates *prior to* a specified date
  - Use **After** to select all dates *later than* a specified date
  - Use **Between** to select dates by specifying a beginning and end date. All dates in between are considered.
- If the search field is numeric, the dropdown list lets you choose **Less Than**, **More Than**, **Equal To**, or **Between**.

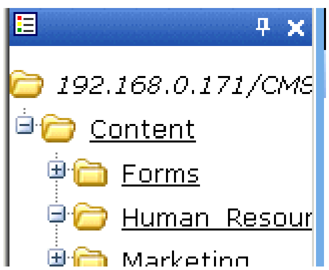
Adding Sub-Folders

To further organize content in your Ektron CMS300 Web site, you can create sub-folders to store related content blocks.

NOTE The ability to add a sub-folder is a privilege granted by the system administrator. If you do not see a Add Folder button () on the View Contents of Folder screen, you do not have permission to do so.

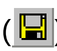
To add a sub-folder, follow these steps.

1. Navigate to and click the folder under which you want to create a sub-folder.



2. The contents of the folder appear in the main section of the Workarea.
3. Click the Add Folder button ().
4. The Add Sub-folder screen appears.
5. Enter the required information in the fields. Use the following table to assist you.

Field	Description
Folder name	Enter a name for the sub-folder.
Description	Enter a full description of the folder
Style Sheet	Specify the style sheet that the content in the folder will use. If left blank, the folder inherits the style sheet from the parent folder. Your system administrator should be able to assist you in choosing a style sheet.
Template	Specify a default template in which to display the content blocks. The default template is used when quicklinks are generated for the content in the content folder. If left blank, the template from the parent folder is inherited. Your system administrator should be able to assist you in choosing a template.
XML Configuration	By default, content blocks and folders inherit their XML configuration settings from their parent folders. To “break” or restore inheritance, place or remove a check in the checkbox next to **Inherit XML Configuration**. For more information, see the “Managing XML” chapter of the **Ektron CMS300** Administrator’s manual.

6. Click the Save button ().

Deleting Folders

You can delete folders that are no longer needed.

NOTE The ability to delete a folder is a privilege granted by the system administrator. If you do not see a Delete Folder button () on the View Contents of Folder screen, you do not have permission to do so.

CAUTION! Deleting a content folder permanently deletes its content blocks, quicklinks and sub-folders.

To delete a content folder, follow these steps.

1. Navigate to the content folder you want to delete.
2. Click the Delete Folder button ().
3. A confirmation message appears.
4. If you are sure you want to delete the content folder, click **OK**.
5. The screen is refreshed, and the folder is deleted.

Scheduling Content to Begin and End

Scheduling content lets you control when a content block becomes visible on the Web site. Similarly, you can remove a content block on a predetermined date and time. When used together, a start and end date can relieve you of much work by managing how long a content block is viewable on your Web site.

You can also set options for what happens to a content block after reaching its end date.

How Does It Work?

When you create a content block or modify an existing one, you can select a “go live” date and time. If you do, and the content makes it through the approval chain, Ektron CMS300 publishes the content block to the live site at that time.

For example, your company is having a sale of the century in a month, and everything is ready except the announcement. You decide to update your Web site to let the public know about the sale. With this feature, you create the Web content now and set it to go live a week before the sale.

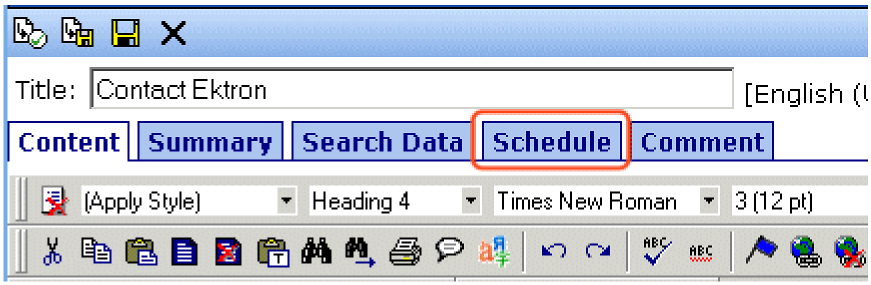
This topic is explained through the following subtopics:

- ”Setting a Start Date” on page 57
- ”Setting an End Date on a Content Block” on page 60
- ”Setting Archive Options” on page 61

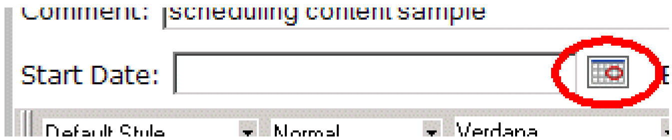
Setting a Start Date

To set a start date, follow these steps.

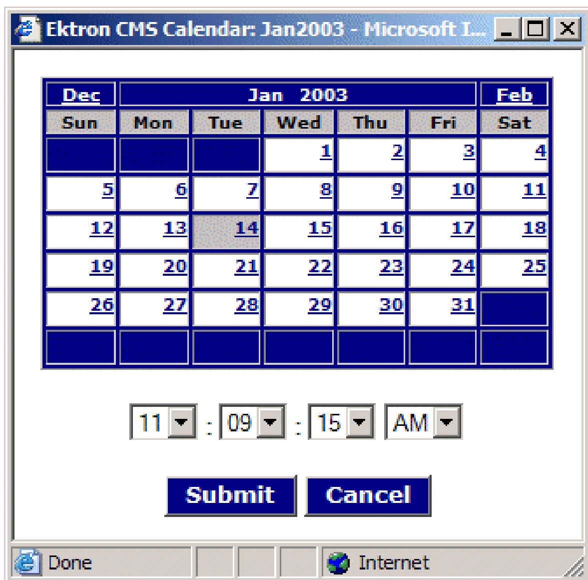
1. Access the editor by adding a new content block or editing an existing one.
2. If adding a new content block, enter a title and the content.
3. Click the **Schedule** tab.



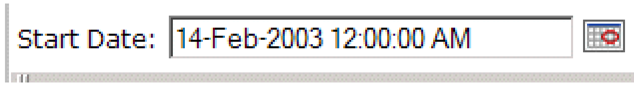
4. Click the calendar button next to the start date field.



5. The Ektron CMS300 calendar pops up.
6. Select the date and time when the content will become visible on the Web site.



7. Click the **Submit** button.
8. The date and time appear in the **Start Date** field



As an alternative, you can enter the date and time directly, without using the calendar. If you do, use the following format

DD-MMM-YYYY hh:mm:ss tt

NOTE When you select a time for content to go live, that time depends on the server's system clock. If the clock is incorrect, the content will not go live at the intended time.

What Happens After I Set a Start Date?

After you save the content block, it appears on the Content Pending Start Date report, which helps you keep track of content with a future start date. *See Also:* "Content Pending Start Date Report" on page 111

After you set a go live date and the content completes the approval chain, two scenarios may occur:

- The content block is new
- The content block already exists

Each scenario is now explained.

Setting the Go Live Date on New Content

When you set a go live date on a new content block, the content becomes viewable on the specified date and time as long as it completes the approval chain. If a user accesses the page that contains the content before then, he sees only the template. This occurs within Ektron CMS300 and when the content is viewed on the Web site.

Setting the Go Live Date on Existing Content

When you set a go live date for changes made to an existing content block, and it completes the approval chain, the content has a grey border within Ektron CMS300 until the date specified.

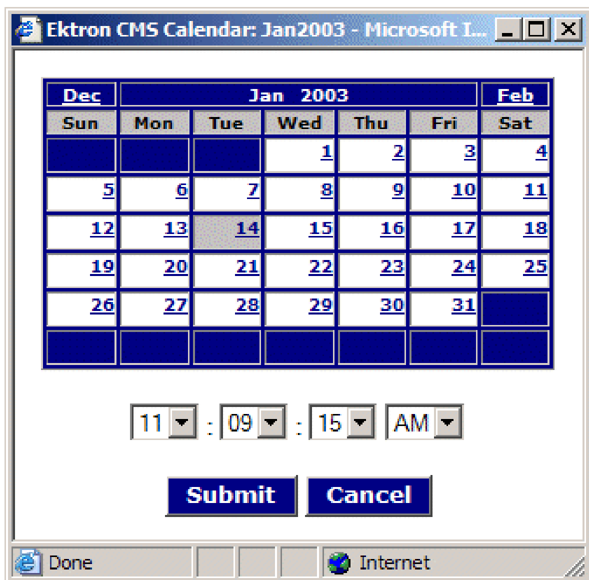
When you view the content block on the Web site, you see the previously published version. When the go live date occurs, the new content replaces the previously published version, and the content block's status changes to Active.

Setting an End Date on a Content Block

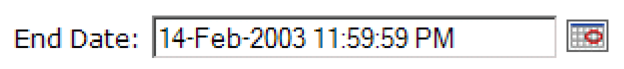
To set an end date for a content block, follow these steps.

1. Access the editor by adding a new content block or editing an existing one.
2. If adding a new content block, enter a title and content.
3. Click the calendar button next to the **End Date** field.

4. A calendar pops up.
5. Select the date and time you want the content to be removed from the Web site.



6. Click the **Submit** button.
7. The date and time appear in the **End Date** field



NOTE When you select a time for content to go live, that time depends on the server's system clock. If the clock is incorrect, the content will not be removed at the intended time.

What Happens After I Set an End Date?

If you set an end date to a content block, and it gets published to your Web site, the content is visible on the Web site. When a content block reaches its end date, you have three choices for what to do with it. These are explained in "Setting Archive Options" on page 61.

If your choice means the content will not appear on the Web site, Ektron recommends having another content block ready to replace it. If not, and a site visitor goes to the page containing the content, he sees the template without the content block.

Appearance on Content Reports

After a content block reaches its end date, it appears on the Expired Content report, which helps you keep track of expired content. *See Also:* "Expired Content Report" on page 112

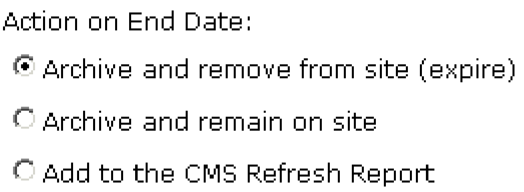
Also, the Content to Expire report lists all content blocks whose end date will occur within a number of days that you specify. *See Also:* "Content to Expire Report" on page 113

Setting Archive Options

After setting an End Date, you can specify a content block's archive options, which determine how it is handled upon reaching the end date/time.

To be eligible for any option, the content must reach its end date/time, progress through its approval chain, and be published. Until those events occur, the content block remains visible both within its content folder and on the site.

The archive options (illustrated below) appear below the **Start Date** and **End Date** fields on the content block's **Schedule** screen.



Each option is explained below.

Archive Options

Option	Can site visitors view content upon expiration?	Can users view and edit content within Ektron CMS300 upon expiration?
Archive and remove from site (expire)	No	Yes, within its folder by clicking the archive button ( )
Archive and remain on Site	Yes The content will not appear on a page that uses the ListSummary function but will appear wherever the ArchiveListSummary function is used.	Yes, within its folder by clicking the archive button ( )
Add to CMS Refresh Report	Yes	Yes, in its content folder and on the Refresh Report. *See Also:* "Refresh Reminder Report" on page 111

Restoring Content from Archived to Active State

To restore a content block from archived state to active, follow these steps.

1. Navigate to its folder.
2. If necessary, click the Archive button to view it. (See "Archive Options" on page 62).
3. Click the Edit button ( ).
4. Click the **Schedule** tab.

5. Remove the **End Date** or change it to a future date.
6. Submit the content for publishing. When the content block is published, it will no longer be archived.

Adding a Content Block Summary

A summary provides a short description of a content block to supplement the title when displaying a list of content blocks on a Web page. When you create or edit a content block, you can create a summary. Then, your Web site developer can create Web pages that contain just the summaries to attract readers to the full story.

A good example is a news Web site. A page on that site could list the titles of the top stories followed by a summary of each (illustrated below).

> **TOP STORIES**
> Ektron Named a Rising Star (08-15-2003)
> **August 15, 2003, Amherst, New Hampshire, USA —** Ektron, Inc., an innovator in Web content management and authoring, has been named a Rising Star as part of the prestigious New England Technology Fast 50 Program.
>
> Ektron Launches International Distribution Program *(08-08-2003)*
> **August 8, 2003, Amherst, New Hampshire, USA —** Ektron, Inc., an innovator in dynamic Web content authoring and management with over 350,000 users, today announced the launch of its international distribution program.

Like content blocks, summaries can include images and files as well as different font styles and sizes. This chapter explains how to create summaries and how they can help navigation within your site. Your system administrator determines how to display the summaries on your site.

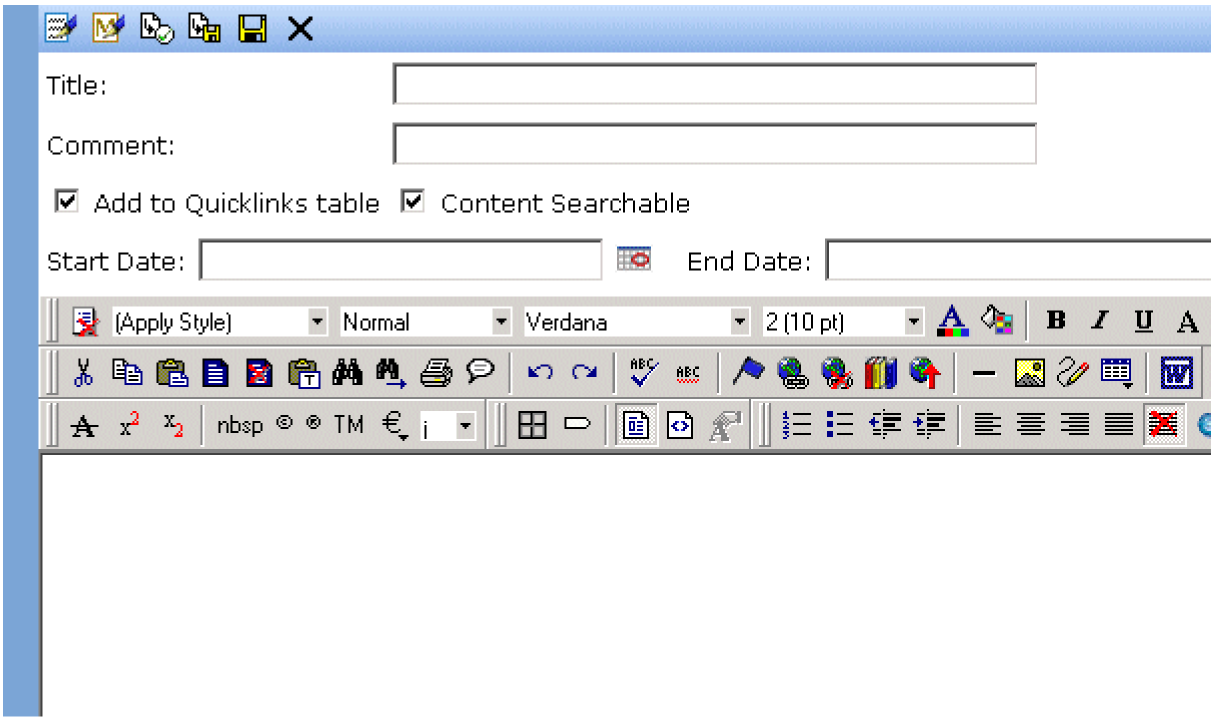
Creating Summaries

There are two ways to create summaries:

- for a new content block (see "Creating a Summary on a New Content Block" on page 65)
- for an existing content (see "Creating a Summary for an Existing Content Block" on page 66)

Creating a Summary on a New Content Block

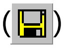
1. Navigate to the folder in which you want to create the content.
2. Click the Add Content button. The Add Content screen appears.



3. Insert a **Title** and content. *See Also:* "Adding a Content Block" on page 37
4. Click the **Summary** tab.
5. Enter summary information for the content block. The summary can include images, files, and hyperlinks. Its length can be restricted by your system administrator in the configuration setup screen.

6. When done, click the appropriate button.

Creating a Summary for an Existing Content Block

1. Navigate to the folder that contains the content.
2. Click the content block.
3. The View Content screen appears.
4. Click the **Summary** tab to enter or edit summary information for the content block. The summary can include images, files, and hyperlinks. Its length can be restricted by your system administrator in the configuration setup screen.
5. When done, click the Save button ().
6. The View Content page reappears. The status of the content block changes to “checked out” to you.

NOTE When you enter or edit an existing content block’s summary, its status changes to checked out. After you create the summary, click the Check-In button to check the content block in. From that point, you need to submit or publish it.

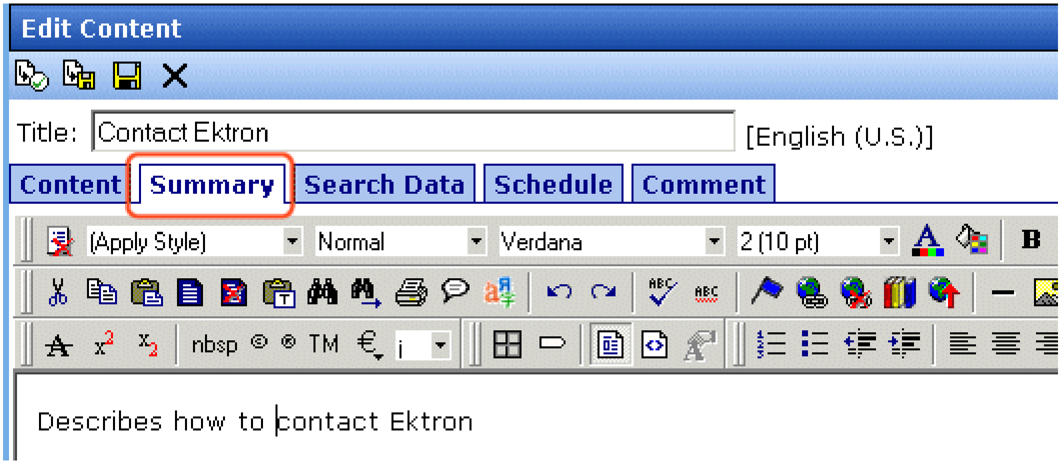
Editing a Summary

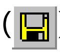
NOTE You can only edit the summary of content blocks that are published, checked in, or checked out by you.

To edit the a content block’s summary, follow these steps.

1. Access the View Content page for the content block whose summary you want to edit, as described in ”Viewing a Content Block” on page 33.
2. Click the **Summary** tab.

3. The Edit Summary window opens.



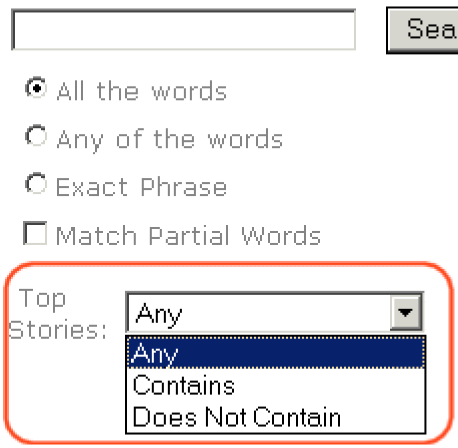
4. Click the Edit button. The summary opens within the editor.
5. Make the necessary changes.
6. Click the Save button ().
7. The summary is saved, and the View Content page is displayed with a status of checked out.

NOTE When you edit an existing content block's summary, it goes into a checked out state. After creating the summary, check the content block back in. From that point, you must submit it or publish it.

Adding or Editing Search Data

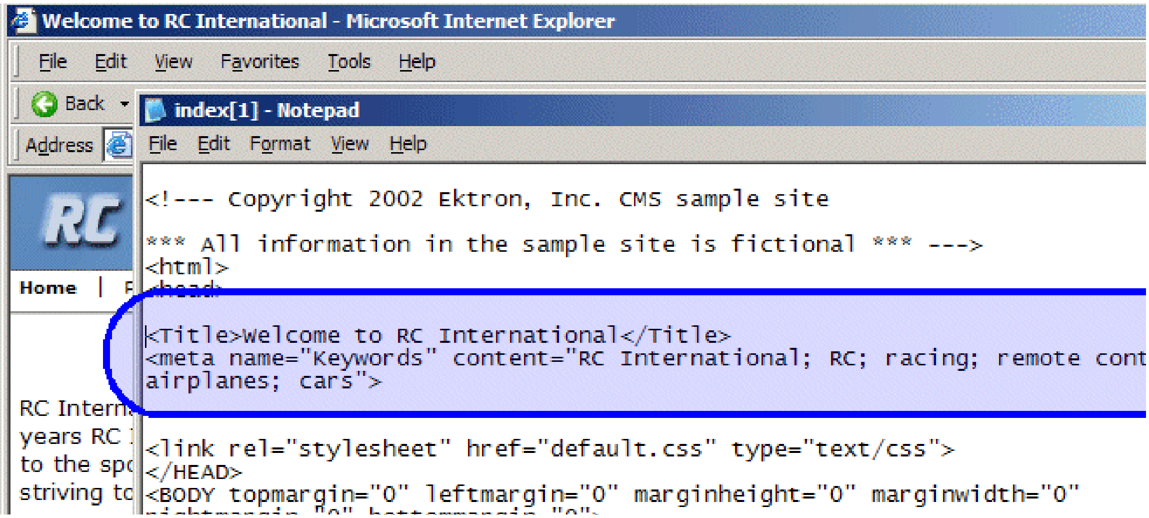
You can add two kinds of search data to **Ektron CMS300** content.

- Search data that can appear on your Web site's search page, (below the standard search fields) to help site visitors find content on your Web site (illustrated below).



This search data can also appear on the Search screen used to find content and library items within the Workarea. For more information, see "Entering Custom Search Data" on page 69.

- Search data that resides in the source code of a Web page. Examples include the title and meta tags. This data makes it easier for search engines to find your Web page (illustrated below).



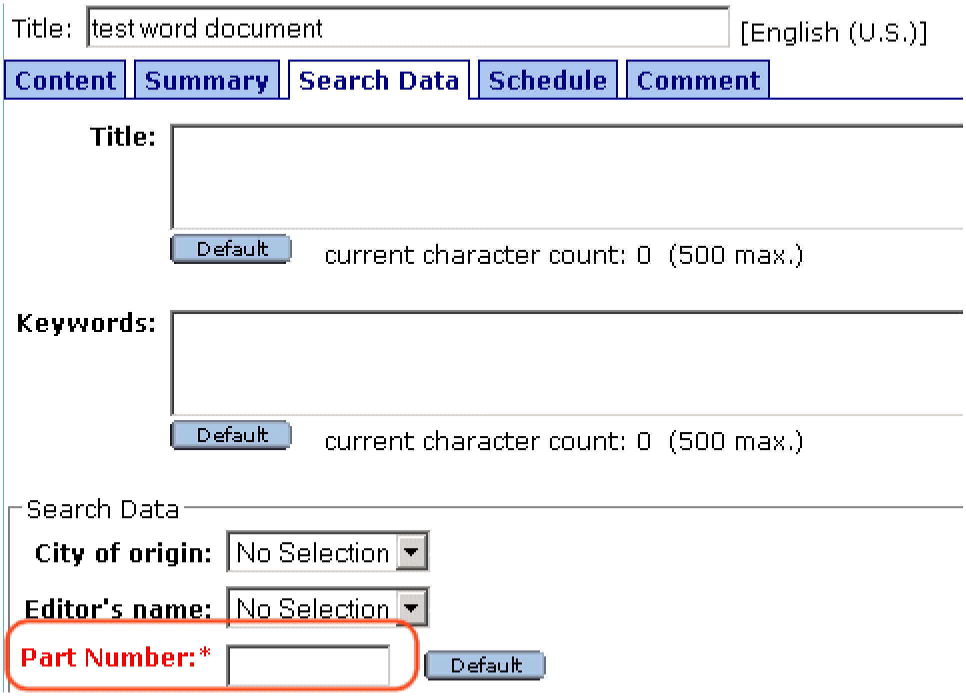
For more information, see "Entering Title and Keywords" on page 71.

Entering Custom Search Data

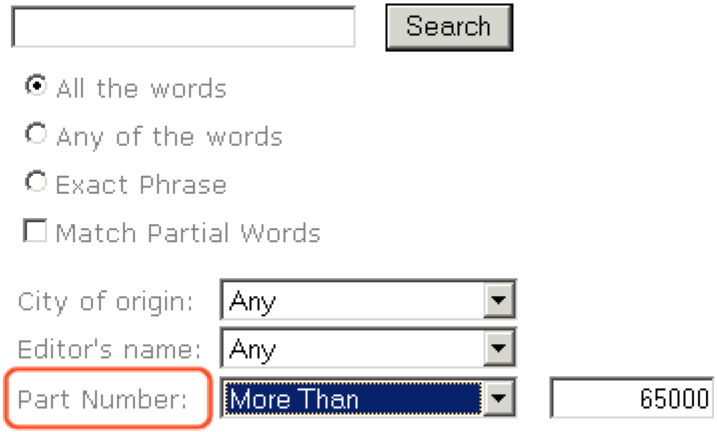
Your system administrator defines the search data that can be added to content. When you create or update content and library items, you can define search data using the fields that the administrator specified.

For example, each document stored in your Asset Management system has a unique part number. Your system administrator adds a custom search field called **Part Number**, and specifies that only numbers can be inserted into the field.

When you add the document to **Ektron CMS300**, you access the content's search data and insert the correct part number for the document (illustrated below).



Then, anyone visiting your Web site can find that document by its part number (or a range of part numbers) using the field on your Web site's search screen (illustrated below).



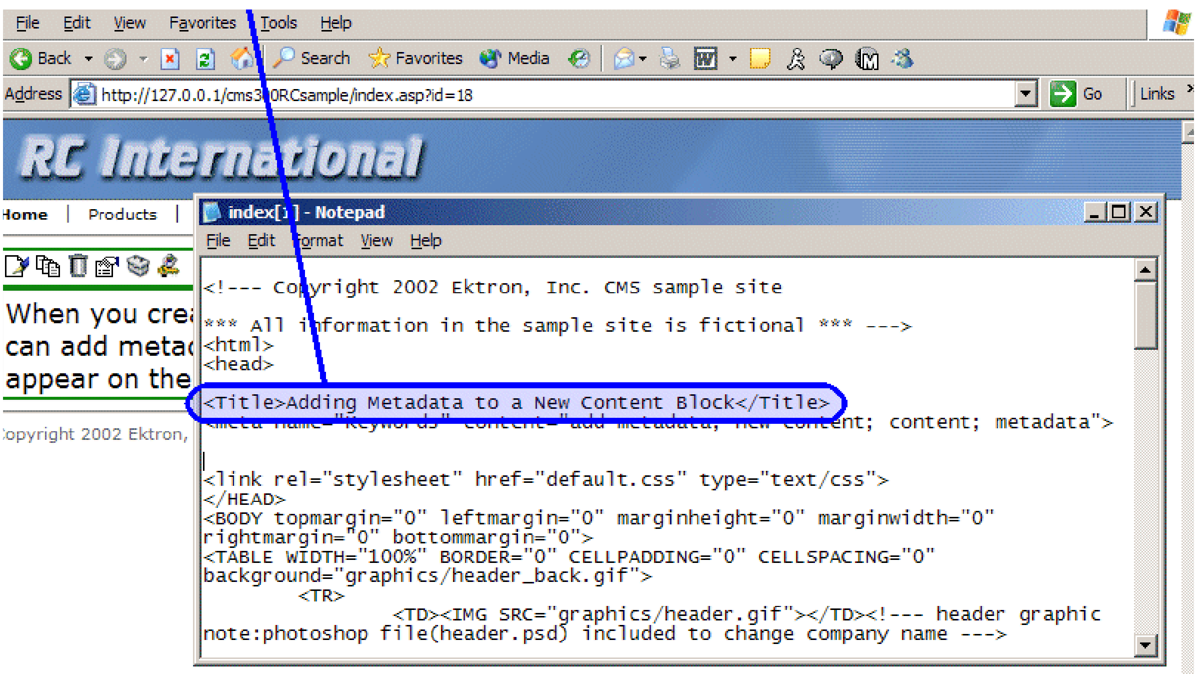
> **NOTE** When your system administrator sets up search data, he determines whether or not is it "publicly viewable."
> If it is, the search field appears on the search screen that site visitors use along with the search screen in the Ektron CMS300 Workarea. If the data is not publicly viewable, it only appears on the Workarea search screen.

Entering Title and Keywords

After you create or update a content block, it is typically published to the World Wide Web (WWW). Programs that search the Web (such as Google) look at a page's title and keywords to determine if they should return your Web page with their results.

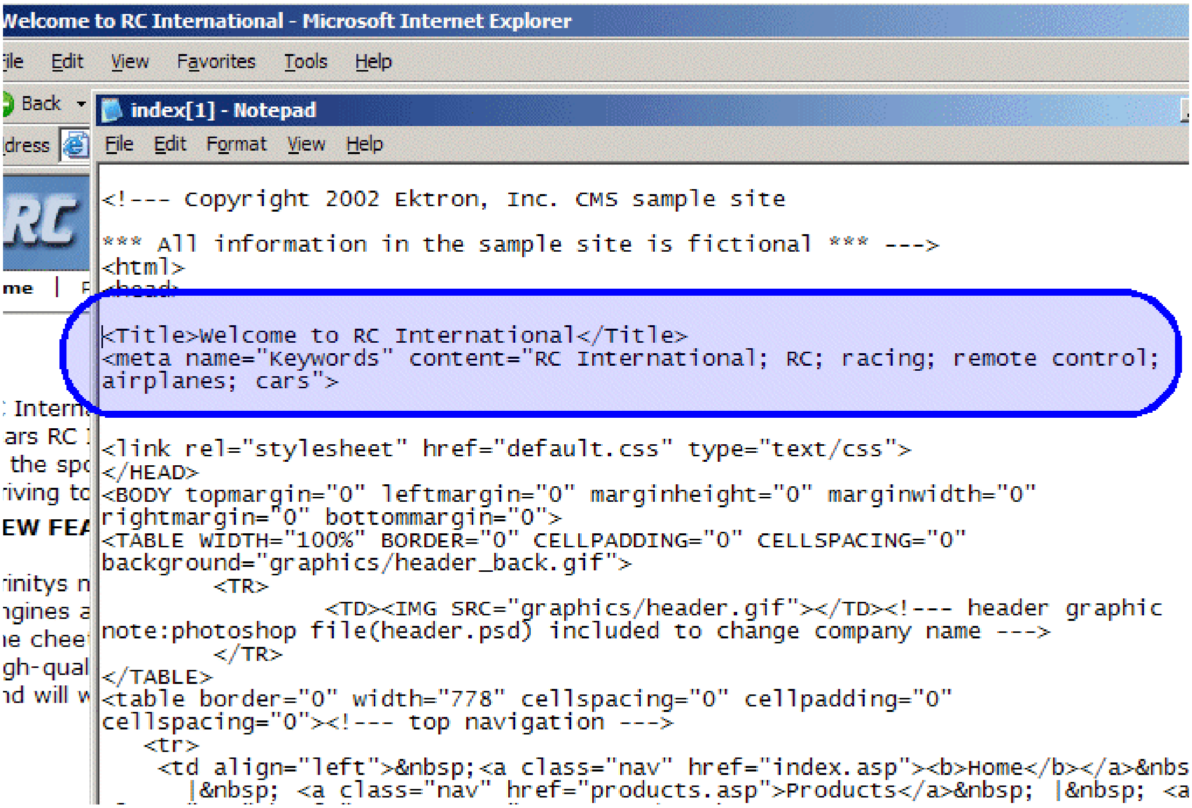
To improve search results, **Ektron CMS300** provides two fields within Search Data.

- **Title** - appears on the search results screen to further define your Web page



- **Keywords** - are searched by leading search programs, along with the page's title

After a content block is published to the Web site, you can view the page source to see its search data. Below is the source of a sample Web page.



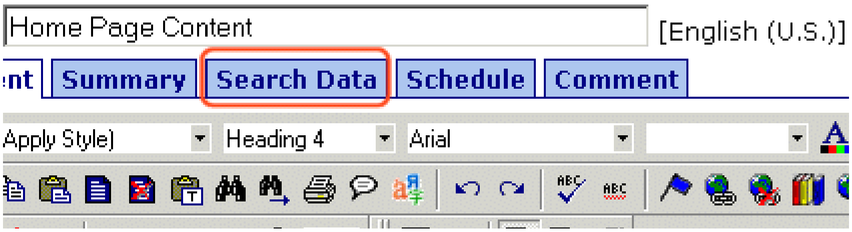
On this Web page, notice the keywords are included in the meta tag, and the title is in HTML tags. These appear according to how the administrator sets up the search data definitions.

Entering or Editing Search Data

To enter or edit a content block's search data, follow these steps.

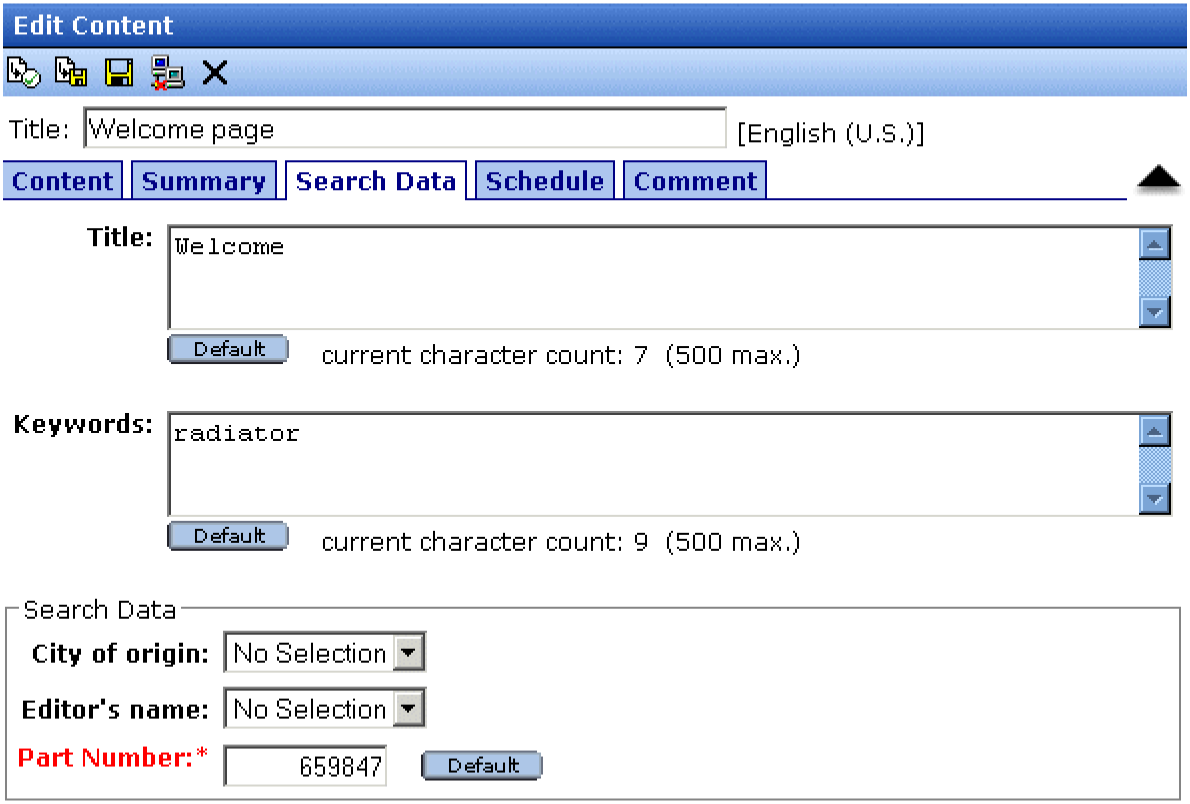
WARNING! You may only edit the search data of content blocks that are published, checked in, or checked out by you.

1. Access the View Content screen for the content block whose search data you want to enter or edit, as described in "Viewing a Content Block" on page 33.
2. Click the **Search Data** tab.



3. The Edit Search Data screen opens with the current search data displayed. In order to add search data to a content block, an administrator *must* have created definitions for it in the language of the content block.

NOTE Your screen may differ from the example below. Your system administrator determines the appearance of the Edit Search Data screen.



4. Edit the search data. Note that

- Required fields are marked with an asterisk (*). Someone must place at least one response in such fields before the content block can be submitted into the approval chain.
- Your system administrator may prevent you from editing a field. In this case, the field has a gray background, and you cannot place the cursor there.
- Fields may appear in two columns. In this case, the system administrator provides a list of terms that you can apply to the content block. You can only select terms from the list -- you cannot enter free text.

  One column is labeled **Not Included** and the other **Included**. Move terms between lists by clicking the arrow (**>>** and **<<**). Or, move all terms between lists by clicking **All >>**.

- In the **Keywords** field, you may see a semi-colon (;) as a separator character. Use the separator character to separate items in a field.
- If default search data was defined for a specific data type, you can click the **Default** button at the bottom of each field to restore it.
- Below each field is a **Characters Left** field, which counts the number of search data characters. You cannot exceed the maximum (500 characters) when entering search data information.

5. Click the Save button ( ).
6. The View Content screen reappears.

The content block is now in a checked out state to you. For the changes to take effect on the Web site, check in the content and submit it into the approval chain.

See Also: "Approving/Declining Content Blocks" on page 76

Approving/Declining Content Blocks

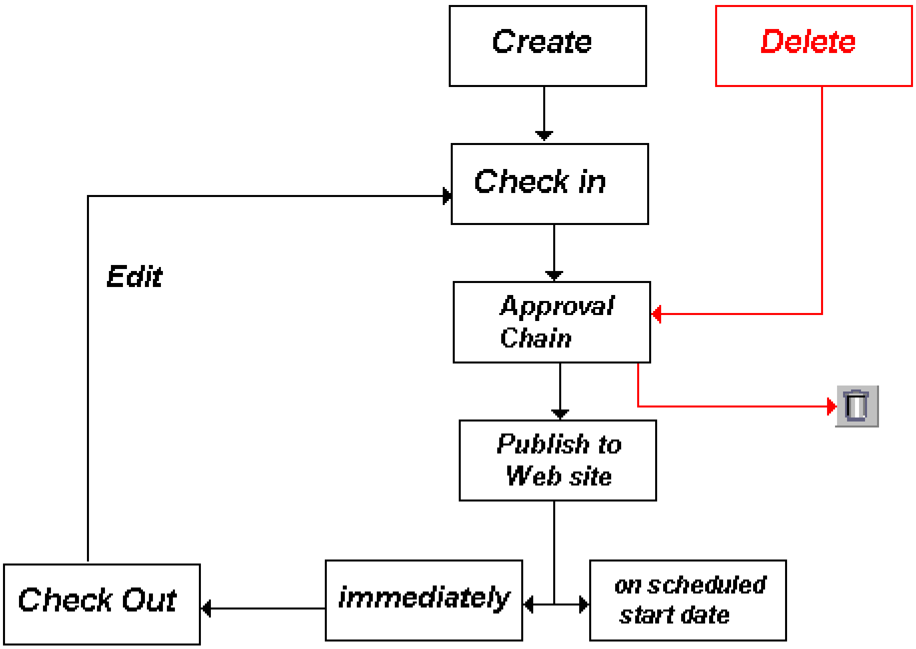
Your site administrator establishes an *approval chain* for each folder, or even specific content blocks. The approval chain is a list of people or groups who must approve a new or edited content block before it is published to the Web site. If a user group is part of an approval chain, any member of the group can approve the content.

The administrator also determines the sequence of approvers in the chain.

When a new or edited content block is submitted to the approval chain, it is reviewed by users who may

- change it
- approve or decline it
- publish it to the Internet (it is published when the last user approves it)

The chart below illustrates the approval process.

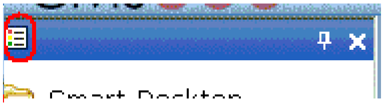


You can approve and decline all content blocks that have been submitted to you from the approval folder. The following topics guide you through the approval or decline of these content blocks.

- ”Approve/Decline One Content Block” on page 77
- ”Approve/Decline Several Content Blocks” on page 79
- ”Example of an Approval Chain” on page 79

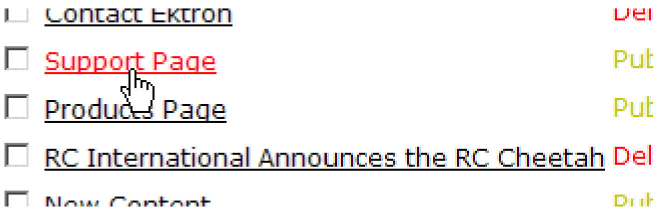
Approve/Decline One Content Block

1. Click the Smart Desktop button (circled in red below).

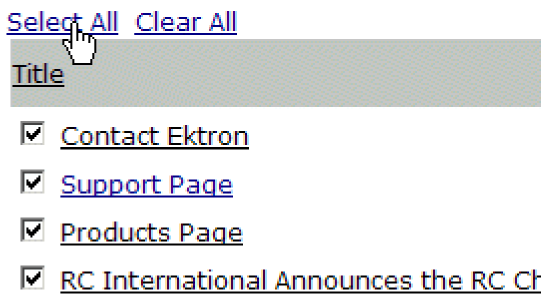


2. Click **Reports**.
3. Click **Approvals**.

4. Click the content block you want to approve or decline.



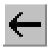
To select all displayed content blocks, click **Select All** at the top of the screen.



5. The content block appears. You can view the content, summary, search data, etc.

A toolbar at the top of the screen lists tasks you can perform on the content.

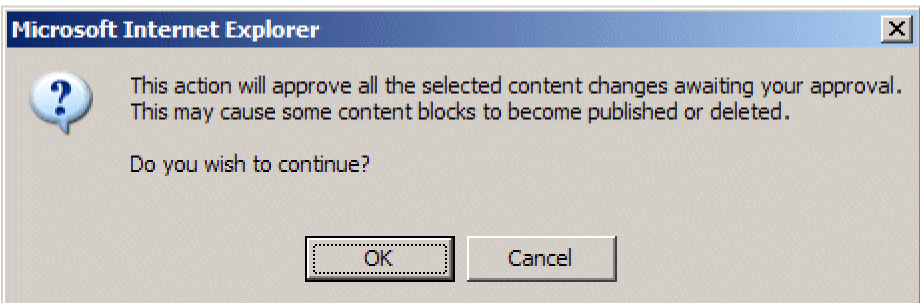
Button	Name	Result of Clicking
	Publish	Accept changes to the content block and publish it to the site. Note: If there is another approver in the approval chain for the content, this is replaced by a **SUBMIT** button.
	Decline	Reject changes and keep current version of content block live on the Web site.
	Edit	Check out content block and change it if desired.
 	View Published/ Staged	Toggle between the currently published version of content block and submitted version. This can help you compare versions. *See Also:* "Staged Content" on page 449

Button	Name	Result of Clicking
	View Diff	View differences between the version awaiting approval and the currently published content block. *See Also:* "Comparing Versions of a Content Block" on page 87
	Back	Return to previous screen.

Approve/Decline Several Content Blocks

To approve several submitted content blocks without reviewing them, follow these steps.

1. Select the submitted content blocks you want to approve, as described in "Approve/Decline One Content Block" on page 77.
2. Click the Approve All button ().
3. The following message appears.



4. To continue, click **OK**.
5. The approved content blocks are either submitted to the next publisher, published immediately to the Web site, or deleted, depending on the approval chain set for each content block.

Example of an Approval Chain

The approval chain begins when a content contributor submits a new or edited content block. If email is enabled, an email is sent to the next approver in the approval chain.

The following example follows a typical content block from creation to publication. Three users make up this approval chain.

- Sports Writer - creates sports content
- Sports Editor - edits and publishes all sports articles
- Editor In Chief - edits and publishes all articles

Each user has different permissions that correspond to their roles.

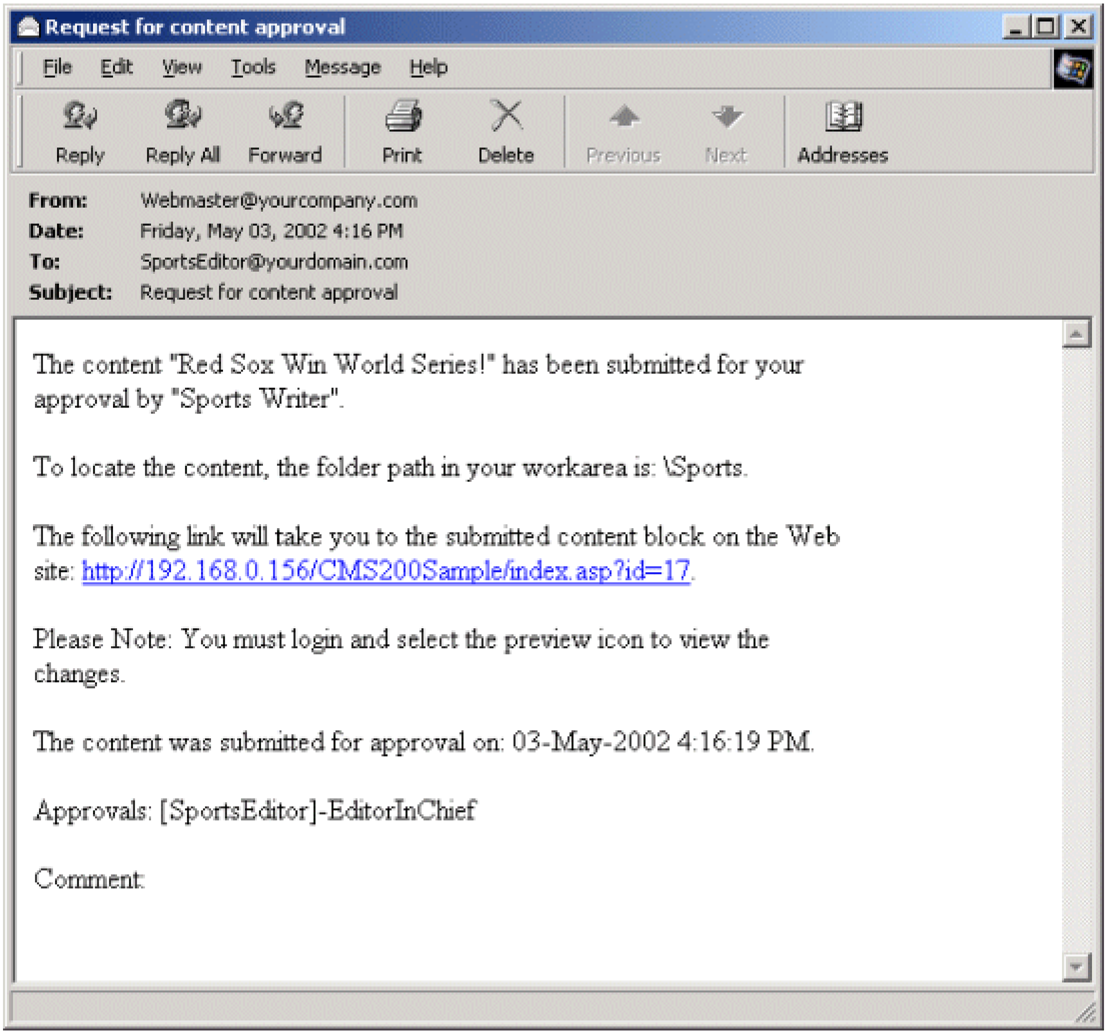
The example uses the following topics to explain a typical approval chain.

- ”Creating a Content Block” on page 80
- ”First Approver” on page 81
- ”Second Approver” on page 83

Creating a Content Block

The first step is to create a content block. To create a new content block:

1. Log in to Ektron CMS300 as a SportsWriter.
2. Create a content block as described in ”Adding a Content Block” on page 37.
3. Click the Submit button ( ) at the top of the window.
4. The content block is in the approval chain. The first user in the chain receives an email saying the content block is ready for approval.



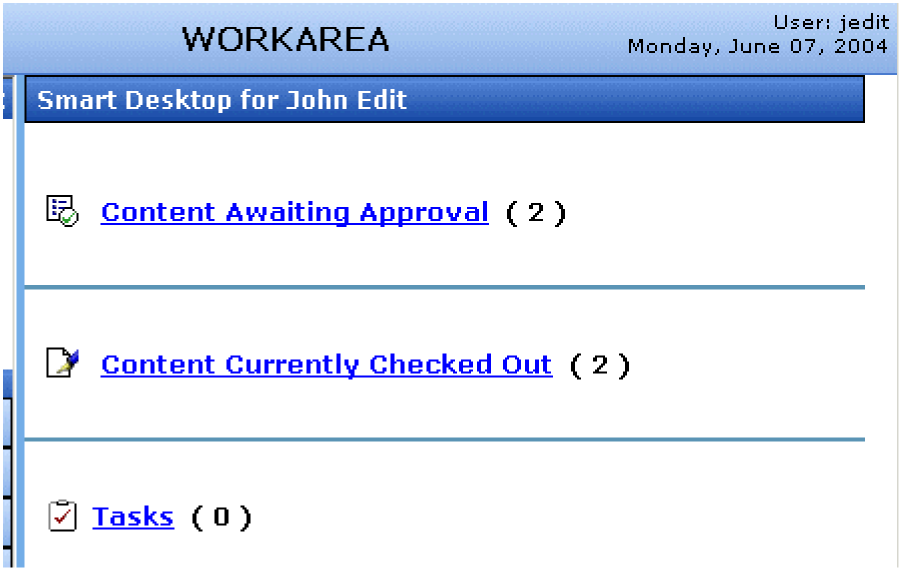
NOTE Emails are only sent if your Administrator enables them.

The content contributor, Sports Writer, has completed his role in the approval chain but continues to receive emails notifying him of changes in the content block’s status.

First Approver

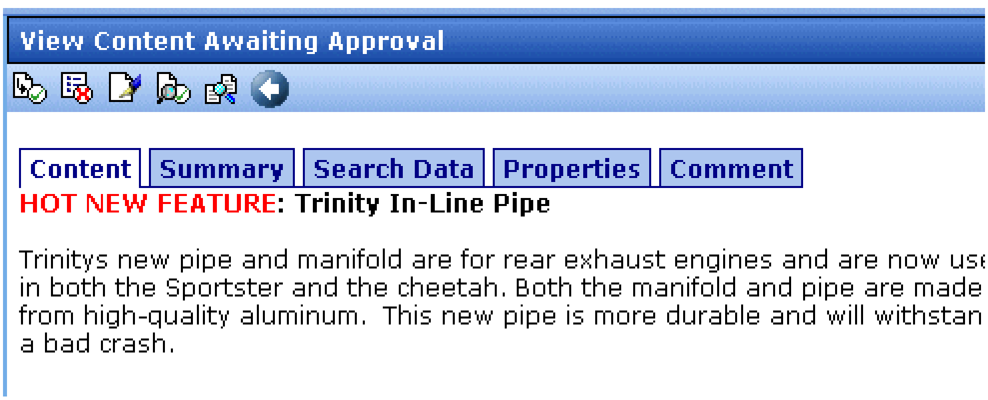
After Sports Writer submits the content block, the first user in the approval chain, Sports Editor, receives an email stating that a content block needs his approval. He can change and approve the content block or decline it.

Sports Editor logs into Ektron CMS300, navigates to his desktop, where he sees a link **Content Awaiting Approval**.



He clicks the link and sees all content blocks awaiting his approval.

The approvals folder window displays information such as title, who submitted it, go live date, etc. The Sports editor clicks the submitted content block.



The View Content Awaiting Approvals window appears listing all information necessary to decide whether to approve or decline the content block.

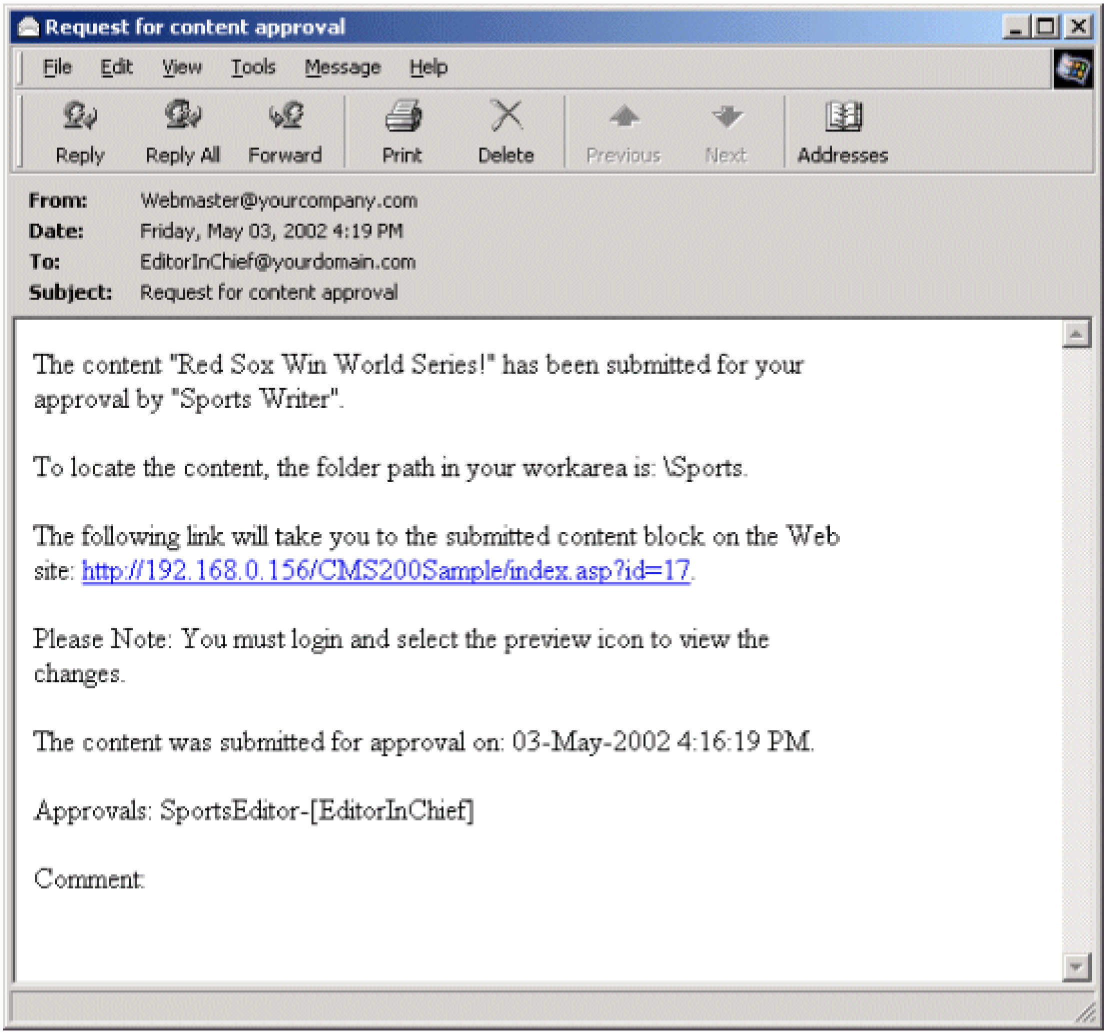
At the approval window, the Sports Editor has several options.

Button	Result
Approve	Send content to next approver in approval chain.
Decline	1. Send email to creator, notifying him/her that content was declined. 2. Remove content from approval chain.
Edit	Invokes the editor. The approver can make changes to content block.

For demonstration purposes, we‘ll choose **Approve**.

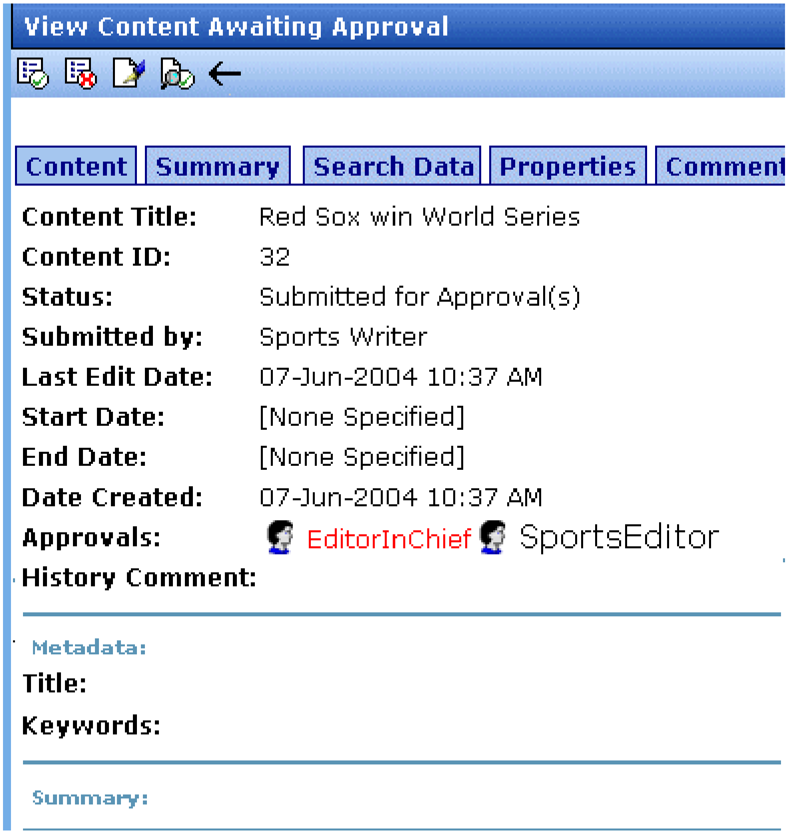
Second Approver

After the content block is approved, the next approver in the approval chain receives an email saying that the content block is ready for approval.



EditorInChief logs in to Ektron CMS300 and accesses his Workarea. The Workarea has an Approval folder with the content awaiting his approval. EditorInChief navigates through the Approval folder until he finds the content block **Red Sox win World Series**.

From this window, EditorInChief can view information about the content block, including title, go live date, user who created it, etc. He then clicks the content he wants to approve.



This window is similar to the previous approver’s but includes a Publish button at the top of the screen. The EditorInChief has a publish button (instead of a submit button) because he is the last approver in the approval chain. When he approves the content block, it is published to the Web site.

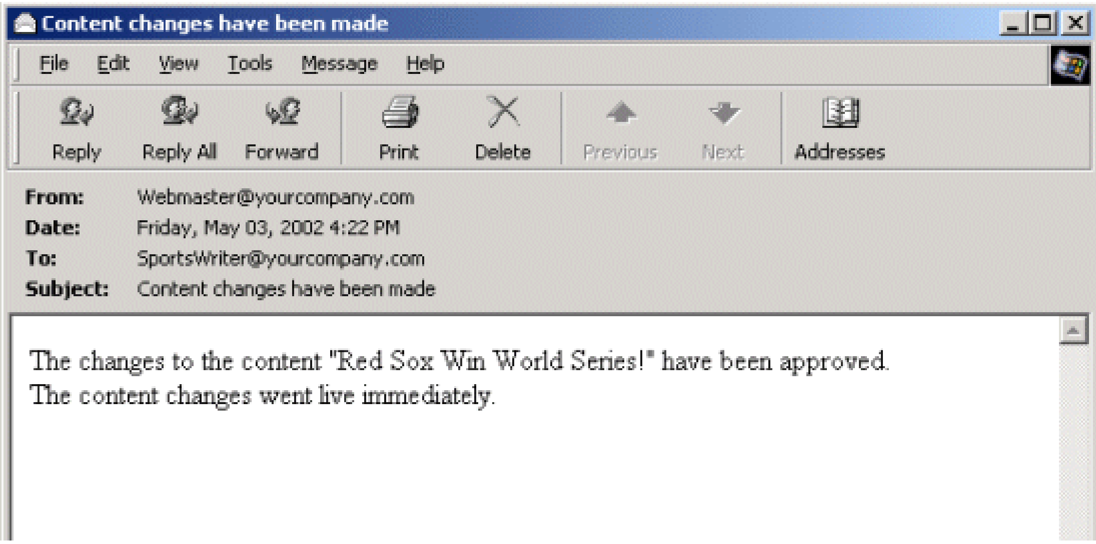
Like the Sports editor, the EditorInChief has the following options.

Button	Description
Approve 	Sends the content to the next approver in the approval chain.
Decline 	1. Sends an email to the creator, notifying him/her that the content was declined. 2. Removes the content from the approval chain.

Button	Description
Edit 	Invokes the editor. The approver can make changes to the content block.

After reviewing the content, the EditorInChief decides it is great and publishes it. At this point, the content block becomes live on the Web site, and the approval chain is complete.

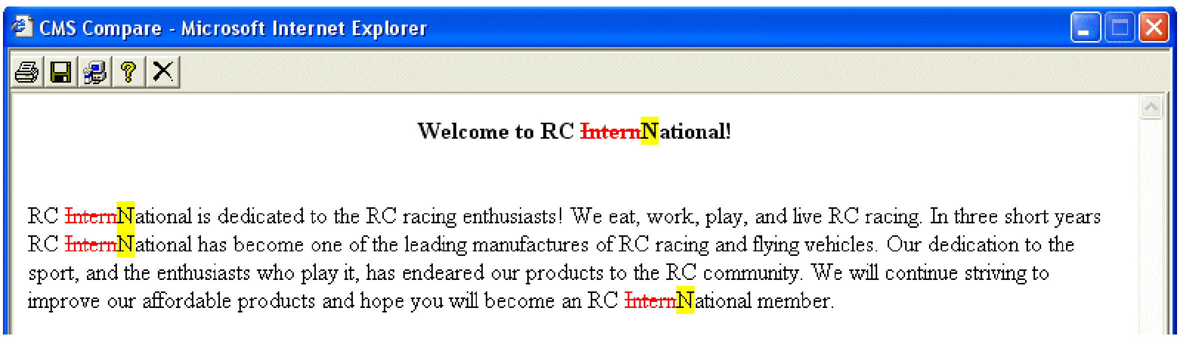
The user who created the content block receives an email notifying him that it was published.



Comparing Versions of a Content Block

The View Content Difference feature highlights changes that were made to a selected content block. Below is an example of the View Content Difference screen, showing two versions of a content block. The changes are indicated by

- redlining deleted content
- highlighting in yellow added content



Within the View Content Difference feature, you can perform several tasks, as well as view different versions of the content separately, or compared.

When Can I Compare Content?

The View Content Difference feature is only available when

- you are viewing an historical version of a content block
- a staged version of the content is available (*See Also:* ”Staged Content” on page 449)

The following table explains when you can use the feature, and which versions are compared.

Content Block Status	**Compares current published version with**
Published	Historical version stored in the content history area
Checked-In	Most recently checked-in version
Submitted	Submitted version
Pending Start Date	Scheduled version pending start date
Checked Out	Not available

If a content block can be compared with another version, the View Difference button () appears in the content history area or the Web page view.

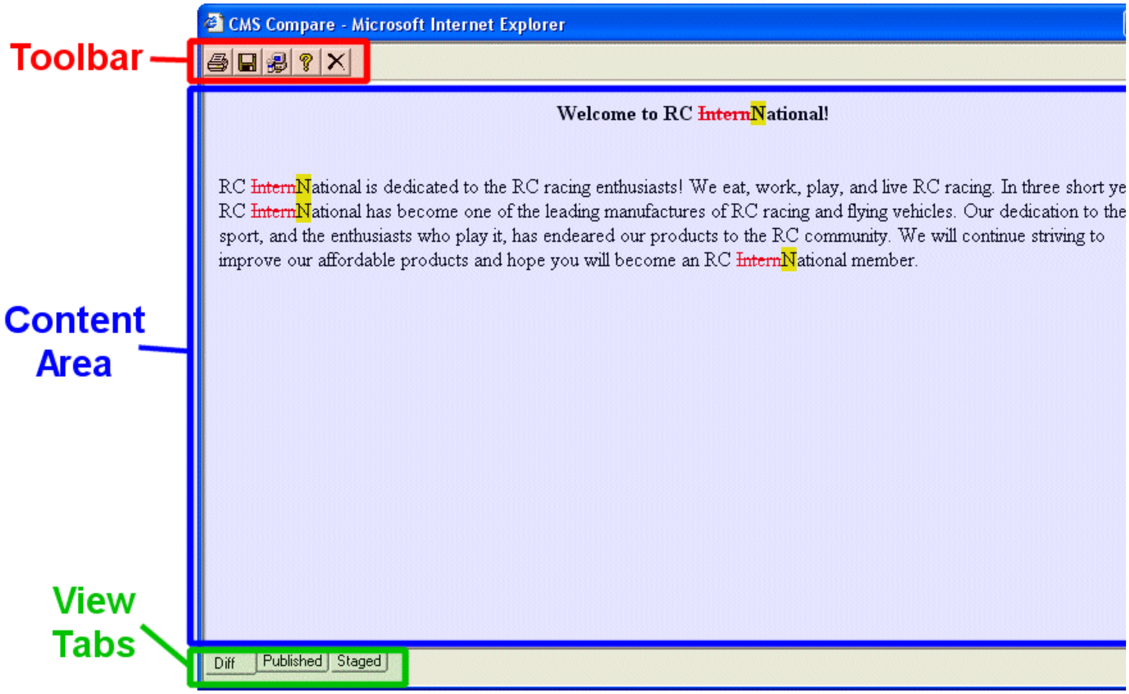
The Compare Content Window

NOTE The first time the View Content Difference feature is opened, a simple installation program runs. *See Also:* "First Use of the View Content Difference Feature" on page 93.

The Compare Content window consists of the following:

- Toolbar
- Content area

- View content tabs



Each area is explained below.

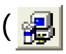
Toolbar

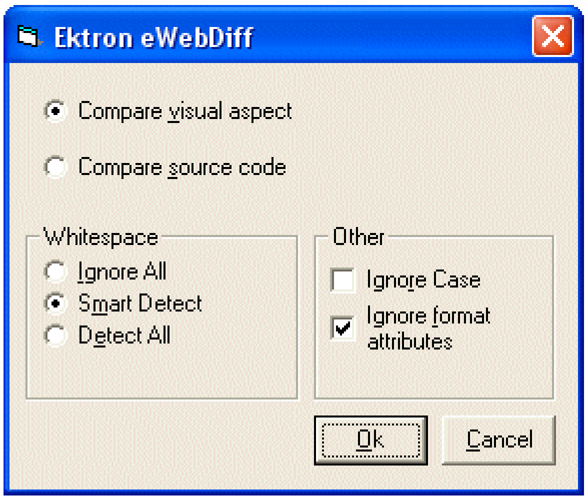
The content comparison toolbar has five buttons, explained below.

Button	Name	Description
	Print	Sends content to local or network printer. Note: This option prints the currently displayed content, whether it is the compared, published, or staged content.
	Save	Saves a copy in HTML format on your local machine or network. When saved as a physical file, the HTML may be edited. However, the changes are not saved to the Web Server. The save option saves the version of the content you are viewing.

Button	Name	Description
	Setup	Opens setup dialog box to configure the settings. Typically, only an administrator would use this. For more information, see ”Setup” on page 90.
	Help	Displays additional information about the compare feature.
	Exit	Closes the window.

Setup

Click the **Setup** button () to open the setup dialog box. Typically, a system administrator would edit these settings.



You can change the setup options to better suit your needs. The following table explains each option.

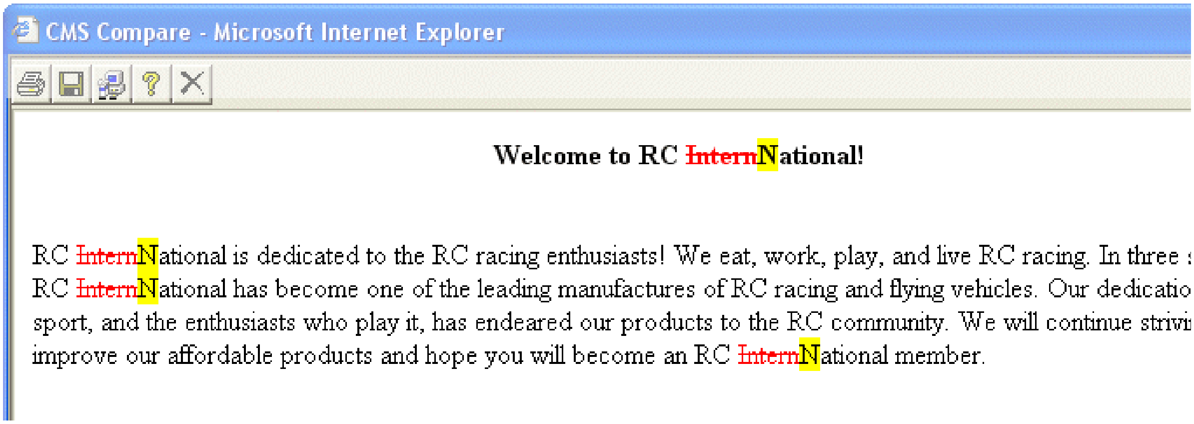
Option	Description
Compare Options	
Compare visual aspect	Compares content as it would appear on a Web page.

Option	Description
Compare source code	Displays compared content as source HTML.
Whitespace Options	
Ignore All	Blank (whitespace) characters are ignored.
Smart Detect	One or more consecutive whitespace characters are treated as a single separation sequence. That is, multiple whitespace characters are ignored.
Detect All	Blank (whitespace) characters are treated as any other character.
Other Options	
Ignore Case	Determines whether comparison is case sensitive. For example, if you check this box, the strings “Bob” and “BOB” are not highlighted because their only difference is the case of the characters.
Ignore Format Attributes	Determines whether comparison ignores changes in text-formatting attributes (HTML Visual Analysis only).

After updating setup information, click **OK** to save changes.

Content Area

The content area displays the content comparison.



The following table describes the change indicators.

Symbol	Example	Content state
Plain black text	Trinitys new pipe and	Unchanged
Yellow highlighted text	Our dedication to the	Added
Red, struck-through text	~~dedicated to the RC~~	Deleted

View Tabs

When viewing content in the View Content Difference feature, there are three view modes, explained below.

View	Description
Diff	Compares published version of content to staged version
Published	Displays currently published version

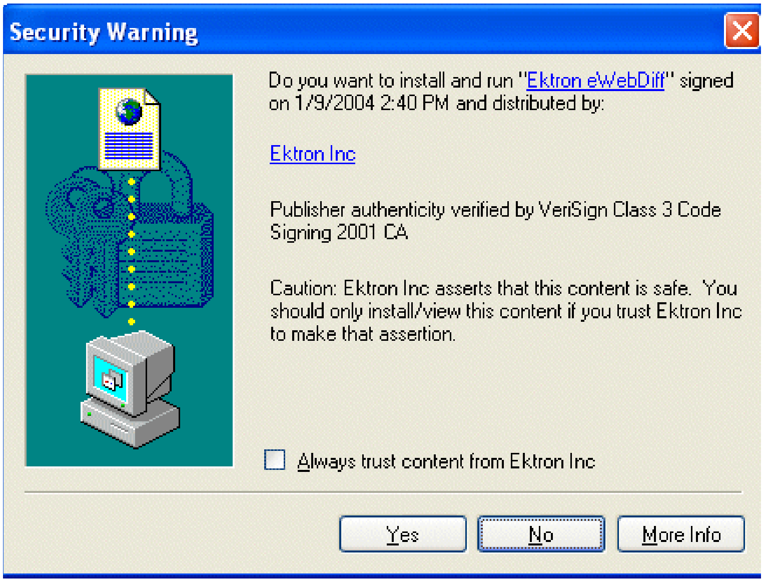
View	Description
Staged	Displays the staged version of content. *See Also:* ”Staged Content” on page 449

To switch between views, click the corresponding View tab.

First Use of the View Content Difference Feature

The first time the View Content Difference screen is used on a client machine, a simple installation program is performed.

Click **YES** when the following screen appears.



When the installation program completes, close and reopen the View Content Difference feature.

Viewing and Restoring Previous Content Blocks

Past versions of published content blocks are available unless your system administrator has purged them. Your ability to view a content block's history is determined by your user privileges.

NOTE This section explains how to view and possibly restore older versions of a content block. To see a change-by-change comparison of two content blocks, use the View Content Difference feature, explained in "Comparing Versions of a Content Block" on page 87.

NOTE The Purge History feature deletes historical versions of content blocks according to user-defined criteria. Therefore, some previous versions may be unavailable. *See Also:* Ektron CMS300 Administrator manual > "Managing Content Folders" > "Folder Properties" >"Purge History"

The View and Restore features are explained through the following subtopics.

- "Accessing Content History" on page 94
- "The Content History Window" on page 96
- "Viewing a Historical Version of a Content Block" on page 97
- "Restoring a Previous Version" on page 99
- "Comparing Historical Versions" on page 99
- "Removing Applied XSLT" on page 99

Accessing Content History

By default, all users can view the history of an **Ektron CMS300** content block. You can access content history from two places:

- The View Content page in the Workarea
- The icon menu for a content block on a Web page

Once you access the content history, the functionality is identical.

The following sections explains how to access the content history from both places.

Accessing the Content History from the Workarea

To access the content history from the Workarea, follow these steps.

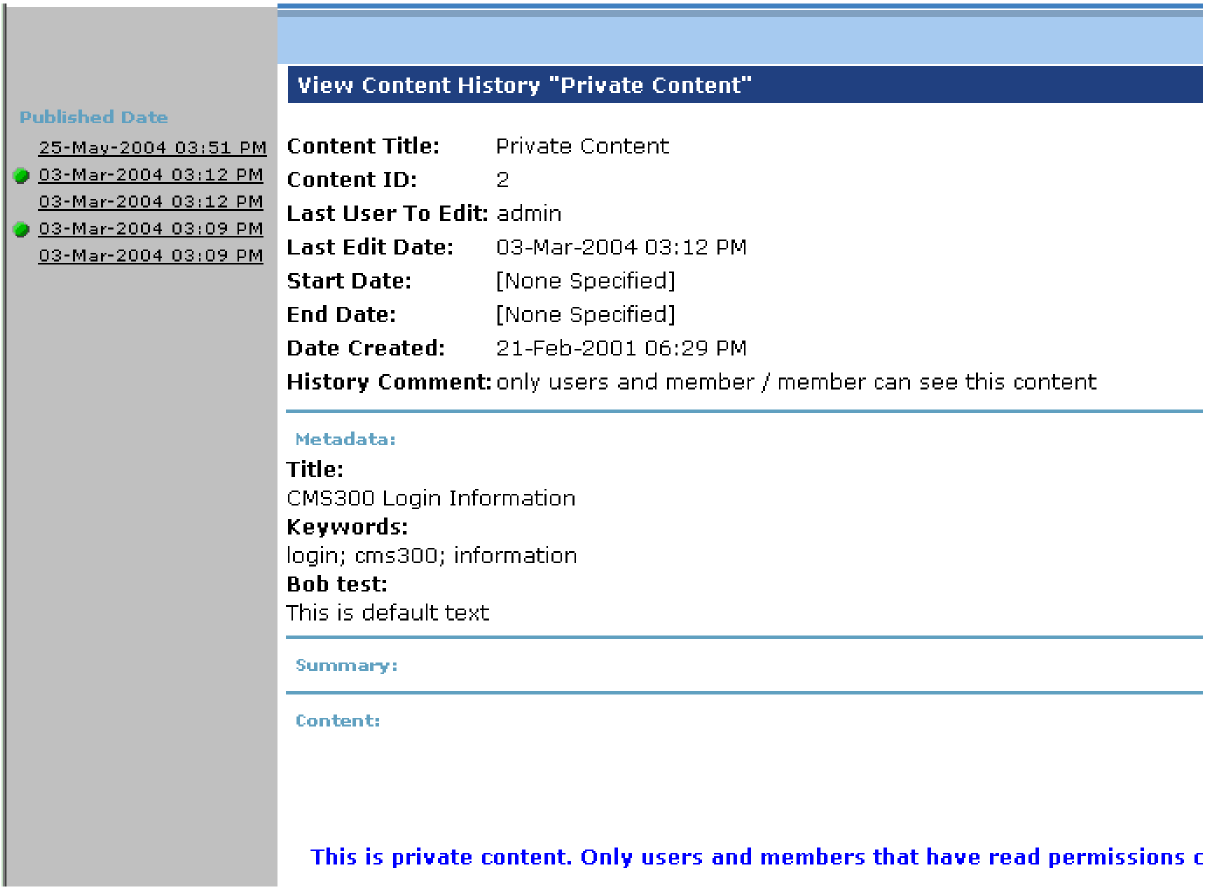
1. Navigate to the View Content page for the content block whose history you want to view.
2. Click the View History button ().

Accessing the Content History from a Web page

To access the view history for a content block from a Web page, follow these steps.

1. Browse to the content block whose history you want to view.
2. Click the View History button ().
3. The Content History window opens.

The Content History Window



This Content History window has two sides:

- The left side, the *Document History* area, displays all versions of the content block. Each version is identified by the date when it was published or checked in.

  Some versions display a green circle.

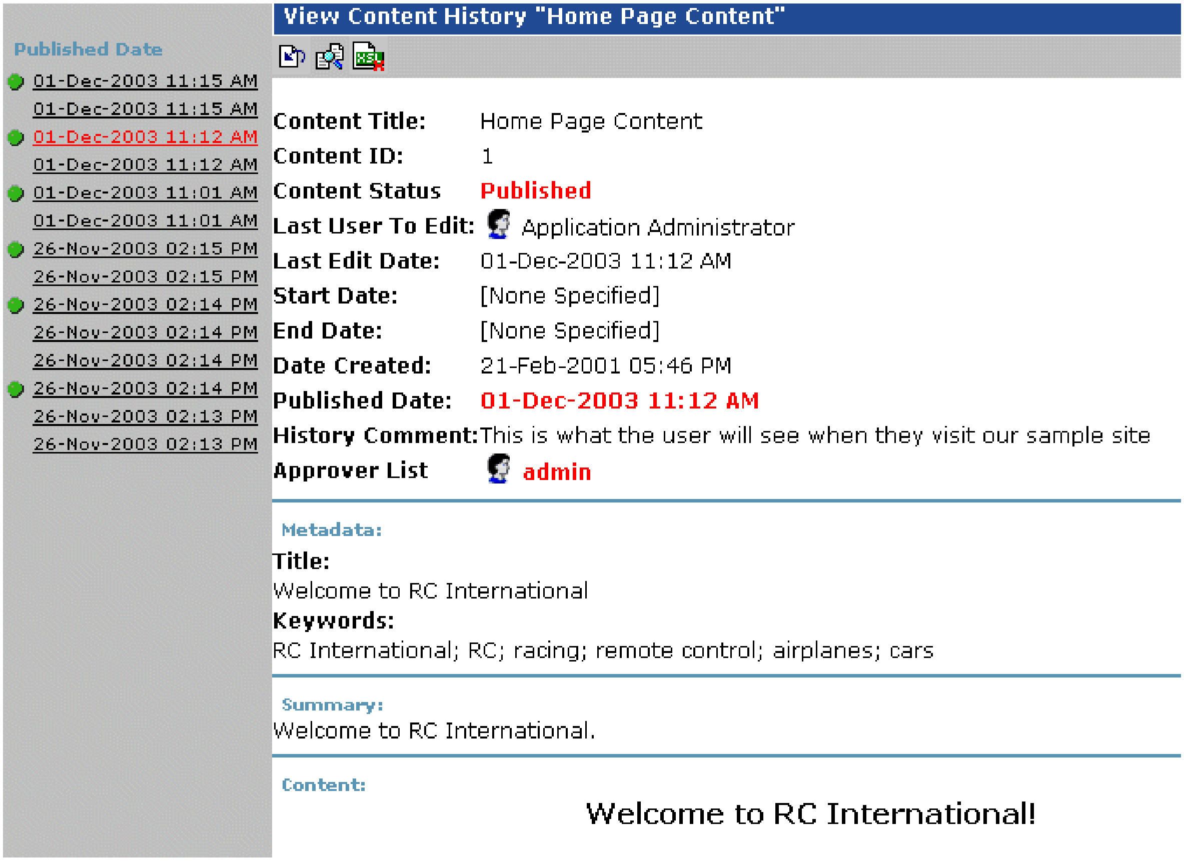
A circle indicates a version that was *published*. On dates without a green circle, the content was checked-in but not published.

- The right side has information about the selected version of the content block.

Viewing a Historical Version of a Content Block

1. Click a date from the left frame

2. Information about that version of the content block appears on the right.



When viewing a historical version of a content block, you can perform three actions.

Action	Button	Description	More Information
Restore		Restore historical version of content block	”Restoring a Previous Version” on page 99
Compare		Compare historical version of content block to current version	”Comparing Historical Versions” on page 99
Remove XSLT *XML Content Only*		Remove XSLT applied to XML content block	”Removing Applied XSLT” on page 99

Each task is explained below.

Restoring a Previous Version

NOTE The ability to restore a content block is a privilege granted by the system administrator. If you do not see a Restore button ( ) on the View Content History screen, you do not have permission to do so.

1. Select an historical version of the content that you want to restore, as described in ”Viewing a Historical Version of a Content Block” on page 97.
2. Click the Restore button ( ).
3. The content history window closes, and you return to the View Content page or the Web page, with the content in a checked in status.
4. If desired, check out the content to make additional changes.
5. Select the workflow to perform on the content block.
6. When the historical version is placed in the approval chain and approved, it is published to the Web site.

Comparing Historical Versions

After you select an historical version of a content block, you can view the differences between it and the current version. To compare a historical version, follow these steps.

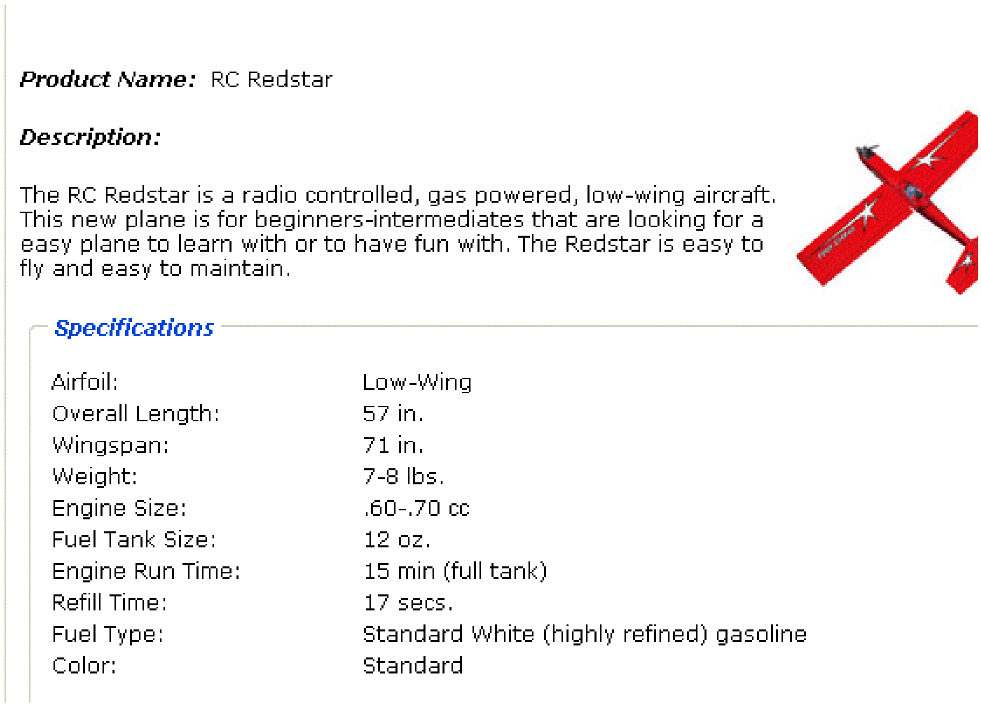
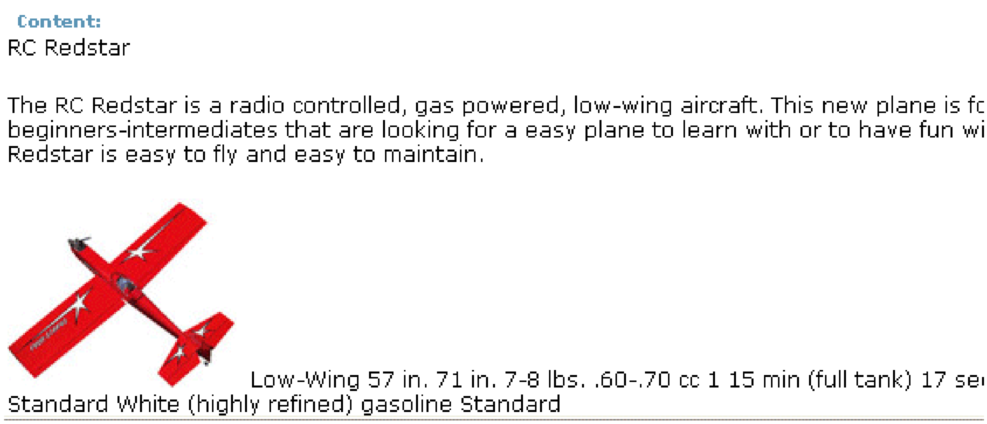
1. Select an historical version of content, as described in ”Viewing a Historical Version of a Content Block” on page 97.
2. Click the View Differences button ( ).

   The historical and the current versions are compared. To learn more about the comparison, see ”Comparing Versions of a Content Block” on page 87.

Removing Applied XSLT

You can only remove an applied XSLT when viewing historical versions of an XML content block. If you remove the applied XSLT, you can view the content without the irrelevant XML tags.

The following table compares the views.

<table>
<tr><td>With XSLT</td><td>
Product Name: RC Redstar
Description:
The RC Redstar is a radio controlled, gas powered, low-wing aircraft. This new plane is for beginners-intermediates that are looking for a easy plane to learn with or to have fun with. The Redstar is easy to fly and easy to maintain.
Specifications
Airfoil: Low-Wing
Overall Length: 57 in.
Wingspan: 71 in.
Weight: 7-8 lbs.
Engine Size: .60-.70 cc
Fuel Tank Size: 12 oz.
Engine Run Time: 15 min (full tank)
Refill Time: 17 secs.
Fuel Type: Standard White (highly refined) gasoline
Color: Standard</td></tr>
<tr><td>Without XSLT</td><td>
Content:
RC Redstar
The RC Redstar is a radio controlled, gas powered, low-wing aircraft. This new plane is fc beginners-intermediates that are looking for a easy plane to learn with or to have fun wi Redstar is easy to fly and easy to maintain.
Low-Wing 57 in. 71 in. 7-8 lbs. .60-.70 cc 1 15 min (full tank) 17 se Standard White (highly refined) gasoline Standard</td></tr>
</table>

Content Workflow Reports

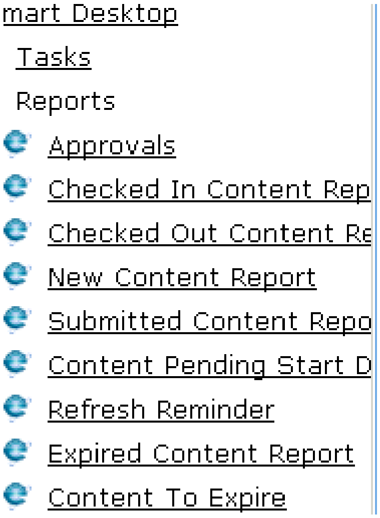
The reports folder contains several reports to help you manage the workflow of content blocks through **Ektron CMS300**. In most cases, you choose a report that corresponds to a content block status, then view all content blocks in that status. If appropriate, you can perform tasks on selected content blocks. For example, you can check in checked out content blocks.

This chapter explains how to access the reports folder in your Workarea, what information is on the reports, and actions you can perform on them.

Accessing the Reports Folder

To access the Reports folder, follow these steps.

1. Log in to your Ektron CMS300 Web site and access the Workarea.
2. Access the Smart Desktop (see ”Accessing the Workarea” on page 13). Click the **Reports** folder.
3. A list of available reports appears.



NOTE The Approvals and Checked Out Reports are also available from the Workarea.

The reports are described below.

Report	Displays content blocks in this status	For more information, see
Approvals	Requiring your approval	”Approvals Reports” on page 105
Checked In Content	Checked in	”Checked In Report” on page 107
Checked Out Content	Checked out	”Checked Out Report” on page 108
New Content	New (that is, created and saved but never published)	”New Content Report” on page 109
Submitted Content	Submitted for publication	”Submitted Report” on page 109
Pending Content	Approved and pending a start date	”Content Pending Start Date Report” on page 111
Refresh Reminder Report	End date has been reached	”Refresh Reminder Report” on page 111
Expired Content	Expired date has been reached	”Expired Content Report” on page 112
Content to Expire	Will expire within specified number of days	”Content to Expire Report” on page 113

Information on the Report

Each report displays the following information about content blocks in the selected status.

Field	Description
Title	Title of content block.
ID	Internal number assigned to content block by **Ektron CMS300**.

Field	Description
Date Modified	If a Start Date was assigned to the content block, it appears here.
Last Editor	The user who last edited the content block.
Path	Folder location of content block.

Sorting and Filtering Content Reports

In each content report, you can sort and filter the data. These include:

- Sorting by column
- Filtering by user
- Filtering by content folder

The sorting and filtering actions in each content report are identical. The following section uses the checked-in content report as an example.

Sorting by Column Heading

You can sort report data by any column heading. By clicking on a heading, you can sort the report by

- Title
- ID
- Last editor
- Date Modified

Filter by User

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

Filter by Content Folder

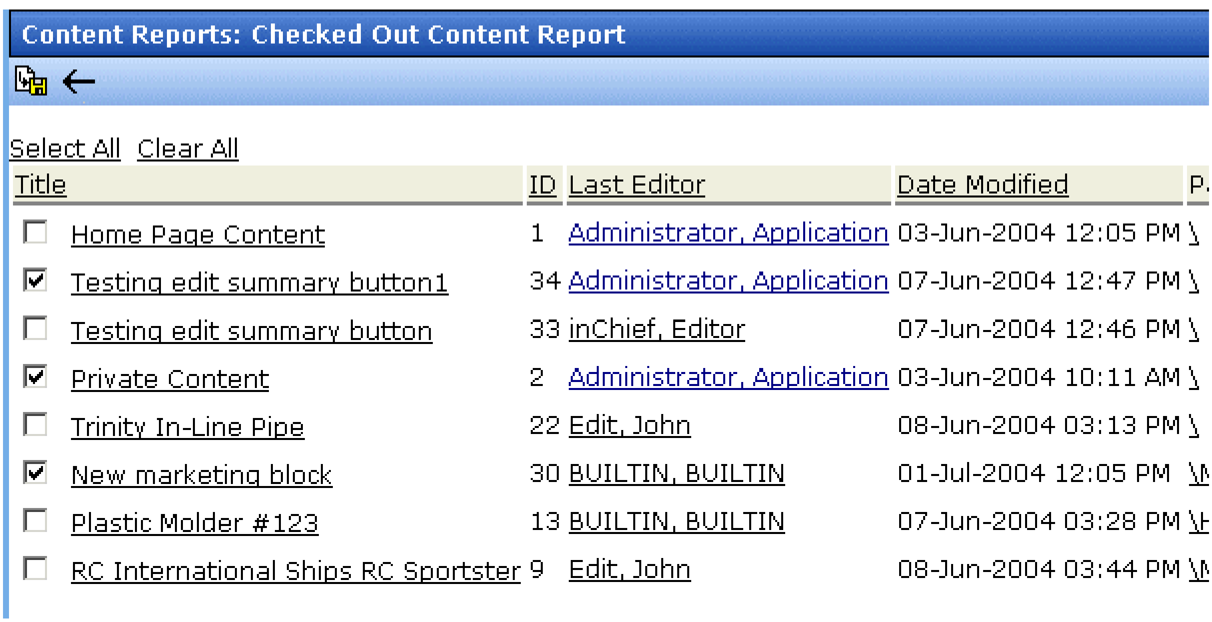
To display only content that was checked in to a selected folder, click the folder in the report. When you do, the report redisplays, showing only content blocks in that folder.

Performing an Action on Several Content Blocks

You can perform the following actions on several or all content blocks 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

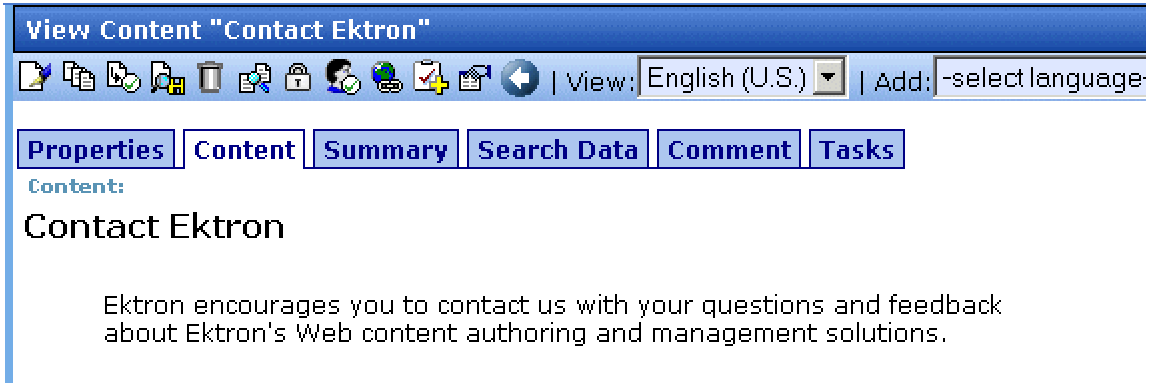
To select several reports, check the relevant checkboxes (illustrated below). To select all reports, click **Select All**.



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

Viewing/Editing Content Blocks on the Report

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



The View Content screen provides several toolbar options that you can perform on the content block. These options are explained in "After you enter the content, you have the following options." on page 34.

Approvals Reports

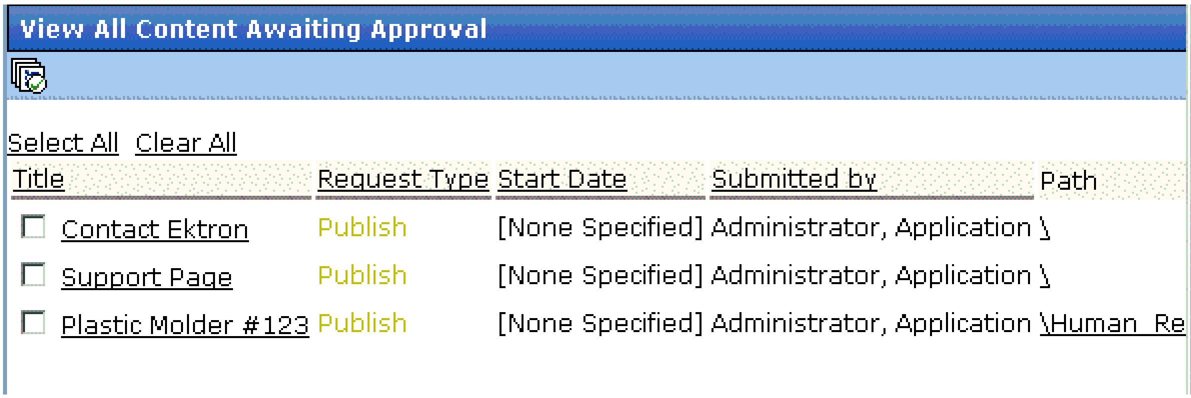
Each content block awaiting your approval appears on this report. Thus, you can quickly find all such content blocks without searching through all folders and continue with the proper workflow.

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

Field	Description
Title	Title of content block.
Request Type	Request made for the content block. Either **Publish** or **Delete.**

Field	Description
Start Date	Start date, if any, assigned to the content block. Determines when content will go live on Web site.
Submitted By	User who submitted content for approval.
Path	Path to content folder where content block resides.

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

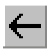


Approving/Declining Content Blocks

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

Approve/Decline One Content Block

1. Access your Approvals report in the Workarea (see ”Approvals Reports” on page 105).
2. Click the content block 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 block 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.
	Decline	Reject changes and keep current version of content block live on Web site.
	Edit	Check out content block and make changes to it if desired.
 	View Published/ Staged	Toggle between published and submitted versions of content block. This can help you compare differences.
	Back	Go back to previous screen.

Approving Multiple Content Blocks

See "Performing an Action on Several Content Blocks" on page 104

The selected content blocks are either submitted to the next publisher, published immediately, or deleted, depending on the approval chain set for the content block.

Checked In Report

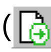
The Checked In Content report displays all the content blocks currently in a checked in status.

To learn how to access, sort, view, edit and select content blocks on this report, see "Accessing the Reports Folder" on page 101.

The report displays the following information.

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS300.
Last Editor	Last user to edit the content block.
Date Modified	Date and time content block was last edited.
Path	Folder location of content block in Ektron CMS300 Web site.

Submitting Multiple Content Blocks

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

Checked Out Report

The Checked Out Content report displays all content blocks currently in a checked out status. The report displays the following information.

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS300.
Last Editor	Last user to edit the content block.

Column	Description
Date Modified	Date and time content block was last edited.
Path	Folder location of content block in Ektron CMS300 Web site.

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

New Content Report

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

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS300.
Last Editor	Last user to edit the content block.
Date Modified	Date and time content block was last edited.
Path	Folder location of content block in Ektron CMS300 Web site.

Submitted Report

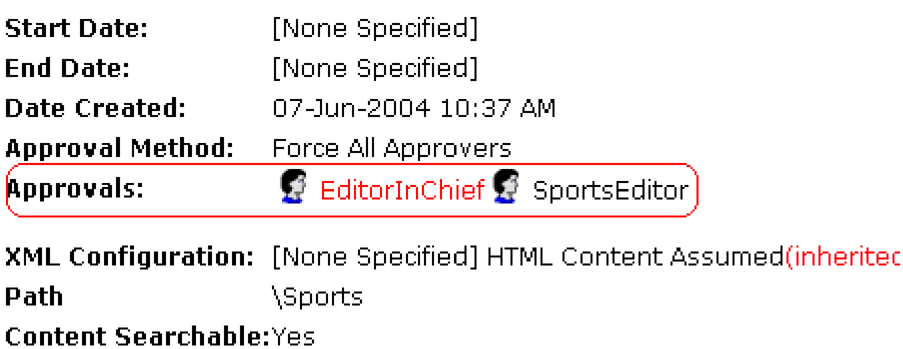
The Submitted Content report displays all content blocks in a submitted state. The report contains the following information.

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS300.
Last Editor	Last user to edit the content block.
Date Modified	Date and time content block was last edited.
Path	Folder location of content block in Ektron CMS300 Web site.

Viewing Position in Approval Chain

While viewing the Submitted Content report, you can view a content block's position is its approval chain. To do so, follow these steps.

1. From the Submitted Content Report, click the content block's title.
2. The View Content page is displayed.
3. Click the **Properties** tab.
4. The content block's position in the approval chain is indicated by red text on the **Approvals** line.



Content Pending Start Date Report

The Pending Start Date Report displays all content blocks that were approved, but whose start dates haven't occurred. Each content block on the report contains the following information.

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS300.
Last Editor	Last user to edit the content block.
Start Date	Date and time content block will go live on Web site.
Path	Folder location of content block in Ektron CMS300 Web site.

Editing Content with a Pending Start Date

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

1. Click the content block 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 blocks whose end date has passed and whose archive option is set to **Refresh Report**. These content blocks are still visible on the Web site. Their appearance on this report indicates that they are due for a content review. *See Also:* "Setting Archive Options" on page 61

Each item on the report contains the following information.

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS300.
Last Editor	Last user to edit the content block.
Email	Click this icon to send instant email to the **Last Editor**. *See Also:* **Ektron CMS300** Administrator manual chapter “email Features.”
Date Modified	Date and time the content block was last updated.
Path	Folder location of content block in Ektron CMS300 Web site.

Expired Content Report

The Expired Content report displays all content blocks whose end date has passed. As such, they are no longer visible on the Web site. Each item on the list contains the following information.

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS300.
Last Editor	Last user to edit the content block.
End Date	Date and time the content block expired.
Path	Folder location of content block in Ektron CMS300 Web site.

Editing Expired Content

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

1. Click the content block 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.

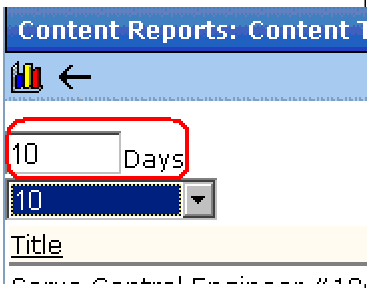
Content to Expire Report

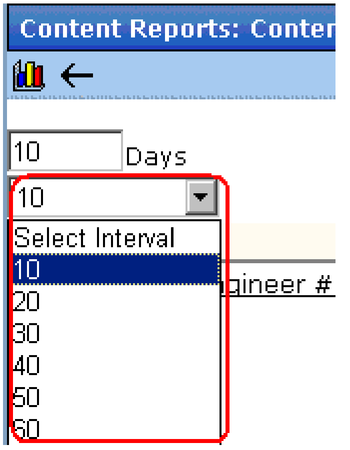
The Content to Expire report lists all content blocks whose end date will occur within a number of days that you specify. For example, if today is January 1 and you select 10 days, the report lists all content blocks whose end date is January 1 through January 10.

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

Selecting the Report's Date Range

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

Option	Illustration
Enter the number in the **Days** field	

Option	Illustration
Select a number from the dropdown that appears below the **Days** field	

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

Library Folder

The library folder stores images, files, quicklinks and hyperlinks that can be inserted into editor content. Before you can insert them into content, you must copy them from your computer to a larger, file server computer that everyone editing your site can access.

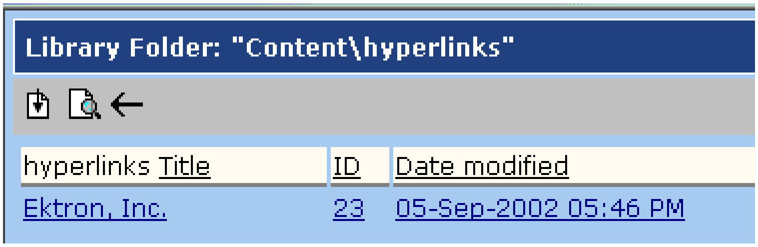
This chapter explains how to copy such files and insert them into Web content through the following topics.

- ”Terms Used in this Chapter” on page 115
- ”Accessing The Library” on page 116
- ”Searching the Library” on page 119
- ”Files” on page 120
- ”Hyperlinks” on page 133
- ”Images” on page 134
- ”Quicklinks and Forms” on page 135

Terms Used in this Chapter

- An *image* is any graphic file, which can include illustrations and photos. Common image file extensions are .gif., .jpg, .tiff, etc.
- A *file* is type of computer file that can be launched from a browser, such as Internet Explorer. Examples include a Microsoft Word document and a .PDF file.
- A *hyperlink* is a commonly used or hard to remember Web address (also known as a URL). After you add hyperlinks to the library, users can easily apply them to editor content.

  So for example, if the editor content is “Contact Ektron,” the user can select the text, click the library button, select **hyperlinks** to find the Ektron hyperlink, and apply that hyperlink to the text.



Once the page is published, a person reading it can click the text to “jump” to the web address `www.ektron.com`.

- A *quicklink* is a special kind of hyperlink that jumps to another content block on your Web site. (A regular hyperlink jumps to a Web page on the internet.)

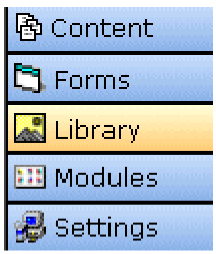
  Whenever a content block is created, a quicklink is created for it.

- A *form* is a quicklink to an HTML form content block. Whenever a content block is created, a form link is automatically created for it.

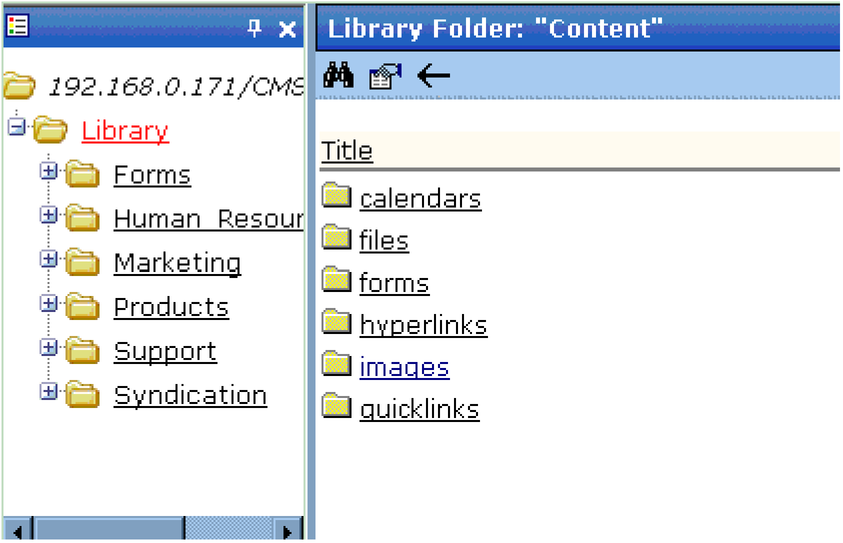
Accessing The Library

1. To access the library, click the Workarea button ( ) or icon.

2. Click the Library folder in the lower left corner of the Workarea.



3. The Library folder appears.



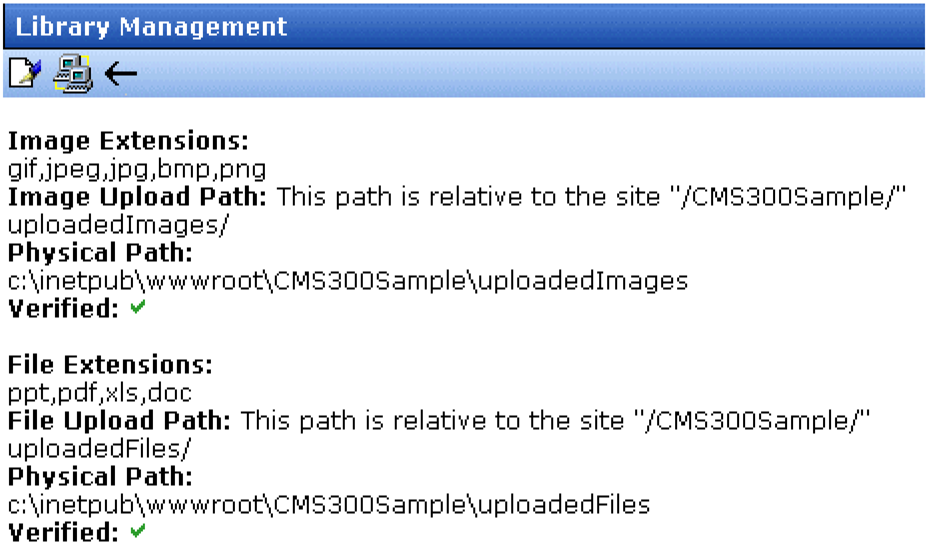
Also, a properties toolbar button lets you view any folder's properties. *See Also:* "Library Folder Properties" on page 117

And a search button lets you look for library items. *See Also:* "Searching the Library" on page 119

Library Folder Properties

To view a library folder's properties, follow these steps.

1. Click the Properties button ().
2. The Library Management screen appears. From here, you can view all options for a folder.



3. The library properties screen displays the following settings.

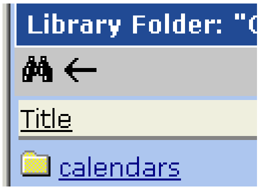
Field	Description
Image Extensions	File extensions of images that can be copied to this library folder. For example, .gif and .jpg.
Image Upload Path	Server location to which images are copied.
Physical Path	The physical path on the file server where uploaded images are stored.
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and your administrator needs to set up that folder on the file server.
File Extensions	Extensions of files that can be copied to this library folder. For example, .doc and .pdf.
File Upload Path	Server location to which files are copied.
Physical Path	The physical path on the file server where uploaded images are stored.
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and your administrator needs to set up that folder on the file server.

Your system administrator controls these settings.

Searching the Library

You can search the library for items. The search helps find an item when you only know some information about it. For example, you know that an image's name includes **Ektron** but don't know the exact name or its folder.

To search the library, click the binoculars button from the library Workarea (illustrated below).



When you do, a search screen appears with several fields that let you narrow your search. The fields are described below.

NOTE Some search field check boxes are circles while others are squares. If the box is a circle, you can only choose one option. If it is a square, you can select as many as you want. Only library assets that satisfy *all* search criteria appear on the Search found screen.

Field	Description
Keywords	Specify keywords that the search will use. A keyword can be a complete or partial name. The search looks for keywords in the file's internal name (for example, airplane.gif) or title The title is assigned by the user when the image is added to the library.
All Types	The search considers all library asset types.
Images only	The search only includes images.

Field	Description
Quicklinks Only	The search only includes quicklinks.
Files Only	The search only includes files.
Hyperlinks Only	The search only includes hyperlinks.
Filename Search	If you check this box, the search considers only the file name, *not* the title assigned when the item is added to the library.
Only search items last edited by myself	The search only considers library assets that were last modified by you.
One or more of the search criteria set by your system administrator in the Search Data Definitions screen.	

Files

This section explains how to work with Library files through the following subtopics:

- ”Copying Files to the Library” on page 120
- ”Viewing Files” on page 123
- ”Editing a File” on page 125
- ”Overwriting Files” on page 126
- ”Library Link Searching” on page 129
- ”Deleting Library Items” on page 129
- ”Adding a Library File to Content” on page 130

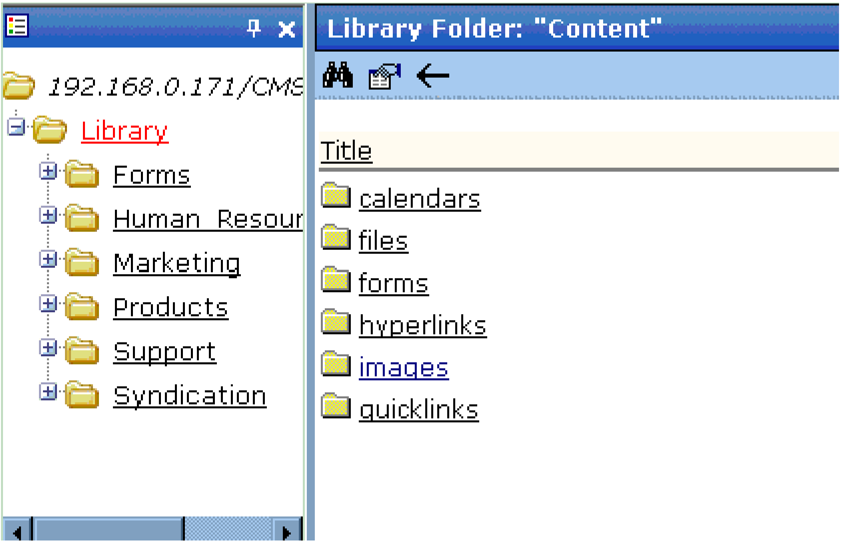
For a definition of the term “files,” see ”Terms Used in this Chapter” on page 115.

Copying Files to the Library

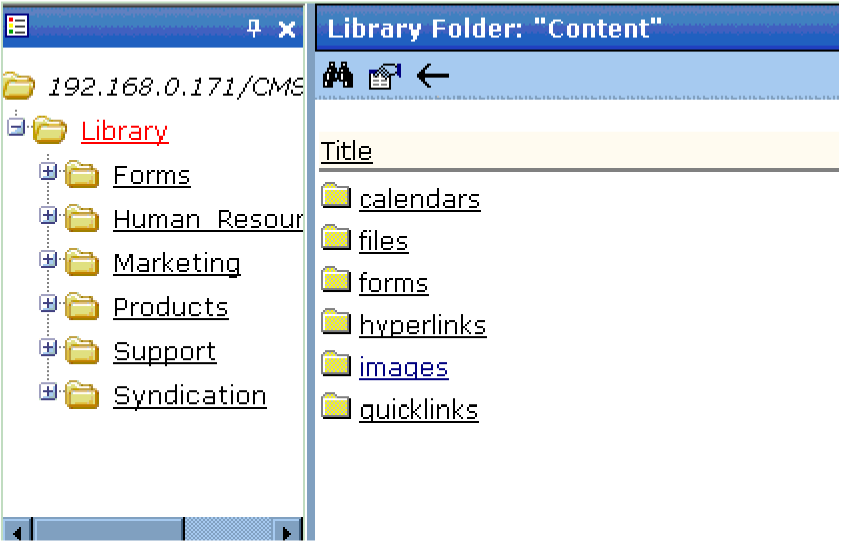
Files must be copied to the Ektron CMS300 library before users can insert them into content. To copy a file to the library, follow these steps.

1. In the Workarea, browse the library folder and select a sub-folder to which you want to copy a file.

NOTE When you copy a file to a folder, only users with permissions to it can insert the file into their content blocks.

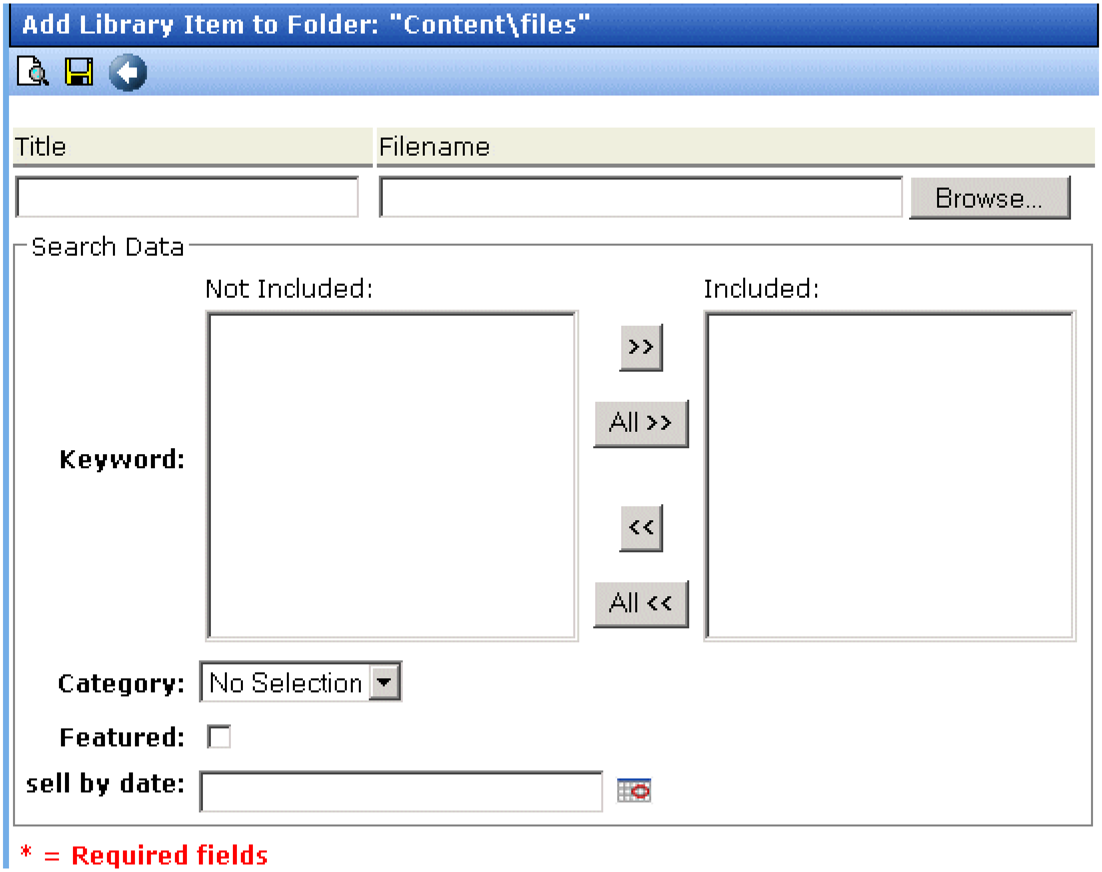


2. Several sub-folders appear in the right frame. Click the **files** folder.



3. A list of files copied to the Library root folder appears.

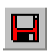
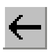
4. Click the Add Library button ().
5. The Add File screen appears.



6. Enter the necessary information according to the following table.

Field	Description
Title	Enter a title for the file to be copied
Filename	Enter the folder path to the file to be copied. You can use the **Browse** button to help you find the file.
If defined by your system administrator, one or more search data fields appear. These fields let you assign search data to the selected library file. Users performing a library search can use these criteria to find library items. *See Also:* "Searching the Library" on page 119	

Below is a description of the buttons on the screen.

Button	Name	Description
	Browse	Browse through the computer or network for the file.
	Preview	View the file to make sure it's correct before uploading it. Note: An application that can display the file must be installed on your computer.
	Save	Add the file to the library.
	Back	Return to the previous screen.

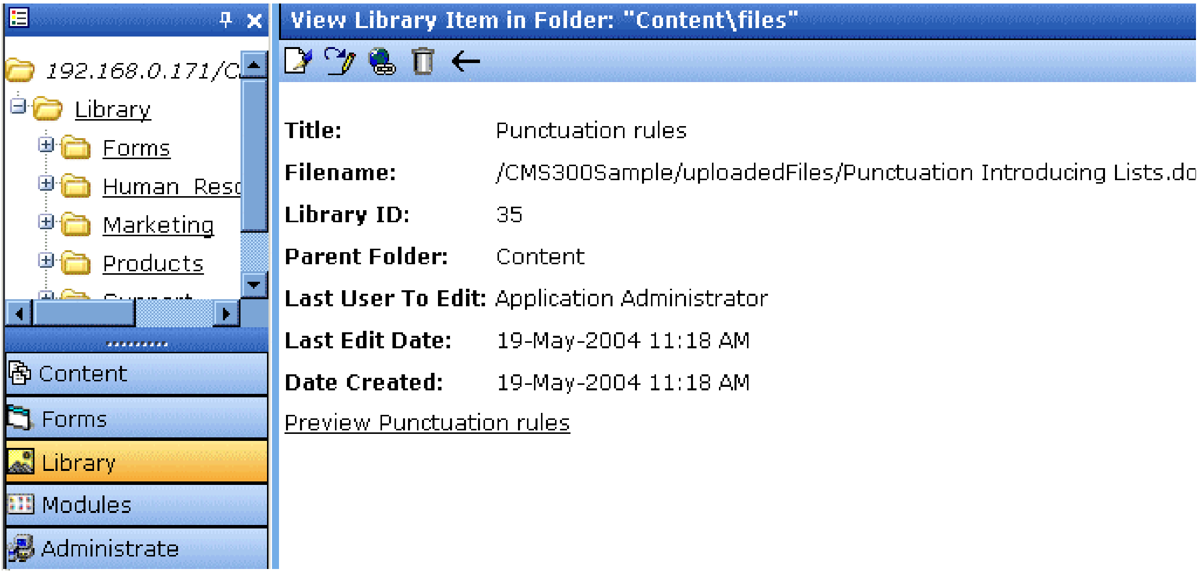
After you enter the necessary information and click the Save button, the file is copied. Now, users with permissions to the selected folder can insert the file into their content.

Viewing Files

Once a file is copied to the library, you may preview it. To preview a copied file, follow these steps.

1. Navigate to the library folder to which the file was copied.
2. A list of files in that folder appears.

3. Click the file you want to preview.
4. The View File screen appears.



The table below describes each field on the screen.

Field	Description
Title	Title assigned by user who copied or edited it.
Filename	Filename and location on the server.
Library ID	ID number assigned by Ektron CMS300 when file was originally copied.
Parent Folder	File's parent folder. Users need permissions to this folder to insert the file into content.
Last User to Edit	Last user who changed file.
Last Edit Date	When file was last edited.
Date Created	When file was originally copied to library.
Search Data	If your system administrator set up any search data definitions, they appear accompanied by any values assigned to them when they were added to the library.

5. To view the file, click the **Preview** link at the bottom of the screen.
6. The application used to open the selected file type displays the file.

NOTE You may need to download some files before you can be view them (for example, .mdb, .mp3, .zip, etc.).

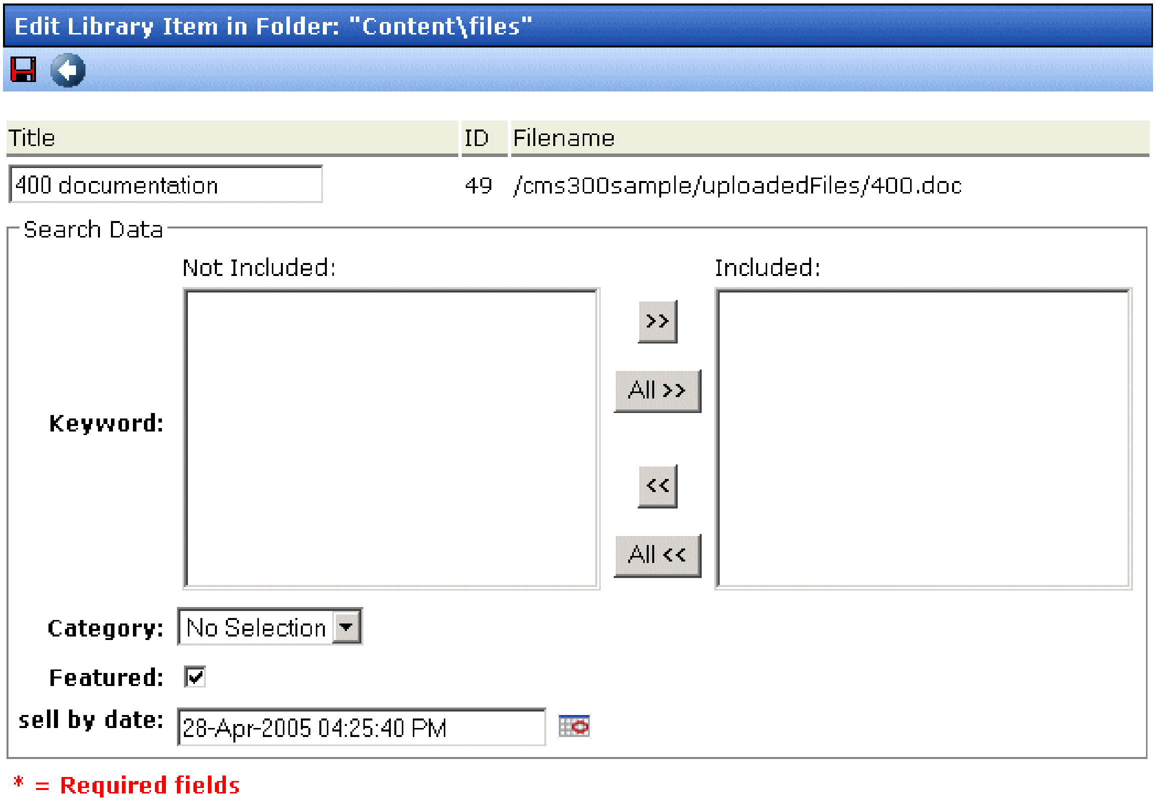
The following table describes the buttons on the View Library Item screen.

Button	Description	For more information, see
	Edit the title of the library item	”Editing a File” on page 125
	Overwrite the library item	”Overwriting Files” on page 126
	Find content blocks linked to this library item	”Library Link Searching” on page 129
	Delete Library item	”Deleting Library Items” on page 129
	Return to previous screen	

Editing a File

You can edit the title and search data of any file that was copied to the library. To do so, follow these steps.

1. Access the View File screen, as described in ”Viewing Files” on page 123.
2. Click the Edit button ( ).
3. The Edit File screen appears.



4. Change the title of the file.
5. As needed, update the search data. Your system administrator defines the search data in the Search Data Definitions screen.
6. Click the Update button ().

Overwriting Files

If a library file becomes out of date or the wrong version was copied, you may replace it with a new version. Overwriting files lets you minimize disk space and the number of library files.

NOTE The ability to overwrite a library file is a privilege granted by the system administrator. If you do not see an Overwrite button () on the View Library Item in Folder screen, you do not have permission to overwrite.

NOTE You can only overwrite images and files.

Before You Overwrite an Image

When overwriting an image, the new image uses the same size dimensions and file extension as the older image. Be sure that the two images have the same file extension and size or make the adjustments at each occurrence of the image.

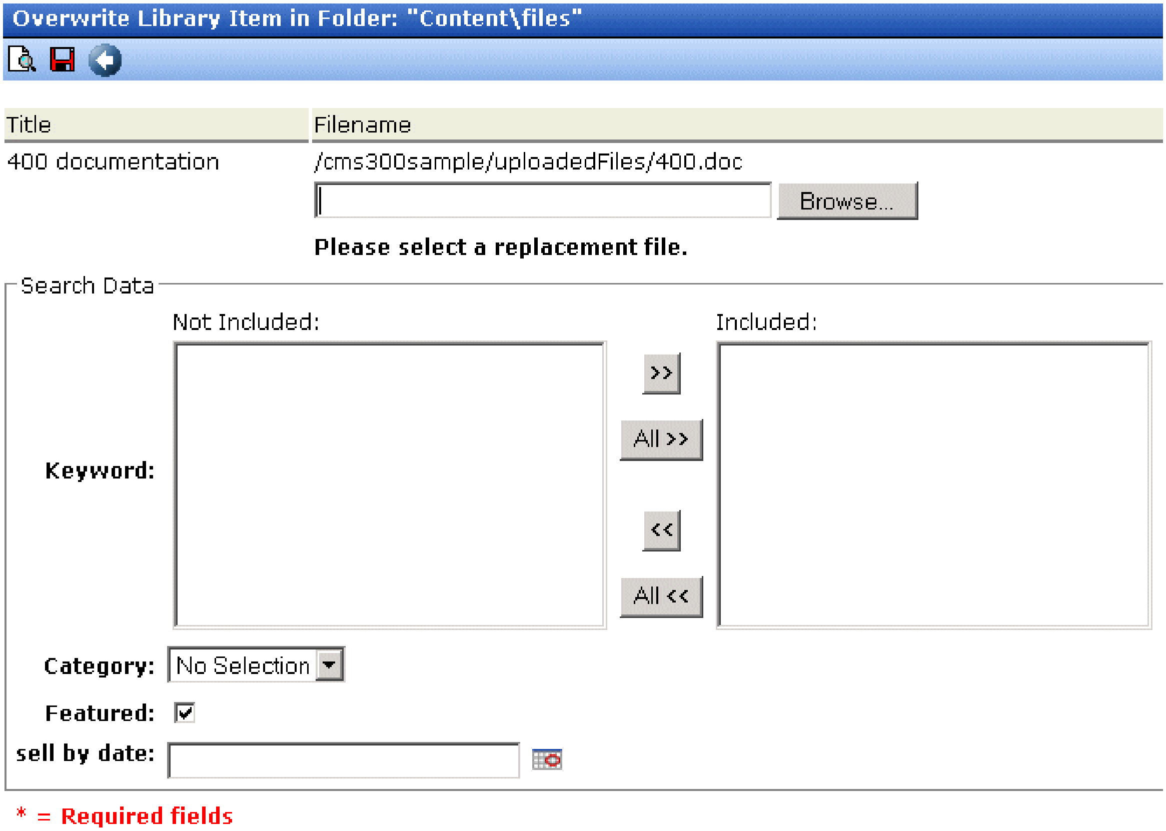
Before You Overwrite a File

Remember, all links that point to the overwritten file now point to the new file.

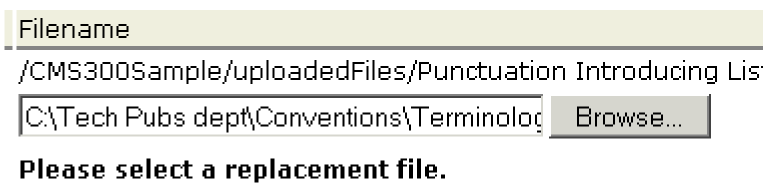
Overwriting Library Assets

To overwrite a library file, follow these steps.

1. Navigate to the View File screen for the file you want to overwrite, as described in "Viewing Files" on page 123.
2. Click the Overwrite button ().
3. The Overwrite File screen appears.

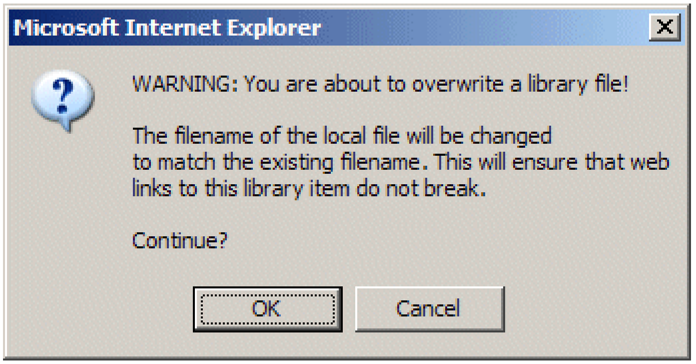


4. Click the **Browse** button.
5. A window opens that lets you locate the new file.
6. Click the file, then click the **Open** button.
7. You return to the overwrite file screen with the path to the new file in the text field.



8. To preview the file before you copy it, click the Preview button ( ). The file is previewed in a separate window. Click the **X** button in the top right corner of the screen to close it and return to the Workarea.

9. As needed, update the search data on the lower section of the screen. Your system administrator defines the search data in the Search Data Definitions screen.
10. To overwrite the current version of the file with this version, click the Update button ( ).
11. The following message appears.



12. To overwrite the file, click **OK**.

Library Link Searching

Link searching indicates all content blocks that include a library link. It is useful when you want to delete a library item. With the click of a button, you see all content blocks that you need to update to reflect the change you are making.

Performing a Library Item Link Search

To perform a library item link search, follow these steps.

1. Access the View Library Item for any type of library item, as described in "Viewing Files" on page 123.
2. Click the Link Search button ( ).
3. A list of all content blocks that reference the library item is displayed.

You should edit those content blocks before deleting the item.

Deleting Library Items

You can delete obsolete items from the library. By deleting an item, you prevent users from adding it to their content. A deleted hyperlink, quicklink or form quicklink remains on your Web server, so any existing links to them are not broken.

On the other hand, if an item is a file or image, the delete window displays an additional prompt, **Remove from the server,** that lets you remove the item from the server. This feature is available to help reduce disk space taken up by these files. Before removing an image or file from your server, you should review all content blocks with links to it and remove or update the link. *See Also:* "Library Link Searching" on page 129

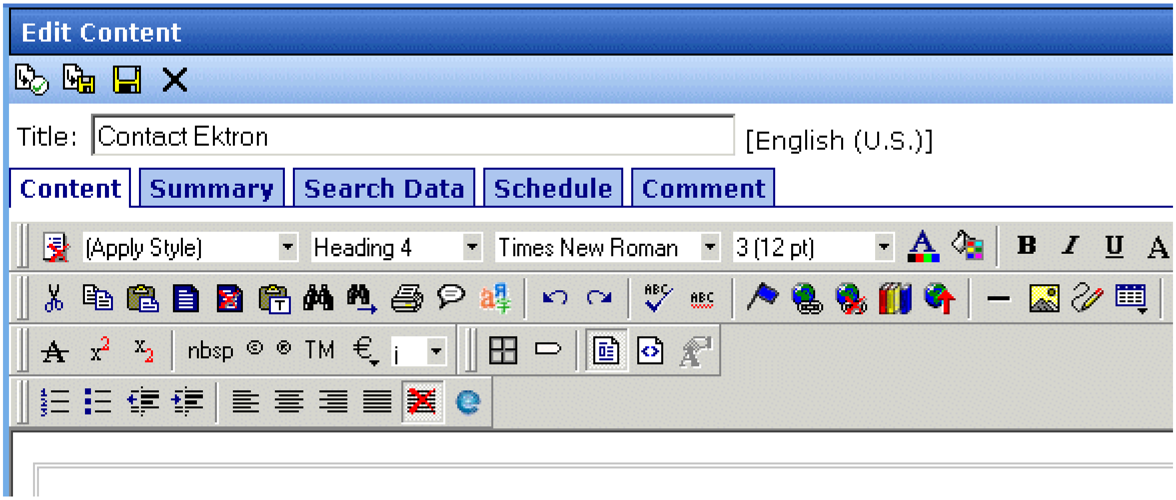
To delete an item from the library, follow these steps.

1. Access the View Library Item screen for the item you want to delete, as described in "Viewing Files" on page 123.
2. Click the Delete button ( ).
3. The Delete Library Item screen is displayed.
4. If appropriate, check the box next to **Remove from the server** (see above).
5. Click the Delete button ( ).

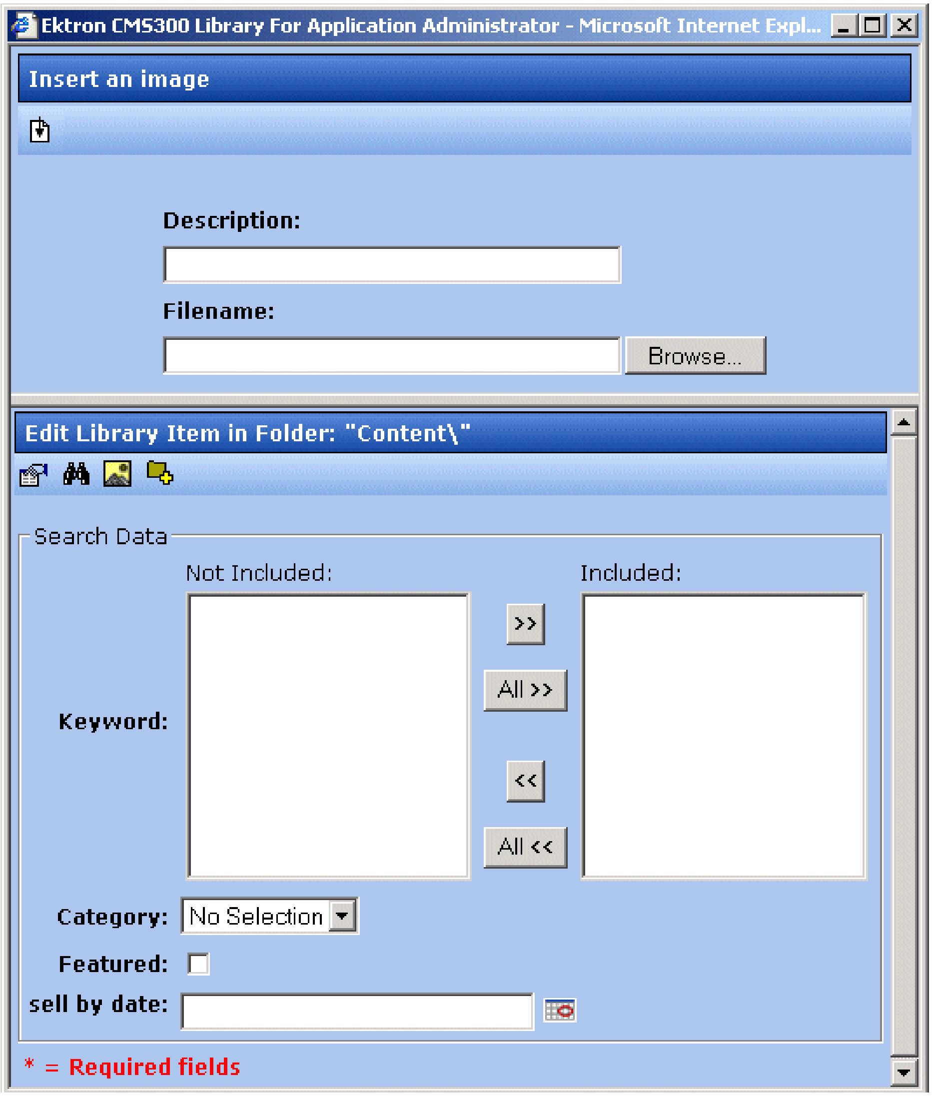
Adding a Library File to Content

After a file is copied to the library, users can add it to a content block. To add a file to a content block, follow these steps.

1. Invoke the editor by adding or editing a content block in Ektron CMS300.



2. Click the Library button ().
3. The following screen appears.



NOTE The **Search Data** section of the screen is designed by your system administrator.

4. Use the following table to help you insert a library item into the content.

Button	Name	Use to
Insert an Image (top) Screen Section		
	Insert	Browse to and insert any file on your PC or network.
Edit Library Item in Folder (bottom) Screen Section		
	View Properties	Display folder properties. See ”Library Folder Properties” on page 117
	Search	Search the **Ektron CMS300** library. See ”Searching the Library” on page 119
	Insert Image	Insert an image from the content block’s corresponding Library images folder
	Extended library	Insert a file from the library or anywhere on your PC or network

Hyperlinks

For a definition of the term “hyperlinks,” see ”Terms Used in this Chapter” on page 115.

Adding Hyperlinks

You must copy hyperlinks to the library before content creators can insert them into content blocks. To copy a hyperlink to the library, follow the procedure described in ”Copying Files to the Library” on page 120. The only difference is that you insert a hyperlink instead of a file.

Viewing Hyperlinks

To view a hyperlink, follow the procedure described in ”Viewing Files” on page 123. The only difference is that you view a hyperlink instead of a file.

Editing Hyperlinks

To edit a hyperlink, follow the procedure described in ”Editing a File” on page 125. The only difference is that you edit a hyperlink title instead of a file title. You can also edit the URL.

Adding Hyperlinks to Your Content

Once a hyperlink is added to the library, users can add the hyperlink to their content blocks.

To add a hyperlink to a content block, follow the procedure described in ”Adding a Library File to Content” on page 130. The only difference is that you add a hyperlink instead of a file.

Images

For a definition of the term “images,” see ”Terms Used in this Chapter” on page 115.

Uploading Images

You must copy images to the library before content creators can insert them into content blocks. To copy an image to the library, follow the procedure described in ”Copying Files to the Library” on page 120. The only difference is that you add an image instead of a file.

Viewing Images

To view an image, follow the procedure described in ”Viewing Files” on page 123. The only difference is that you view an image instead of a file.

Editing Image Titles

To edit an image’s title, follow the procedure described in ”Editing a File” on page 125. The only difference is that you edit an image’s title instead of a file title.

Overwriting Images

When an image in the library becomes out of date, or if the wrong version of an image was copied, you may overwrite that image with a new or correct version. Overwriting images minimizes disk space and the number of copied library images.

NOTE Overwriting images is an advanced permission that you may or may not have.

To overwrite an image, follow the procedure described in ”Overwriting Files” on page 126. The only difference is that you overwrite an image instead of a file.

NOTE You can only overwrite an image with another image of the same extension. (that is, .gif > .gif, not .jpg > .gif)

Adding Images to Your Content

Once an image is added to the library, users can add it to a content block.

To add an image to a content block, follow the procedure described in ”Adding a Library File to Content” on page 130. The only difference is that you add an image instead of a file.

The image is placed into the picture properties dialog box, where you can change it before inserting it. For information about the picture properties dialog box, see ”Using the First Picture Properties Dialog Box” on page 317.

Quicklinks and Forms

For a definition of the terms quicklinks and forms, see ”Terms Used in this Chapter” on page 115.

Adding a Quicklink or Form to Content

After a new content block is created, users can insert a quicklink or form to it into any other content block. To do so, follow the procedure described in ”Adding a Library File to Content” on page 130. The only difference is that you add a quicklink or form instead of a file.

Be sure to place the cursor where you want the quicklink or form to appear before inserting it. When the quicklink or form is inserted, the title of the “jumped to” content block appears in the content. To test the quicklink or form, select the newly-inserted title and double click it.

When the page is published, a reader can click the link to jump to the quicklink or form page.

Viewing Quicklinks or Forms

To view a quicklink or form, follow the procedure described in ”Viewing Files” on page 123. The only difference is that you view a quicklink or form instead of a file.

The table below describes each field on the quicklinks display.

Field	Description
Title	Title given to the hyperlink or form by the user who added it, or last edited it.
URL Link	URL link for the quicklink or form.
Library ID	ID number assigned automatically by Ektron CMS300 when the quicklink or form was originally added.
Parent Folder	Parent folder that the quicklink or form belongs to. Users need permissions to this folder to be able to access the quicklink or form.
Last User to Edit	Last user that made changes to the quicklink or form.
Last Edit Date	The date the quicklink or form was last edited.
Date Created	The date and time the quicklink or form was originally added to the Ektron CMS300 library.

To preview a quicklink or form, click the link at the bottom of the page.

Updating Default Template for Multiple Quicklinks

NOTE This action can only be performed on quicklinks.

When a content block is moved in Ektron CMS300, its quicklink does not get changed. However, the quicklink does get moved to the proper library folder. Once it is moved, you can update the default template called in the content block's quicklink.

To update the default template for one or many quicklinks, follow these steps.

1. in the Library, access the quicklinks folder containing quicklinks you want to update.
2. Click the Update Quicklinks button ( ).
3. The Update URL Link Template Quicklinks screen is displayed.
4. Check the quicklinks you want to update.

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

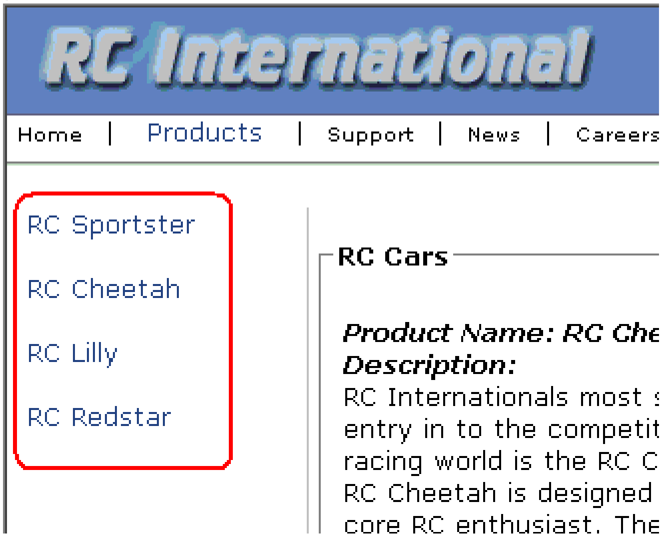
5. In the **To:** text field, enter the name of the template you want to apply to the selected quicklinks.
6. Click the Update Quicklinks button ( ) to update the changes.

   A confirmation message is displayed.
7. Click **OK** to continue.

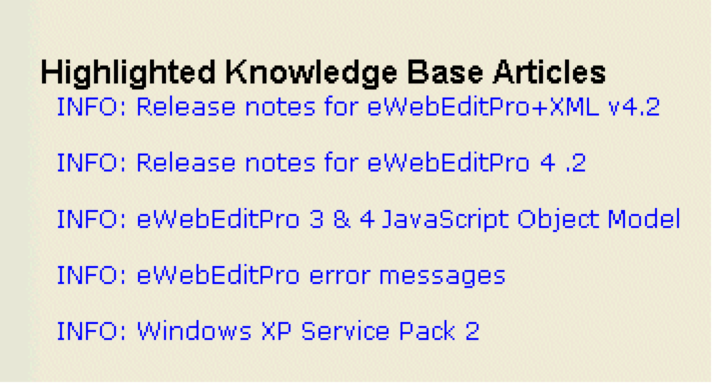
The selected quicklinks are updated to use the template specified.

Working with Collections

A collection provides a list of content blocks 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.



You can also use a collection to display other 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.



This section explains how to create collections. Your system administrator would then modify content blocks to display the collections on your Web site using the ecmCollection function.

NOTE Your system administrator must assign to you permission to work with collections. For details, see the Collections chapter of the Ektron CMS300 Administrator Manual.

This section explains how to find, create, and manage collections through the following subtopics.

- ”Finding Collections” on page 139
- ”Viewing a Collection” on page 142
- ”Creating a Collection” on page 144
- ”Editing Content Blocks in a Collection” on page 150
- ”Reordering Collections List” on page 151
- ”Editing Collection Information” on page 152
- ”Deleting a Collection” on page 152
- ”Working with Collections in a Multi-Language System” on page 153
- ”Comparison of Collections, Menus, and the List Summary Features” on page 155

Finding Collections

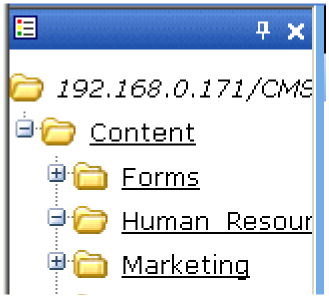
Every collection is assigned to a folder. If you want to find the collections assigned to any folder, navigate to it and click the Collection button (). For more information, see ”Finding a Collection by Navigating to its Content Folder” on page 139.

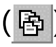
Since collections can be assigned to several content folders, the Modules folder provides a central Collections folder, which displays all collections on one screen, regardless of their content folder. For more information, see ”Finding a Collection Using the Collections Folder” on page 141.

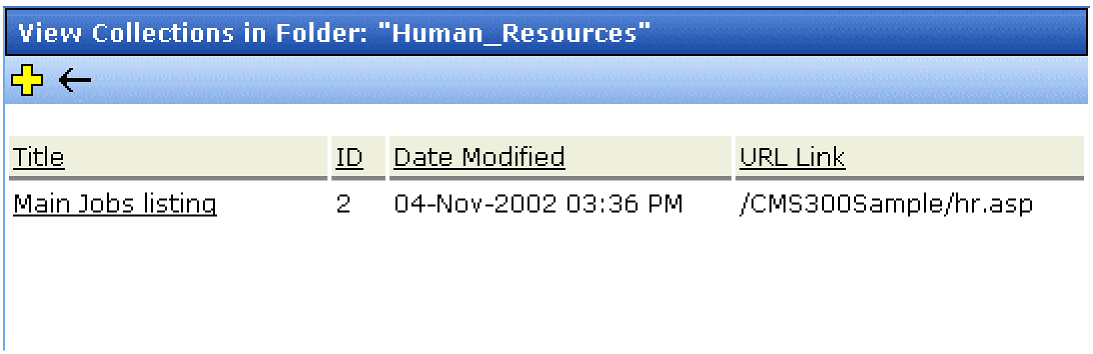
Finding a Collection by Navigating to its Content Folder

To access collections for a content folder, follow these steps.

1. Click the content folder that contains the collection.



2. The folder's content blocks appear in the right frame.
3. If you are using **Ektron CMS300**'s multi-language support features, select the language. *See Also:* "Working with Collections in a Multi-Language System" on page 153
4. Click the Collections button ().
5. The View Collections screen appears.



The screen displays each collection created for the folder. The following table explains each column.

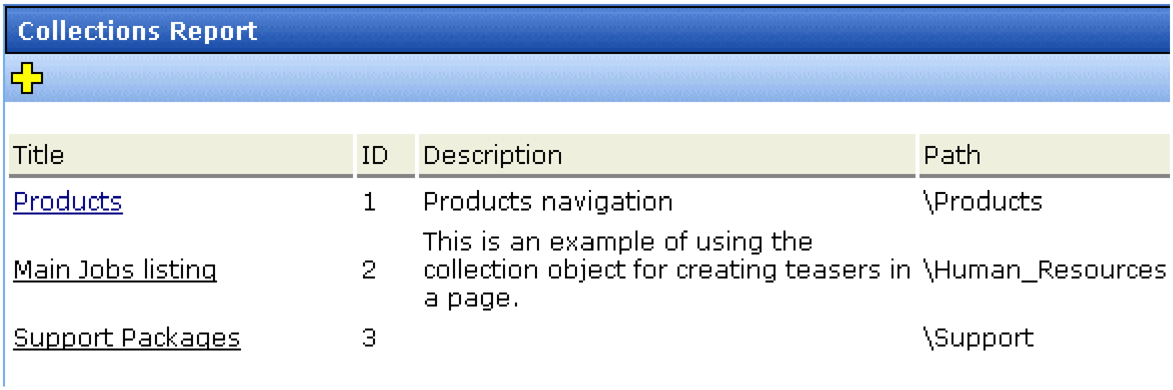
Column	Description
Title	The title assigned to the collection by the creator.
ID	The ID assigned to the collection by Ektron CMS300. This number is used to store and retrieve the data to/ from the database.
Date Modified	When the collection was last edited.
URL	The default template used to display the content.

To learn more about a collection and perform tasks on it, proceed to "Viewing a Collection" on page 142.

Finding a Collection Using the Collections Folder

To access the Collections screen that displays *all* collections in *all* content folders, follow these steps.

1. From the top-level folders in the lower left frame of your Workarea, click **Modules**.
2. Click the **Collections** folder.
3. The Collection Report screen appears.



The screen has four columns. The following table describes each column.

Column Title	Description
Title	Title given to collection by user who created, or last edited, it.
ID	ID number assigned by Ektron CMS300. (Developers use this number to reference the collection in ecmCollection custom function.)
Description	Description given to collection by user who created, or last edited, it.
Path	Folder location of the collection.

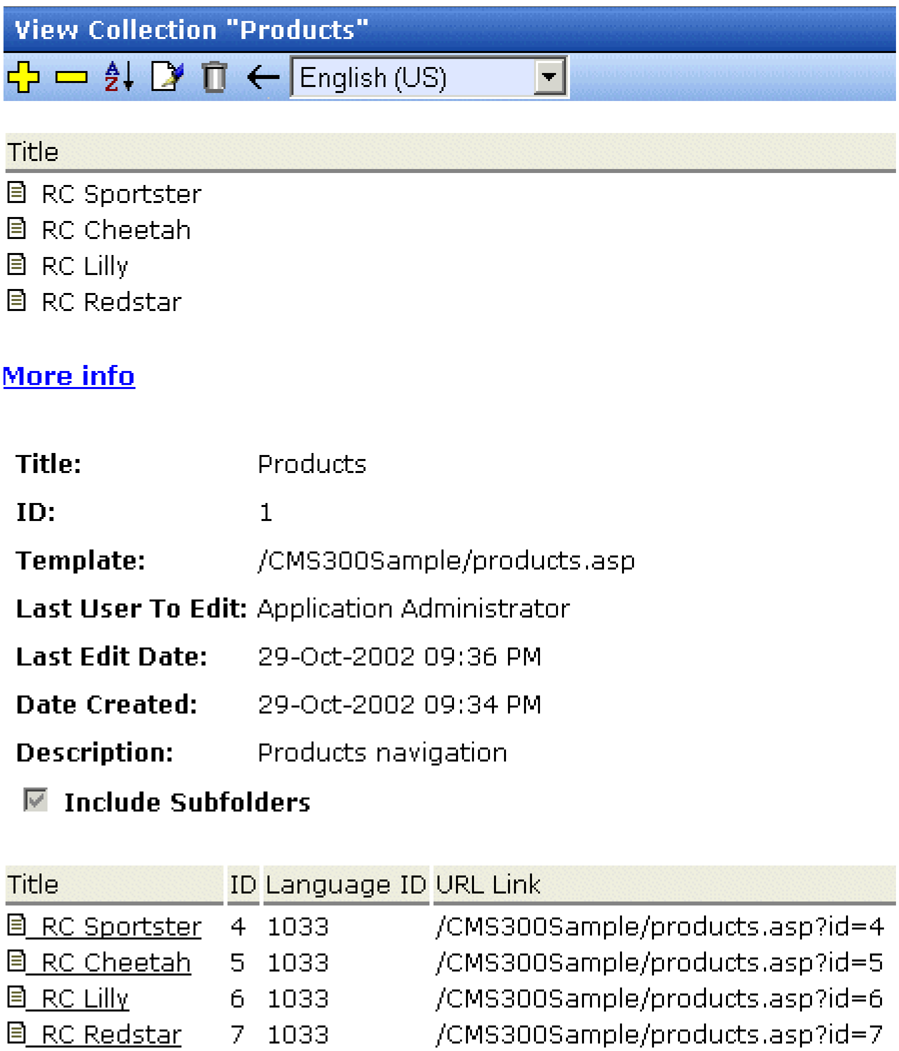
To learn more about the collection and perform tasks on it, proceed to "Viewing a Collection" on page 142.

You can also add a collection from the Collections Report screen. *See Also:* "Creating a Collection" on page 144

Viewing a Collection

To view a collection, follow these steps.

1. Select a collection using the procedure described in "Finding a Collection by Navigating to its Content Folder" on page 139 or "Finding a Collection Using the Collections Folder" on page 141
2. The View Collection screen appears.

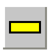
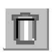


The screen displays each item in the collection. To learn more about a collection, click **More Info**. When you do, the lower section of the screen displays the following information about the collection.

- title
- description
- ID number
- template
- last user who edited it
- last date when it was edited
- date it was created
- whether or not the content folder’s sub-folders can be included
- for each content block in the collection
    - a link to the block (click this to view and edit the block)
    - ID number
    - quickink

Collections Toolbar

The following table describes the collection toolbar buttons.

Button	Name	Description	More Information
	Add	Add new collection or add items to a collection.	”Creating a Collection” on page 144
	Remove	Remove items from a collection.	”Removing Content Blocks from the Collection” on page 150
	Reorder	Reorder items in a collection.	”Reordering Collections List” on page 151
	Edit	Edit collection information.	”Editing Collection Information” on page 152
	Delete	Delete a collection.	”Deleting a Collection” on page 152

Button	Name	Description	More Information
	Back	Return to previous screen.	

Creating a Collection

Creating a collection involves two steps:

- ”Adding a Collection” on page 144
- ”Assigning Content Blocks to the Collection” on page 147

The following sections explain each step.

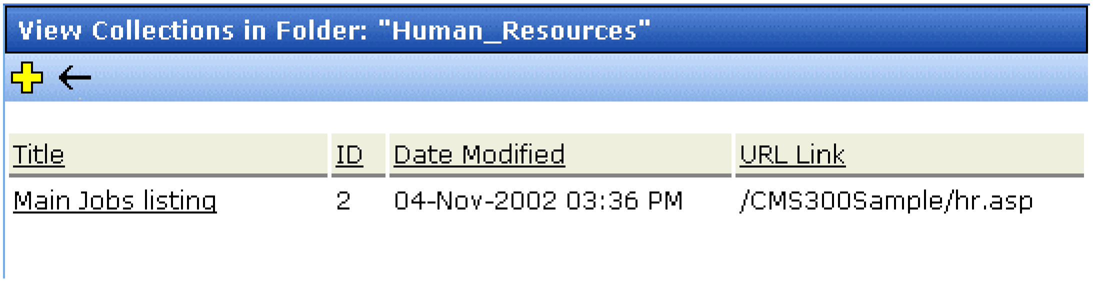
NOTE This section explains creating a collection in a site that does not support multiple languages. If you want to create collections in several languages, see the Ektron CMS300 Administrator manual section “Special Features” > “Multi-Language Support” > “Working with Multi-Language Content” > “Working with Collections in a Multi-Language System.”

Adding a Collection

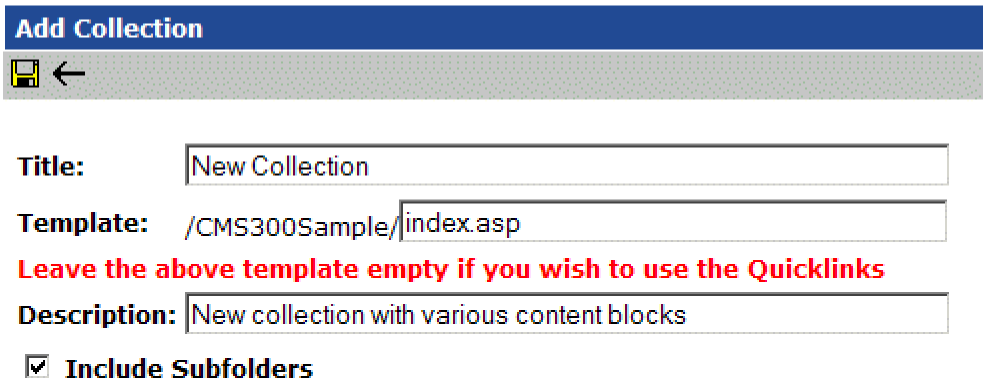
To add a new collection, follow these steps.

1. Navigate to the folder in which you want to create the collection.
2. If you are using **Ektron CMS300**’s multi-language support features, select the language. *See Also:* ”Working with Collections in a Multi-Language System” on page 153
3. Click the Collections button ( ).

NOTE If you access the collection via the Collections folder, you cannot choose the collection’s folder. It is automatically placed in the Content folder.



4. Click the Add button ().
5. The Add Collection screen appears.



6. Complete the screen using the following table.

Field	Description
Title	Assign a unique title to the collection.
Template	Enter the default template for the collection. This template is used to display the content of the links generated if no template is assigned in the custom function. If left blank, the links use their respective quicklinks. *See Also:* "Default Template vs. Quicklinks" on page 146
Description	Add a more detailed description for the collection.
Include Sub-folders	Check if you want to add to the collection content blocks in sub-folders of the content folder.

7. Click the Save button ().

You can now assign content blocks to the collection. See "Assigning Content Blocks to the Collection" on page 147.

Default Template vs. Quicklinks

You can specify a template that determines the screen display for a collection when it is published on a Web page. (See your system administrator for information about **Ektron CMS300** templates.) Or, you can disable the template and, instead, use quicklinks to determine the page template. (*See Also:* "Quicklinks and Forms" on page 135)

If you specify a *template*, all content blocks in the collection use the same screen elements other than the specific content. For example, the page header, footer and information in the right frame of the screen are all the same. On the other hand, if you use *quicklinks*, every page in the collection uses its original template. As a result, the surrounding information may change for every content block in the collection.

Here is an example of links using quicklinks. Notice that content uses several templates. As a result, when a user clicks a content block in the collection, the screen information around the content block changes according to its template.

Title	ID	URL Link
Home Page Content	1	/CMS300Sample/index.asp?id=1
Support Page	8	/CMS300Sample/index.asp?id=8
Plastic Molder #123	13	/CMS300Sample/hr.asp?id=13
RC Cheetah	5	/CMS300Sample/products.asp?id=5
RC Redstar	7	/CMS300Sample/products.asp?id=7
New Content Block	17	/CMS300Sample/index.asp?id=17
Contact Ektron	15	/CMS300Sample/index.asp?id=15

Here is an example of links when using a template named index.asp. In this case, all pages have the same information surrounding the content block.

Title	ID	URL Link
Home Page Content	1	/CMS300Sample/index.asp?id=1
Support Page	8	/CMS300Sample/index.asp?id=8
Plastic Molder #123	13	/CMS300Sample/index.asp?id=13
RC Cheetah	5	/CMS300Sample/index.asp?id=5
RC Redstar	7	/CMS300Sample/index.asp?id=7
New Content Block	17	/CMS300Sample/index.asp?id=17
Contact Ektron	15	/CMS300Sample/index.asp?id=15

To toggle between a default template and quicklinks, follow these steps.

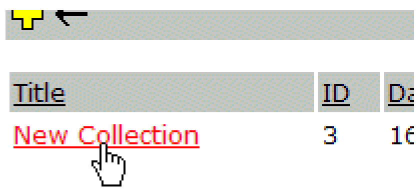
1. Access the Edit Collection screen for the collection you want to edit.
2. Modify the **Template** field.
3. Click the Save ( ) button.

Assigning Content Blocks to the Collection

After a collection is created, your next step is to assign content blocks to it. To do so, follow these steps.

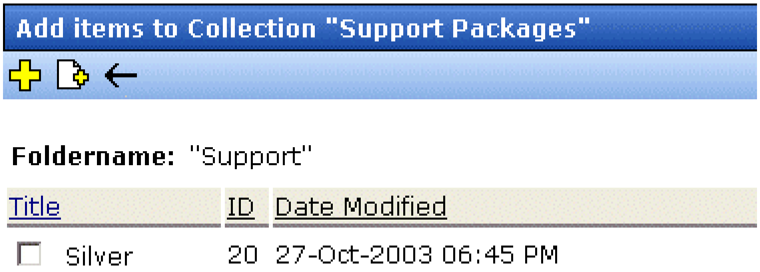
NOTE When viewing a Collection on the Web site, the last published version of a content block appears. If a content block has never been published, nothing appears.

1. Access the collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 139.
2. Access the View Collection Screen, as described in "Viewing a Collection" on page 142.
3. Click the collection to which you want to assign content blocks.



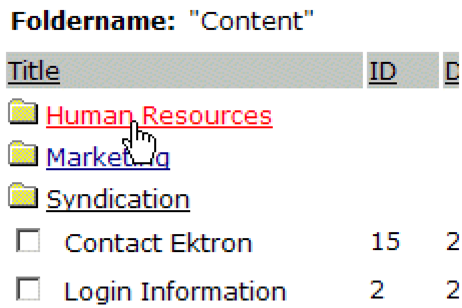
4. The View Collection screen appears.
5. Click the Add button ( ).

6. The Add Items to Collection screen appears, displaying content blocks in the selected folder that are not part of the collection.



7. Check boxes next to content blocks to add to the collection. You can only add content blocks in the selected folder or possibly its sub-folders. (Sub-folders are available if the **Include subfolders** field is checked for the collection.)

   If a collection includes sub-folders, you can add content blocks from the sub-folders. On the View Collection screen, click a sub-folder to view its content blocks.



   (To return to the parent folder, click the folder with the up arrow ()).

8. Check boxes next to content blocks that you want to add to the collection.

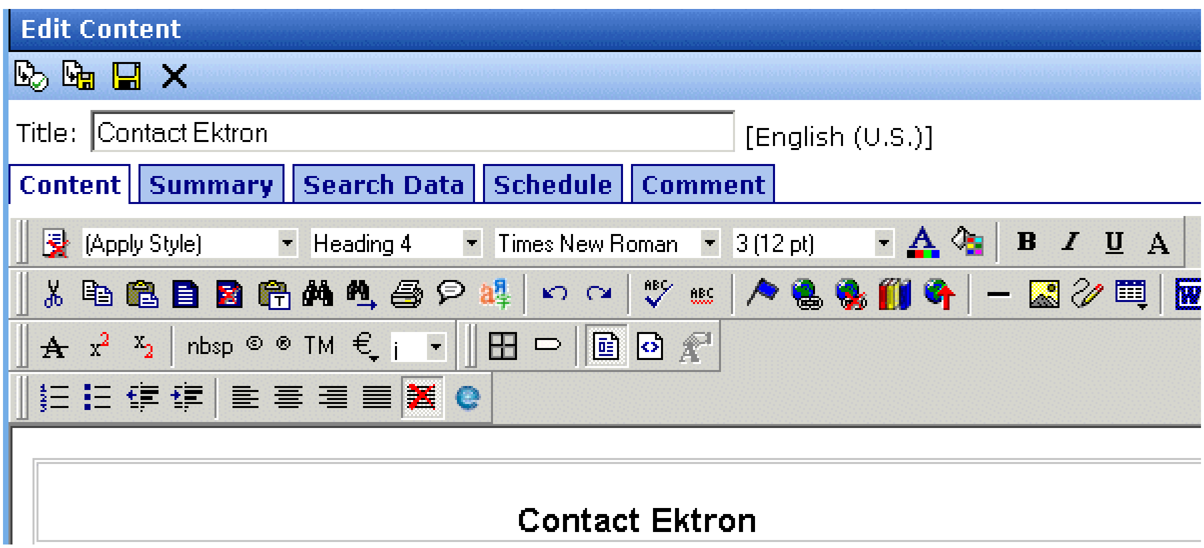
NOTE If you select a content block from a sub-folder, click the add button to add the selected content to the collection. Navigating between sub-folders deselects content blocks.

9. Click the Add button ( ).

Creating a New Content Block for a Collection

You can create a new content block while adding content block links to a collection. To add a content block, follow these steps.

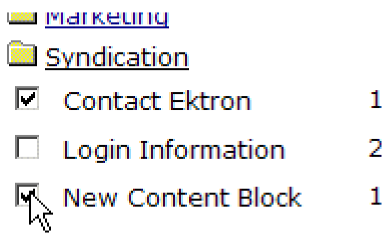
1. Access the View Collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 139.
2. Access the View Collection Screen for a collection, as described in "Viewing a Collection" on page 142.
3. If you are using **Ektron CMS300**'s multi-language support, select the language of the collection.
4. Click the Add button ( ).
5. The Add Items to Collection screen appears.
6. If your collection includes sub-folders and you want to add the content block to one of them, navigate to that sub-folder. Otherwise, proceed to the next step.
7. Click the Add Content button ( ).
8. The Add Content screen appears. If you are using **Ektron CMS300**'s multi-language support, the content block's language appears next to the title. The language is derived from the collection's language and cannot be changed.

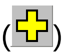


9. Create the content block.

NOTE Refer to ”Adding a Content Block” on page 37 for additional information for creating new content blocks.

10. Click a workflow option in the Add Content screen.
11. The Add Content screen closes, and the new content block link appears in the list of links available to the collection.
12. Check off the content block you created and other content blocks.



13. Click the Add button () to add the content blocks to the collection.

Editing Content Blocks in a Collection

After a collection is created, you can add or remove content block links to and from it.

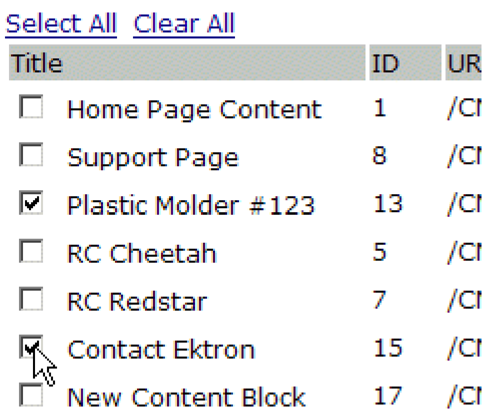
Adding Content Blocks to the Collection

For information about adding content block links to a collection, see ”Assigning Content Blocks to the Collection” on page 147.

Removing Content Blocks from the Collection

To remove a content block link from a collection, follow these steps.

1. Access the collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 139.
2. Access the View Collection Screen, as described in "Viewing a Collection" on page 142.
3. Click the Remove button ( ).
4. The Delete Items from Collection screen appears.
5. Click boxes next to links that you want to delete.



Click **Select All** to select all boxes.

Click **Clear All** to remove all check marks.

6. Click the Delete button ( ).

Reordering Collections List

After a collection is created, and more than one content block is assigned to it, you can reorder the collections list. To do so, follow these steps.

1. Access the collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 139.
2. Access the View Collection Screen, as described in "Viewing a Collection" on page 142.
3. Click the Reorder button ( ).

4. The Reorder Collection screen appears.

5. Click the content block whose order you want to change.
6. Click the up or down arrow to move the content block in either direction.
7. Repeat steps five and six until you set the desired order.
8. Click the Update button ( ).

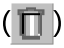
Editing Collection Information

To edit information about a collection, follow these steps.

1. Access the collections screen for the content folder in which you want to add the collection, as described in ”Finding a Collection by Navigating to its Content Folder” on page 139.
2. Access the View Collection Screen, as described in ”Viewing a Collection” on page 142.
3. Click the collection whose information you want to change.
4. Change any of the field values. For documentation of the fields, see ”Complete the screen using the following table.” on page 145.

Deleting a Collection

When you no longer want a collection, you can delete it. To delete a collection, follow these steps.

1. Access the collections screen for the content folder in which you want to add the collection, as described in ”Finding a Collection by Navigating to its Content Folder” on page 139.
2. Access the View Collection Screen, as described in ”Viewing a Collection” on page 142.
3. Click the Delete button ().
4. A confirmation message appears.
5. Click **OK** to proceed.

Working with Collections in a Multi-Language System

In a multi-language **Ektron CMS300** system, you can create a language-specific edition of each collection. For example, prior to the 4.7 Release, the RC International sample site’s products page had a collection in the default application language (English unless you change it). From 4.7 on, you can create an edition of a collection in every enabled language.

When a visitor to your site selects a language then navigates to a page with a collection, **Ektron CMS300** displays the collection in the selected language if available. If not, **Ektron CMS300** displays nothing.

NOTE Note the contrast between the collections and content blocks: if a collection is not available in the selected language, nothing appears. But if a content block is not available in the selected language, content in the default language appears.

When creating a collection for a foreign language, decide if you want to create

- a foreign edition of an existing collection, or
- a new collection in a foreign language

For example, if you want to provide several versions of a single page that change depending on the language selected by the user, see ”Creating a Language-Specific Collection if Another Edition Exists” on page 154.

On the other hand, if you are creating a collection to appear only on a foreign language page, and no other edition of the collection will appear on your site, see ”Creating a Language-Specific Collection if Another Edition Does Not Exist” on page 154.

You can only add content blocks in the language of a collection. So, create the content blocks first, then create the collection that links to them.

Creating a Language-Specific Collection if Another Edition Exists

1. Click the content folder in which your collection exists. The folder’s contents are displayed.
2. Click the View Collections button ( ).
3. The View Collections screen is displayed.
4. Select the collection that you want to translate.
5. From the Add drop-down list, select the language of the new collection.
6. Using the Add button ( ), select the content blocks to add to the collection. Navigate through the folders to the content blocks you want to add. You can only add content blocks in the selected language.

Creating a Language-Specific Collection if Another Edition Does Not Exist

1. Navigate to the folder in which you will create the collection.
2. Click the View Collections button ( ). The View Collections screen is displayed.
3. Click the Add button ( ) and enter basic information about the collection. (This screen is described in ”Creating a Collection” on page 144.)
4. The View Collections in Folder screen appears. Click the collection you just created.
5. From the Add drop-down list, select the language of the new collection.

6. Using the Add button ( ), select the content blocks to add to the collection. Navigate through the folders to the content block you want to add. You can only add content blocks in the selected language.

Comparison of Collections, Menus, and the List Summary Features

A menu, a collection, and the ListSummary function are similar in that they let you add a list of links to a Web page. The following table compares these features to help you understand which one would best accommodate your needs for a particular page.

NOTE To implement these features, the assistance of a developer is required.

	Collection	Menu	List Summary
Display title of *all* content blocks in a folder and possibly subfolders			X
Display title of *selected* content blocks in a folder and possibly subfolders	X	X	
Display external hyperlinks & library assets		X	
Display content block summary (optional)	X		X

	Collection	Menu	List Summary
Display additional content block information: • comment • last modified date • start date • end date • user who last edited it • ID number • path relative to your site’s root	X		
Can be multi-leveled (that is, you can have submenus)		X	

Working with Menus

Ektron CMS300's Menu feature lets users create and maintain a dropdown menu system for your Web site. The menu options can link to content blocks, library assets, external hyperlinks, and submenus. Below is a sample menu.

In this example (delivered with **Ektron CMS300**), the menu appears when the person viewing the Web page moves the cursor over **Products**. The above display illustrates the menu's appearance to a visitor to your site.

However, if a content contributor with permission to edit menus signs in to **Ektron CMS300** then views the menu, it has additional options for editing the menu or adding a content block.

NOTE For more information on adding content, see "Adding a Content Block" on page 37.

This chapter describes the following aspects of managing menus:

- what they are
- how they can be used
- how to the add, edit, view and delete a them

What's In This Chapter

The following information is included in this chapter:

- "The Structure of Menus and Menu Items" on page 158
- "Access to the Menus Feature" on page 159
- "Managing Menus" on page 160
- "Adding a New Menu" on page 160
- "Adding a Menu Item" on page 164
- "Editing a Menu" on page 172
- "Editing a Menu Item" on page 173
- "Viewing a Menu" on page 179
- "Reordering Menu Items" on page 184
- "Deleting a Menu" on page 185
- "Deleting a Menu Item" on page 186
- "Working with Menus in a Multi-Language System" on page 187

The Structure of Menus and Menu Items

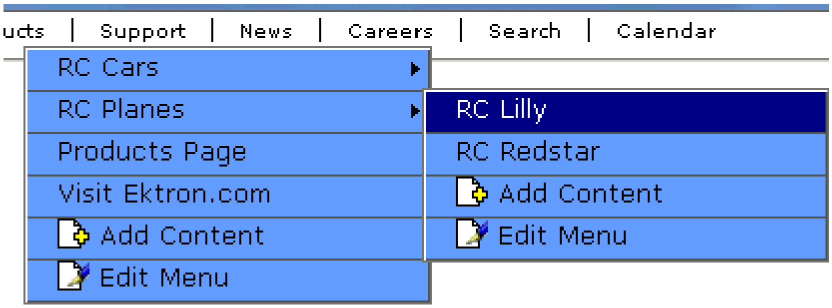
Menus have the following structure:

- **menu** - top level structure that is a placeholder for menu items and submenus. It is assigned to a content folder. If a menu item links to a content block, the block must reside in the assigned folder or one of its subfolders.

  A menu also identifies the page template used to display menu options that are content blocks.

- **menu item** - the individual options on a menu; can be any of the following
  - content block

- library asset
- external hyperlink (link to a page outside your Web site)
- submenu (a link to another menu. In the illustration below, the menu on the right is a submenu. It appears when the user hovers the cursor over the menu item to the left, **RC Planes**. The right pointing arrow indicates that a submenu is available.)



Access to the Menus Feature

There are three ways to access the Menus feature:

- the Workarea, by choosing the associated content folder then clicking the View Menus button ( )
- the Workarea, by choosing **Modules > Menus**
- the **Edit Menu** option on the sample menu displayed above

If you choose the first or second option, you then select a specific menu. Next, that menu appears on the View menus screen. For the third option, the selected menu appears on the View Menu screen.

From the View Menus screen, you can perform the following actions on a menu.

- Create a new menu
- Edit menu information (URL and template link)
- Translate the menu into another language

- Delete the menu
- Add or remove items
- Change the sequence of menu items
- Edit menu items
- For submenus
  - add /remove items
  - change sequence of menu items
  - edit menu information
  - edit information about menu items

Managing Menus

Ektron CMS300 gives you the flexibility to add, edit, view and delete a menu. The following sections explains how to do that:

- ”Adding a New Menu” on page 160
- ”Adding a Menu Item” on page 164
- ”Adding a New Content Block to a Menu via Navigation Link on a Web Page” on page 171
- ”Editing a Menu” on page 172
- ”Editing a Menu Item” on page 173
- ”Editing Types of Menu Items” on page 176
- ”Viewing a Menu” on page 179
- ”Reordering Menu Items” on page 184
- ”Deleting a Menu” on page 185
- ”Deleting a Menu Item” on page 186
- ”Working with Menus in a Multi-Language System” on page 187

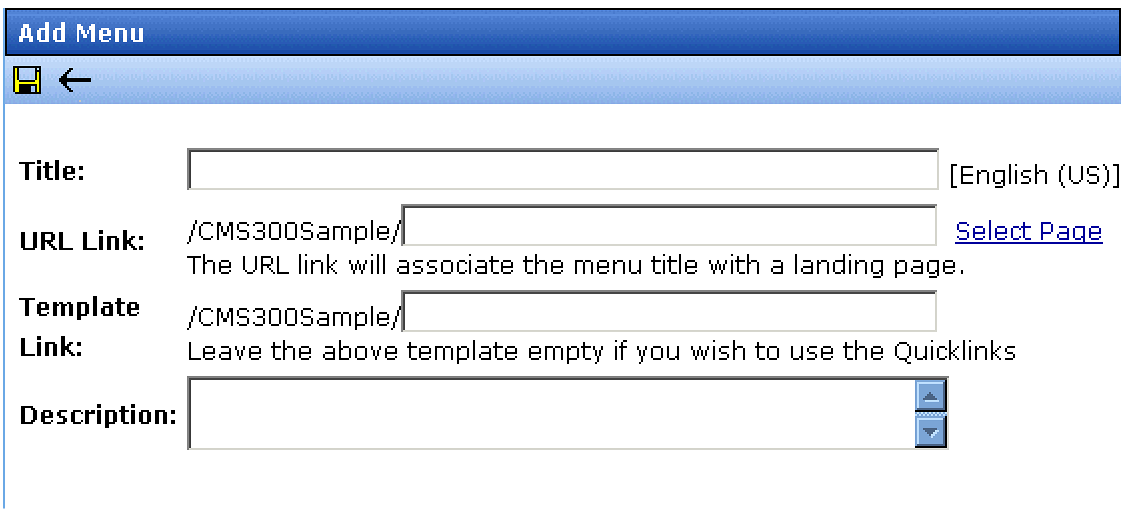
Adding a New Menu

You can add a new menu by navigating to the folder that contains its content blocks or by choosing **Modules > Menus** from the left frame of the Workarea. If you choose **Modules > Menus**

- you cannot select the menu's language -- it assumes the current language. In contrast, if you create a menu after choosing a content folder, you can select a language during the menu creation process.
- you cannot select the menu's folder -- it is automatically assigned to the root folder. In contrast, if you create a menu after choosing a content folder, you select a folder while creating the menu.

Adding a Menu via Content Folder

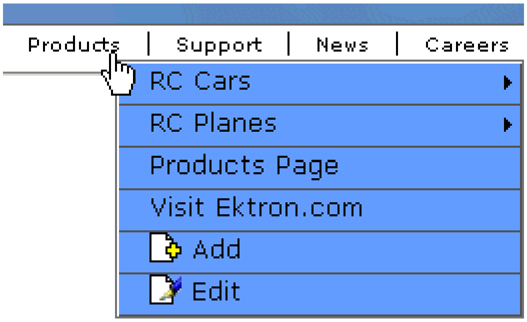
1. Navigate to the content folder that contains the content blocks you want to display on the menu. The content blocks can reside in the selected folder or any of its subfolders.
2. In the View Language dropdown list, select the language of the menu you want to create.
3. Click the View Menus button ( ).
4. The View All Menus screen appears.
5. Click the Add button ( ).
6. The Add Menu screen appears.



7. Using the following table, complete the fields on the Add Menu screen.

Fields on the Add/Edit Menu Screen

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Title</td><td>The name given to the menu by the creator. It appears on the Web page to indicate the kind of information on the menu.</td></tr>
<tr><td>URL Link</td><td>After you create a menu, your developer links it to text or an image on a Web page by modifying a page template. As a result, when a user reading that Web page moves the cursor over the text or image, the menu appears. In the illustration below, the menu appears when the user moves the cursor over Products.



You can also assign a URL link to a menu, using this field. If you do, and the user clicks the link text or image, he jumps to the specified page.

For example, in this field you assign the product landing page, <code>CMS400Example/products.aspx</code>. In the illustration above, if the user moves the cursor over Products, the assigned menu appears. However, if the user clicks Products (as indicated by the hand), he jumps to <code>CMS400Example/products.aspx</code>.

Entering the Path to the Landing Page

This path must be relative. For example: <code>/300Sample/index.aspx</code>

This URL path can be a static template path (like the one mentioned above) or a dynamic path, such as

<code>/300Sample/index.aspx?id=25</code></td></tr>
</table>

Field	Description
Template Link	Note: This field applies to content blocks only. It has no effect on other types of menu items (such as images). If you want to apply a template to this menu, enter the template here. If you do, all content blocks on this menu use this template when selected from the menu. If you do not enter a template here, the content blocks on this menu use the template specified in their quicklink. **Overriding the Template Link** You can override the menu template for any content block on this menu and, instead, use the template specified in its quicklink. To do so, follow these steps. 1. Add all items to the menu. (See "Adding a Menu Item" on page 164) 2. Go to the View Menus option. 3. Click **More Info**. 4. Click the menu item you want to change. 5. At the **Link** field, change the value from **Menu Template** to **Quicklink**.  Important! If you created menus prior to upgrading to this version of **Ektron CMS300**, those menu items are assigned as quicklinks. You cannot change them to template links simply by entering a template link here. Instead, you must go to each menu item and change the **Link** field value from **QuickLink** to **Menu Template** (as illustrated above).
Description	Add a more detailed description for the menu.

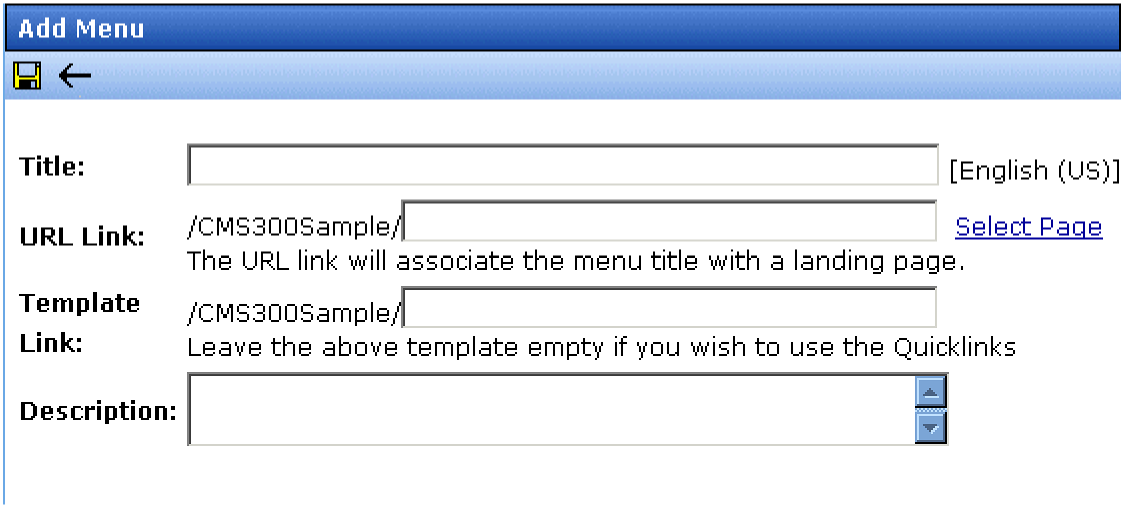
6. Click the Save button ( ).

With the menu added, you may assign menu items to it. See "Adding a Menu Item" on page 164.

Adding a Menu via the Menus Module

See Also: "Adding a New Menu" on page 160

1. From the left frame of the Workarea, click **Modules > Menus**.
2. Click the Add Menu button ( ).
3. The Add Menu screen appears.



4. To complete the fields on the Add Menu screen, see "Fields on the Add/Edit Menu Screen" on page 162.

With the menu added, you may assign menu items to it. See "Adding a Menu Item" on page 164.

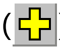
Adding a Menu Item

Similar to being able to add, edit, view or delete a menu, Ektron CMS300 also allows you to add, edit, view and delete a menu item to a menu. *See Also:* "The Structure of Menus and Menu Items" on page 158

Adding a Menu Item via Content Folder

To add a menu item via a content folder, follow these steps.

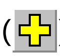
1. Navigate to the content folder that contains the menu to which you want to add items.
2. Click the menu that you want to add items to.
3. In the View Language dropdown list, select the language of the menu.

4. Click the Add Item button ().
5. The Add Menu screen opens, displaying a list of items that can be added to the menu.
6. Use the table below to select the type of menu item and follow the steps to add that menu item.

Assign this type of content to the menu	For details, see
Content block	”Adding a Content Block as a Menu Item” on page 167
Any library asset: images, files, quicklinks, hyperlinks to the menu	”Adding a Library Asset as a Menu Item” on page 168
External hyperlink	”Adding an External Hyperlink as a Menu Item” on page 169
Submenu to the main menu	”Adding a Submenu as a Menu Item” on page 169

Adding a Menu Item via Menus Module

To add a menu item via the menus module, follow these steps.

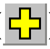
1. From the left frame of the Workarea, click **Modules > Menus**.
2. Click the menu that you want to add a menu item to.
3. In the View Language dropdown list, select the language of the menu.
4. Click the Add Item button ().
5. The Add Menu screen displays a list of items that you can add to the menu.
6. Use to the table below to select the type of menu item and follow the steps to add that menu item.

Menu item type	For more information, see
Content blocks	”Adding a Content Block as a Menu Item” on page 167

Menu item type	For more information, see
Any library assets: images, files, quicklinks, hyperlinks to the menu	”Adding a Library Asset as a Menu Item” on page 168
External hyperlinks	”Adding an External Hyperlink as a Menu Item” on page 169
Submenu to the main menu	”Adding a Submenu as a Menu Item” on page 169

Adding a Menu Item via Navigation Link on a Web Page

1. Access the Web page that contains the link to display the menu.
2. Place the mouse on the hyperlink that causes the menu to appear.
3. The menu appears.

4. Click **Edit Menu**.
5. In the View Language dropdown list, select the language of the menu.
6. Click the Add Item button ().
7. The Add Menu screen displays a list of items you can add to the menu.
8. Use to the table below to select the type of menu item and follow the steps to add that menu item.

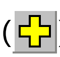
Assign this type of content to the menu	For details, see
Content blocks	”Adding a Content Block as a Menu Item” on page 167
Any library assets: images, files, quicklinks, hyperlinks to the menu	”Adding a Library Asset as a Menu Item” on page 168
External hyperlinks	”Adding an External Hyperlink as a Menu Item” on page 169
Submenu to the main menu	”Adding a Submenu as a Menu Item” on page 169

Adding a Content Block as a Menu Item

To add a content block as a menu item, follow these steps.

1. Follow the directions in ”Adding a Menu Item via Content Folder” on page 164, ”Adding a Menu Item via Menus Module” on page 165, or ”Adding a Menu Item via Navigation Link on a Web Page” on page 166.

NOTE You can only add content blocks that reside in the menu’s content folder or its subfolders.

2. Click the circle next to **Content Block**.
3. Click the **Next...** button.
4. The Add New item screen appears, listing all content blocks in the folder (and its subfolders) in which you created the menu.
5. Click any folder to display its content blocks.
6. Check all content blocks you want to add to the menu.
7. Click the Add Item button ().
8. The View Menu screen reappears, showing the new content blocks.

9. Click the Edit icon ( ) next to each new content block to access the Edit Menu Item screen. This screen lets you assign additional information to the menu item, such as the target window. See ”Fields on the Add/Edit Menu Screen” on page 162.

Adding a Library Asset as a Menu Item

To add a library asset as a menu item via a content folder or menus module, follow these steps.

1. Follow the directions in ”Adding a Menu Item via Content Folder” on page 164, ”Adding a Menu Item via Menus Module” on page 165, or ”Adding a Menu Item via Navigation Link on a Web Page” on page 166.
2. Click the radio button next to **Library Asset** option.
3. Click the **Next** button.
4. The Library screen opens.
5. Navigate to the folder whose assets you want to add.
6. In the right frame, select the type of asset to insert (image, hyperlink, etc.).

NOTE To insert assets, the menu’s folder must contain library assets. However, you can insert library assets from other folders for which you have permission.

7. Select a library asset and click the Insert button ( ).
8. The Add New Item screen appears. Use the following table to complete that screen.

Name	Description
Title	Title of the Library asset. When you insert the asset, the title is used for the title of the menu item. You can change it if needed.
Browse Library	If you want to insert a different asset, click the **Browse Library...** button to browse the Library and select another asset.

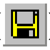
9. Click the Save button ( ).

Adding an External Hyperlink as a Menu Item

To add an external hyperlink as a menu item via a content folder or menus module, follow these steps.

1. Follow the directions in ”Adding a Menu Item via Content Folder” on page 164, ”Adding a Menu Item via Menus Module” on page 165, or ”Adding a Menu Item via Navigation Link on a Web Page” on page 166.
2. Click the circle next to **External Hyperlink**.
3. Click the **Next** button.
4. The Add New Item screen is displayed.
5. Complete the fields as needed.

Field	Description
Title	Title of the new external hyperlink menu item.
URL Link	The URL link for the external hyperlink. For example, www.google.com.

6. Click the Save button ().

NOTE When adding an External Hyperlink menu item, the URL does not get added to the library nor is an ID assigned to it. So, when you save the menu item, it is not added to the CMS database nor can it be retrieved for future use.

Adding a Submenu as a Menu Item

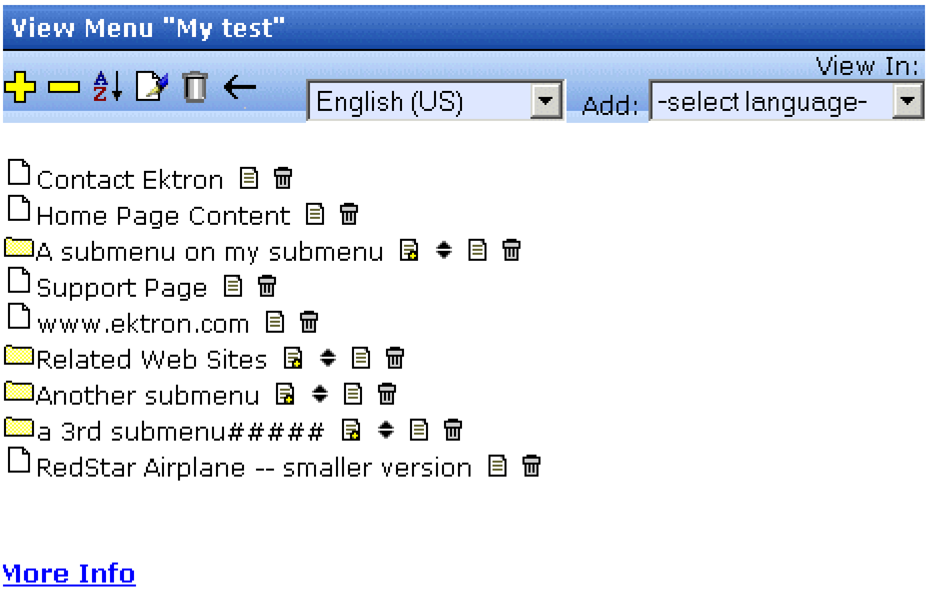
To add a submenu as a menu item via content folder or menus module, follow these steps.

1. Follow the directions in ”Adding a Menu Item via Content Folder” on page 164, ”Adding a Menu Item via Menus Module” on page 165, or ”Adding a Menu Item via Navigation Link on a Web Page” on page 166.
2. Click the radio button next to **Submenu**.
3. The Add Menu screen is displayed.
4. Complete the fields using ”Fields on the Add/Edit Menu Screen” on page 162 as a reference.

5. Click the Save button ( ).

Adding an Item to a Submenu

1. From the left frame of the Workarea, click **Modules > Menus**.
2. Select the menu.
3. Find the submenu to which you want to add items. (Submenus have a folder icon ( ) next to them.)



4. Click the Add Item icon ( ) next to the submenu.
5. The Add Menu screen opens, displaying items you can add.
6. Refer to the table below for selecting a menu item and follow the steps to add it.

Assign this type of content to the menu	For details, see
Content block	”Adding a Content Block as a Menu Item” on page 167

Assign this type of content to the menu	For details, see
Any library asset: images, files, quicklinks, hyperlinks to the menu	”Adding a Library Asset as a Menu Item” on page 168
External hyperlink	”Adding an External Hyperlink as a Menu Item” on page 169
Submenu to the main menu	”Adding a Submenu as a Menu Item” on page 169

Adding a New Content Block to a Menu via Navigation Link on a Web Page

NOTE You can only use this feature after your Web developer has modified a page template to display the menu. This procedure is described in the **Ektron CMS300** Developer Manual section “Custom ASP Functions” > “Menus.”

To add a new content block to a menu via a navigation link on a Web page, follow these steps.

1. Access the Web page that contains the link to display the menu.
2. Place the mouse on the hyperlink that causes the menu to appear.
3. The menu appears.

4. Click ( ) **Add Content**.

NOTE The Add Content option lets you add only a new content block to a menu. You cannot add another type of menu item using this button.

5. A screen displays the name of the current folder and its subfolders. To create the new content in the current folder, click **Next**. To create it in subfolder, click it.
6. The Add Content screen opens, allowing you to enter information. Enter all information in the Add Content screen and click the **Publish** button. *See Also:* ”Adding a Content Block” on page 37
7. The content block is added to the menu.

Editing a Menu

You can edit a menu via:

- its content folder
- menus module
- navigation link on a Web page

This section describes each option.

Editing a Menu via its Content Folder

To edit a menu from a content folder, follow these steps.

1. Access the View Menu screen, as described in ”View a Menu via its Content Folder” on page 180.
2. Click the Edit button ( ).
3. The Edit Menu screen is displayed.
4. As necessary, change the fields in Edit Menu screen by referencing ”Fields on the Add/Edit Menu Screen” on page 162.
5. Click the Save button ( ).

Editing a Menu via Menus Module

To edit a menu via the Menus Module, follow these steps.

1. Access the View Menu screen, as described in ”Viewing a Menu via the Menus Module” on page 183.
2. Click the Edit button ( ).

3. The Edit Menu screen is displayed.
4. As necessary, update the fields in Edit Menu screen by referencing "Fields on the Add/Edit Menu Screen" on page 162.
5. Click the Save button ( ).

Editing a Menu via Navigation Link on a Web Page

To edit a menu via a navigation link on a Web page, follow these steps.

1. Navigate to the Web page that contains the link to display the menu.
2. Click the menu link.
3. The menu appears.

4. Click the **Edit** option.
5. The View Menu screen for the menu appears.
6. Click the Edit button ( ).
7. The Edit Menu screen is displayed.
8. As necessary, update the fields by referencing "Fields on the Add/Edit Menu Screen" on page 162.
9. Click the Save button ( ).

Editing a Menu Item

You can edit a menu item via:

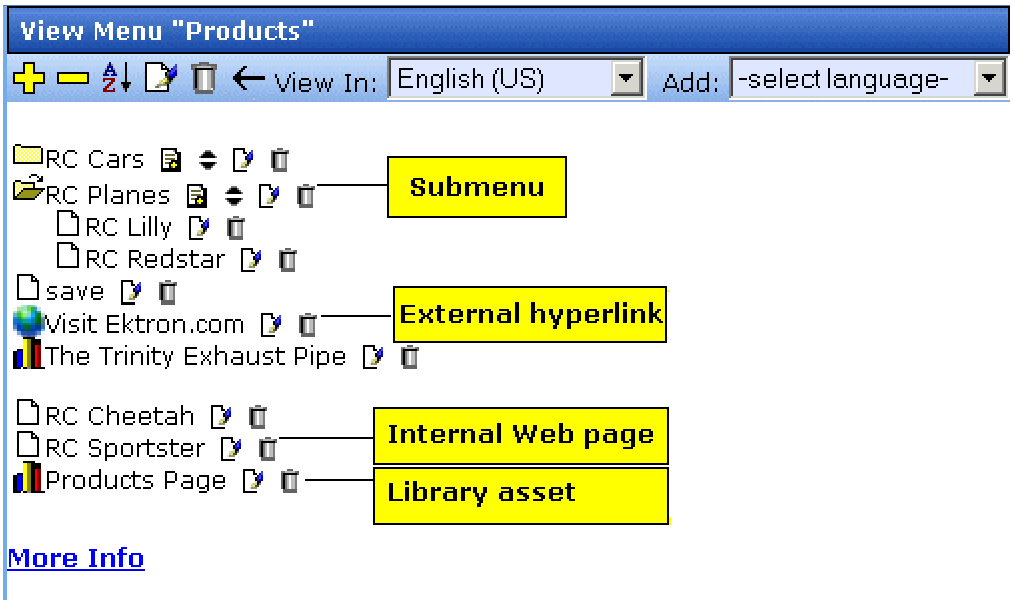
- its content folder
- menus module

- navigation link on a Web page

Editing a Menu Item via its Content Folder

To edit a menu item from its content folder, follow these steps.

1. Access the View Menu screen, as described in "View a Menu via its Content Folder" on page 180.
2. Click the menu you want to edit.
3. The View Menu screen for that menu appears, listing all menu items.



The following icons indicate the type of each menu item and the options you can perform on them.

Icon	Menu item type	Available actions	For more information, see
	Submenu	Add submenu item ()	"Adding an Item to a Submenu" on page 170

Icon	Menu item type	Available actions	For more information, see
		Reorder submenu items ( )	”Reordering Menu Items” on page 184
		Edit submenu ( )	”Fields on the Add/Edit Menu Screen” on page 162
		Delete submenu ( )	”Deleting a Submenu” on page 186
	Web page on your site	Edit Web page on your site ( )	”Editing a Content Block Menu Item” on page 176
		Delete Web page on your site ( )	”Removing a Menu Item via its Content Folder” on page 186
	External Web page	Edit external Web page ( )	”Editing an External Hyperlink Menu Item” on page 178
		Delete External Web page( )	”Removing a Menu Item via its Content Folder” on page 186
	Library asset	Edit library asset ( )	”Editing a Library Asset Menu Item” on page 178
		Delete library asset ( )	”Removing a Menu Item via its Content Folder” on page 186

Editing a Menu Item via Menus Module

To edit a menu via the Menus module, follow these steps.

1. Access the Menu Report screen, as described in ”Viewing a Menu via the Menus Module” on page 183.
2. Click the menu you want to edit.
3. The View Menu screen for that menu appears, listing all items on the menu.

Editing a Menu Item via Navigation Link on a Web Page

To edit a menu via navigation link on a Web page, follow these steps.

1. Access the template where you inserted the link to display the menu.
2. Click the **Menu Navigation link** title on the Web page.
3. A DHTML menu is displayed along with all menu items on the menu.

4. Click **Edit Menu**.
5. The Edit Menu Item screen appears.
6. See ”Editing a Menu Item via its Content Folder” on page 174.

Editing Types of Menu Items

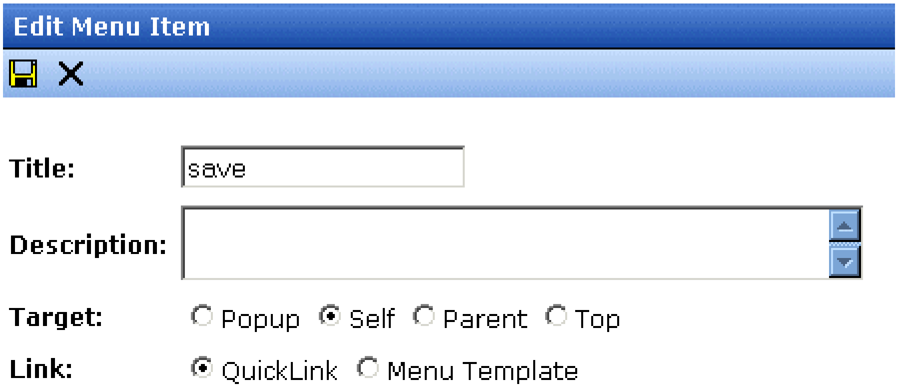
This section explains how to edit the following types of menu items:

- content block on your Web site
- library asset
- link to an external Web site
- submenu

Editing a Content Block Menu Item

To edit a content block menu item via its content folder or menus module, follow these steps.

1. Navigate to the menu you want to edit by referencing ”Viewing a Menu” on page 179.
2. The View Menu screen displays the menu items.
3. Click the edit icon ( ) next to the content block ( ) you want to edit.
4. The Edit Menu Item screen opens.



5. Using the table below as a reference, make changes to the content menu item.

Fields on the Edit Menu Item Screen

Field	Description
Title	The name that was given to the menu item by the creator. Edit if needed.
Description	Add a more detailed description for the content menu item that is being edited.
Target	Select how the library menu item will display. • Popup: Opens in a new browser window • Self: Opens in the same window • Parent: Opens in the parent window • Top: Note: By default, the target option is set to self.
Link	See "Template Link" on page 163

6. Click the Save button ( ).

Editing a Library Asset Menu Item

To edit a library menu asset via its content folder or menus module, follow these steps.

1. Navigate to the menu whose items you want to edit by referencing ”Viewing a Menu” on page 179.
2. The View Menu screen displays the menu items.
3. Click the edit icon ( ) next to the library asset ( ) you want to edit.
4. The Edit Menu Item screen opens.
5. Make changes to the library asset menu item. For documentation of the fields, see ”Fields on the Edit Menu Item Screen” on page 177.
6. Click the Save button ( ).

Editing an External Hyperlink Menu Item

To edit an external hyperlink menu item via its content folder or menus module, follow these steps.

1. Navigate to the menu that you want to edit by referencing ”Viewing a Menu” on page 179.
2. The View Menu screen displays the menu items.
3. Click the edit icon ( ) next to the external hyperlink ( ) you want to edit.
4. The Edit Menu Item screen opens. Update as needed. Use the table below to guide you through the fields.

Name	Description
Title	Title of the new external hyperlink menu item.
URL Link	The URL link for the external hyperlink. For example, www.google.com.

5. Click the Save button ( ).

Editing a Submenu Menu Item

To edit a submenu menu item via its content folder or menus module, follow these steps.

1. Navigate to the menu for which you want to edit the menu items for by referencing to ”Viewing a Menu” on page 179.
2. The View Menu screen opens, displaying a list of all menu items.
3. Click the submenu icon ( ) to display its contents.

To edit a	See this section
Content block	”Editing a Content Block Menu Item” on page 176
Library Asset	”Editing a Library Asset Menu Item” on page 178
External Hyperlink	”Editing an External Hyperlink Menu Item” on page 178
Submenu	”Fields on the Add/Edit Menu Screen” on page 162

Viewing a Menu

Just like editing an existing menu, you can view a menu via:

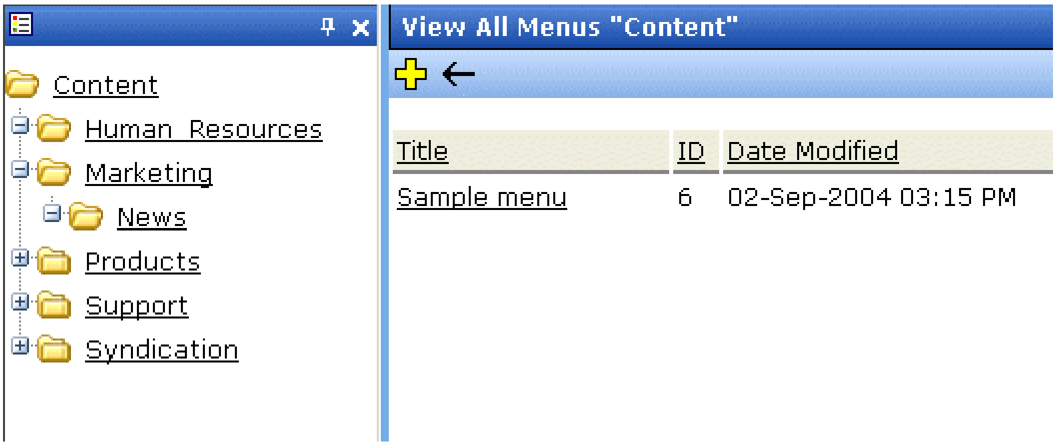
- its content folder
- menus module
- navigation link on a Web page

When viewing a menu via the content or menu folder, you get an *internal* view of information entered by menu creator. When viewing via a navigation link on a Web page, you get an *external* view of the menu, as seen by anyone navigating Web site.

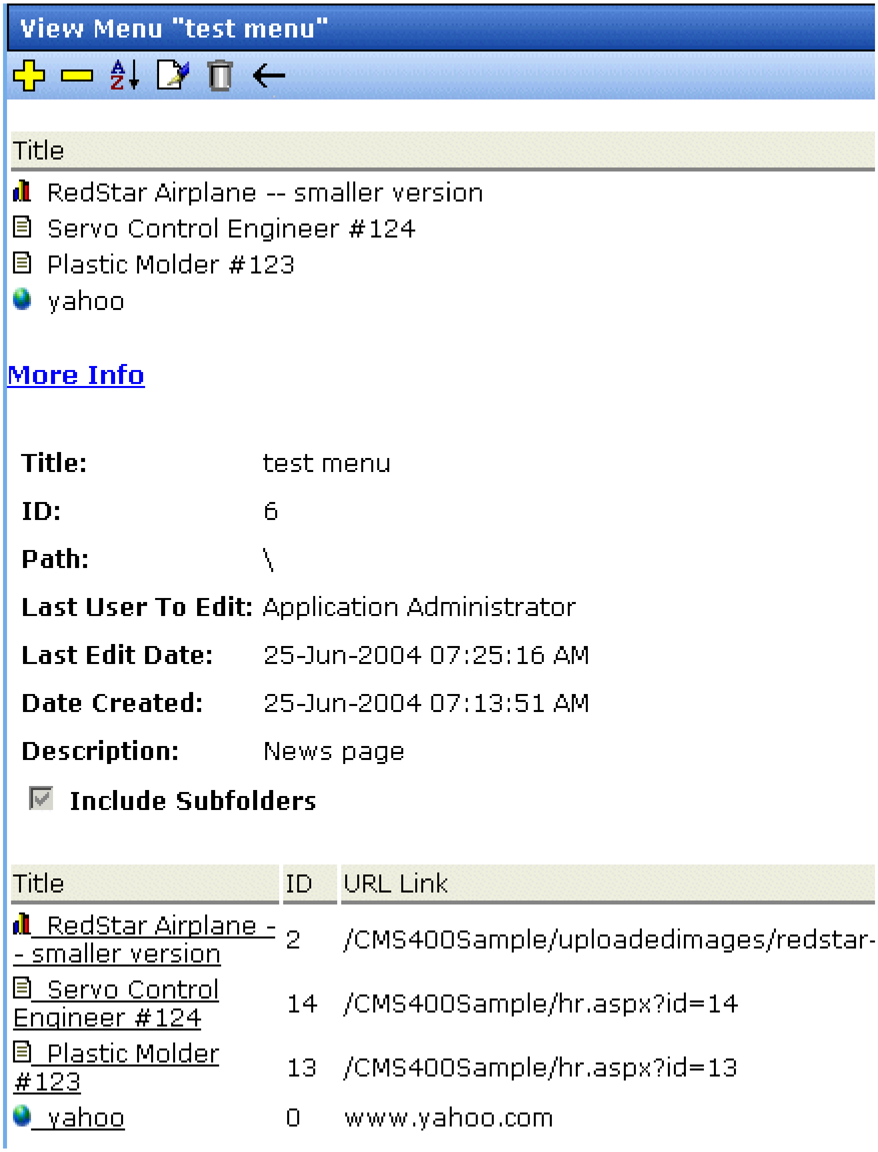
View a Menu via its Content Folder

To access a menu via its content folder, follow these steps.

1. Access the Workarea and navigate to the content folder that contains the menu.
2. Click the View Menu button ( ).
3. The View All Menus screen displays a list of menus under that folder.



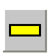
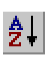
4. Click the menu you want to view.
5. Click **More Info** to view the details about the menu.



6. The following table explains the information on the View Menus screen.

Name	Description
Information about menu items	See "Editing a Menu Item via its Content Folder" on page 174
Title	Title assigned to the menu folder.
ID	ID number assigned to the menu by Ektron CMS300. Note: The ID for the Menu is automatically generated by the 300 application when you create a menu.
Language ID	The decimal number representing the menu's language.
Path	Path to the content folder that contains the menu.
Last User to Edit	Last user to edit this menu.
Last Edit Date	Date and time when this menu was last edited.
Date Created	Date and time when this menu was created.
Description	Description given to the menu.

The View Menu screen also provides the following buttons.

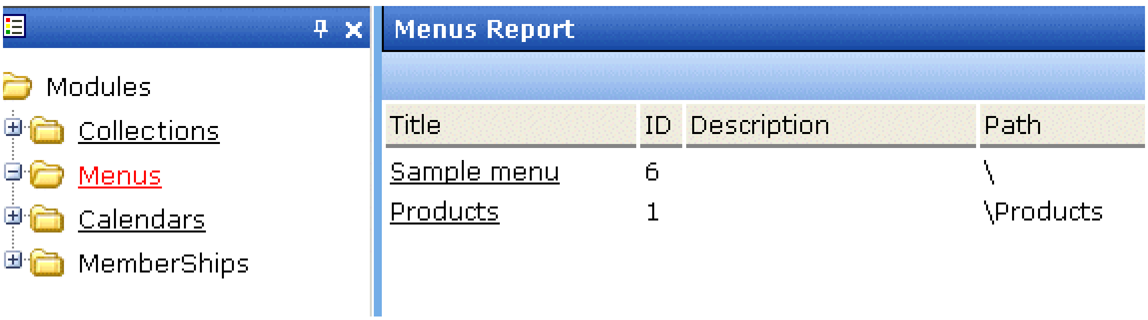
Button	Name	Description	More Information
	Add Menu Item	Add item to menu	"Adding a Menu Item" on page 164
	Remove Menu Item	Remove item from the menu	"Deleting a Menu Item" on page 186
	Reorder Menu Item	Adjust sequence of menu items	"Reordering Menu Items" on page 184

Button	Name	Description	More Information
	Edit Menu	Edit existing menu	”Editing a Menu” on page 172
	Delete Menu	Delete menu and its menu items	”Deleting a Menu” on page 185
	Back	Return to previous screen	

Viewing a Menu via the Menus Module

To access the menu via the Modules folder, follow these steps.

1. Click the **Modules** folder from the left frame of the Workarea.
2. Click the **Modules** folder again to expand its hierarchy.
3. Click **Menus** from the folder hierarchy to view its content.
4. The Menus Report screen displays all menus.



5. Continue from the section ”Click the menu you want to view.” on page 180.

View Menus via Navigation Link on a Web Page

To access the menu via a navigation link on a Web page, follow these steps.

1. Access the Web page on which your Web developer inserted the link to display the menu.
2. Click the link that launches the menu on the Web page.

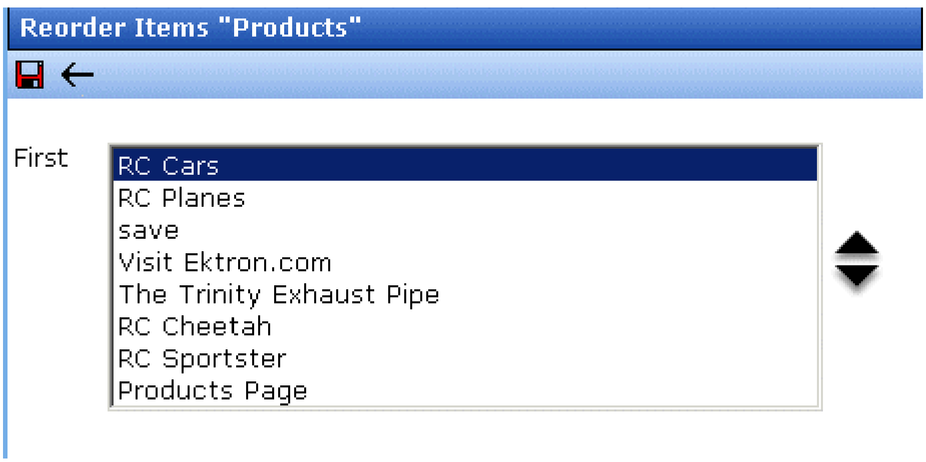
3. A DHTML menu is displayed along with all menu items on the menu.

For information on how to display a menu on a Web page, refer to the section on menus in the Developers Manual.

Reordering Menu Items

To rearrange the items on a menu, follow these steps.

1. Navigate to the menu you want to rearrange. See "Viewing a Menu" on page 179.
2. Click the Reorder button ( ).
3. The Reorder Items screen appears.



4. Click the item you want to move.
5. Click the up arrow to move it up, or the down arrow to move it down.
6. When finished, click the Save button ( ).

Deleting a Menu

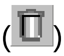
Similar to editing and viewing a menu, you can delete a menu via

- its content folder
- menus module

You cannot delete a menu from the navigation link on a Web page.

Deleting a Menu via Content Folder

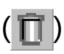
To delete a menu via its content folder, follow these steps.

1. Access the View Menu screen, as described in "View a Menu via its Content Folder" on page 180.
2. Click the Delete button ().
3. A confirmation message is displayed.
4. Click **OK** to delete the menu.

NOTE Deleting a menu automatically deletes all menu items associated with it. Do not confuse, however, the menu link with the item itself. For example, deleting a menu deletes its *links* to content blocks but has no effect on the content blocks.

Deleting a Menu via Menus Module

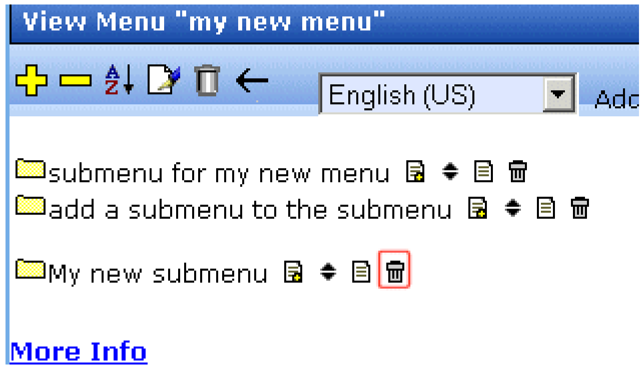
To delete a menu via its menus module, follow these steps.

1. Access the View Menu screen, as described in "Viewing a Menu via the Menus Module" on page 183.
2. Click the Delete button ().
3. A confirmation message is displayed.
4. Click **OK**.

NOTE Deleting a menu automatically deletes all menu items associated with it. Do not confuse, however, the menu link with the item itself. For example, deleting a menu deletes its *links* to content blocks but has no affect on the content blocks.

Deleting a Submenu

1. Access the View Menu page, as described in ”Viewing a Menu via the Menus Module” on page 183.
2. Select the submenu.
3. Click the delete icon ( ) to the right of the submenu (surrounded in red below).



Deleting a Menu Item

Similar to editing and viewing a menu, you can remove a menu item from a menu via

- its content folder
- its menu folder

Removing a Menu Item via its Content Folder

You can delete any menu item by clicking the accompanying Delete icon ( ) on the View menu screen.

Alternatively, you can follow these steps. The procedure below is quicker if you are deleting several or all items at once.

1. Access the View Menu screen, as described in ”View a Menu via its Content Folder” on page 180.
2. Click the menu you want to delete.
3. The View Menu screen for that menu is displayed.
4. Click the Remove button ( ).

5. The Delete Menu Item screen opens.
6. Click the check box next to the menu item you want to delete.

   You can click **Select All** to choose all menu items. Click **Clear All** to unselect all menu items.
7. Click the Delete button ( ).

Removing a Menu Item via Menus Module

You can delete any menu item by clicking the accompanying Delete icon ( ) on the View menu screen.

Alternatively, you can follow these steps. The procedure below is quicker if you are deleting several or all items at once.

1. Access the View Menu screen, as described in "Viewing a Menu via the Menus Module" on page 183.
2. Click the Remove button ( ).
3. The Delete Menu Item screen opens.
4. Click the checkbox next to the menu item you want to delete. You can click **Select All** to choose all menu items delete. Click **Clear All** to unselect all menu items.
5. Click the Delete button ( ).

Working with Menus in a Multi-Language System

NOTE For background information about supporting multiple languages on your Web site, see the **Ektron CMS300** Administrator manual section "Multi-Language Support" > "Working with Multi-Language Content."

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 CMS300** 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 blocks that will be on the menu. In this way, you can link these content blocks to the new menu. However, after creating a menu, you can add new items to it.

Translating a Menu

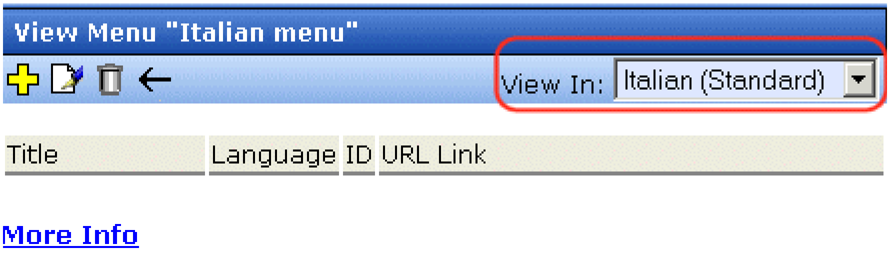
To translate a menu into any supported language, follow these steps. You can navigate to the menu via the Web site or from the Workarea. Each procedure is described below.

By Navigating the Site

1. Sign on to **Ektron CMS300** and select the language in which the menu currently exists.
2. Navigate to the page that has the menu you want to translate.
3. Click the menu and the **Edit Menu** option.

4. The View Menu screen appears for the selected menu.
5. From the Add drop-down list, select the language into which you want to translate the menu.

6. The Add Menu screen appears. Complete the screen for the menu in the selected language. See "Fields on the Add/Edit Menu Screen" on page 162.
7. Click the Save button ( ).
8. The View Menu screen reappears. Now, the **View In** drop-down list displays the menu's new language.



9. Add items to the menu. See "Adding a Menu Item" on page 164. If adding a content block, you can only insert one in the selected language.
10. Later, you can add more menu items, edit them, delete them, view them, etc. These capabilities are described in this chapter.

By Accessing the Menus Report Screen

1. From the Workarea screen, click **Modules > Menus**.
2. Click the menu you want to translate.
3. Follow the instructions from Step 3 in "By Navigating the Site" on page 188.

Creating a Menu in Any Language

To create a menu in any language, follow these steps.

1. Form the Workarea screen, click **Modules > Menus**.
2. From the language drop-down list, select the new menu's language.

3. Create the menu. See "Adding a New Menu" on page 160.

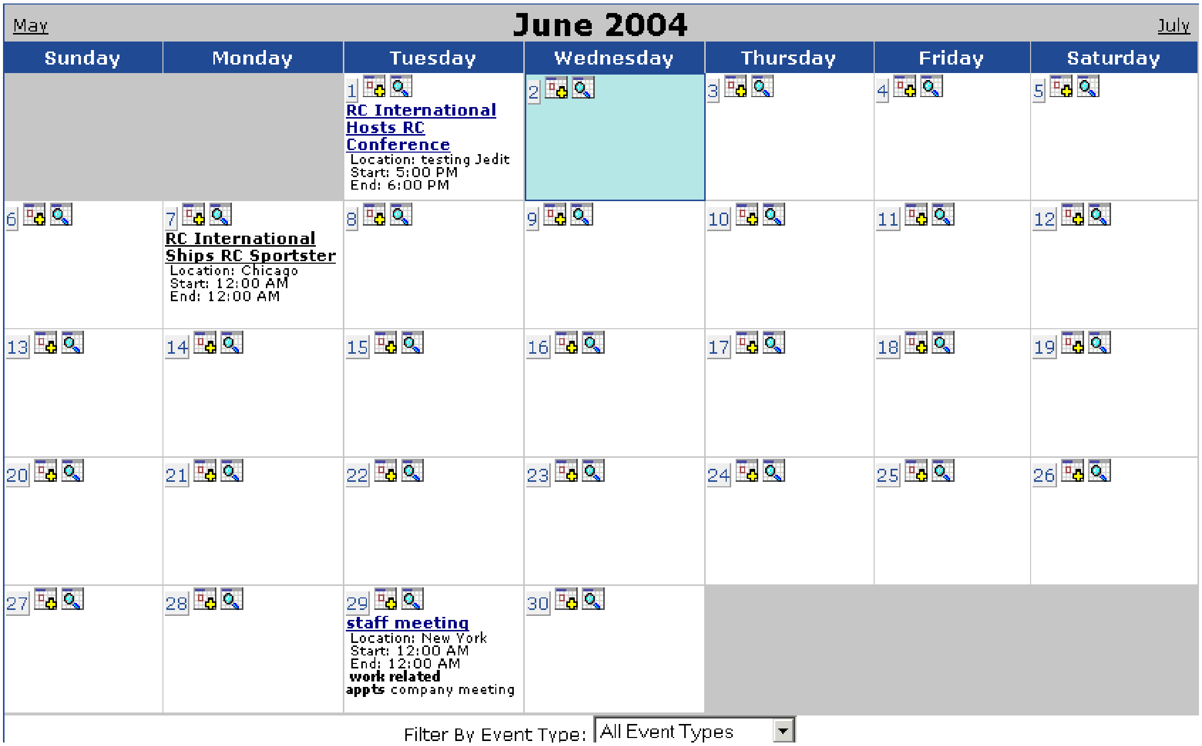
Working with Calendars

Calendars in **Ektron CMS300** perform the same function as a paper calendar: they keep one or more users informed about upcoming events. They can be displayed to all visitors to your Web site, and any authorized user can add events to a calendar.

Typical calendar events could include

- company meeting
- reserving a conference room for an interview
- company holidays
- deadlines

These are only a few uses of calendar events. Calendars are versatile and can easily meet all of your needs. A sample calendar appears below.



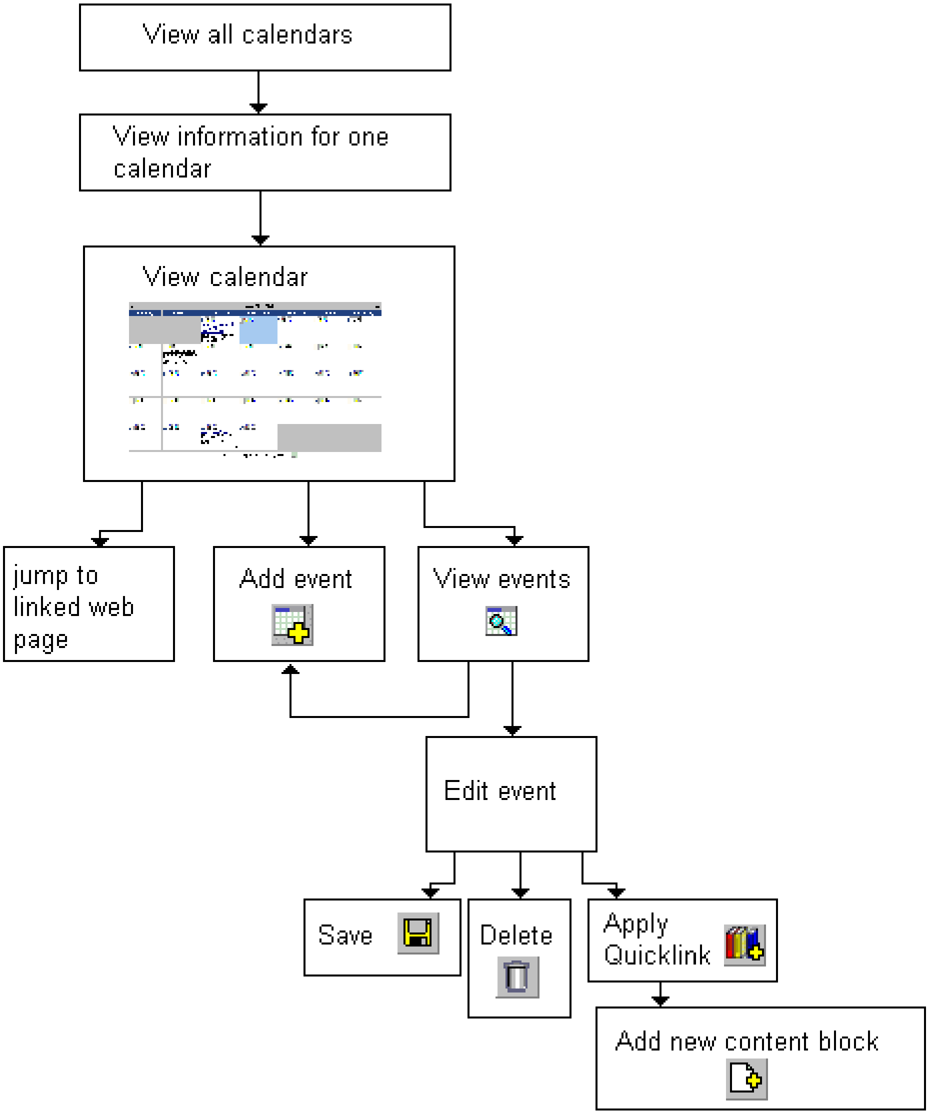
The Calendar Feature is explained through the following topics:

- ”Understanding Calendars” on page 191
- ”Accessing the View Calendar Screen” on page 193
- ”Viewing a Calendar” on page 197
- ”Adding a Calendar Event” on page 199
- ”Adding a New Content Block for a Calendar Event” on page 205
- ”Viewing a Calendar Event” on page 208
- ”Editing Calendar Events” on page 209
- ”Deleting Calendar Events” on page 211

Understanding Calendars

Before working with calendars, you should understand the following points.

- **Ektron CMS300** supports several calendars at one time. There might be a site-wide calendar, and other calendars for special interests, such as an athletic events calendar.
- A calendar displays one month at a time. Each date can display several events.
- Only system administrators can create a calendar.
- Each calendar is assigned to a content folder (*See Also:* "Working with Folders and Content Blocks" on page 26). Your ability to view, add, edit, and remove calendar events is determined by your permissions for that folder.
- The following illustrates the workflow of calendar tasks.

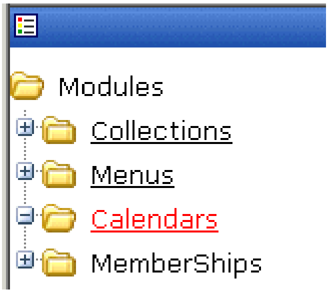


Accessing the View Calendar Screen

The View Calendar screen collects general information about a calendar, and provides toolbar buttons that let you perform calendar-related activities.

To access the View Calendar screen, follow these steps.

1. Access the **Modules** folder from the lower left corner of the Workarea.
2. Click the **Calendars** folder.



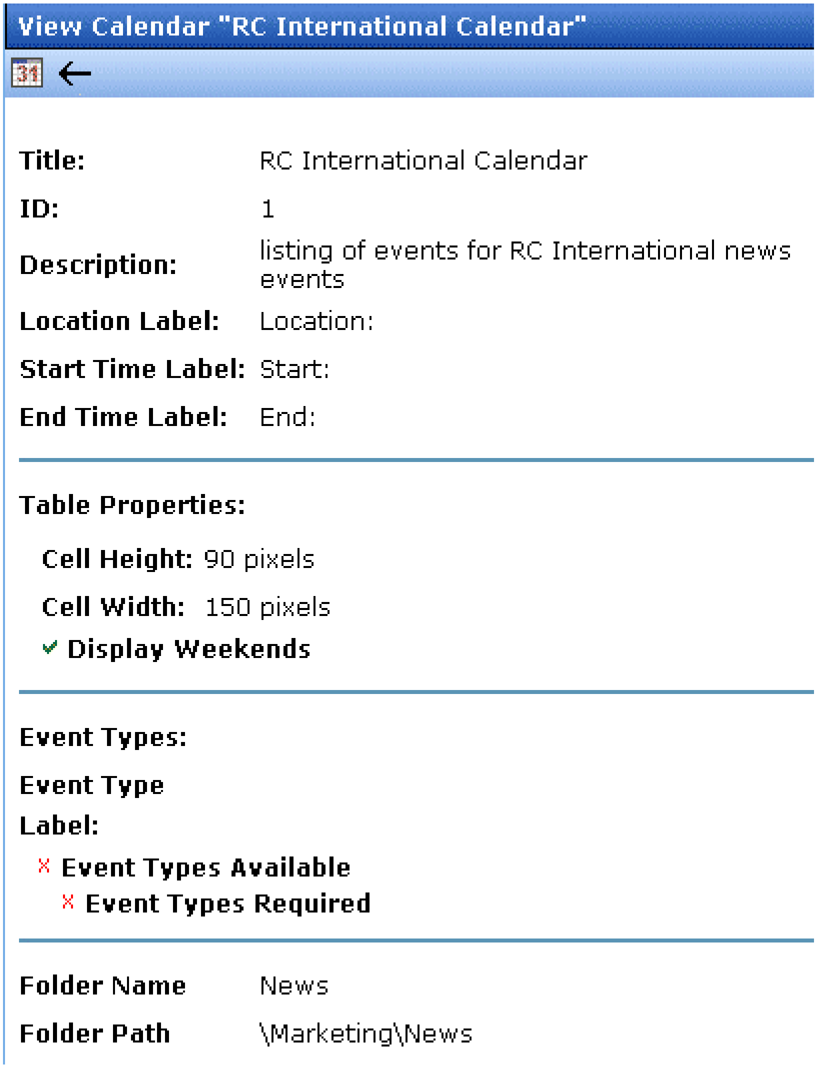
3. The Calendar Modules screen appears. It lists all calendars in **Ektron CMS300**.

Calendar modules

Title	ID	Description	Path
RC International Calendar	1	listing of events for RC International news events	\

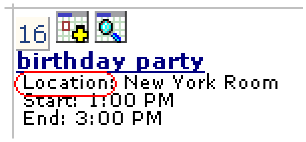
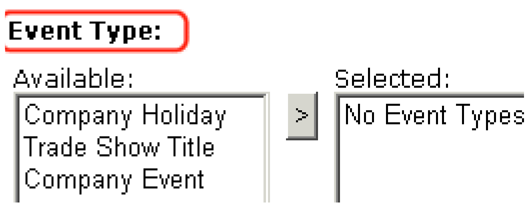
NOTE Only system administrators can create a new calendar.

4. Click a calendar.
5. The View Calendar screen appears, showing information about the calendar.



The following table explains the fields on the View Calendar screen.

Field	Description
Title	Title given to the calendar. The title identifies the calendar within the Workarea.
ID	ID number automatically assigned to calendar. This is used to display the calendar on a Web page.

Field	Description
Description	Description given to the calendar.
Location Label	Label for the calendar's location information. This label appears on the calendar when a location is assigned to a calendar event. 
Start Time Label	Label for the calendar's start time. This appears on the calendar when a start time is assigned to a calendar event.
End Time Label	Label for the calendar's end time data. This appears on the calendar when an end time is assigned to a calendar event.
Cell Height	Height of cells in the calendar. Helps determine the size of each calendar date's block.
Cell Width	Width of cells in the calendar. Helps determine the size of each calendar date's block.
Table Properties: Display Weekends	A green check ( ) means the calendar displays every day of the week. A red X ( ) means the calendar displays weekdays only.
Event Type Label	Indicates if event types are assigned to this calendar. *See Also:* "Understanding Event Types" on page 203 One section of the Add Calendar Events screen displays available event types and lets the user assign them to the event.  By default, this text is **Event Type:**. Your system administrator can edit the text.
Event Types Available	A green check ( ) means you can add event types to the calendar.

Field	Description
Event Types Required	A green check ( ) means that when entering a calendar event, you must assign an event type to it.
Folder Name	Name of content folder to which the calendar is assigned for permission purposes. You can only add, edit or delete events for calendars in folders to which you have been granted permission.
Folder Path	Complete path to the calendar's content folder.

The View Calendar screen may contain the following toolbar buttons that let you perform other tasks.

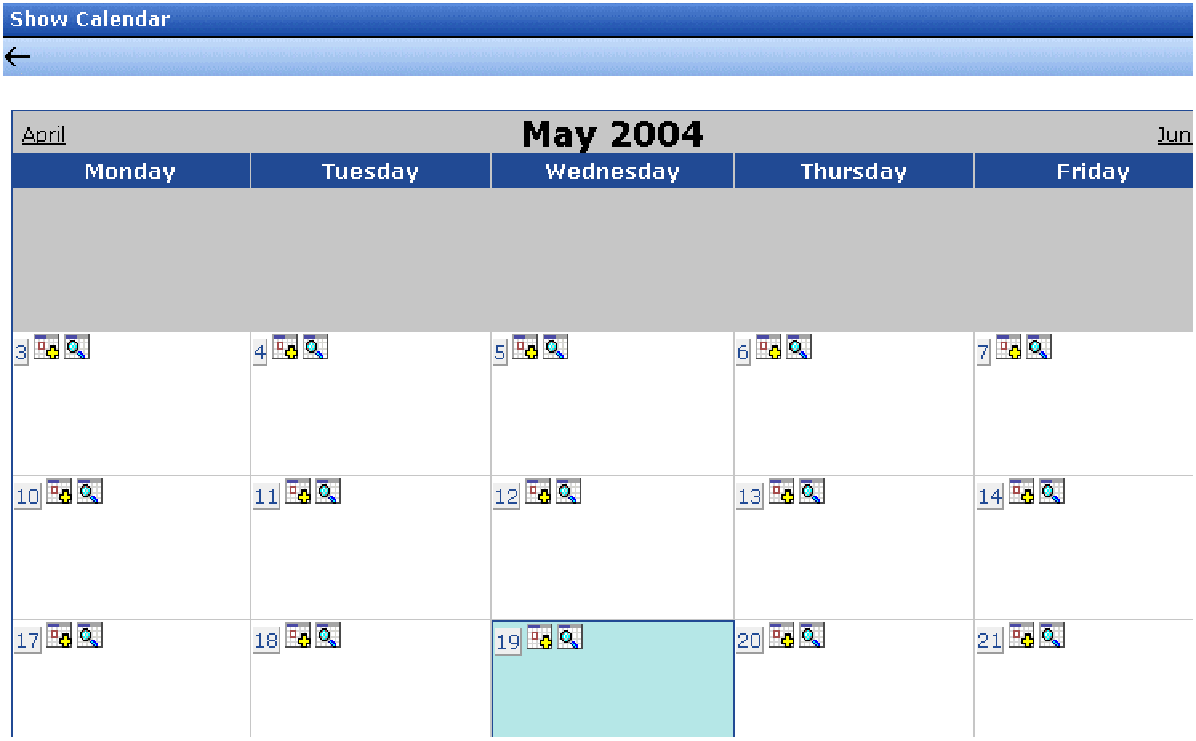
Button	Name	Description	More Information
	View Calendar	Show calendar in the Workarea	”Viewing a Calendar” on page 197
	Back	Return to previous screen	

Viewing a Calendar

NOTE This section explains how to view a calendar and enter calendar events from the Workarea. Once a calendar is available on your Web site, you can also perform these actions by logging in and navigating to the calendar on your site.

To view a calendar, follow these steps.

1. Access the View Calendar screen for the calendar you want to see, as described in ”Accessing the View Calendar Screen” on page 193.
2. Click the View Calendar ( ) button.
3. The calendar appears.

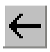


4. If you want to view events of a certain type only, click the **Filter by Event Type** drop-down list (illustrated below). Then, choose an event type. *See Also:* "Understanding Event Types" on page 203

The page is refreshed, and the calendar displays events of that type only.

NOTE The style sheet applied to the calendar in the Workarea is different from the one applied to the calendar on the sample Web site.

From here, you can perform the following tasks. Note that the Add and View buttons appear on each calendar day, while the Return button is on the toolbar at the top of the screen.

Click on	Action	More Information
	Add Calendar Event	”Adding a Calendar Event” on page 199
	View Calendar Events	”Adding a Calendar Event” on page 199
	Return to Previous Screen	Return to previous screen
Event title within calendar (sample below) 	Jump to calendar event’s Web page (if available)	

Adding a Calendar Event

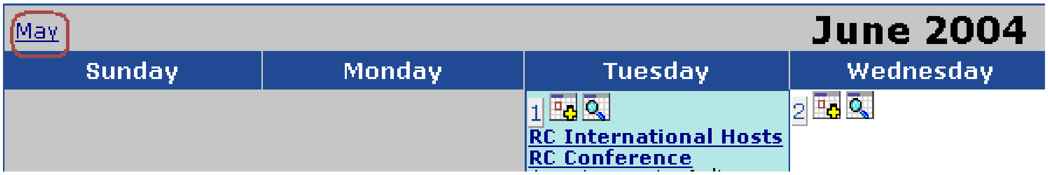
NOTE You can only add a calendar event if you have add or edit permission for the calendar’s folder.

To add a calendar event, follow these steps.

1. Access the calendar to which you want to add an event, as described in ”Viewing a Calendar” on page 197.

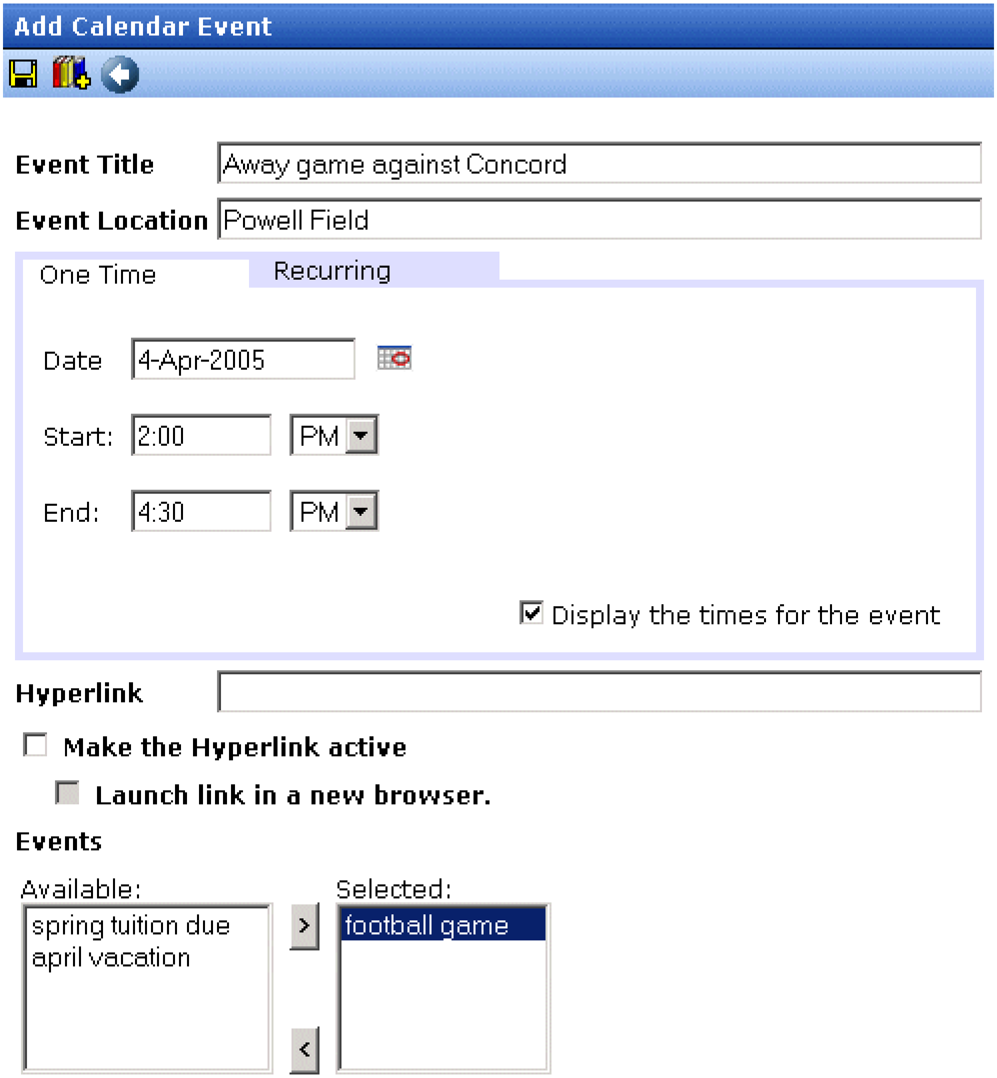
NOTE You can also add a calendar event after viewing the View Events screen. *See Also:* ”Viewing a Calendar Event” on page 208

2. Navigate to the month and day for which you want to add a calendar event.



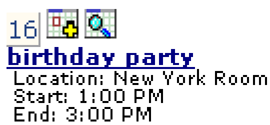
3. Click the Add Event () button.
4. The Add Calendar Event screen appears.

NOTE Folder information appears at the bottom of the screen only if the folder has sub-folders or content blocks under it.



5. Respond to the fields using the following table as a reference.

Field	Description
Event Title	Enter a title for the event. Note: If you enter a quicklink in the **Hyperlink** field, the quicklink's content block title replaces this title. You can then edit the new title if desired.

Field	Description
Event Location	If desired, enter a location for the event (for example, Conference Room 1 or Cafeteria).
One Time/ Recurring	If you want to enter a one-time only event, continue reading. If you want to add a recurring event, see ”Adding a Recurring Event” on page 203.
Date	Click the calendar icon ( ) to display a calendar. From it, select a start date.
Start Time	Select a start time for the event.
End Time	Select an end time for the event.
Display the times for the event	Check this box if you want the calendar to display the event’s start and end times (illustrated below). 
Hyperlink	You can link a Web page to this calendar event. The Web page could contain more information about the event, directions to it, etc. If you insert a hyperlink, when this event appears on the calendar, the reader can click the event to jump to that page. To enter any page on the internet, enter its Web address. For example, `www.ektron.com`. To link to a content block on your Web site, click the library button ( ). (This type of link is known as a *quicklink*.) The Quicklinks dialog appears, and you can navigate to the content block. The last published version of a linked content block appears. If a content block has never been published, nothing appears. If you select a hyperlink, the title of the selected content block replaces any text in the **Event Title** field. You can edit the new title if desired. Note: You can add a new content block from the Quicklink dialog. See ”Adding a New Content Block for a Calendar Event” on page 205

Field	Description
Make the Hyperlink Active	Check this box to activate the link assigned in the **Hyperlink** field. If you do, when a user views the calendar, he can click the event to “jump” to the specified Web page.
Launch link in a new browser	Check this box if you want the Web page or quicklink specified in the **Hyperlink** field to appear in a new browser window when someone clicks it. If you do not check this box, the new Web page replaces the current one when the link is clicked.
Event Type	Note: This field only appears if your system administrator set up one or more event types for this event. *See Also:* ”Understanding Event Types” on page 203 To apply an event type to this event, click an Event Type from the right column. Then, click the Right Arrow ( ) to move the event type to the **Selected** column. Repeat for each event type you want to assign to the event.

NOTE For information about adding a new content block while adding a calendar event, see ”Adding a New Content Block for a Calendar Event” on page 205.

6. Click **Save** ( ).

Understanding Event Types

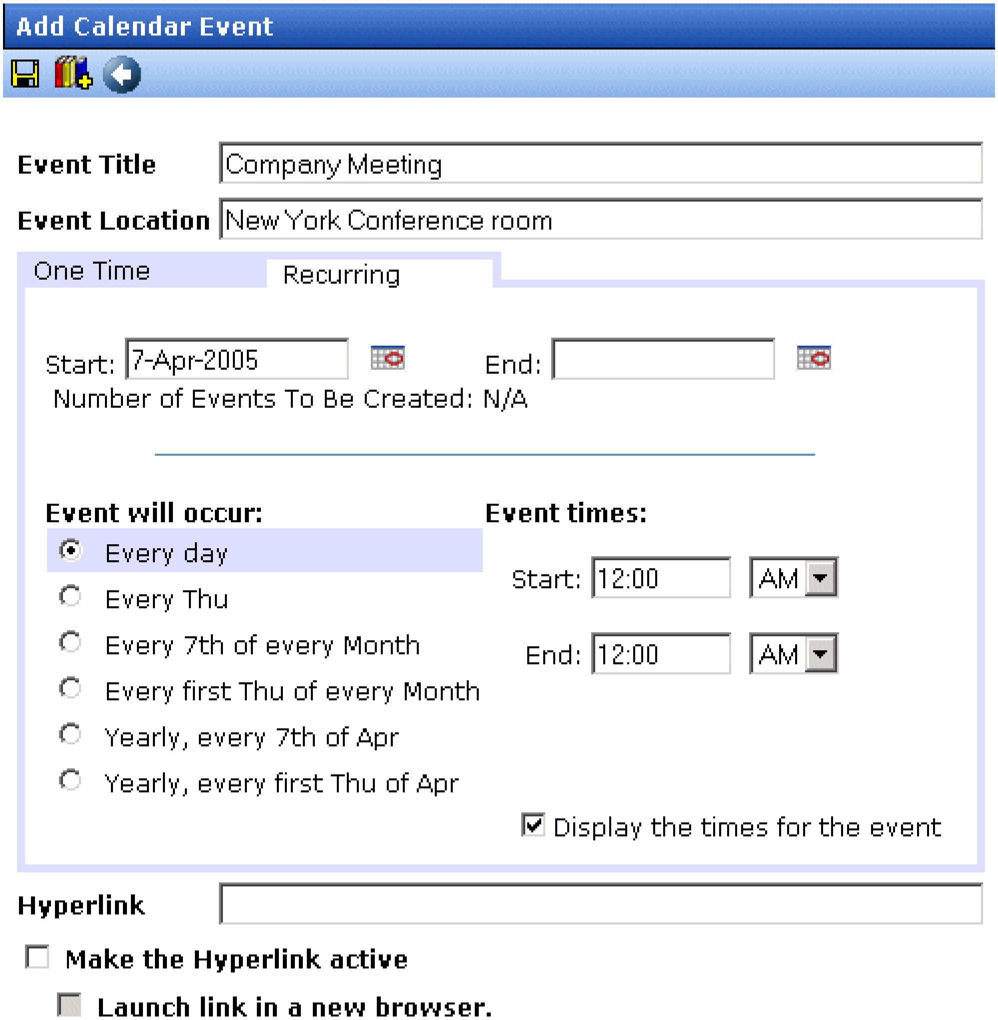
Your system administrator can set up types of calendar events. For a personal or workgroup calendar, examples might be staff meetings, employment interviews, conference calls. For an educational institution, examples might be academic deadlines, sporting events, and tuition due dates.

If you assign a type to an event while creating it, you can later display only events of that type. This feature lets the viewer temporarily suppress unwanted events. As a result, the calendar display is cleaner, because it only shows relevant information.

Adding a Recurring Event

You can assign an event to occur multiple times on a calendar. To do so, follow these steps.

1. Add a calendar event (as described in ”Adding a Calendar Event” on page 199).
2. Click the **Recurring** tab to assign the event for more than one day.



3. Refer to the table below to complete to the Recurring fields.

Field	Description
Start Date	Click the calendar icon ( ) to display a calendar. From it, select a start date.

Field	Description
End Date	Click the calendar icon ( ) to display a calendar. From it, select an end date for the series of recurring events.
Event will occur	Select the frequency of the event from among the choices.

4. Finish your edits.

For documentation of	See
Start Time	"Start Time" on page 202
End Time	"End Time" on page 202
Display the times for the event	"Display the times for the event" on page 202
Hyperlink	"Hyperlink" on page 202
Make Hyperlink Active	"Make the Hyperlink Active" on page 203
Launch Link in New Browser	"Launch link in a new browser" on page 203
Event Types	"Event Type" on page 203

5. Click the Save button ( ).

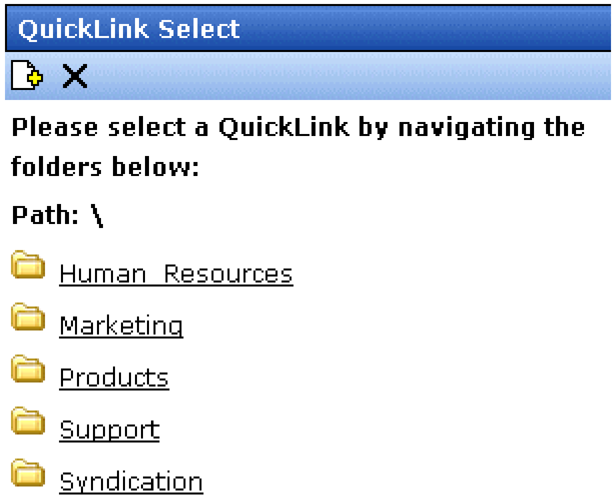
Adding a New Content Block for a Calendar Event

While adding a new event to a calendar, you can add a new content block. You might use the content block to supply additional information about the event.

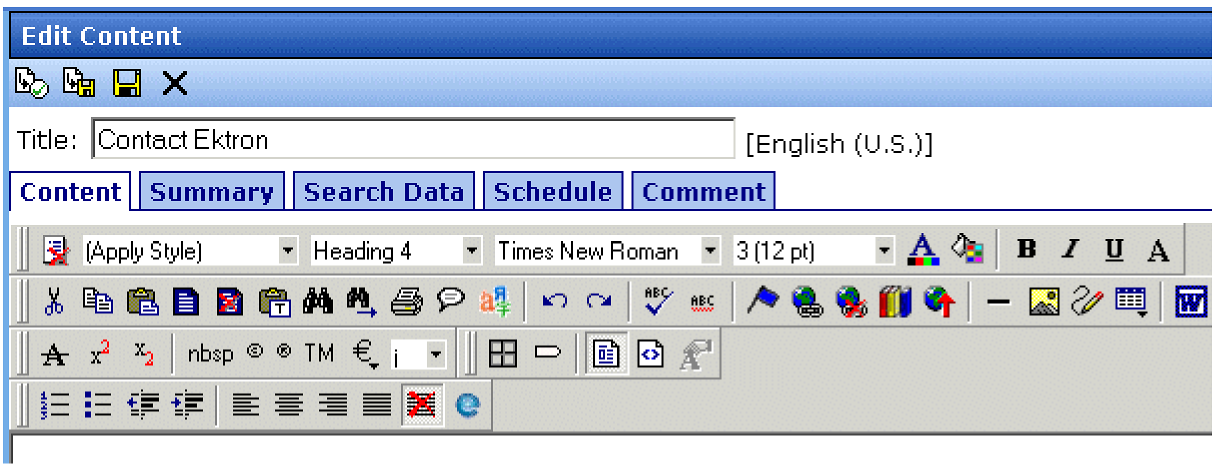
You add the new content block while adding a quicklink. As a result, the event will include a quicklink to the new content block.

To do so, follow these steps.

1. Access the Add Calendar Event screen, as described in "Adding a Calendar Event" on page 199.
2. Enter event information, such as title, location, date, etc.
3. Click the Add Library ( ) button.
4. The Quicklink Select screen appears.

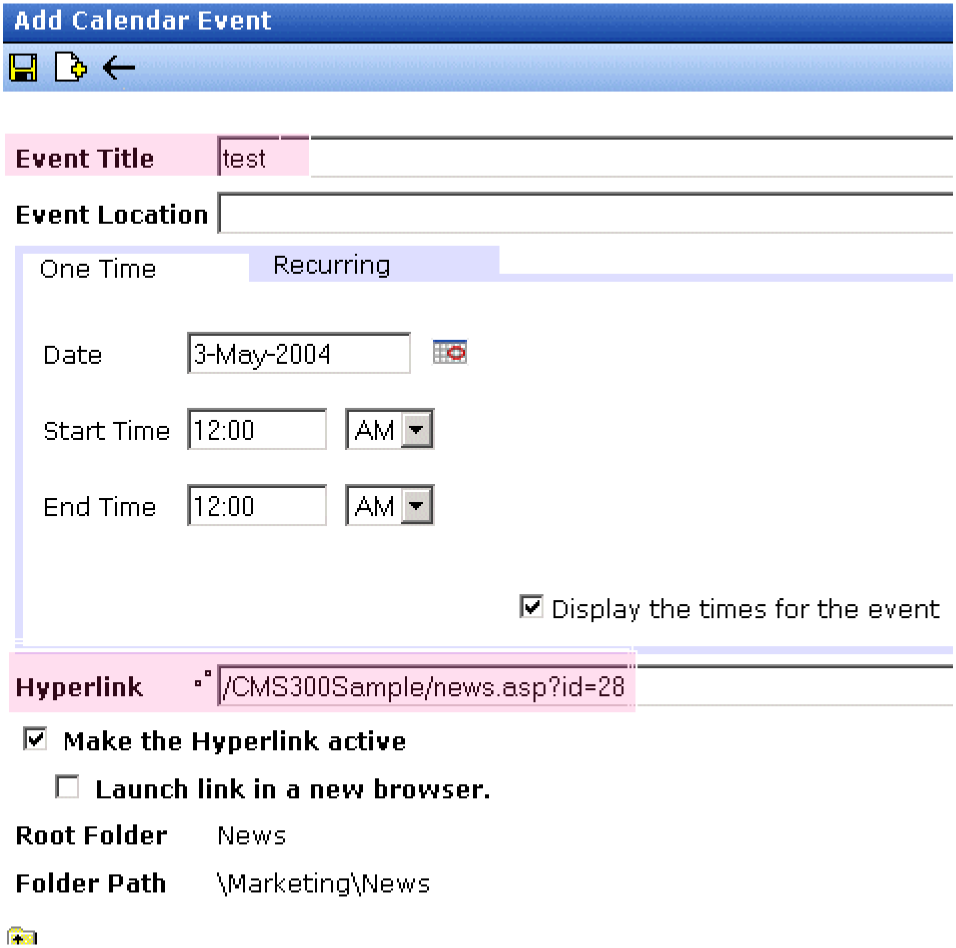


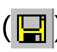
5. Click the Add Content ( ) toolbar button.
6. The Add New Content screen appears.



7. Enter content into the new content block.
8. Click a workflow button from the toolbar at the top of the screen. For more information about creating a content block, see "Adding a Content Block" on page 37.

9. The content is saved, the window closes, and the Add Calendar Event screen appears with the new content block added to the content tree.
10. Click the title of the new content block.
11. The **Event Title** and **Hyperlink** fields are populated with information from the selected content block.

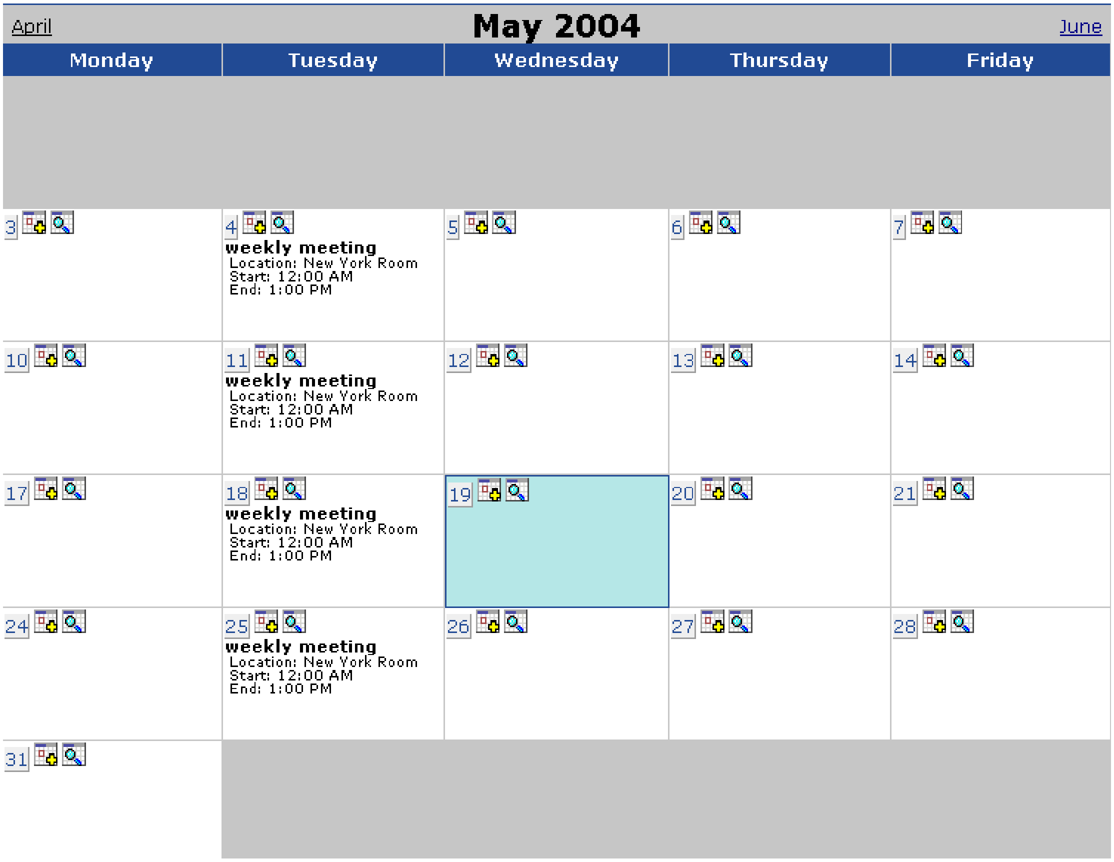


12. Make changes to the fields using the table in "Adding a Calendar Event" on page 199.
13. Click the Save button ().

Viewing a Calendar Event

Once events are added to a calendar, you can easily view them. To view a calendar event, follow these steps.

1. Access the Show Calendar screen for the calendar that contains the event you want to view, as described in "Viewing a Calendar" on page 197.
2. Place the cursor on the event you want to view.



3. Click the View Events ( ) button.

   The View Events screen appears, listing all calendar events for that date. From this screen, you can perform the following functions:

   - Add a new event (*See Also:* "Adding a Calendar Event" on page 199)
   - View, edit, and delete an existing event

Editing Calendar Events

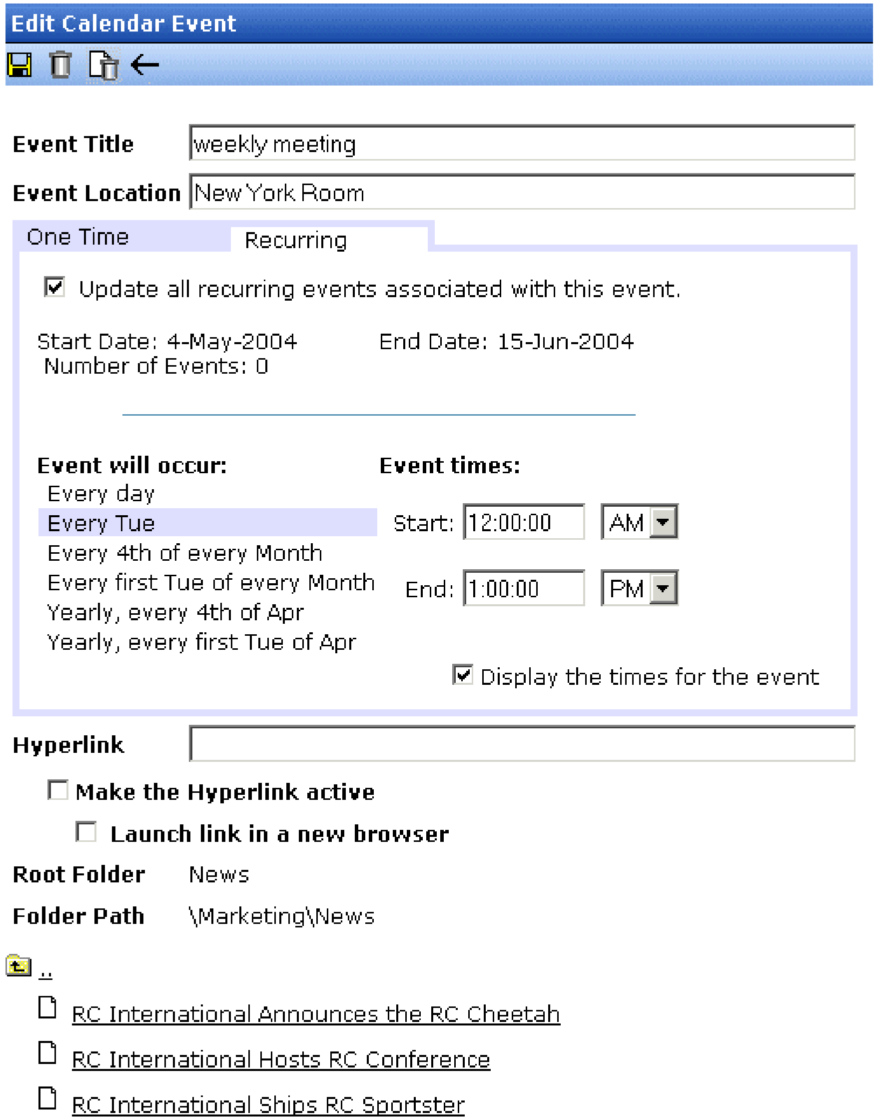
The section explains how to edit a single event or a recurring series of events.

NOTE You can only edit a calendar event if you have edit permission for the folder to which the calendar is assigned.

Editing a Single Event

After a calendar event is added to a calendar, you may edit it to change the title, location, times, etc. To edit a calendar event, follow these steps.

1. Access the View Calendar Events screen for the date that contains the event you want to edit, as described in ”Adding a Calendar Event” on page 199.
2. Click the event you want to edit.
3. The Edit Calendar Event screen appears.



4. Update the fields using the table described in "Adding a Calendar Event" on page 199 as a reference.

5. Click the Save button ( ).

Editing Recurring Events

After a recurring series of events is added to a calendar, you may edit it to change the title, location, hyperlink, and event type.

NOTE You cannot edit event dates or times. To change those, delete and re-enter the series of events.

To edit a recurring series of events, follow the steps in ”Editing a Single Event” on page 209. The only difference is the **Update all recurring events associated with this event** box.

To apply the edits to only the instance of the event that you selected, uncheck the box. To apply the changes to *all* instances, check the box.

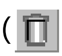
Deleting Calendar Events

The section explains how to delete a single event or a recurring series of events.

NOTE You can only delete a calendar event if you have add, edit, or delete permission for the content folder to which the calendar is assigned.

Deleting a Single Occurrence Calendar Event

You can easily delete calendar events that are no longer needed, or do not belong to the calendar they were added to. To delete a calendar event, follow these steps.

1. Access the View Calendar Events screen for the date that contains the event you want to delete, as described in ”Adding a Calendar Event” on page 199.
2. Click the event you want to delete.
3. The Edit Calendar Event screen appears.
4. Click the Delete button ().
5. A confirmation message appears.
6. Click **OK**.

Deleting a Recurring Calendar Event

You can delete a single event in a recurring series or all events in the series.

Deleting a Single Recurring Event

1. Access the View Calendar Events screen for the date that contains the event you want to delete, as described in "Adding a Calendar Event" on page 199.
2. Click the event you want to delete.
3. The Edit Calendar Event screen appears.
4. Click the Delete Content button ().
5. A confirmation message appears.
6. Click **OK**.

Deleting All Events in a Recurring Series

1. Access the View Calendar Events screen for any date that contains an events in the series that you want to delete, as described in "Adding a Calendar Event" on page 199.
2. Click the event in the series that you want to delete.
3. The Edit Calendar Event screen appears.
4. Click the Delete This and Associated Recurrring Events button ().
5. A confirmation message appears.
6. Click **OK**.

Managing Tasks

A task is a request from one user to another to perform an action within **Ektron CMS300**. Examples of a tasks include:

- updating content
- publishing a content block
- updating an image
- reordering a collection

The Tasks folder displays all tasks that are either assigned to you or that you assigned to another user or user group. You can also assign tasks to yourself.

A task may or may not be related to a specific content block. If it is, you can access a content block then “attach” a task to it. This kind of task is managed just like the other tasks, but you can also view and update it via the attached content block. For more information, see ”Viewing a Task” on page 224.

This chapter explains how to work with tasks through the following topics.

- ”Creating a Task via the Task Folder” on page 214
- ”Creating a Task via a Content Block” on page 224
- ”Viewing a Task” on page 224
- ”Editing a Task” on page 230
- ”Adding Comments to Tasks” on page 230
- ”Deleting a Task” on page 233
- ”Viewing a Task’s History” on page 234
- ”Task Module Toolbar” on page 235

Creating a Task via the Task Folder

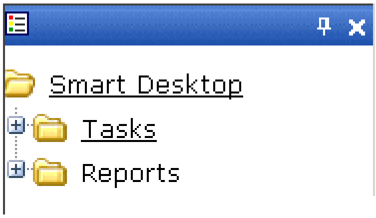
This topic consists of the following subtopics:

- "Accessing the Tasks Folder" on page 214
- "Creating the Task via the Task Folder" on page 215
- "Adding a Task Category and Task Type" on page 220

Accessing the Tasks Folder

To access the Tasks folder, follow these steps.

1. Access your Smart Desktop, as explained in "Understanding the Smart Desktop" on page 14.
2. The Smart Desktop folders appear in the top left frame.



3. Click the **Tasks** folder. The following subfolders appear:

- **Assigned To Me** - tasks assigned to you
- **Assigned By Me** - tasks you assigned to someone else
- **Created By Me** - tasks you created
- **Assigned To User** - search for tasks assigned to a user
- **Not Started** - tasks whose state is set to not started
- **Active** - tasks whose state is set to Active
- **Awaiting Data** - tasks whose state is set to Awaiting Data
- **On Hold** - tasks whose state is set to On Hold
- **Pending** - tasks whose state is set to Pending
- **Reopened** - tasks whose state is set to Reopened
- **Complete** - tasks whose state is set to Reopened

You can click any folder to view only tasks in that category.

Also, the View Tasks screen appears in the right frame, listing all tasks assigned to you, or assigned by you.

From this page, you can view, sort, update, or add tasks. To learn more about the View Tasks screen, see ”Viewing a Task” on page 224.

To learn about sorting by Task Type, see ”Sorting Tasks By Task Type” on page 228.

Creating the Task via the Task Folder

See Also: ”Task Module Toolbar” on page 235

To create a task, follow these steps.

1. Access your Tasks folder, as described in ”Accessing the Tasks Folder” on page 214.
2. Click the Add button ( ).
3. The Add Task screen appears.

4. Enter information for the task using the following table.

Field	Description
Task Title	Enter a title for the task (for example, Update Content). The title appears in the left column of the View Tasks screen.
Assigned To	Your user name appears. • If you do not have Redirect permissions, you cannot assign tasks to other users. • If you have Redirect permissions, your user name appears followed by **Select User or Group**. To assign the task to yourself, proceed to the next field. To assign the task to someone else, click **Select User or Group** and choose a user or group. When you complete the screen, an email is sent to the selected user or user group informing him of the assigned task. Note: email is only sent to the user or user group if email notification is enabled for **Ektron CMS300**.
Language	Select the language of the user who will perform the task.
Content	If this task involves a content block, select it. When you click **Select**, a new window appears. From this window, you can navigate through folders to find the content block. You can only select a content block whose language matches the user language selected above. *See Also:* "Selecting a Content Block for the Task" on page 218
Priority	Select the priority of the task. Your choices are High, Normal and Low. The priority appears on the View Tasks screen. A user can sort tasks on the screen by priority .
Task Category	Select a category for the task. When a Task Category is chosen, the Task Type drop down box is auto filled with task types associated with that category. *See Also:* "Adding a Task Category and Task Type" on page 220.
Task Type	Select the Task Type for this task. You must specify a Task Category before you assign a task type.*See Also:* "Adding a Task Category and Task Type" on page 220.

Field	Description
Add	By clicking the Add link, you can add Task Categories and Task Types. *See Also:* ”Adding a Task Category and Task Type” on page 220 Note: If you Add a Task Category or Task Type while adding a task, the task information (Task Title, Assigned To, Language, etc.) entered will be lost when the screen refreshes.
Edit	By clicking the Edit link, you can edit the Task Type chosen in the Task Type drop down box. *See Also:* ”Editing a Task Type” on page 222 Note: If you edit a Task Type while adding a task, the task information (Task Title, Assigned To, Language, etc.) entered will be lost when the screen refreshes.
State	Choose a status for the task. Your choices are: • Not Started • In Progress • Completed • Waiting on Someone else • Deferred If the task is not linked to a content block, you can assign it to any state. However, if you later link the task to a content block (via the **Content** link above), the state switches to Not Started. The state appears on the View Tasks screen. A user can sort tasks on the screen by state.
Start Date	Using the calendar button, choose a start date for the task. The start date appears on the View Tasks screen. A user can sort tasks on the screen by start date.
Due Date	Using the calendar button, choose the date by which the task needs to be completed. The due date appears on the View Tasks screen. A user can sort tasks on the screen by due date.

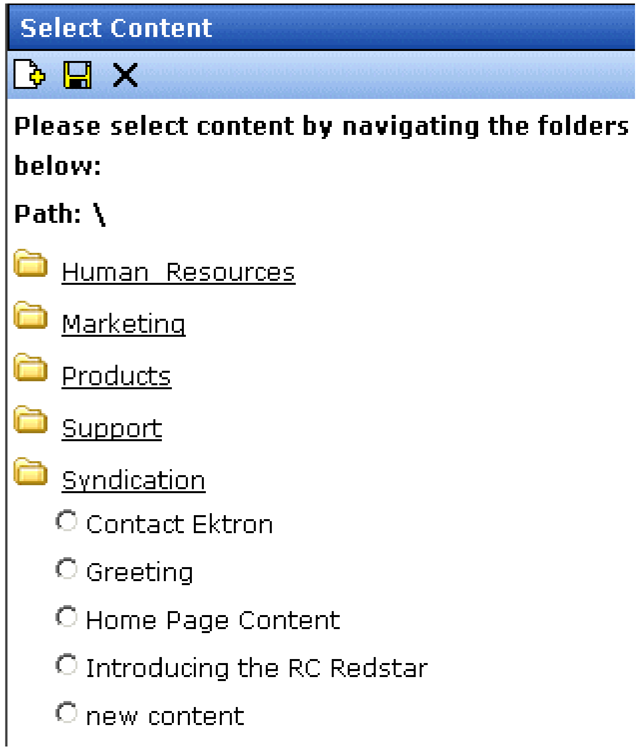
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Description</td><td>Add additional information to describe the task. The description appears on the View Task screen (circled below).

</td></tr>
</table>

5. Click the Save button ( ).
6. If email notification is enabled, an email is sent to the user/user group to which the task was assigned.

Selecting a Content Block for the Task

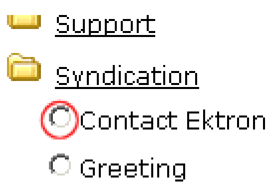
When you click **Select Content** from the Add Task screen, the Select Content screen appears. It shows only content blocks in the selected language.



You should only select a content folder for which you have permissions.

To select an existing content block to assign to the task, follow these steps.

1. Navigate to the content block. (Click any folder to open it.)
2. Click the circle to the left of the block.



3. Press the Save button ().

Adding a Task Category and Task Type

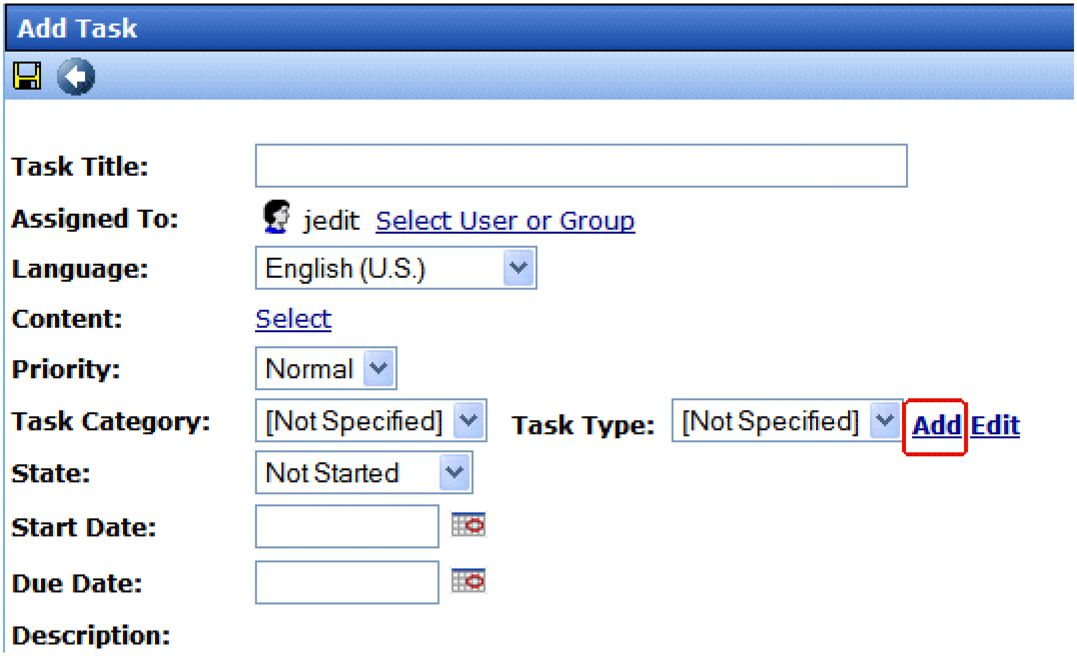
Task Categories and Task Types let users and administrators sort task by user defined categories and types.

By clicking the Add link, located next to the Task Type drop down box, you can add Task Categories and Task Types. This allows you to add categories and types without leaving the Add Task screen.

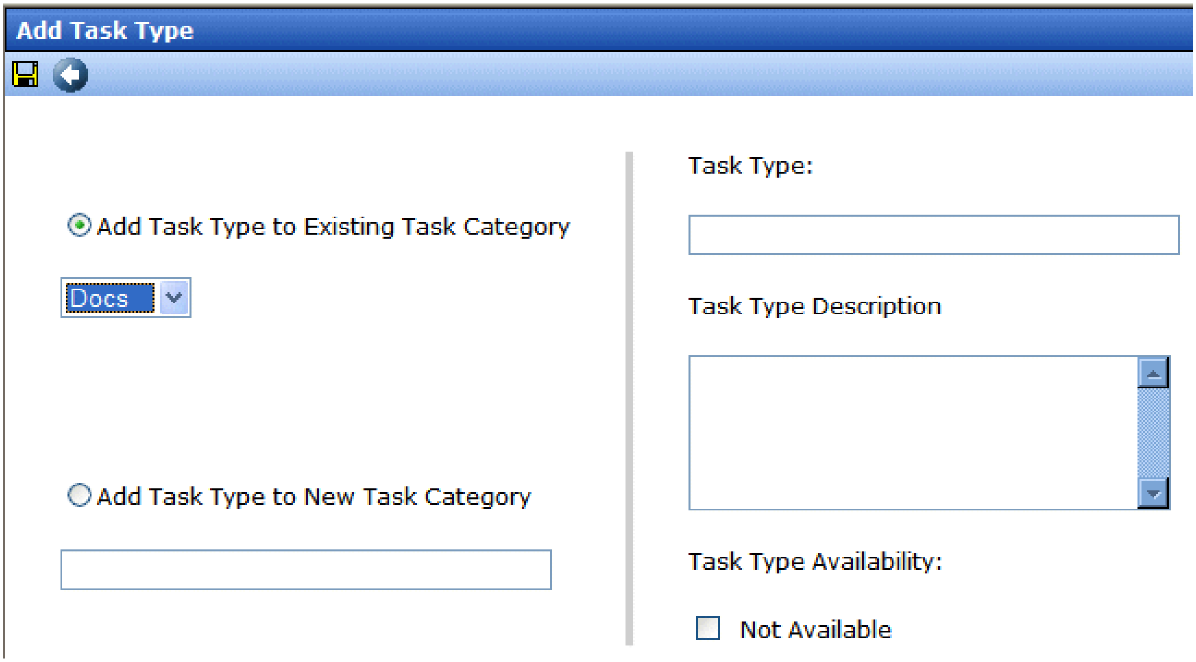
NOTE Administrators can also add and edit Task Categories and Task Types from the Workarea by clicking **Settings > Configurations > Task Types**. Ektron CMS400.NET Administrators Manual > “Managing Tasks” > “Task Categories and Types”.

To add a Task Category and a Task Type, follow these steps.

1. Go to the Add Task screen, as described in ”Creating the Task via the Task Folder” on page 215.
2. Click the Add link, next to the Task Type drop down box.



3. The Add Task Type screen appears.



From this screen you can perform the following:

- Add a task type to an existing task category
- Create a new task category
- Add a new task type
- Add a task type description
- Define task type availability. *See Also:* "Task Type Availability" on page 222.

NOTE As a user, if you set the Task type to Not Available, you cannot edit the Task Type after that. To make the Task Type available, See your administrator. Task Type availability is explained in the Ektron CMS300 Administrators Manual > "Managing Tasks" > "Task Categories and Types" > "View Categorization Screen"> "Task Type Availability"

4. Enter your information.
5. Click Save.
6. Your new Task Category and Task Type appear in the drop down boxes.

Task Type Availability

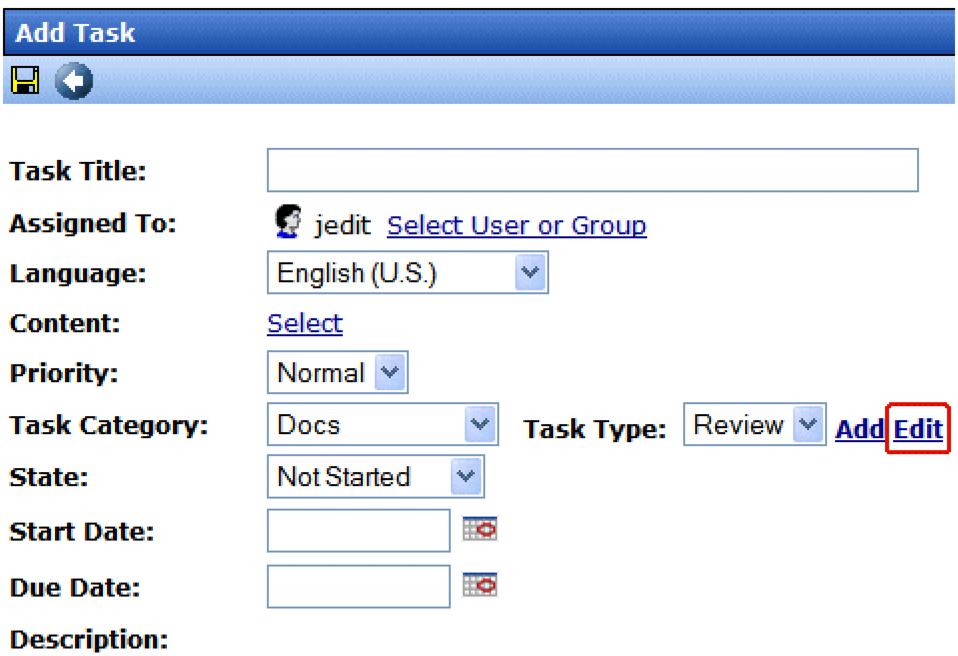
Task types can be hidden from users by clicking the Not Available check box in the Add Task Type and Edit Task Type screens. By making Task Types not available, you can make the Task Type unavailable without deleting it.

Editing a Task Type

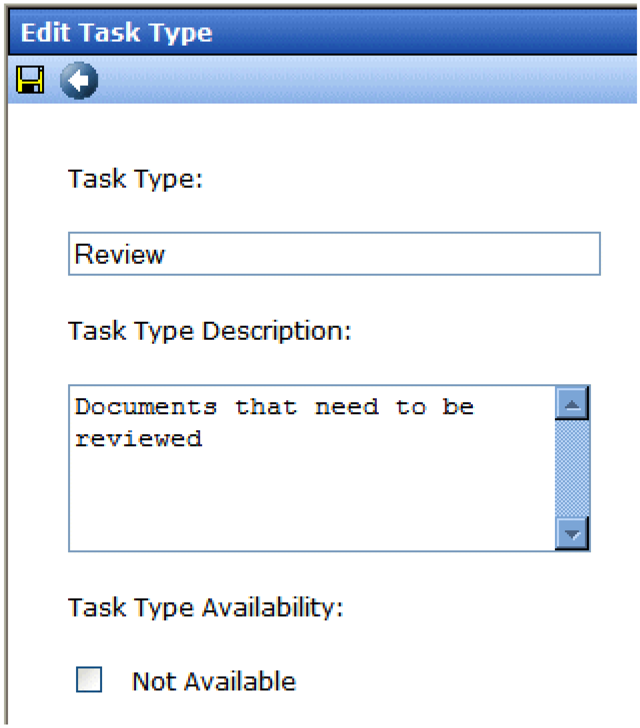
From the Add Task screen, you can edit a Task Type. This will allow you to change the Task Type name, Task Type description, and Task Type availability.

To edit a task type, follow these steps.

1. Go to the Add Task screen, as described in "Creating the Task via the Task Folder" on page 215.
2. Choose a Task Category and the Task Type to edit.
3. Click the Edit link, next to the Task Type drop down box.



4. The Edit Task Type screen appears.



From this screen you can edit the following:

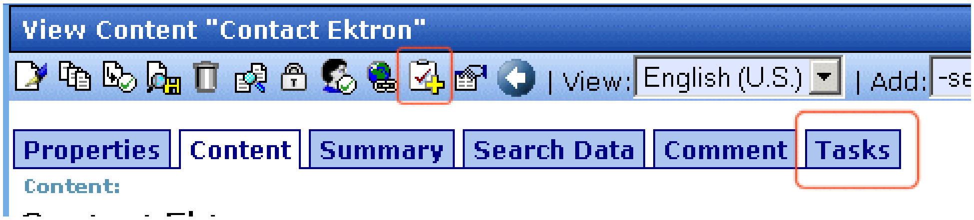
- Task Type
- Task Type Description
- Task Type Availability. *See Also:* ”Task Type Availability” on page 222

NOTE As a user, if you set the Task type to Not Available, you cannot edit the Task Type after that. To make the Task Type available, see your administrator. Task Type availability is explained in the Ektron CMS300 Administrators Manual > “Managing Tasks” > “Task Categories and Types” > “View Categorization Screen“> “Task Type Availability”

5. Edit the information.
6. Click Save ().
7. The Task Type information is changed.

Creating a Task via a Content Block

The above section describes assigning tasks from the Tasks folder. You can also assign task via the content folder, as illustrated below.



Assigning a Task from the View Content Screen

To assign a task from the View Content screen, follow these steps.

1. Access the View Content screen for the content block to which you want to “attach” in a task, as described in ”Viewing a Content Block” on page 33.
2. Click the Add Task button ( ).
3. Follow the directions in ”Creating the Task via the Task Folder” on page 215. The only differences are

- the content block’s ID number and title appear on the screen
- the language of the content block is the default language

Viewing a Task

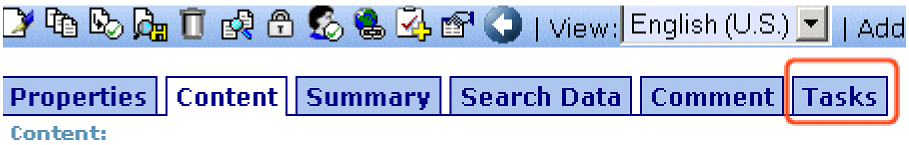
Once a task is added, (with the exception of Administrators) only the user who assigned the task and those to whom the task was assigned can view it.

To view a task, follow these steps.

Viewing a Task from the Content Folder

1. Access the Contents folder from the left side of your Workarea.
2. Select the content block associated with the task.

3. Click the **Tasks** tab.



4. The page lists all tasks assigned to the content block.
5. Select a task.

From the view task page, you can add a comment to the task. See ”Adding Comments to Tasks” on page 230 for more information.

Viewing a Task from the Tasks Folder

To view a task from the Tasks folder, follow these steps.

1. From the Smart Desktop, select the Tasks folder.
2. Using one of the options, click the task you want to view.
3. The View Task screen is displayed. From here, you can perform these tasks.

- ”Editing a Task” on page 230
- ”Deleting a Task” on page 233
- ”Adding Comments to Tasks” on page 230

See Also: ”Task View Options” on page 225, ”Sorting Tasks By Task Type” on page 228, ”Sorting Tasks By Column” on page 229

Task View Options

Beneath the main task module folder, several view screens display all tasks filtered by specified categories. 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 change a tasks state to another state. To select all tasks on a screen, click the check box in the header row (illustrated below).

Folder	Displays these tasks	Action you can perform from view screen
Tasks	All tasks assigned to you, that are in one of the following states. • not started • active • awaiting data • on hold • reopened • pending	• Click on the task to view it • Add a task • Sort tasks by Task Type • Sort tasks by column
Assigned To Me	All open tasks assigned to you	• Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
Assigned By Me	All open tasks you assigned to yourself or others	• Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
Created by Me	All open tasks you created	• Click on the task to view it • Sort tasks by Task Type • Sort tasks by column

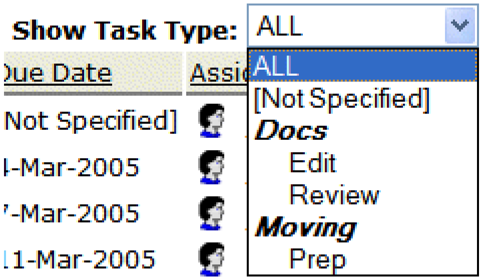
Folder	**Displays these tasks**	**Action you can perform from view screen**
Assigned to User	All open tasks assigned to a user you select	• Select any user and view all tasks assigned to that user. To do so, select new user from **Assign to User** drop down list and click **Get Tasks**. • Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
Not Started	All whose state is Not Started	• Change to the following states: **Awaiting Data** **On Hold** • Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
Active	All whose state is Active	• Change to the following states: **Awaiting Data** **On Hold** • Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
Awaiting Data	All whose state is Awaiting Data	• Change to the following states: **Active** **On Hold** • Click on the task to view it • Sort tasks by Task Type • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
On Hold	All whose state is On Hold	• Change to the following states: **Active** **Awaiting Data** • Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
Pending	All whose state is Pending	• Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
Reopened	All whose state is Reopened	• Click on the task to view it • Sort tasks by Task Type • Sort tasks by column
Completed	All whose state is Completed	• Change to the following state: **Archive** • Click on the task to view it • Sort tasks by Task Type • Sort tasks by column

Sorting Tasks By Task Type

On every View Task page, you can sort tasks by the Task Type assigned to the task. You sort by Task Type using the Show Task Type drop down box. It is located in the upper right corner of the workarea.

Note Task Types only appear in the Show Task Type dropdown box when they have been added to a task.



To sort by Task Type, click the drop down box and choose a Task Type. Words in ***bold Italics*** are Task Categories. You cannot sort by Task Categories.

Sorting Tasks By Column

On every View Tasks page, you can sort the information by most columns. Information can be sorted by the following.

Column	Click to sort tasks
Title	Alphabetically by title of associated content block
CID	Content block ID number
State	By task state, from first to last
Priority	By task priority. High appears first, followed by Normal then Low
Due Date	By due date, beginning with dates closest to today
Assigned To	Alphabetically by user to whom the task is assigned Note: Once set, a task's assigned-to user does not change throughout the life of the task.
Assigned By	Alphabetically by user who assigned the task

Editing a Task

You can change task information, such as

- Title
- Assigned to
- Language
- Content
- Priority
- Task Category
- Task Type
- Status (State)
- Due Date
- Start Date
- Description

To edit a task, perform the following steps:

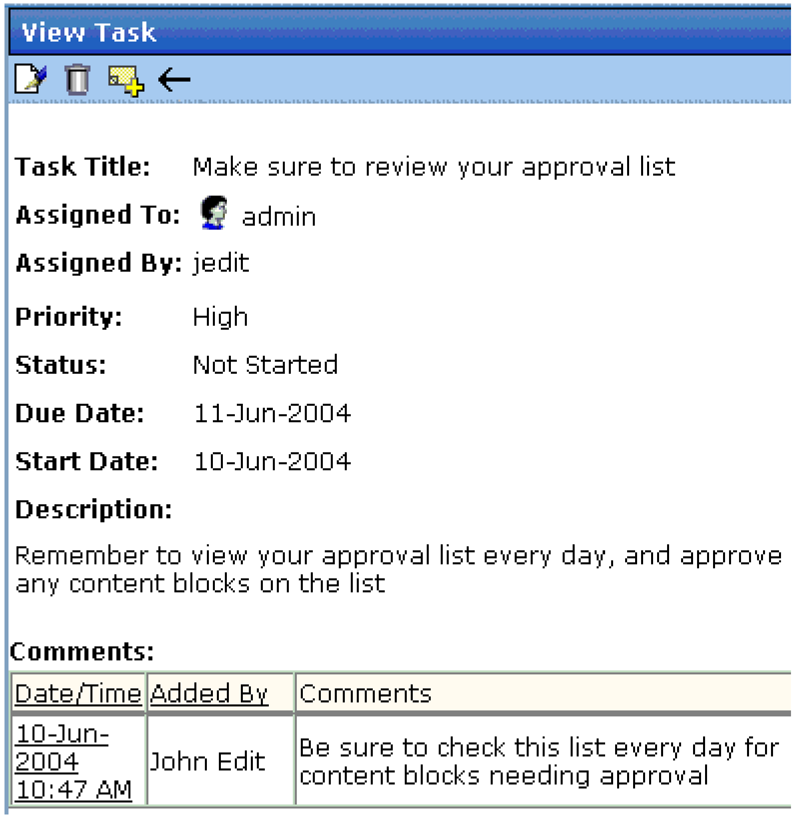
1. Access the view task page for the task, as described in "Viewing a Task" on page 224.
2. Click the Edit button ( ).
3. The Edit Task screen appears.
4. Edit the task.
5. Click the Update button ( ) to save the changes.

Adding Comments to Tasks

You can add comments to an assigned task if you want to provide additional information about its status. For example, if you update a task's status from *In progress* to *Waiting on Someone Else*, you can use a comment to describe the status change, such as:

```
left voice mail with John with questions about
his changes to the home page
```

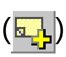
Comments appear at the bottom of the View Tasks screen (Illustrated below).



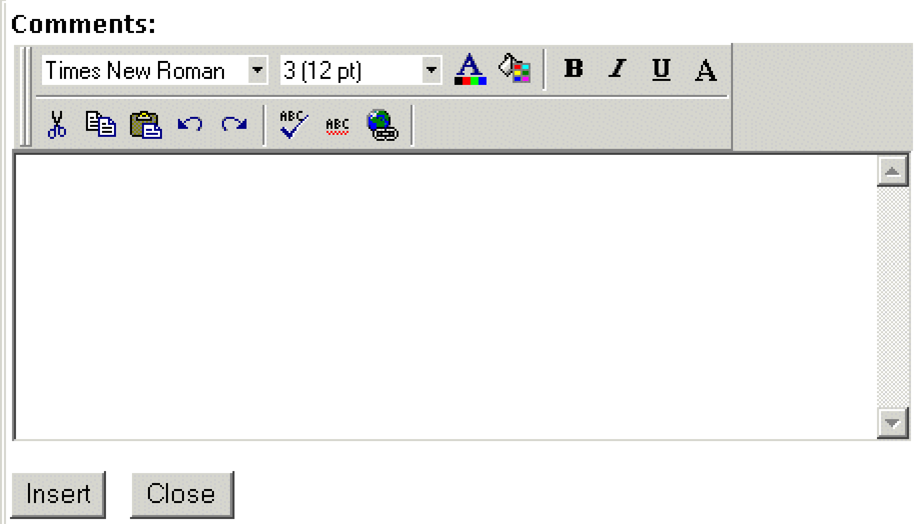
Several comments can be added to a task to record its progress from assignment to completion.

To add a comment to a task, follow these steps.

1. Access the View Task screen for the task, as described in "Viewing a Task" on page 224.

2. Click the Add Comment button ().

3. The Comments window appears.

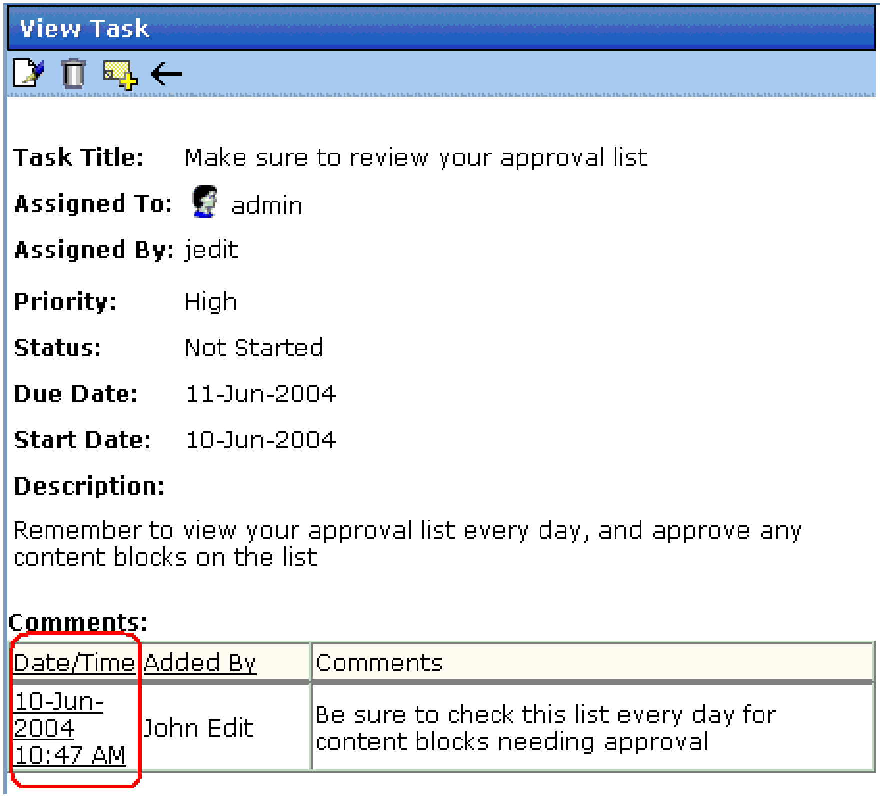


4. Enter your comment in the editor. Note that you can format and spell check the text using the toolbar buttons.
5. Click the Insert button.
6. The View Task screen reappears with the comment at the bottom of the page.

Updating Comments

To update a comment, follow these steps.

1. Access the View Task screen that contains the comment you want to update, as described in "Viewing a Task" on page 224.
2. Click the comment's **Date/Time** link (illustrated below).



3. The Comments window opens with the comment displayed.
4. Update the comment.
5. Click the Update button.

Deleting a Task

You can easily delete a task that is no longer needed. For example, the user who assigned a task would typically delete it when it is completed.

To delete a task, follow these steps.

1. Access the View Task screen for the task, as described in "Viewing a Task" on page 224.
2. Click the Delete button ( ).
3. A confirmation message appears.

4. Click **OK**.

Viewing a Task's History

Ektron CMS300 maintains a history of all events in the life of a task, as well as any comments entered. As examples, the task history shows when and by whom the task was created, when it changed to Active, when it was linked to a content block, when its state changed, when it was approved, etc.

You can view the task's history until the task is purged. To view a task's history, follow these steps.

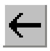
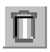
1. Navigate to the View Task screen, as explained in "Viewing a Task" on page 224.
2. Click the History button ( ).
3. The history of task events appears (example below).

View Task History for review today

Date	Initiator	Activity	Information
16-Sep-2004	jedit	Creation	
16-Sep-2004	jedit	Other	Task Assigned to All Authors
16-Sep-2004	jedit	Content Linked	Plastic Molder #123(13)
16-Sep-2004	jedit	Start Date Changed	Date Set to 17-Sep-2004
16-Sep-2004	jedit	Due Date Change	Date Set to 22-Sep-2004
16-Sep-2004	jedit	Start Date Changed	Date Set to 17-Sep-2004
16-Sep-2004	jedit	Due Date Change	Date Set to 22-Sep-2004

Task Module Toolbar

The following table explains the toolbar buttons available while managing tasks.

Button	Name	Description	More Information
	Add Comment	Add a comment to the task.	"Adding Comments to Tasks" on page 230
	Add Task	Access the Add Task screen from the View Content page.	"Task Module Toolbar" on page 235
	Add Task	Access Add Task screen from task module folder.	"Creating the Task via the Task Folder" on page 215
	Back	Return to previous page.	
	Calendar	Select a date.	
	Delete Task	Delete a task.	"Deleting a Task" on page 233
	Edit Task	Edit a task.	"Editing a Task" on page 230
	Save	Save task information.	
	Update	Save task information.	
	View Task	View task information.	"Viewing a Task" on page 224

Using the Asset Management System

IMPORTANT! The Asset Management System is a separate, add-on module that requires its own license. Please contact Ektron Sales for details (sales@ektron.com).

The Asset Management System (AMS) lets you import Microsoft Office documents and any other kind of file into **Ektron CMS300**. (Non-Office files are known as *managed files*.) Collectively, these files are known as *assets*.

After being saved in the **Ektron CMS300**, asset files can be updated and tracked like HTML content blocks. If you're familiar with how content blocks are handled, much of what you already know applies to assets. For example, assets

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

When a file is imported to the CMS then saved, a copy of it is saved to the asset management server. From then on, whenever a user edits and saves the file, a new copy is stored. In this way, you can review previous versions of any asset and restore a prior version if needed.

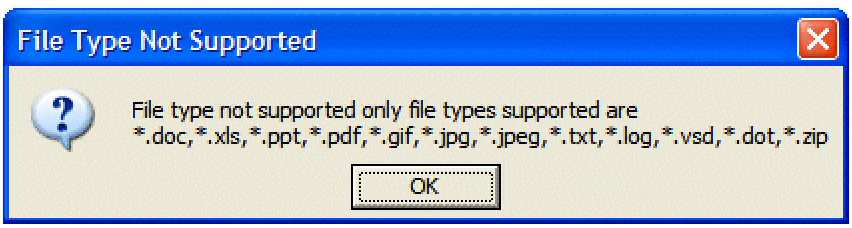
The rest of this chapter explains how to use the Asset Management System with **Ektron CMS300** through the following topics.

- ”Supported Types of Assets” on page 237
- ”Security” on page 239
- ”Working with Office Documents” on page 239
- ”Working with Managed Files” on page 252
- ”Asset Workflow” on page 259
- ”Viewing AMS Assets within the CMS” on page 259
- ”Deleting an AMS Asset” on page 260
- ”Approving AMS Assets” on page 260
- ”Adding Assets to Collections and Menus” on page 260
- ”Asset Reports” on page 260

Supported Types of Assets

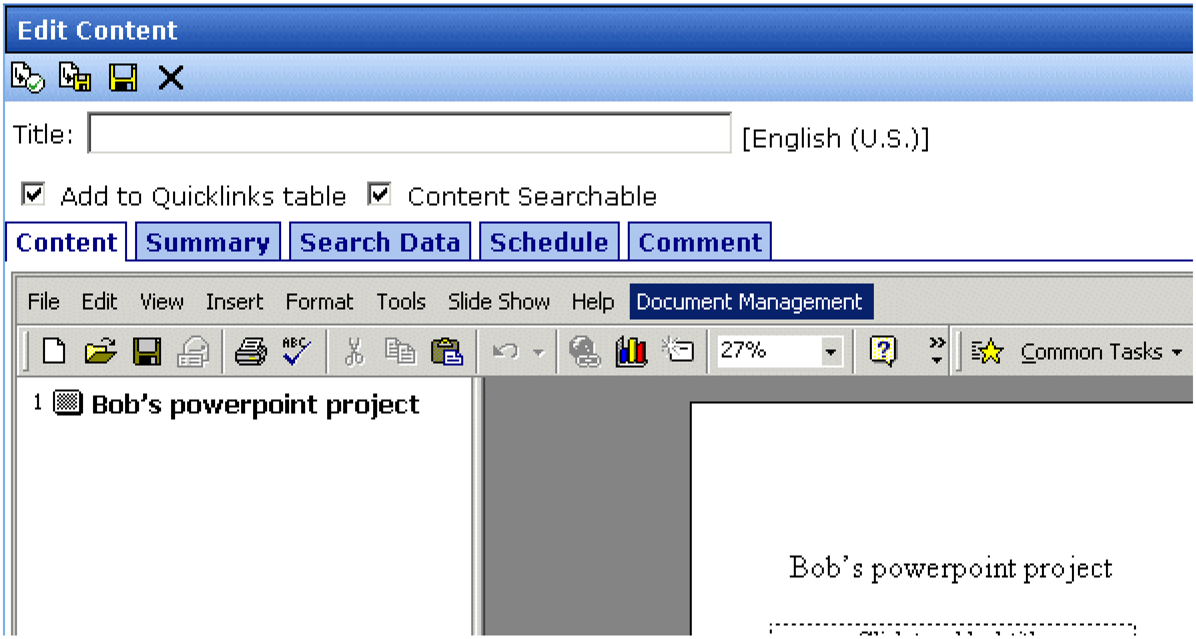
- Microsoft Office 2000 or later documents: Word, Excel, Powerpoint, Project, Publisher, Visio, etc.
- Managed files: any Windows-executable file such as .zip files, PDFs, .txt files, graphic files such as .gif and .jpeg, etc.

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



Office Documents

You can edit any Office document within the Content tab, just like an HTML content block. The host application's toolbar appears below **Ektron CMS300**'s tabs on the Edit Content screen.

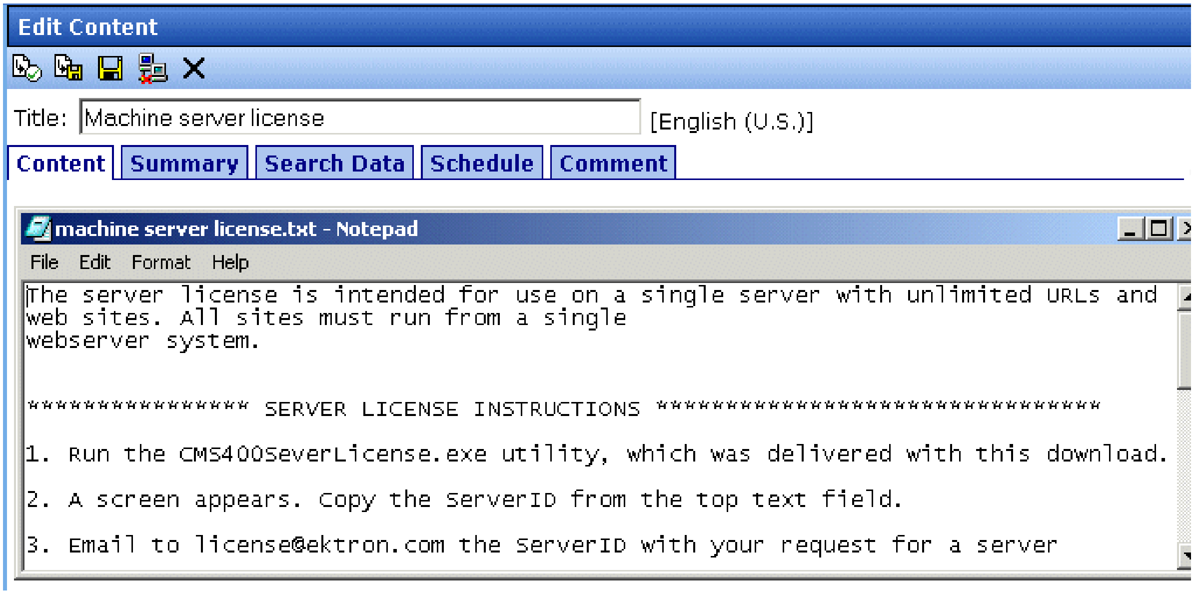


You can insert summary, search data, schedule, comment, and task information for the Office document. From the View Content screen, you can use standard toolbar buttons to perform actions such as view history, submit for publishing, and delete.

For more information, see "Working with Office Documents" on page 239.

Managed Files

Ektron CMS300 can track and control any non-Office type of file that runs on your computer (for example, .PDF, .gif and .zip). When editing these file types, the host application appears in a separate window. The **Ektron CMS300** View Content screen appears in the background.



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

For more information, see ”Working with Managed Files” on page 252.

Security

For the purposes of security, assets are treated like content blocks. Your system administrator applies security to each folder, determining which user groups can perform which tasks on the contents of the folder. For more information, see the "Setting Permissions" chapter of the **Ektron CMS300** Administrator Manual.

Working with Office Documents

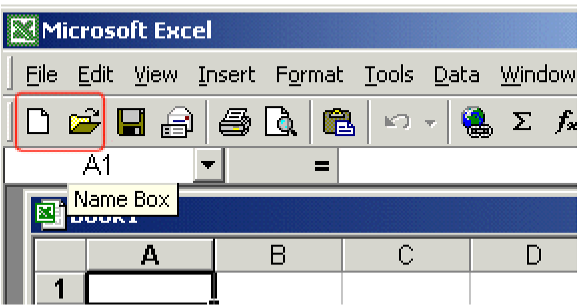
This section explains how to work with MS Office documents through the following subtopics:

- ”Notes on Working with Office Documents” on page 240

- "Creating a New Office Document" on page 240
- "Importing One Office Document into the AMS" on page 245
- "Importing Several Office Documents into the AMS" on page 247
- "Importing Files Individually vs. Several at Once" on page 249
- "The Work Offline Option" on page 250
- "Editing an Office Document" on page 250

Notes on Working with Office Documents

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



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

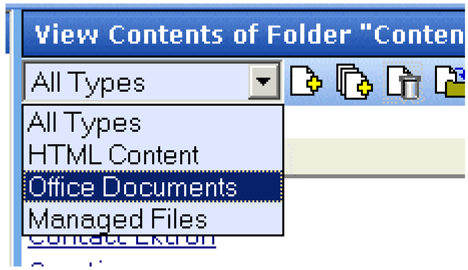
Creating a New Office Document

To create a new Office document, follow these steps.

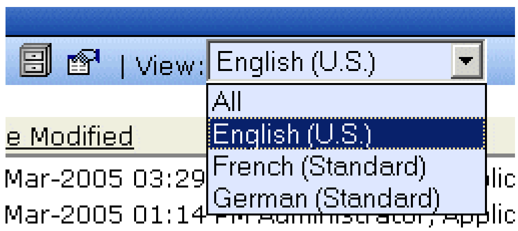
1. From the Workarea, select the **Content** folder.
2. Select the folder in which you want to place the document.

NOTE To learn about working with folders, see "Working with Folders and Content Blocks" on page 26.

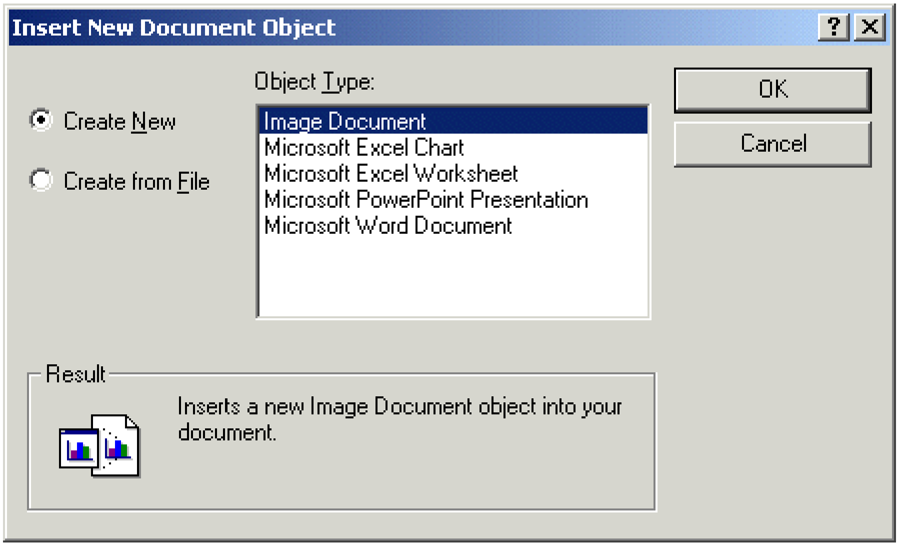
3. Click the down arrow next to the add dropdown list to view a list of items you can add.



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



6. Click the Add Content button ().
7. The Insert New Document Object screen appears.



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

8. If the document does not yet exist, check the **Create New** button. Then, select the type of document you want to create and press **OK**.

   If the document already exists, see "Importing One Office Document into the AMS" on page 245.

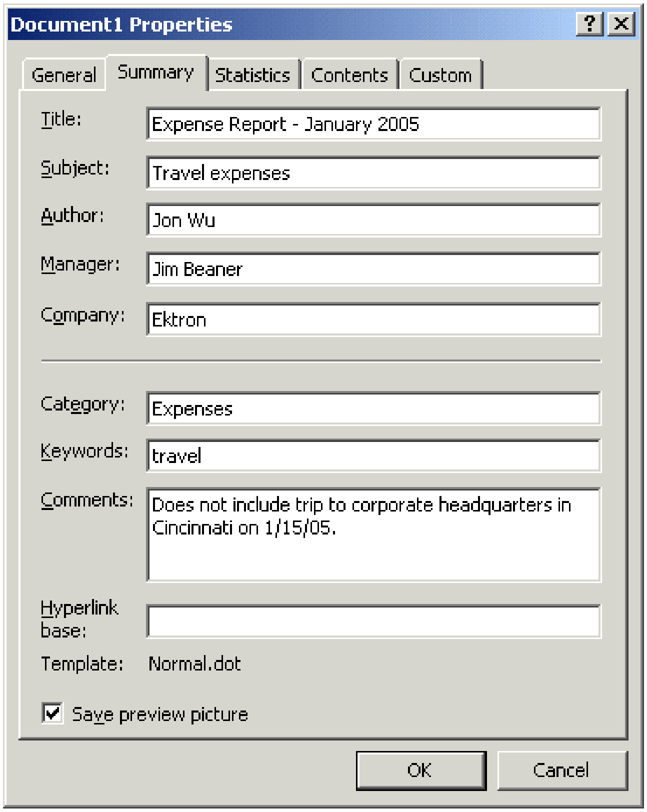
9. The application assigned to the document type appears within **Ektron CMS300**.
10. Enter a **Title** and add content to the document.
11. Decide whether the content should be added to the **Quicklinks Table** and if the content should be searchable. *See Also:* "Add to Quicklinks Table" on page 39 and "Content Searchable" on page 39
12. If desired, add a summary, search data, a schedule, and comments. *See Also:*
    - "Adding a Content Block Summary" on page 64
    - "Adding or Editing Search Data" on page 68
    - "Scheduling Content to Begin and End" on page 57
13. If desired, you can edit the document's properties. *See Also:* "Editing a Document's Properties" on page 243

14. Check in or submit the content for publishing as you would a content block. *See Also:* "Adding a Content Block" on page 37 and "Save, Check in, and Publish" on page 243

Editing a Document's Properties

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

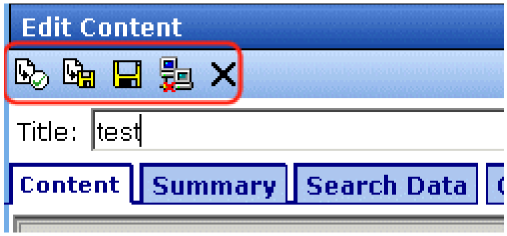
NOTE Ektron CMS300 installs the Document Management menu on the Office application.



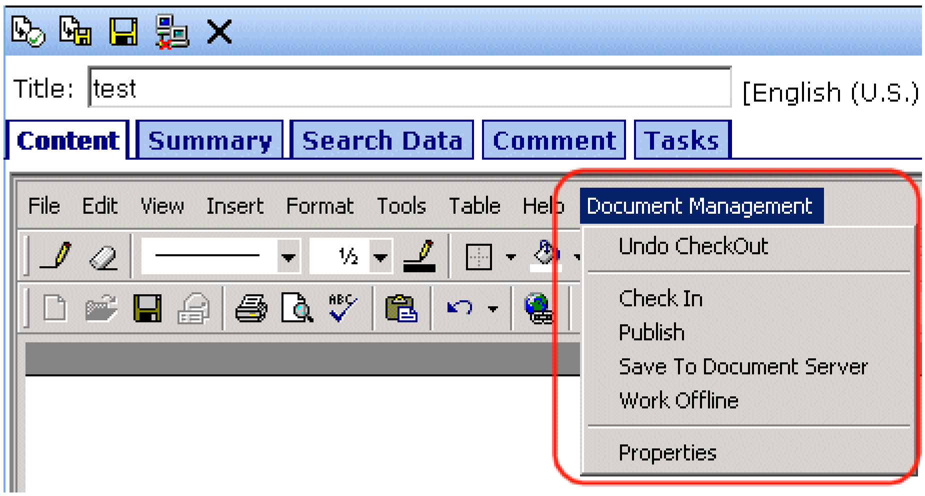
Save, Check in, and Publish

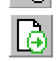
When you finish editing a document, you have four options for what to do next. They are explained in the following table.

You can carry out any option by clicking an **Ektron CMS300** toolbar button.



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



Action	**Document Management Menu Option**	**Toolbar button**
Check document in so you and others can continue to edit it.	Check in	
Submit document into approval chain. Upon approval, publish content to Web site.	Publish or submit for publishing	 or 

Action	Document Management Menu Option	Toolbar button
Save recent changes. Use to save latest changes before continuing.	Save to DocServer	
Save file to local computer. *See Also:* "The Work Offline Option" on page 250	Work Offline	
Discard changes made in current editing session.	Undo Check out	

Importing One Office Document into the AMS

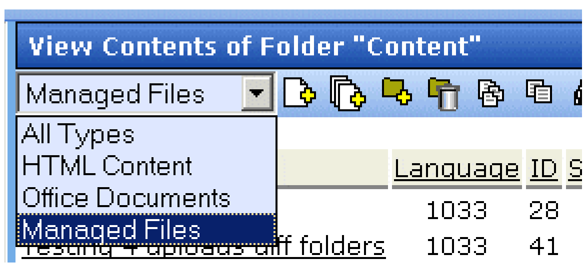
Your computer or network may have Office documents that you want to manage using the AMS. Follow these steps to import any document into Ektron's AMS.

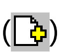
See Also: "Importing Files Individually vs. Several at Once" on page 249

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

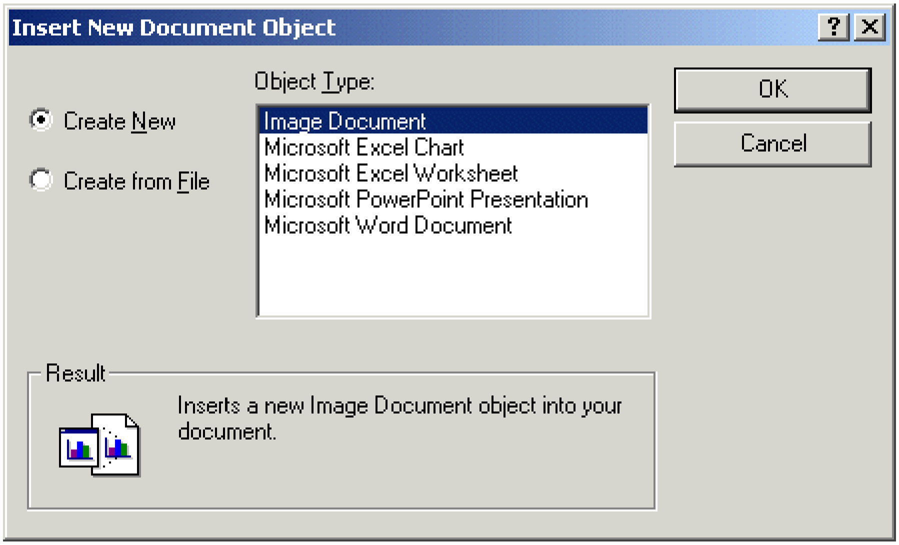
NOTE To learn about working with folders, see "Working with Folders and Content Blocks" on page 26.

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



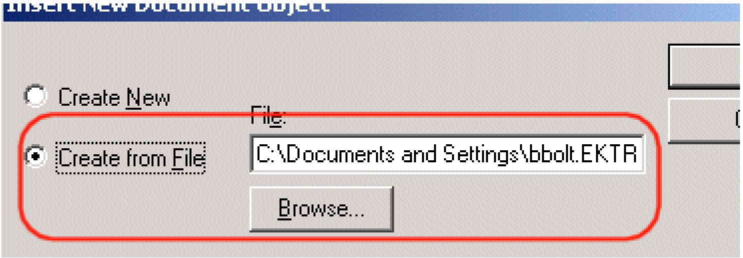
4. Select **Office Documents**.
5. Click the Add Content button ().

6. The Insert New Document Object screen appears.



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

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



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

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

11. Decide whether the content should be added to the **Quicklinks Table** and if the content should be searchable. *See Also:* ”Add to Quicklinks Table” on page 39 and ”Content Searchable” on page 39
12. If desired, add a summary, search data, a schedule, and comments. *See Also:*
    - ”Adding a Content Block Summary” on page 64
    - ”Adding or Editing Search Data” on page 68
    - ”Scheduling Content to Begin and End” on page 57
13. If desired, you can edit the document’s properties. *See Also:* ”Editing a Document’s Properties” on page 243
14. Check in or submit the content for publishing as you would a content block. *See Also:* ”Adding a Content Block” on page 37 and ”Save, Check in, and Publish” on page 243

Importing Several Office Documents into the AMS

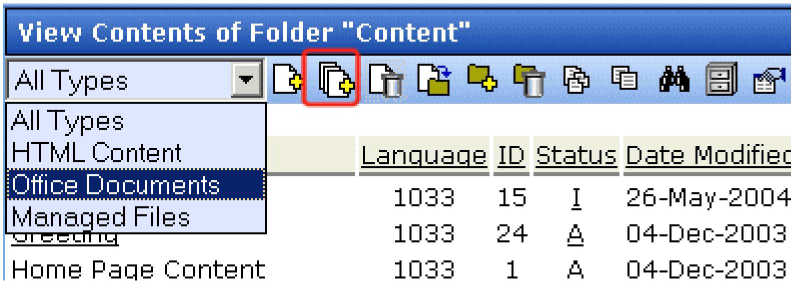
Your computer or network may have several Office documents that you want the AMS to manage. Follow these steps to import several Office documents at once into Ektron’s AMS.

See Also: ”Importing Files Individually vs. Several at Once” on page 249

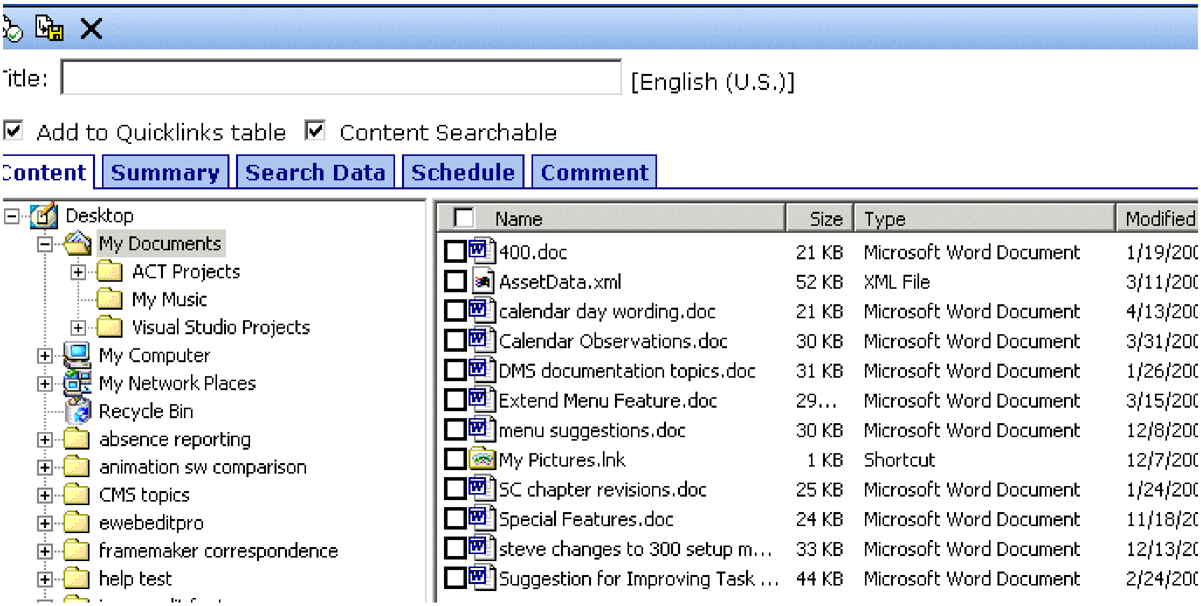
1. Place all files to be imported in the same folder on your computer or network.
2. From the Workarea, select the **Content** folder.
3. Select the CMS folder in which you want to place the documents being imported.

NOTE To learn about working with folders, see ”Working with Folders and Content Blocks” on page 26.

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



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



8. In the left frame, navigate to the folder that contains the files you want import.

9. In the right frame, click the checkbox next to each file you want to import. You can only import files in the selected folder at this time.

10. In the **Title** field, you can enter an optional title to apply to all imported documents. *See Also:* "Importing Files Individually vs. Several at Once" on page 249

11. Decide whether the content should be added to the **Quicklinks Table** and if the content should be searchable. *See Also:* "Add to Quicklinks Table" on page 39 and "Content Searchable" on page 39

12. Click the Check in () or Submit for Publishing button (). *See Also:* "Adding a Content Block" on page 37 and "Save, Check in, and Publish" on page 243

13. The selected files are imported into AMS.

Importing Files Individually vs. Several at Once

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

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

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

```
Personnel (Vacation Request.doc)
Personnel (Direct Deposit Form.doc)
Personnel (Absence Report Form.doc)
```

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

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

The Work Offline Option

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

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

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

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

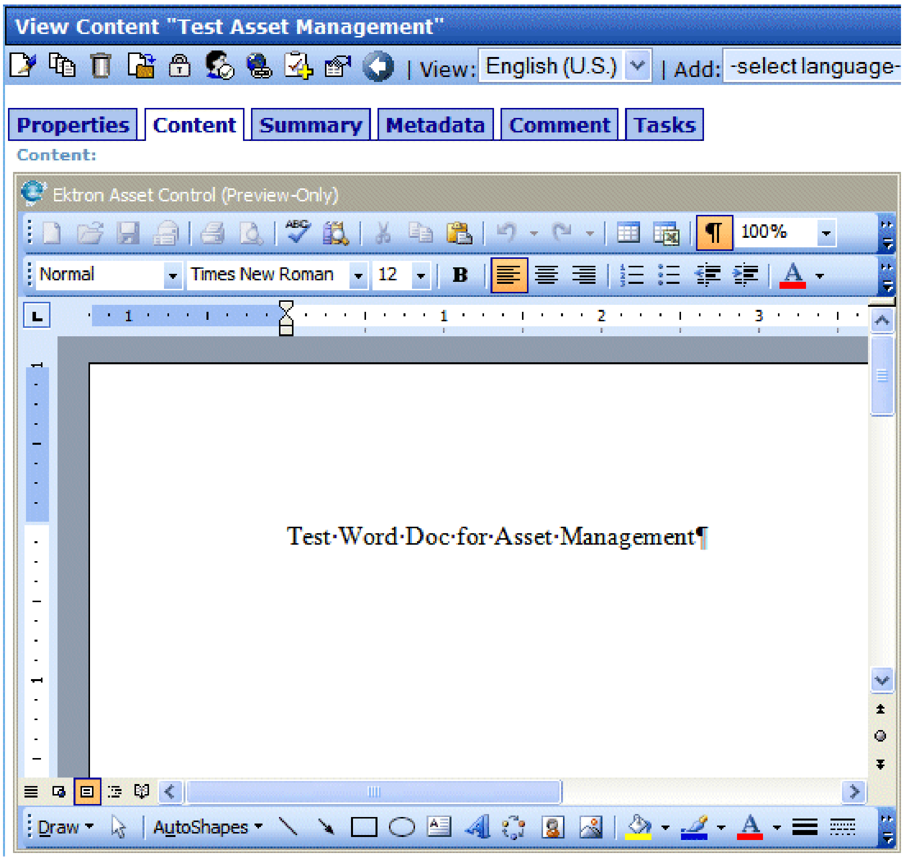
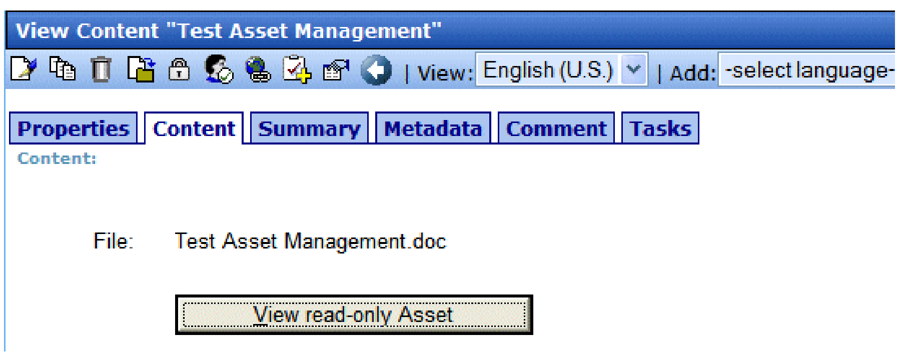
NOTE A system administrator can check in any checked-out asset. If he does, the most recently published asset gets checked in.

Editing an Office Document

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

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

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

Mode	Image
Preview Turned on	
Preview Turned off	

5. Click the Edit button ().
6. The document opens in the host application.
7. Edit the document as well as its summary, search data, schedule, tasks, or comments.

   See Also:

   - ”Adding a Content Block Summary” on page 64
   - ”Adding or Editing Search Data” on page 68
   - ”Managing Tasks” on page 213
   - ”Scheduling Content to Begin and End” on page 57

8. If desired, edit the document’s properties. *See Also:* ”Editing a Document’s Properties” on page 243
9. Check in or submit the content for publishing, as you would any content block. *See Also:* ”Save, Check in, and Publish” on page 243

Working with Managed Files

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

- ”Creating a New Managed File” on page 252
- ”Importing One Managed File” on page 252
- ”Importing Several Managed Files” on page 254
- ”Editing a Managed File” on page 257

Creating a New Managed File

Unlike an Office document, you cannot create a managed file within **Ektron CMS300**. Instead, you must create it on your computer using the host application. After creating the file, import it into the AMS.

Importing One Managed File

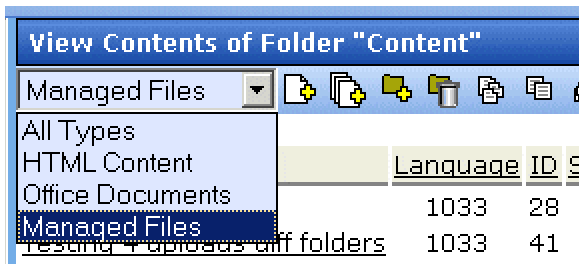
To import a managed file into AMS, follow these steps.

See Also: ”Importing Files Individually vs. Several at Once” on page 249

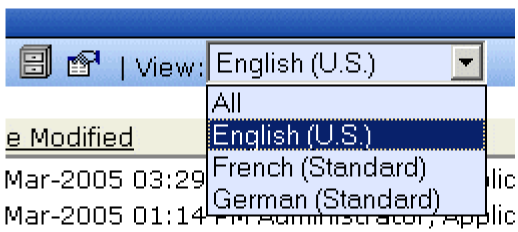
1. From the Workarea, select the **Content** folder.
2. Select the folder in which you want to place the file.

NOTE To learn about working with folders, see ”Working with Folders and Content Blocks” on page 26.

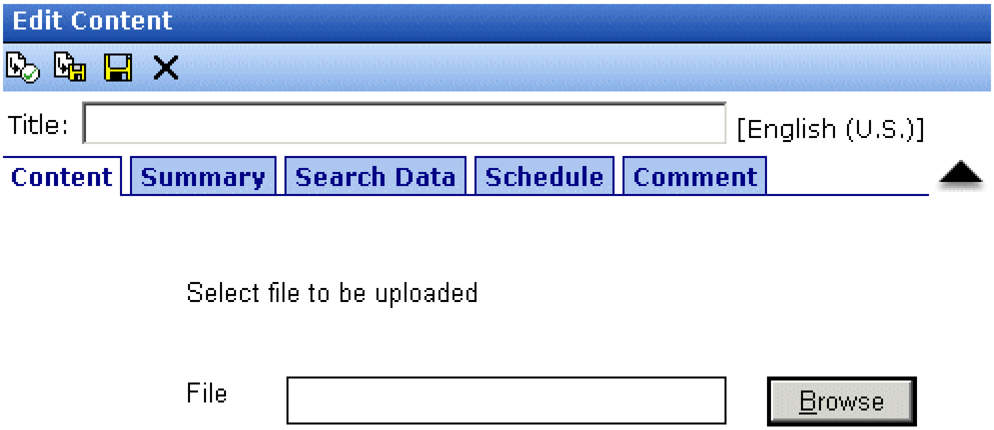
3. Click the down arrow next to the add dropdown list to view the asset types you can add.



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



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



8. Click the **Browse** button.
9. Browse through your computer and network to the file you want to import. When you do, the file's path appears within the **File** field.
10. Insert a **Title**.
11. Decide whether the content should be added to the **Quicklinks Table** and if the content should be searchable. *See Also:* "Add to Quicklinks Table" on page 39 and "Content Searchable" on page 39
12. If desired, add a summary, search data, a schedule, and comments. *See Also:*
    - "Adding a Content Block Summary" on page 64
    - "Adding or Editing Search Data" on page 68
- "Scheduling Content to Begin and End" on page 57

13. Click the appropriate button to either check in ( ) or publish ( ) the file. *See Also:* "Adding a Content Block" on page 37 and "Save, Check in, and Publish" on page 243
14. A window appears momentarily, indicating that the file is being uploaded to the AMS server.

Importing Several Managed Files

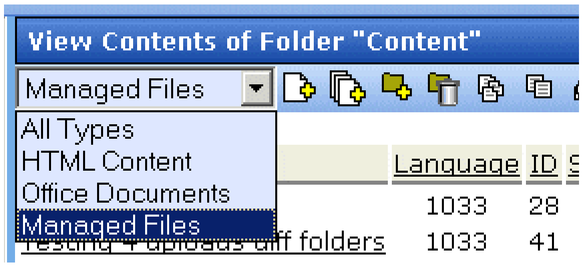
To import several managed files into AMS, follow these steps.

See Also: "Importing Files Individually vs. Several at Once" on page 249

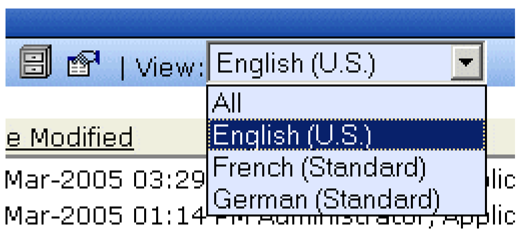
1. From the Workarea, select the **Content** folder.
2. Select the folder in which you want to place the files.

NOTE To learn about working with folders, see "Working with Folders and Content Blocks" on page 26.

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

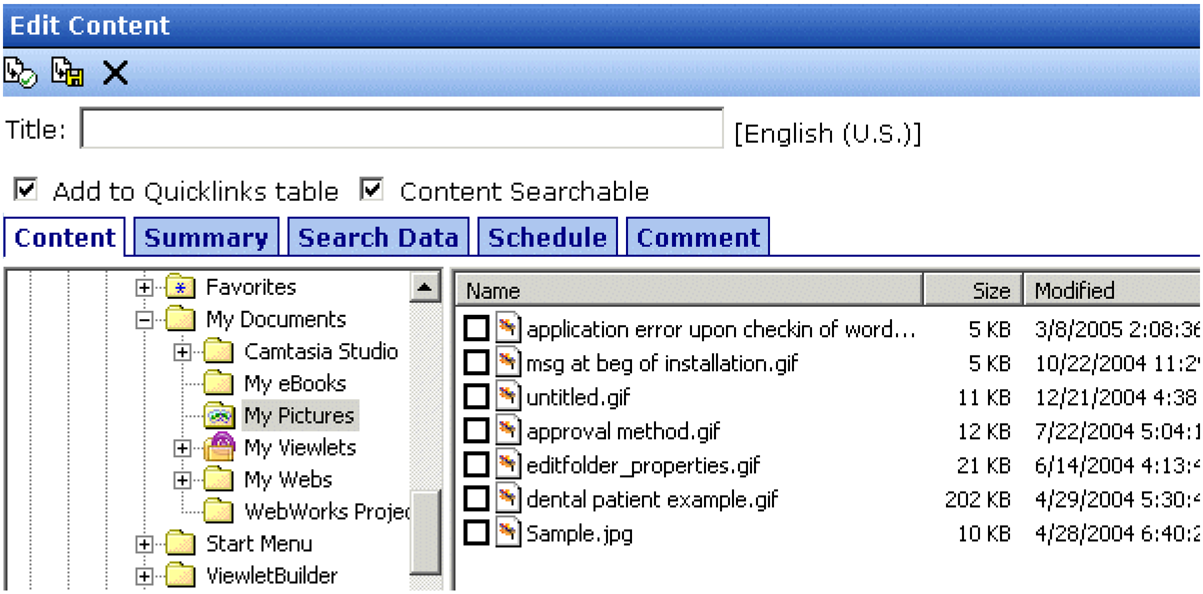


4. Select **Managed Files**.
5. The default language appears in the **View:** dropdown list. To save the managed files under a different language, open the dropdown list and select the language.



6. Click the Add Several Files button ().

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



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

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

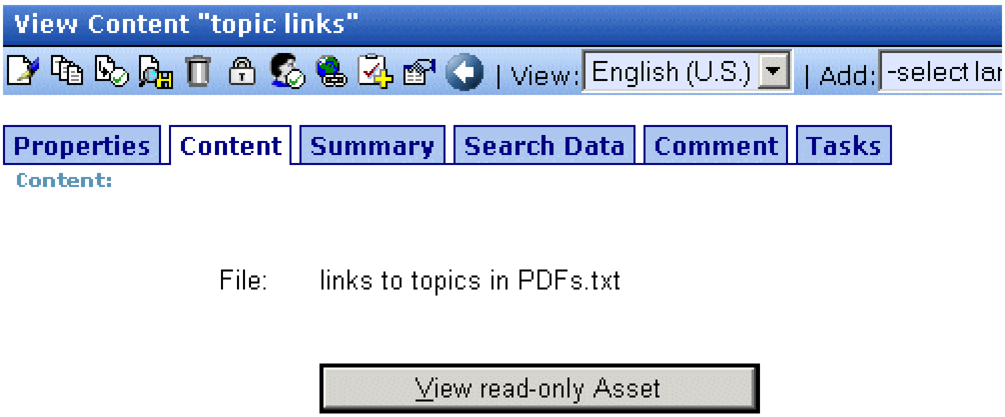
10. In the **Title** field, enter a title for all imported files. *See Also:* "Importing Files Individually vs. Several at Once" on page 249
11. Decide whether the content should be added to the **Quicklinks Table** and if the content should be searchable. *See Also:* "Add to Quicklinks Table" on page 39 and "Content Searchable" on page 39
12. Click the Check in ( ) or Submit for Publishing button ( ).

    See Also: "Adding a Content Block" on page 37 and "Save, Check in, and Publish" on page 243
13. The selected files are imported into AMS.

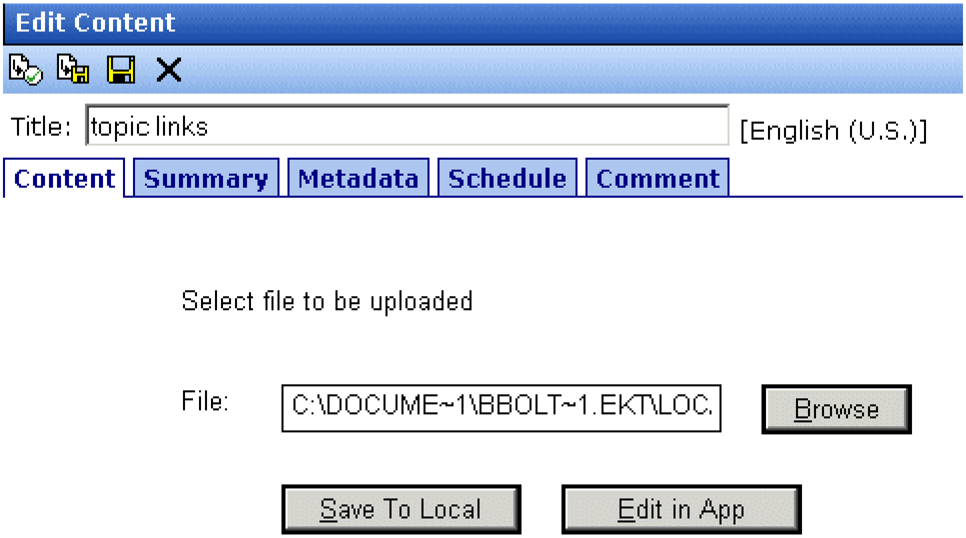
Editing a Managed File

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

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



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



8. To open the managed file in the host application, click **Edit in App**. Then make your changes, save it in the host application and click either the Check in ( ) or Submit for Publishing button ( ).
   - If you want to save this version of the file to your computer, click **Save to Local**. If you do, a window appears. Navigate to the desired folder then click the **Save** button.
   - If you want to select another file on your computer or network and save it under this name in **Ektron CMS300**, click **Browse**. If you do, a window appears. Navigate to the desired folder then click the **Open** button. The new file is saved under the old **Ektron CMS300** name.
9. Edit the managed file as well as its summary, search data, schedule, tasks, or comments.

   See Also:

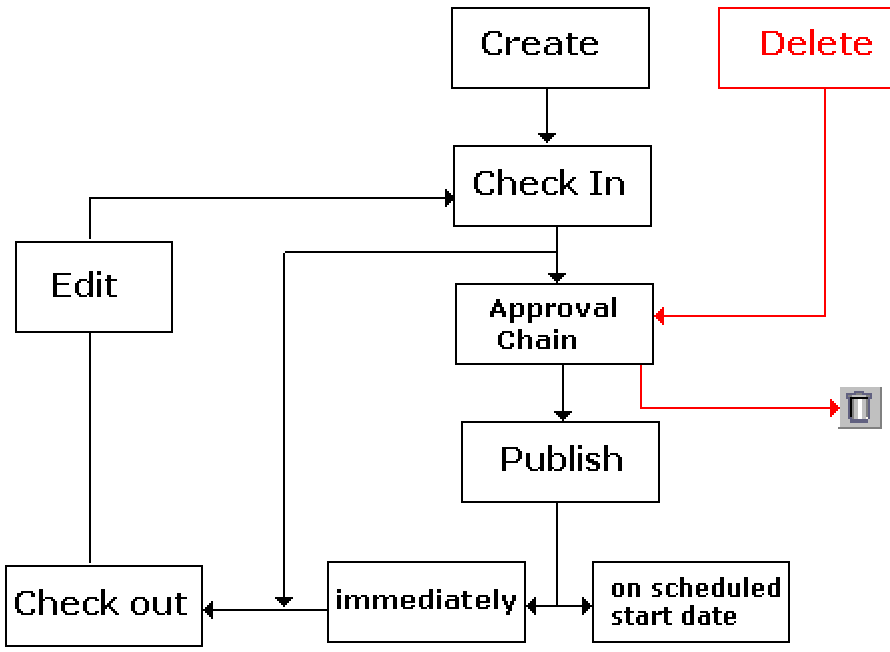
   - ”Adding a Content Block Summary” on page 64
   - ”Adding or Editing Search Data” on page 68
   - ”Managing Tasks” on page 213
   - ”Scheduling Content to Begin and End” on page 57

10. Save the file within the host application.

11. Check in or submit the file for publishing, as you would any content block. *See Also:* "Save, Check in, and Publish" on page 243

Asset Workflow

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



Viewing AMS Assets within the CMS

To view an asset, follow these steps.

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

Deleting an AMS Asset

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

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

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

Approving AMS Assets

Assets are placed into the approval chain just like content blocks. For more information, see "Approving/Declining Content Blocks" on page 76.

Adding Assets to Collections and Menus

You can add an asset to a collection or a menu just as you would an HTML content block. For more information, see "Working with Collections" on page 138 and "Working with Menus" on page 157.

Asset Reports

Ektron CMS300 provides several reports that track assets by status.

Report	Displays assets in this status	For more information, see
Approvals	Requiring your approval	"Approvals Reports" on page 105
Checked In Content	Checked in	"Checked In Report" on page 107

Report	Displays assets in this status	For more information, see
Checked Out Content	Checked out	”Checked Out Report” on page 108
New Content	New (that is, created and saved but never published)	”New Content Report” on page 109
Submitted Content	Submitted for publication	”Submitted Report” on page 109
Pending Content	Approved and pending a start date	”Content Pending Start Date Report” on page 111
Refresh Reminder Report	End date has been reached	”Refresh Reminder Report” on page 111
Expired Content	Expired date has been reached	”Expired Content Report” on page 112
Content to Expire	Will expire within specified number of days	”Content to Expire Report” on page 113

For more information, see ”Content Workflow Reports” on page 101.

Using the CMS/AMS Search

See ”Search Content Folder” on page 45.

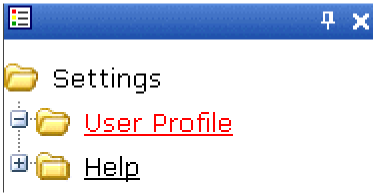
Updating Your User Profile

When a new user is added to an Ektron CMS300 Web site, the administrator sets up a personal profile for him. It contains information such as password and email address. You can update some personal profile information when needed. This section explains how to modify your personal profile.

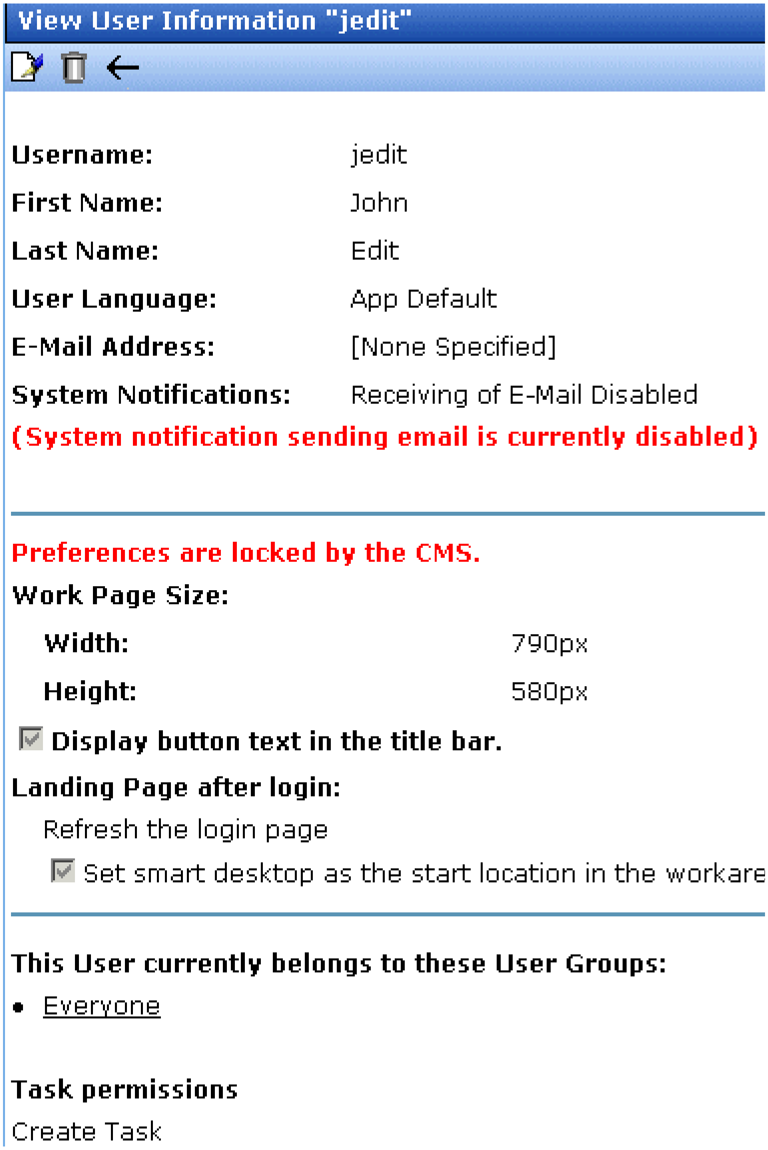
Viewing Your Profile

Before changing your personal profile, you must view it. To do so, follow these steps.

1. Access your Smart Desktop. *See Also:* "Understanding the Smart Desktop" on page 14
2. From the lower left frame, click **Settings**.
3. From the top left frame, click **User Profile**.



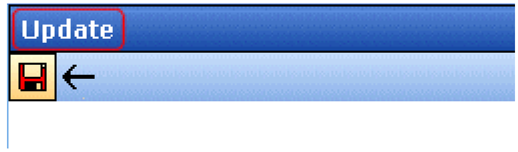
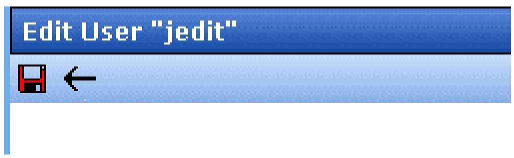
4. Your user profile appears.



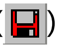
5. Click the Edit button ( ) in the top left corner.

6. The Edit User Information screen appears. The following table explains fields you can edit.

Field	Description
Password	If desired, enter a new password into this field. If you change your password, you do not need to log out then log back in. However, the next time you log in, you must use the new password.
Confirm Pwd	Confirm your new password by retyping it into this field.
User Language	Select a language in which to view Ektron CMS300. Click the black down arrow on the right (circled below) to see a list of choices. 
Email Address	Enter a new valid email address. Notification emails are sent to this email address unless the **Disable E-mail Notification** field is checked. To understand how email notification operates within the content workflow, see "Example of an Approval Chain" on page 79. Also, this address identifies the user sending Instant email. *See Also:* "Sending Instant Email" on page 22
Disable Email Notification	Check this box if you do not want to receive notification emails.
Work Page Size Your system administrator may let you change the work page values. If he does, the following fields are editable. Otherwise, you can only view the fields.	

Field	Description
Width	If desired, change the width of the screen in which **Ektron CMS300** appears. The width in pixels must be between 400 and 2400. This field accommodates users who have larger monitors and/or prefer a smaller resolution, such as 1280 x 1024.
Height	If desired, you can change the height of the screen in which **Ektron CMS300** appears. The height in pixels must be between 300 and 1800. This field accommodates users who have larger monitors and/or prefer a smaller resolution, such as 1280 x 1024.
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 sign in, enter the URL to that page. You might select a page that leads to a group of pages that you maintain. If you don't know the URL, navigate to the page, go to the browser address bar and select the text following the directory in which **Ektron CMS300** resides. For example, if the browser address bar says `http://www.ektron.com/customers.aspx?id=945`, you would enter **customers.aspx?id=945** here.

Field	Description
Set smart desktop as the start location in the Workarea	If you want the Smart Desktop to appear as soon as you enter the Workarea, click inside this check box. *See Also:* "Understanding the Smart Desktop" on page 14 If you leave this check box blank, when you enter the Workarea, you go to the folder of the content block specified at the **Landing Page after login** field.
Inherit Task Permissions From User Groups	This area indicates your task permissions and if you inherit them from user groups to which you belong. For more information, see the **Ektron CMS300** Administrator Manual chapter "Managing Tasks," section "Task Permissions."

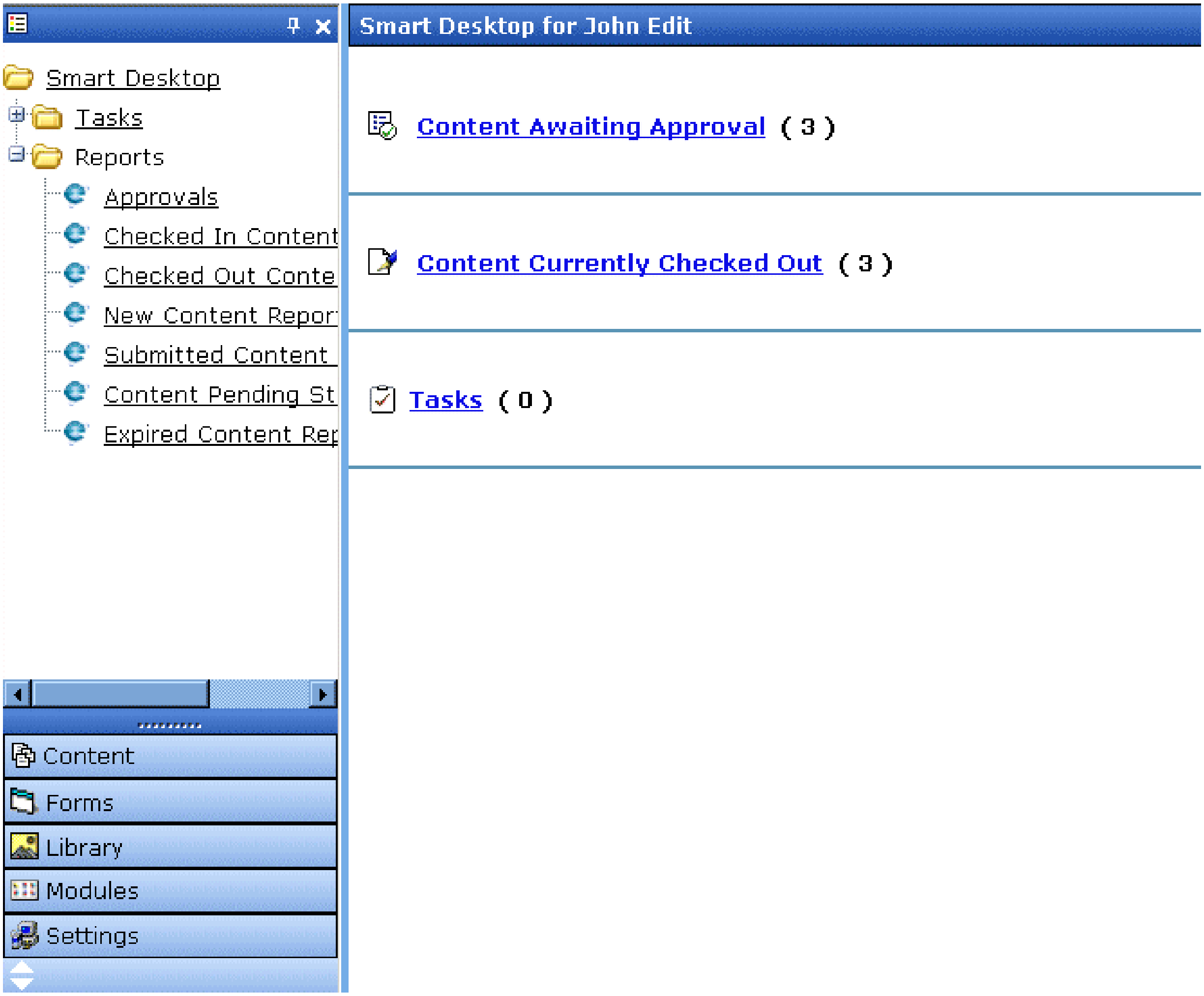
7. Click the Update button ().

Accessing Online Help

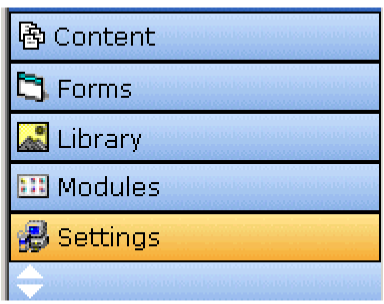
The help folder provides access to important and useful information about using Ektron CMS300. It gives you a library of all documentation plus links to relevant pages on Ektron's Web site. We provide this information to make it easier to learn about our Content Management system.

To access the help folder, follow these steps.

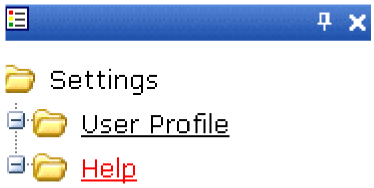
1. Access your Smart Desktop. *See Also:* "Understanding the Smart Desktop" on page 14



2. From the lower left frame, click Settings.



3. From the top left frame, click **Help**.



4. The help screen appears in the right frame.

5. Click on a link to open the documentation or Web page.

NOTE Your computer requires an internet connection to access the online resource links.

Introduction to eWebEditPro+XML

eWebEditPro+XML is a browser-based, Web content editor designed for dynamic Web sites. It lets you create and publish your own Web content in any language supported by the operating system and your Web site.

More specifically, eWebEditPro+XML lets you perform Web page editing functions, such as

- copy content from any Windows-based application
- use Microsoft Word to edit Web content
- cut, copy, and paste
- find and replace text
- check spelling
- edit an image
- change font style, size, attributes (bold, italics, underline), and color
- begin lines with bullets or numbers
- adjust indentation
- right, center, or left justify text and images
- add a bookmark, hyperlink, image, or table
- view your text as WYSIWYG or HTML code
- insert or clean HTML source code

You gain access to these functions either from the toolbar at the top of the editor window or from a menu that appears when you right click the mouse inside the editor.

Using **eWebEditPro+XML**

eWebEditPro+XML is like many other word processing applications. You type text and then use toolbar buttons (illustrated below) and menu options to change the text's appearance or perform functions on it, such as spell checking.

Organization of this Documentation

The next section, "Creating a Simple Web Page" on page 272, walks you through the steps required to create a simple Web page.

The following section, "Toolbar Buttons" on page 276, explains

- each toolbar button
- functions that appear when you right click the mouse

Many of these functions are simple and require only a brief explanation.

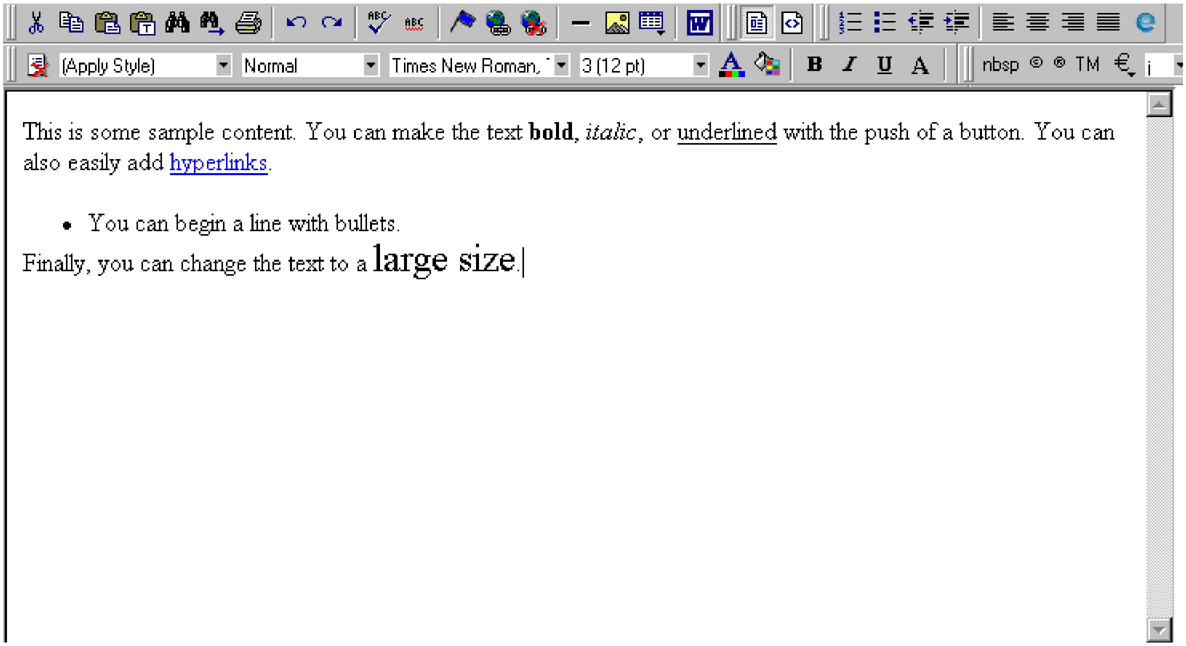
The last section, "Using eWebEditPro+XML's Advanced Features" on page 302, explains how to use the more advanced features.

Creating a Simple Web Page

This section walks you through the process of creating a simple Web page, using only a few of the many features available. Later sections explain all of the features and how to use them.

Your Finished Web Page

When you finish this exercise, your simple Web page will look like this.



Notice that this page has the following elements.

- The second sentence includes bold, italic and underlined text.
- The third sentence includes a *hyperlink*, text that will jump to another Web page when the user clicks on it.
- The fourth sentence begins with a bullet.

- The last sentence has some very large (18 point) text.

Creating the Sample Web Page

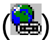
To create this page, follow these steps.

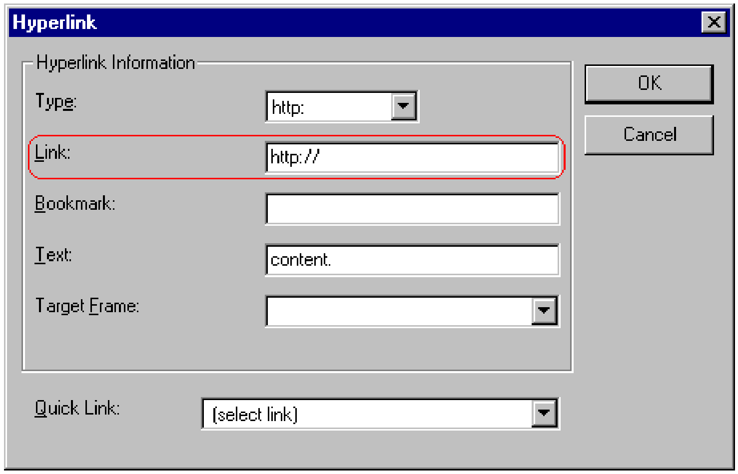
Enter the First Two Sentences

1. Open eWebEditPro+XML. (Your Webmaster installs eWebEditPro+XML on your computer and determines which fonts and sizes are available. Your system may not match the example below.)
2. Type the first two sentences.

   This is some sample content. You can make text bold, italic and underlined with the push of a button.
3. Double click the word “bold” to select it. Then, click the Bold button () to apply bold to the word.
4. Double click the word “italic.” Then, click the Italic button () to apply italic to the word.
5. Double click the word “underlined.” Then, click the underline button () to underline the word.

Creating a Hyperlink

1. Type **You can also easily add hyperlinks**.
2. Double click the word **hyperlinks** so that it becomes selected.
3. Click the Hyperlink button ().
4. The hyperlink dialog box appears.

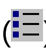


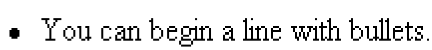
5. In the **Link** field, after **http://**, enter **www.ektron.com**.
6. Click **OK**.

Notice that the word **hyperlink** now appears in a different color. When you save this Web page and a user views it, if the user clicks **hyperlink**, a new Web page will display Ektron's home page.

NOTE If your computer has an internet connection, you can double click the hyperlink to test it.

Applying a Bullet to a Line of Text

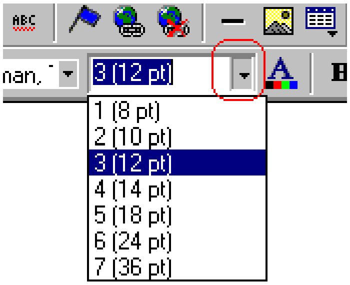
1. Press <Enter> to move the cursor down to the next line.
2. Type **You can begin a line with bullets.**
3. Click the bullet button ().
4. Notice that the line is indented and now begins with a bullet.



Changing the Size of Text

1. Press <Enter> to move the cursor down to the next line.
2. Type **Finally, you can change the font to a large size.**
3. Select the words **large size**.

4. Click the down arrow to the right of the font size list. When you do, the list of available fonts appears.



5. Click **5 (18 pt)**.
6. Notice that **large size** is now much larger than the other text.

Congratulations! You have just created your first Web page with eWebEditPro+XML. You have learned how to apply bold, italic, and underlining, create a hyperlink, add a bullet to a line, and change the size of the text.

This sample used only a few of the many features available. The following sections explain the rest of the details about using the product.

Toolbar Buttons

This section explains how to use the buttons and drop-down lists on the toolbar. (The toolbar is the row of buttons across the top of the editor window, illustrated below.)

The buttons let you perform functions such as cutting and pasting text, inserting images, and creating tables.

All buttons may not appear. Your Webmaster determines which buttons appear on your toolbar. Also, you can customize your toolbar so that it contains only the buttons you use (See “Customizing Your Toolbar” on page 291).

This section explains

- Selecting Text
- Applying Formatting Attributes to Text
- Table of Toolbar Buttons and Drop-Down Lists

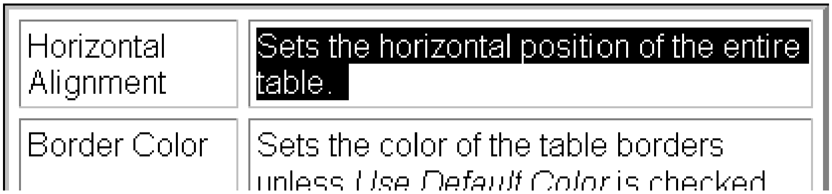
Selecting Text

You select text before performing an action on it, such as copying it.

- To select *all* information on a page, press Ctrl+A.
- To select *a portion* of the information on a page, you have two choices.
  - Hold down the left mouse button and drag the cursor across the data you want to select.
  - Hold down the Shift key and the right arrow key ( ) until the desired data is selected.

- To select *a single word*, place the cursor on the word and double click the mouse.

Selected text has different background and foreground colors, as illustrated below.



Applying Formatting Attributes to Text

Several buttons apply formatting attributes to text, such as bold and italics. There are two ways to apply these attributes.

- Enter the text. Then, select the text and press the toolbar button. The button is now in a "pressed in" condition, and the text has the formatting attribute.
- Press the toolbar button. Then, begin typing the text. As you type, the formatting is applied.

To stop applying the formatting, press the button again. This action changes the button to a "pressed out" condition and terminates the formatting.

Table of Toolbar Buttons and Drop-Down Lists

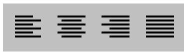
The following table explains each toolbar button and drop-down list.

NOTE The Data Designer feature also has a toolbar. For information, see "Using the Data Designer" on page 177.

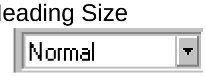
Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Cut	Ctrl+X	Remove selected text and graphics. Place that data into temporary memory, also known as the "clipboard." (If you later cut or copy more information onto the clipboard, the new information overwrites the original information.)	
Copy	Ctrl+C	Copy selected text and graphics into temporary memory. Leave selected data where it is. (If you later cut or copy more information into memory, the original information is lost.)	"Copying from Other Applications" on page 303
Paste	Ctrl+V	Insert the most recently cut or copied text and graphics at the current cursor location.	
Select All	Ctrl+A	Select all content	
Select None		Deselect all selected content	
Paste Text		Paste the contents of the clipboard as plain text. That is, all HTML tags (including images) are not pasted. This button is helpful when you want to eliminate the HTML formatting of the text being copied.	
Replace		Launches the Search and Replace dialog box. The dialog searches for (and lets you optionally replace) text that you specify.	"Finding and Replacing Text" on page 304
Find Next		Find next occurrence of the string entered into the Find What field of the Search and Replace dialog box.	"Finding and Replacing Text" on page 304
Print	Ctrl+P	Print the editor content.	

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Undo	Ctrl+Z	Reverse the most recent action, as if it never occurred. You can undo as many actions as you wish.	
Redo	Ctrl+Y	Reverse the undo action.	
Spell Check (manual)		Begin spell checker.	“Checking Spelling Upon Demand” on page 309
Spell Check (automatic)		Turn on or off spell check as-you-type feature.	“Checking Spelling as You Type” on page 308
Bookmark		Create a bookmark.	“Using Bookmarks” on page 409
Edit Hyperlink		Change information about a hyperlink.	“Using Hyperlinks” on page 413
Remove Hyperlink		Remove a hyperlink.	“Removing a Hyperlink” on page 418
Horizontal Line		Insert a horizontal line.	
Picture		Insert a picture.	“Inserting Images” on page 316
Image Editor		Edit an image.	”Editing Images” on page 331
Table		Insert or edit a table.	“Introduction to Tables” on page 365
Edit in Microsoft Word		Edit content in Microsoft Word.	”Editing in Microsoft Word” on page 313
Insert Comment		Insert a comment into the content (eWebEditPro+XML only)	”Entering Comments” on page 234

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Upload Files		Upload any external files (such as images) to the server.	”Moving an Image to the Server” on page 329
Upload Content		Upload the content currently in the editor to the server.	"Content Upload" n the eWebEditPro Developer’s Reference Guide
Data Design Mode		Switches to Data Design Mode. Button only appears when **eWebEditPro+XML** configuration enables the Data Designer feature.	”Design Mode vs. Data Entry Mode” on page 179
Data Entry Mode		Switches to Data Entry Mode. Button only appears when **eWebEditPro+XML** configuration enables the Data Designer feature.	”Design Mode vs. Data Entry Mode” on page 179
View as WYSIWYG		Display the page content as WYSIWYG (What You See Is What You Get). WYSIWYG is the ability to see in the editor what will appear when user views the Web page.	
View as HTML		Display the page content as HTML.	“Viewing and Editing HTML” on page 419
Number		Begin the line on which the cursor rests with a number. If the line above this line is • not numbered, assign this line 1 • numbered, assign a number one more than the line above	
Bullet		Begin the line on which the cursor rests (or all selected lines) with a bullet (•).	
Indent		Increase or decrease the current line’s distance from the left margin.	

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
 Left, Center, and Right Justify		Align paragraph so that it is arranged • evenly on the left side (uneven on the right) • in the center of each line • evenly on the right side (uneven on the left) • evenly on right and left side	
 About **eWebEditPro+XML**		Display a dialog box that shows your version of **eWebEditPro+XML** and your license keys.	

 Remove Style		Remove all style information applied to selected text. (You apply styles using the Style dropdown list.) For example
		Before
		`<P class=note>This is initial content.</P>`
		After
		`<P>This is initial content.</P>`	

Style 		Display a list of styles. Users can select from the list to apply a style to selected text. Note that the list can change depending on the formatting of the selected line. Your Webmaster determines which styles are available.	
Heading Size 		Change the heading size. Your Webmaster determines which heading sizes are available.	
 Font Style		Change the font style. Your Webmaster determines which fonts are available. Note: If more than one font appears in a selection, the browser on the reader's PC tries to display text using the first font. If the browser cannot find that font, it tries to use the second, etc.	

Button	**Equivalent Keystroke** **(Internet Explorer only)**	**Function**	**For more information, see**
3 (12 pt) Font Size		Change the font size. Your Webmaster determines which font sizes are available.	
Font Color		Change the font color.	
Background Color		Change the background color of the text. Note: To remove background color from selected text, click the Normal button (A).	
B Bold	Ctrl+B	Make the text **bold**.	
I Italic	Ctrl+I	Make the text *italic*.	
U Underline	Ctrl+U	Make the text underlined.	
A Normal		Remove all formatting from selected text.	
nbsp		Insert a blank space character. Although you can add spaces in the editor using the <space> bar on the keyboard, those spaces are ignored when the content is displayed by a browser.	
© Copyright		Insert copyright symbol.	
® Registered Trademark		Insert registered trademark symbol.	
TM		Insert trademark symbol.	
¡ and € Special Characters		Insert special characters (such as £ µ Ñ) from a drop down list. To view the list, click the black down arrow.	

Position Objects Options

These buttons let you absolutely position elements (pictures, tables, etc.) anywhere on a page.

WARNING! Some older browsers (for example, Netscape 4) do not display absolutely positioned elements. Absolute position uses the style attribute. If you use this feature, the content is not compatible with all browsers.

Button	Function
Position	Lets you move selected table or image anywhere on the screen.
Lock	"Locks" selected table or image at its current screen position. Nothing can move a locked object. To move the object, unlock it by clicking this button again.
Move to Front	If two or more images overlay each other, moves the selected image in front of the others.
Move to Back	If two or more images overlay each other, moves the selected image behind the others.
Above Text	If text overlays an image, move the image in front of the text.
Below Text	If an image overlays text, move the text in front of the image.

Text Direction Options

The text direction menu options ( ) allow bi-directional editing of text, which is useful for Arabic, Farsi and Hebrew. The client computer must also support the language.

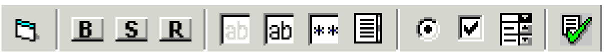
The text buttons determine the editing direction, while the edit buttons determine the side of the editor that displays the scroll bar.

For right-to left languages, such as Arabic, Farsi and Hebrew, the text editing would be "right to left", and the scroll bar would be on the left side.

For western European languages, the text editing would be “left to right”, and the scroll bar would be on the right side.

Button	Function
Left-Right Text	Text is entered left to right.
Right-Left Text	Text is entered right to left.
Left-Right Edit	The vertical scroll bar appears on the right side of the window.
Right-Left Edit	The vertical scroll bar appears on the left side of the window.

Form Elements Toolbar

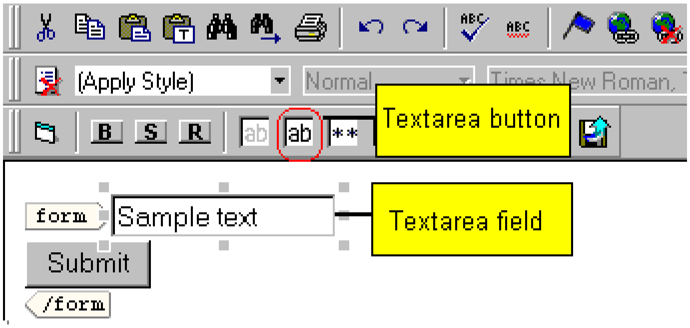


This toolbar lets you insert the elements of an HTML form into the editor. You begin by clicking the Forms button ( ). Next, add the fields and buttons that make up your form. The buttons are described in ”Buttons of the Form Elements Toolbar” on page 286.

NOTE This documentation does not explain how to create HTML forms. Many books and Web sites are dedicated to this subject, such as http://www.w3schools.com/html/html_forms.asp.

Updating Form or Element Information

If you want change a form or an element, click the form or element within the editor then click the element’s toolbar button. For example, to update the textarea field in the illustration below, click the field then click the text area button (circled in red below).



When you do, a dialog appears with the element's information. Update as needed.

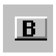
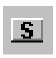
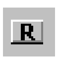
Replacing Form or Element Information

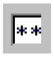
To replace a form element with another, follow these steps.

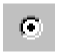
1. Click the element to be replaced.
2. Click the new element's toolbar button.
3. Complete the dialog that appears.

When you close the dialog, the new element and its information replace the old element.

Buttons of the Form Elements Toolbar

Button	Function
 Form	Inserts opening and closing form tags. For example: <form name="Test" action="http://localhost/ewebeditpro4/ formtest.htm" method="post"> </form> When you click this button, a dialog box prompts you to enter the following information for the form: • Name • Action page • Method • Encode Type
 Button	Inserts a button. For example: <input type="button" value="Test Button" name="Test" /> When you click this button, a dialog box prompts you to enter the following information for the button: • Name • Button caption
 Submit button	Inserts a submit button. For example: <input type="submit" value="Submit" /> When you click this button, a dialog box prompts you to enter the following information for the submit button: • Button caption
 Reset button	Inserts a reset button. For example: <input type="reset" value="Reset Page" /> When you click this button, a dialog box prompts you to enter the following information for the reset button: • Button caption

Button	Function
 Hidden text field	Inserts a hidden text field. For example: `<input type="hidden" value="This is initial content" name="mycontent" />` When you click this button, a dialog box prompts you to enter the following information for the hidden text field: • Name • Value
 Text field	Inserts a text field. For example: `<input size="15" value="This is initial content" name="mycontent" />` When you click this button, a dialog box prompts you to enter the following information for the text field: • Name • Value • Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)
 Password	Inserts a password field. For example: `<input type="password" value="" name="mypassword" />` A password differs from a free text field in that the user entry appears as asterisks (*), *not* to the actual characters. This is done to prevent an onlooker from seeing the password. When you click this button, a dialog box prompts you to enter the following information for the password field: • Name • Value • Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)

Button	Function
 Textarea field	Inserts a textarea field. For example: `<textarea name="mycontent" rows="5" cols="40">This is initial content</textarea>` When you click this button, a dialog box prompts you to enter the following information for the textarea field: • Name • Value • Columns • Rows
 Radio button	Inserts a radio button. For example: `<input type="radio" checked="checked" name="mybutton" />` When you click this button, a dialog box prompts you to enter the following information for the textarea field: • Name • Value • Default is Checked
 Check box	Inserts a check box. For example: `<input type="checkbox" checked="checked" name="mycheckbox" />` When you click this button, a dialog box prompts you to enter the following information for the check box: • Name • Value • Default is Checked

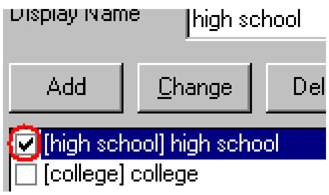
<table>
<tr><th>Button</th><th>Function</th></tr>
<tr><td> Select box</td><td>
Inserts a selection box. For example:
<pre><select multiple="multiple" size="25" name="myselectbox">

<option value="option1">option1</option>

<option value="option2">option2</option>

</select></pre>
When you click this button, a dialog box prompts you to enter the following information for the select box:

Name
Size (the number of characters in the field. If a user’s entry exceeds the size, the field scrolls to the right.)
Allow multiple (determines if a user responding to this selection box can choose more than one option)
Option name (the internal value assigned to this option)
Display name (the user sees this text in the selection box)

This dialog also has three buttons, described below.
Add - lets you add a new option to the selection box
Change -lets you change the selected option’s option name or display name
Delete - removes option from selection list
Note that you can place a check mark next to an option to specify that option as a default value on the form.


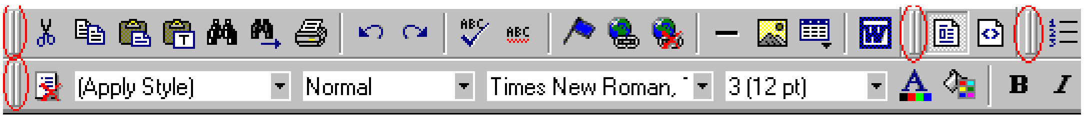
If you place a check mark next to an option, the user only needs to press <Tab> to select the option, as opposed to placing the cursor next to the option and clicking the mouse.
</td></tr>
</table>

Button	Function
 File Upload	Inserts a File Upload field and a Browse button. For example: `<input type="file" size="10" name="Save" />` When you click this button, a dialog box prompts you to enter the following information for the File Upload: • Name • Size (the number of characters in the field. If a user’s entry exceeds the size, the field scrolls to the right.)

Customizing Your Toolbar

The **eWebEditPro+XML** toolbar consists of one or more *menus*. Each menu has one or more buttons.

You can recognize the beginning of a menu by the double vertical bars (circled in the illustration).



This sample toolbar has four menus.

Your Webmaster determines

- which menus are available to you
- which buttons appear on each menu, and the sequence in which they appear initially
- whether or not you are authorized to customize your toolbar. If you are not authorized, your edits are not saved when you leave the **eWebEditPro+XML** screen.

If you are authorized to customize your toolbar, there are six ways to do so. You can

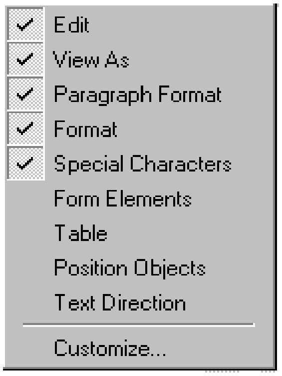
- remove or add available menus
- remove or add toolbar buttons
- rearrange menus on a toolbar
- create a new menu
- move a menu off the toolbar
- rearrange the buttons on a menu

Each procedure is explained below.

Removing Or Adding Menus

To remove or add a menu, follow these steps.

1. Place the cursor on the toolbar.
2. Right click the mouse.
3. A dropdown list appears. It displays all menus available to you and the **Customize** option.



NOTE If **Customize** does not appear on the menu, you are not authorized to customize the toolbar.

Menus that are checked appear on your toolbar.

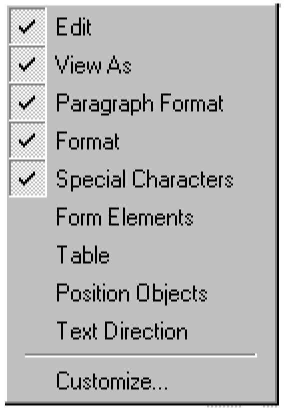
In the above example, the **Special Characters**, **View As**, **Format,** and **Paragraph Format** menus appear. The **Table, Position Objects** and **Text Directions** menus, which are not checked, are available but do not currently appear on the toolbar.

4. To *add* a menu to your toolbar that appears on the list but is not currently checked, place the cursor on the menu name and click the mouse. A check mark appears, and the menu appears on the toolbar.

   To *remove* a menu from your toolbar, place the cursor on the menu name and click the mouse. The check mark disappears, and the menu no longer appears on the toolbar.

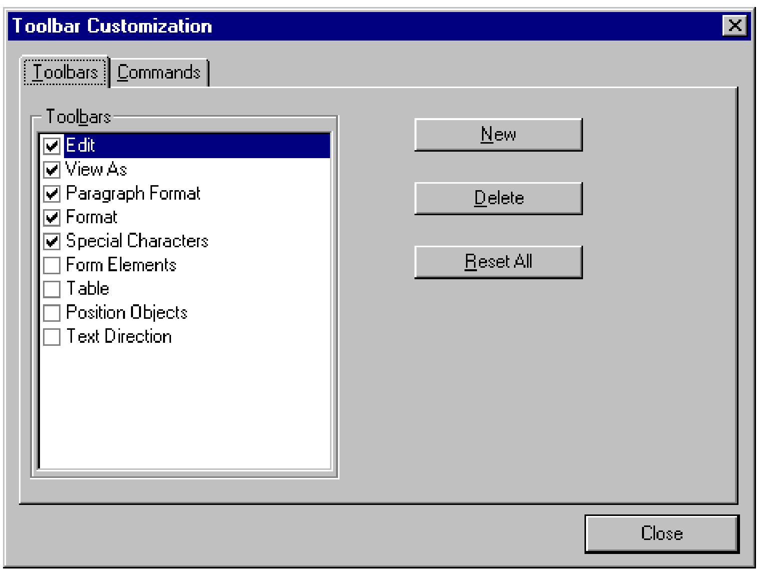
Removing or Adding Menu Items

1. Place the cursor on the toolbar.
2. Right click the mouse.
3. A dropdown list appears. Click **Customize**.



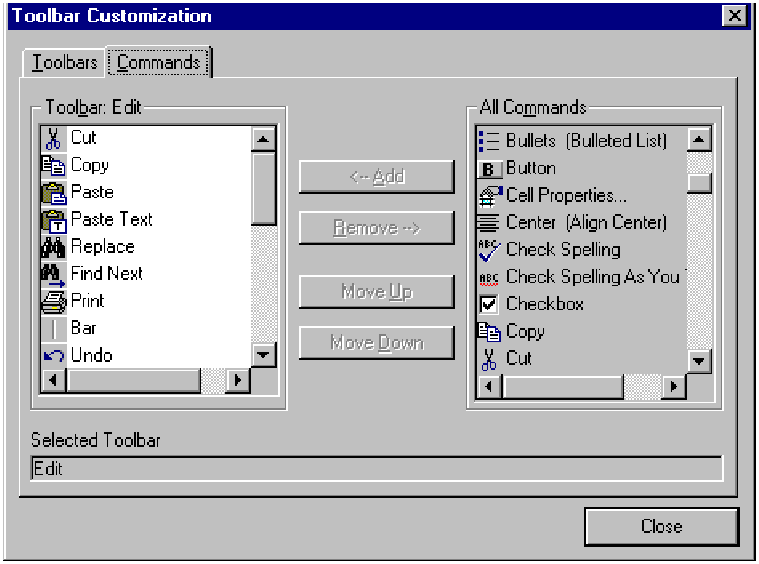
NOTE If **Customize** does not appear on the menu, you are not authorized to customize the toolbar.

4. The Toolbar Customization dialog box appears.



5. Click the menu that you want to edit.

6. Click the **Commands** tab. A new screen appears.



Using the Customize Toolbar Dialog Box

The left half of the **Commands** screen lists the buttons in the sequence in which they appear on the menu.

The right half of the screen lists available buttons that do not currently appear on the menu.

To *add* a button to the toolbar, drag it from the right side of the screen to the location on the left side where you want it to appear. (You can also click a button then click **<--Add**. This action places the button at the bottom of the list.)

To *remove* a button from the toolbar, drag it from the left side of the screen to the right. (You can also click a button then click **Remove-->**.)

The **Move Up** and **Move Down** buttons let you to move any button up or down one slot within the list of buttons.

Rearranging the Items on a Menu

1. Click the button you want to move
2. Click **Move Up** and **Move Down** to move the button up or down one slot for each click.

Restoring Toolbars

If you remove all toolbars from your menu, and then want to restore the menus but do not have the **Customize** menu option, follow these steps.

1. Place the cursor in the editor.
2. Right click the mouse.
3. A menu appears with a **Redisplay toolbars** option.
4. Click this option to restore all menus.

Rearranging the Menus on a Toolbar

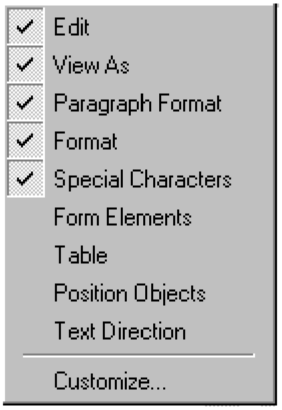
To move a menu to a different toolbar location, follow these steps.

1. Place the cursor on the double vertical bars that indicate the beginning of the menu. 
2. Click the mouse.
3. Hold down the mouse button and drag the menu to the new location. You can move the menu anywhere else on the toolbar.

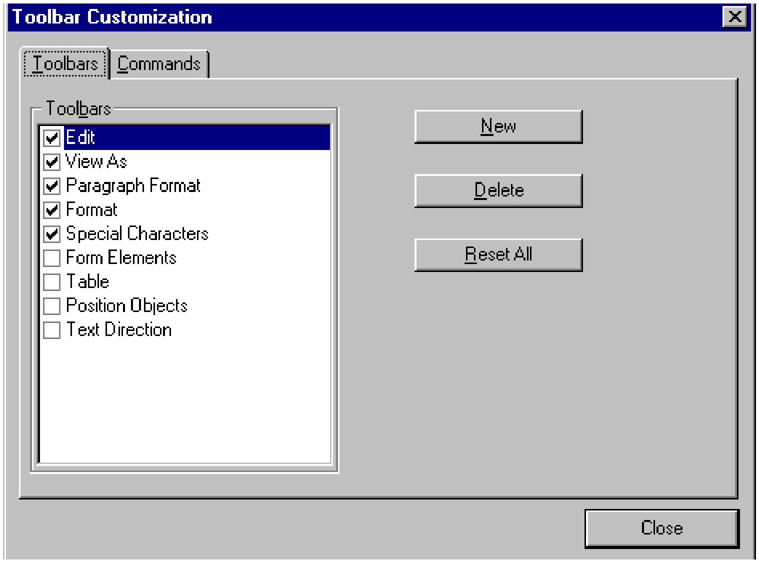
   Note that your Webmaster can define a menu so that it cannot reside on the same row with another menu. If you move such a menu, it will not remain on a row with another menu. Instead, it will move down to the next row.
4. After you place the menu where you want it, release the mouse button.

Creating a New Menu

1. Place the cursor on the toolbar.
2. Right click the mouse.
3. A dropdown list appears. Click **Customize.**



4. The Toolbar Customization dialog box appears.



5. Click **New**.

6. A new menu appears on the left side of the window, above the existing menus. The default name of the new menu is **Custom 0**.

7. To rename the menu, place the cursor in the field that displays the new menu and enter the new name.

NOTE If you click outside the toolbar name field, you cannot later change the menu's name.

8. To have the menu appear on your toolbar, click in the small box to the left of the menu name.
9. Click the **Commands** tab.
10. Add buttons to the menu, following the procedure described in "Using the Customize Toolbar Dialog Box" on page 294.

Moving a Menu Off the Toolbar

You can move a menu from the toolbar to anywhere else on the screen, even if **eWebEditPro+XML** does not occupy the entire screen.

You can also change the orientation of a menu that is not on the toolbar from a horizontal to vertical.

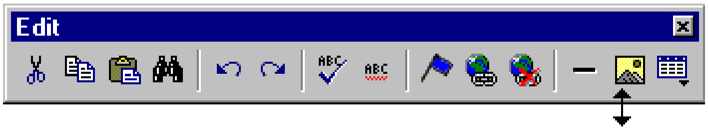
To move a menu, follow these steps.

1. Place the cursor on the double vertical bars that indicate the beginning of the menu. 
2. Click the mouse.
3. Hold down the mouse button and drag the menu to the new location. You can move the menu anywhere on the screen.
4. After you place the menu where you want it, release the mouse button.

Changing the Menu’s Orientation

To change the menu’s orientation, follow these steps.

1. Drag the menu from the toolbar.
2. Move the cursor to the bottom of the menu until it becomes a double-headed arrow (illustrated below).

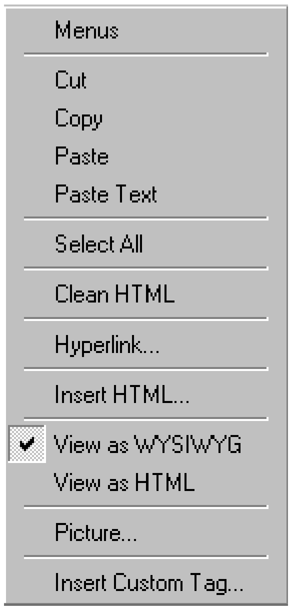


3. Drag the cursor to the lower left. As you do, the menu’s orientation changes from horizontal to vertical (illustrated below).

The Context Sensitive Menu

This section explains the functions available on the menu that appears when you right click the mouse within the **eWebEditPro+XML** editor. You can also access this menu by pressing the application key ().

Because this menu can change depending on what you are doing, it is called a *context-sensitive* menu.



NOTE A different context-sensitive menu is available when your cursor is within a table. That menu is described in “The Table Context Sensitive Menu” on page 375.

The following table lists the menu options and where to get more information on each.

Menu Option	Lets you	For more information, see
Menus	View all toolbar menus.	“Using eWebEditPro+XML without a Mouse” on page 423
Cut	Remove selected text and graphics. Place that data into temporary memory. If you later cut or copy more information into memory, the information in memory is lost.	
Copy	Copy selected text and graphics into temporary memory. Leave selected data where it is. (If you later cut or copy more information into memory, the original information is lost.)	“Copying from Other Applications” on page 303
Paste	Insert the most recently cut or copied text and graphics at the current cursor location.	
Paste Text	Paste the contents of the clipboard as plain text. That is, all HTML tags (including images) are not pasted. This button is helpful when you want to eliminate the HTML formatting of the text being copied.	
Select All	Select all information on your page. After you select it, you can cut it, copy it, etc.	
Clean Source	Remove unnecessary HTML tags	“Cleaning Source Code” on page 421
Hyperlink	Create a link to another Web page or a spot within the current page	“Using Hyperlinks” on page 413
Edit Source	Edit your page’s HTML source	“Editing a Section of a Page” on page 420
Insert Source	Insert HTML source onto the page at the cursor location.	“Inserting Source” on page 420

Menu Option	Lets you	For more information, see
Check Spelling	Compare words in the editor to Microsoft WORD spelling list.	"Checking Spelling" on page 308
View as WYSIWYG/HTML	View and edit your page's HTML	"Viewing and Editing HTML" on page 419
Picture	Insert a picture	"Inserting Images" on page 316
These options only appear if your site is using **eWebEditPro+XML**: Insert Custom tag, *tag name* tag Attributes, *tag name* tag Properties	Work with XML tags	"Editing XML Web Pages" on page 429 only available in the **eWebEditPro+XML** User Guide

Using eWebEditPro+XML's Advanced Features

Most of **eWebEditPro+XML**'s features are easy to learn. For example, to make your text bold, you select the text, and click the bold button (**B**).

However, some of **eWebEditPro+XML**'s features are more complex. For example, when creating a table, you must make several decisions: the number of rows and columns, the size of the border, the spacing between cells, etc.

The following sections explain **eWebEditPro+XML**'s more advanced features.

Copying from Other Applications

You can copy information from most other Windows applications into **eWebEditPro+XML** and retain the formatting from the original application. In general, copying from another application involves these steps.

1. Sign on to the application in which the information resides.
2. Select the information to be copied.
3. Press <Ctrl>+<C>.
4. Go to **eWebEditPro+XML**.
5. Press <Ctrl>+<V> to paste the selected information.

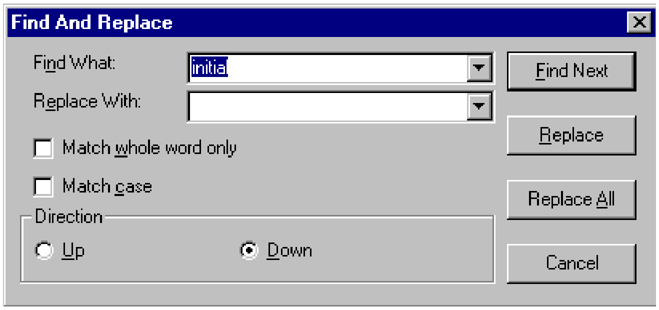
Note that you can only copy content, not background information that generates content.

So, for example, you can copy the values in a spreadsheet but not the formulas used to generate those values. Also, copying dynamic fields from Microsoft WORD would retrieve the current value of the fields but not the variables that generate those values.

It's a good idea to experiment with copying from different sources to test the results.

Finding and Replacing Text

To find (and optionally replace) text on your Web page, click the Replace button ( ). When you do, the Find and Replace dialog box appears.



You can use this dialog box to simply find text, or to find text and replace it with other text. Each option is explained below.

NOTE You can also use this dialog to delete text that appears repeatedly. To do so, follow the directions in "Finding and Replacing Text" on page 304 and enter nothing in the **Replace With** field.

Finding Text

1. In the **Find What** field, type the text that you want to find in the content.
2. Set dialog box options (see "Additional Options on the Dialog Box" on page 305).
3. Click **Find Next** to find the next occurrence of the "find" text.

Finding and Replacing Text

1. In the **Find What** field, type the text that you want to find.
2. In the **Replace With** field, type the text to replace the "find" text.

3. Set dialog box options (see ”Additional Options on the Dialog Box” on page 305).

4. If you want to

   - replace all occurrences of the “find” text with the “replace” text, click **Replace All**.

NOTE You can undo replacements one at a time using the Undo button ( ).

   - replace only the highlighted term with the “replace” text, click **Replace**.

   - find the next occurrence of the “find” text (and optionally replace it with the “replace” text), click **Find Next**.

   - change the highlighted term using the editor, exit the Find and Replace dialog, move to the term and edit as needed.

     To restart the search, press the Find Next button ( ).

5. Continue to find and optionally replace or edit until you reach the end of the text.

Additional Options on the Dialog Box

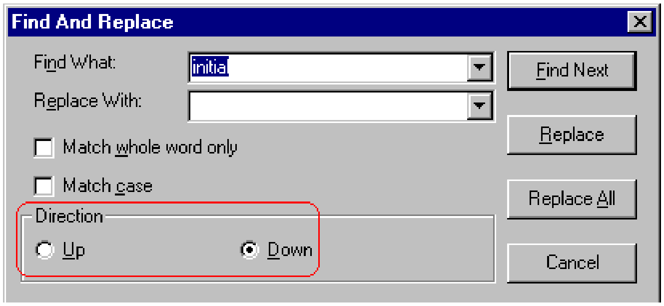
The dialog box also lets you specify

- a search direction
- if the search considers the case (upper or lower) of the search term
- whole word match

Specifying a Search Direction

The search begins where the cursor is when you click **Find Next**. To make sure you locate every occurrence of a term, place the cursor at the top of the content before beginning the search.

If you begin the search from somewhere other than the top of the page, use the **Direction** field to search from the current location to the top or bottom of the file.

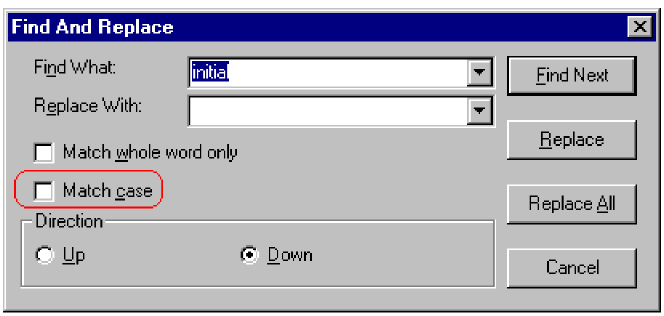


To search from the cursor location to the	Click this option in the Direction field
end of the page	**Down**
top of the page	**Up**

Considering the Case of a Search Term

By default, the search ignores the case (upper or lower) of a search term. In other words, if you enter **Bob** in the **Find What** field, the search finds bob, Bob, BOB, etc.

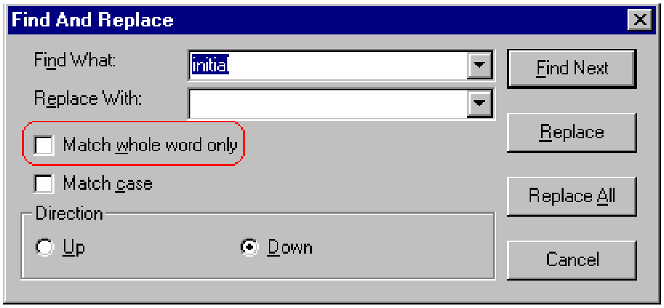
If you want the search to be case sensitive, use the **Match case** check box on the Find window. If you enter **Bob** in the **Find What** field and place a check in the **Match case** box, the search only stops at Bob, not bob or BOB.



Whole Word Match

By default, the search finds any occurrence of the text that you type into the **Find what** field. For example, if you enter **the**, the search finds the word **the**, as well as those letters embedded in other words, such as o***the***rs and ***the***ater.

If you want the search to find only whole word occurrences of the text you type into the **Find what** field, click the **Match whole words only** box in the Find dialog box.



Checking Spelling

The **eWebEditPro+XML** editor can check your spelling as you type or whenever you want to check it. The rest of this section explains

- Disabling Script Blocking
- Check Spelling as You Type
- Checking Spelling Upon Demand
- Spell Checking Selected Text
- Setting Spell Check Options

Disabling Script Blocking

If Norton Antivirus ™ 2001 is installed on your computer, you need to disable script blocking in order to use the spell checker. If you do not disable script blocking, an error message will appear whenever you check spelling.

To do this, follow these steps.

1. Launch Norton Antivirus ™ 2001.
2. From the first window, click **Options**.
3. On the next window, click **Script Blocking**.
4. On the script blocking window, uncheck **Enable Script Blocking**.
5. Press **OK**.

Checking Spelling as You Type

You can have the editor check spelling as you type. To turn on the spell-check-as-you-type feature, click the automatic spell check button( ).

When you click the button, the spell checker reviews every word in the file. A wavy red line ( ) appears under any word whose spelling is not found in the system's dictionary.

The spell checker continues to review each word as you type it, marking any words not in the dictionary.

NOTE Depending on the speed of your computer, there may be a short delay between the time you type an incorrect word and when the wavy red line appears. Also, the spell check does not check a word until you enter a space character after the word.

Fixing Spelling Errors

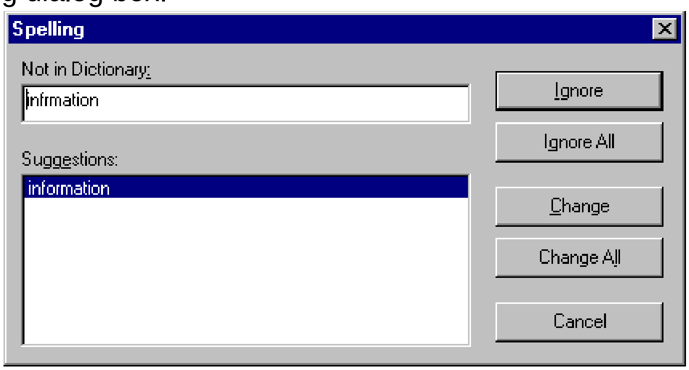
There are two ways to fix a spelling error (indicated by a wavy red line).

- Click the misspelled word and then right click. A menu displays words that are similar to the misspelled word. Click the correct word.
- If you know the correct spelling, type the correction.

Checking Spelling Upon Demand

If you do not want to use the spell-check-as-you-type feature, you can begin spell checking whenever you wish. To do this, click the spell check button ( ).

When you do, the system checks each word in the file. If the spell check finds a word in none of the dictionaries, it displays the Spelling dialog box.



The Spelling Dialog Box

The Spelling dialog box displays

- the word not in the dictionary (in the **Not in Dictionary** field).
- suggested spellings for the word (in the **Suggestions** field). The most likely replacement is selected at the top of the list.
- buttons that let you ignore the word, change the word, or exit.

If you want to	Do this
Replace the word with one of the suggestions and continue spell checking the page.	1. Click the suggested word. 2. Click **Change.**
Replace *every occurrence* of the word with one of the suggestions and continue spell checking the page.	1. Click the suggested word. 2. Click **Change All.**
Correct the spelling of the word by typing it and continue spell checking the page.	1. Click in the **Not In Dictionary** field. 2. Correct the spelling. 3. Click **Change**.
Leave the word as is; continue spell checking the page. You would normally do this if a word (such as a company name) is spelled correctly even though it is not in the dictionary.	Click **Ignore**.
Leave the word as is; continue spell checking the page, ignoring all other occurrences of the word.	Click **Ignore All**.
Stop spell checking.	Click **Cancel**.

Spell Checking Selected Text

To check the spelling for a single word or a group of words, follow these steps.

1. Select the text that you want to spell check.
2. Press the manual spell check button ().

3. The spell checker reviews the words in the selected text and stops at any word not in the dictionary. For documentation of options when a misspelled word is found, see “The Spelling Dialog Box” on page 310.

4. When the spell checker finishes reviewing the words in the selected text, it displays the following message

   Finished checking selection. Do you want to check the rest of the document?

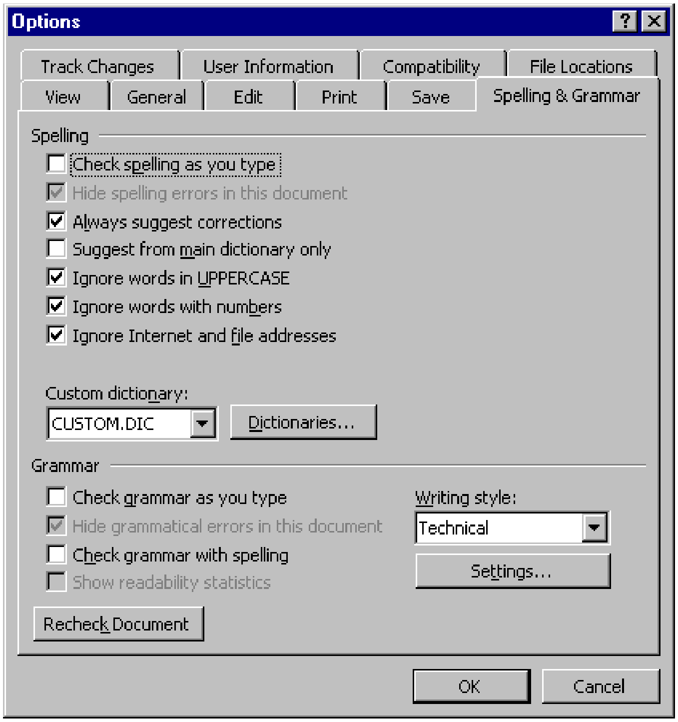
   Click **Yes** to spell check the rest of the document (including text above the selected text).

   Click **No** to stop the spell checker.

Setting Spell Check Options

eWebEditPro+XML can use Microsoft Word’s spell checking feature (your Webmaster makes this decision).

If your installation uses Word, Word’s Spelling & Grammar window (available from the **Tools - > Options** menu) has settings that affect the operation of the spell check.



Specifically, you can set the spell check feature to check or ignore

- words in UPPERCASE (for example, XYLOGIC)
- words with numbers (for example, mp3)
- Internet and file addresses (for example, `http://www.ektron.com`/)

As an example, if you check the box to the left of **Ignore Words in UPPERCASE**, **eWebEditPro+XML**'s spell check does not consider words in all uppercase characters.

You also use the custom dictionary section of the screen to identify custom dictionaries for the spell check to reference.

The spell check feature does not use the other fields on this screen.

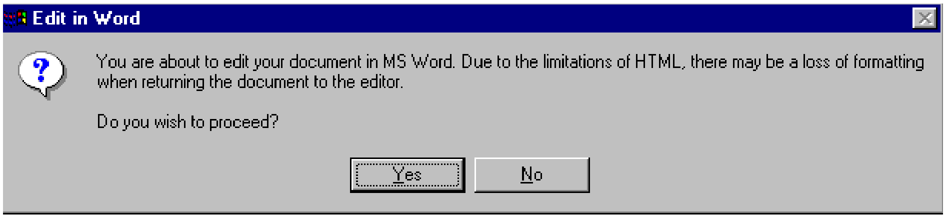
Editing in Microsoft Word

If your computer has Microsoft Word 2000 or greater, you can edit content within Word. You may prefer to do this because of familiarity with Word's user interface, and to use additional functionality available in Word.

NOTE Some Word formatting may not be compatible with HTML and, as a result, not be transferred to eWebEditPro+XML.

To edit with Word, follow these steps.

1. Open **eWebEditPro+XML**.
2. Press the Word toolbar button ( ).
3. The following dialog may appear, warning you that some Word formatting may not be transferred back to **eWebEditPro+XML**. Press **Yes** if you still want to edit in Word.



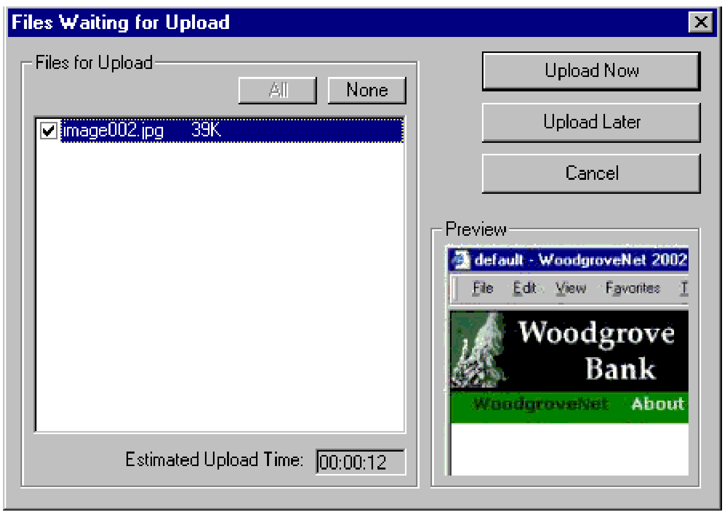
4. Microsoft Word opens. Any content that was in **eWebEditPro+XML** when you pressed the Word button is copied to Word.
5. Edit content as desired.
6. Press **File -> Close**.
7. Another warning like the one in Step 3 may appear. Press **Yes** to copy the edited content back to **eWebEditPro+XML**.
8. When done, return to **eWebEditPro+XML** and press the Word toolbar button again.

9. If you change your mind and decide to restore the content to the way it was before you edited it in Word, press the undo button ( ).

   If you want to restore the Word changes after pressing Undo, press the redo button ( ).

See Also: Uploading an Image in a Microsoft Word Document

If you insert an image into the Word content and then paste that content or save it, the following dialog box appears. The box lists all images in the content and asks if you want to copy them from your computer to your organization's Web server.



If you are ready to publish your Web content and want to display the image, click **Update Now**. If you plan to add more content later, you can click **Upload Later** and upload all images at that time.

Editing XML Documents

If your organization has implemented **eWebEditPro+XML**, you cannot edit XML documents using Microsoft Word. This is because

Word does not support XML editing. If a full XML document is loaded, the Word button ( ) is disabled.

If a Word document includes *some* custom/XML tags, the following dialog appears, warning you about the problem.

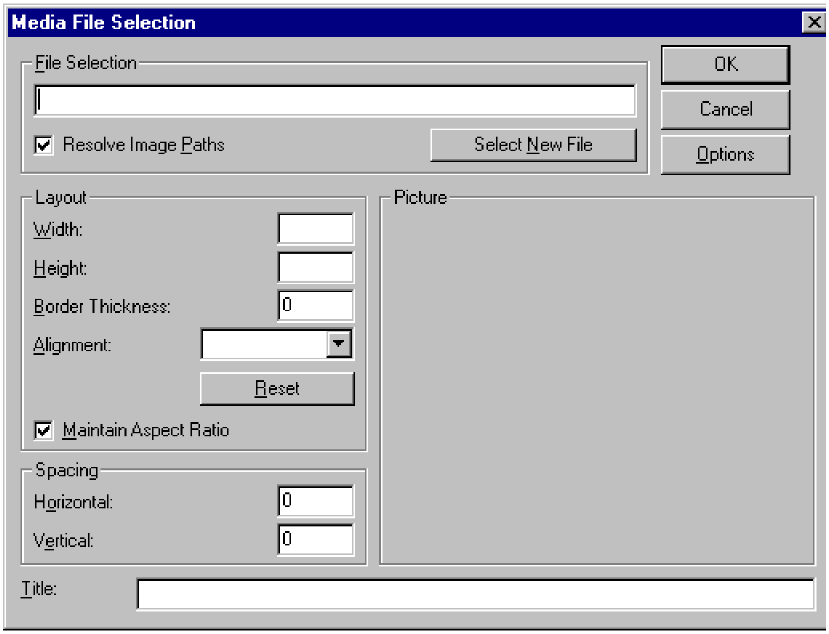
You can proceed and edit using Word or decide not to edit using Word.

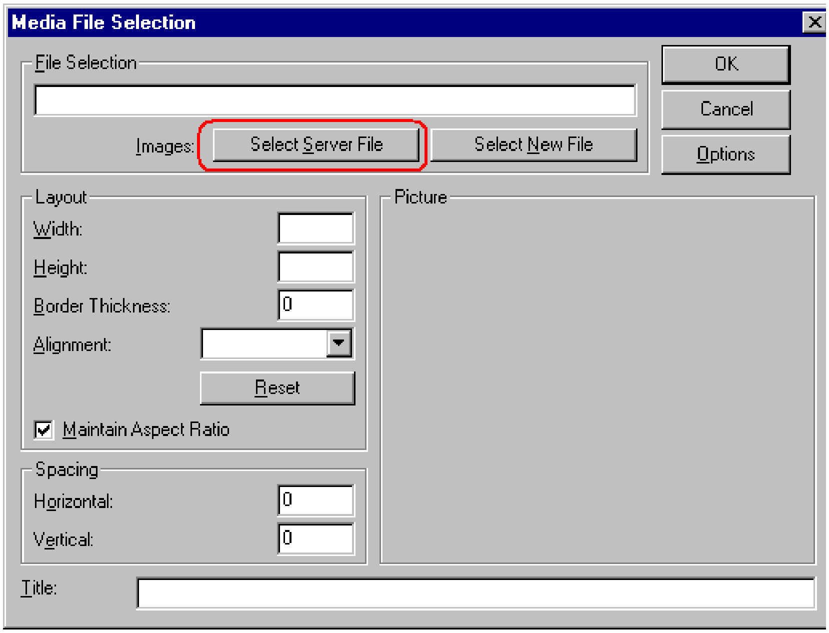
Inserting Images

To insert a picture into the editor, place the cursor where you want the image to appear and click the Insert Picture button (). When you click the button, one of the two Picture Properties dialog boxes illustrated below appears, depending on how your Webmaster has set up your system.

The dialog boxes are very similar, with the only difference being that the **Select Server File** button only appears on the second dialog box.

The **Select Server File** button appears if your upload mechanism is set to FTP. It does not appear if the mechanism is HTTP. For more information, see the **eWebEditPro+XML** Administrator Manual section "Managing Image Selection" > "Examples of Implementing Image Selection" > "Selecting Files from the Server."





You can also access this dialog box to modify a picture after you insert it. To do this, follow these steps.

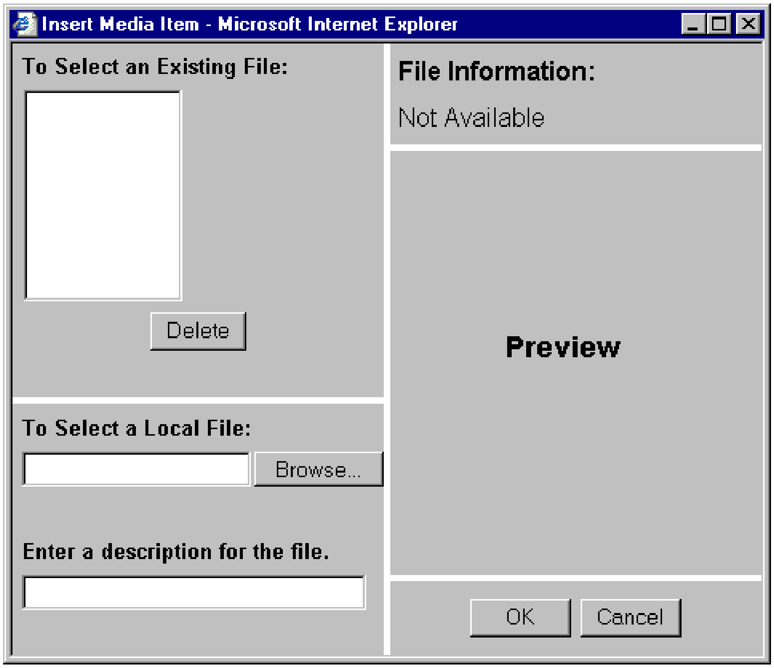
1. Click the picture.
2. Right click the mouse.
3. Click **Picture** from the menu.

If you see the first dialog box, proceed to "Using the First Picture Properties Dialog Box" on page 317. If you see the second dialog box, proceed to "Using the Second Media Selection Dialog Box" on page 321.

Using the First Picture Properties Dialog Box

When the first Picture Properties dialog box appears, click the **Select New File** button. When you do, the Insert Media Item dialog box appears.

This box and lets you insert a picture from your computer (and any network folder available to your computer), or from the Web server to which your computer is connected. Both choices are described below.



Inserting a Picture from the Server

The top left corner of the dialog box (Illustrated below) lists the pictures on the Web server.

Pictures that you previously inserted appear on this list, as do pictures inserted by other users connected to that server.

To insert a picture from the server, follow these steps.

1. Click the picture from the **To Select an Existing File** field that you want to insert.
2. Information about the picture's file size, width and height appears in the upper right corner of the dialog box.
3. If you want to view a picture before inserting it, click **Preview** (on the right side of the dialog box).
4. Click **OK**.
5. The Picture Properties dialog box reappears. Here, you can change the properties of the picture. For more information, see
    - "Adjusting a Picture" on page 322
    - "Setting a Border" on page 324
    - "Aligning the Picture" on page 325

- "Adding Space around the Picture" on page 327

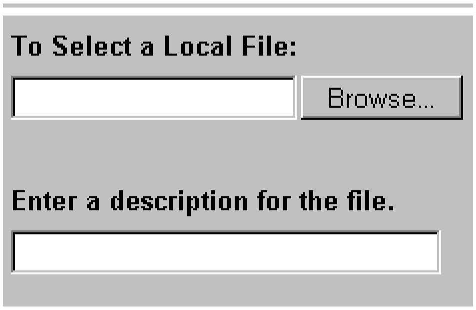
6. Click **OK** to insert the picture into the editor.

Deleting a Picture from the Server

To delete a picture from the server, select the picture and click the **Delete** button.

Inserting a Picture from Your Computer

Use the lower left corner of the dialog box to insert pictures from your computer (and any network folder available to your computer) into the editor.



NOTE You can only select files in the **To Select a Local File:** field if your computer has permission to upload files to the server.

To insert a picture from your computer, follow these steps.

1. Click the **Browse** button.
2. Navigate to the file that you want to insert and press **Open** to insert it.

   Your Webmaster can set a maximum size (in kilobytes) for images. If you select an image that exceeds the maximum, an error message appears and you cannot insert it.

   Your Webmaster can also restrict the type of image file you can insert. For example, if your Webmaster does not authorize you to insert bitmap (.bmp) files and you try to do so, an error message lists valid file extensions, and you cannot insert the image.

3. Click in the **Enter a description for the file** field. Enter a title to describe the file.
4. After you insert the picture, the title appears in the dialog box's top left corner to identify the picture to you and all users connected to the same Web server.

NOTE The title is also the `alt` text for the image. The `alt` text appears in place of the image on the Web page if the image itself cannot display for any reason.

5. Information about the picture's file size, width and height appears in the upper right corner of the dialog box.
6. If you want to view a picture before inserting it, click **Preview** (on the right side of the dialog box).
7. Click **OK**.
8. The Picture Properties dialog box reappears. Here, you can change the picture's properties. For more information, see
   - "Adjusting a Picture" on page 322
   - "Setting a Border" on page 324
   - "Aligning the Picture" on page 325
- "Adding Space around the Picture" on page 327
- "Editing the Picture's Title" on page 328

9. Click **OK** to insert the picture into the editor.

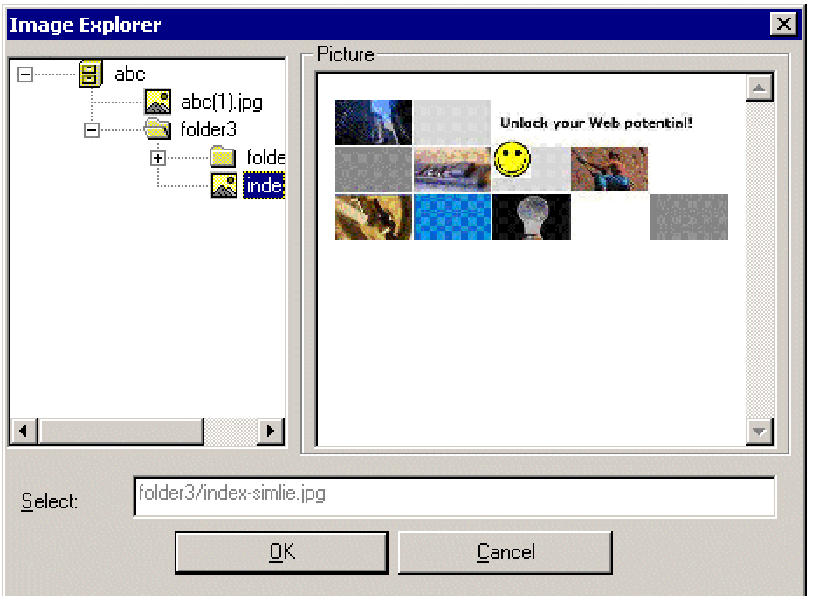
Using the Second Media Selection Dialog Box

When using the second Media Selection dialog box, you can insert a picture from any folder available to your computer (whether the folder is on your computer or a remote computer) or from the Web server. Your Webmaster determines which pictures are available on the Web server.

To insert a picture from

- a folder available to your computer, click **Select New File**, navigate to the file of interest, and click **OK**.
- the Web server, click the **Select Server File** button.You are prompted to enter a **User Name** and **Password**. Your Webmaster assigns these codes to you, which are needed to copy the file to the Web server.

  Next, the Image Explorer dialog appears (illustrated below). Navigate through the folder structure until you find the image. Then click **OK** to insert the image into **eWebEditPro+XML**.



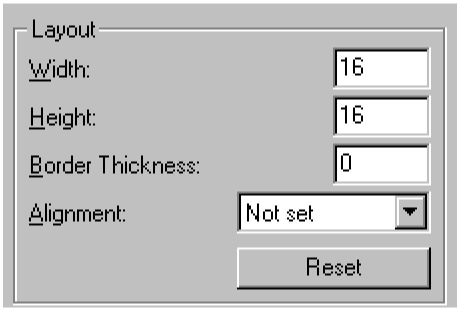
The Picture Properties Dialog Box

You can also use the Picture Properties dialog box to

- adjust the picture's width, height, border thickness, and alignment
- reset the image's properties width, height, border thickness, and alignment to their original specifications
- set spacing between the picture and surrounding information on the page
- enter or edit the picture's title
- view technical information about your connection

Adjusting a Picture

The layout area of the Picture Properties dialog box lets you adjust a picture's width, height, border thickness, and alignment.



You can use the following fields to adjust the picture before inserting it into the editor.

To make this change	Use this field
The width of the picture, in pixels	**Width**
The height of the picture, in pixels	**Height**
Add a border around the picture	**Border Thickness** For more information, see "Setting a Border" on page 324
Adjust the alignment of the picture	**Alignment** For more information, see "Aligning the Picture" on page 325

WARNING! If you substantially adjust the picture's height and/or width, the picture may be distorted when users view your Web page.

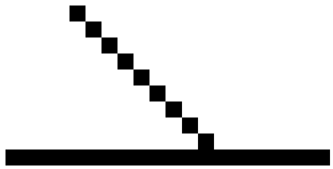
Pixels

A pixel is a single point in a graphic image.

Computer monitors display pictures by dividing the screen into thousands of pixels, arranged in rows and columns. The pixels are so close together that they appear connected.

Below is an image shown at regular size and then enlarged so you can see the pixels that make up the picture.

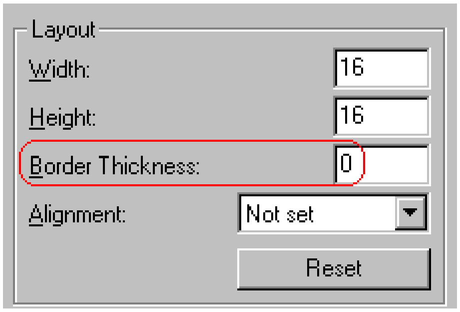
regular size



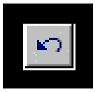
enlarged to show pixels

Setting a Border

To add a border around a picture, enter the border's thickness in pixels in the **Border Thickness** field on the Picture Properties dialog box.



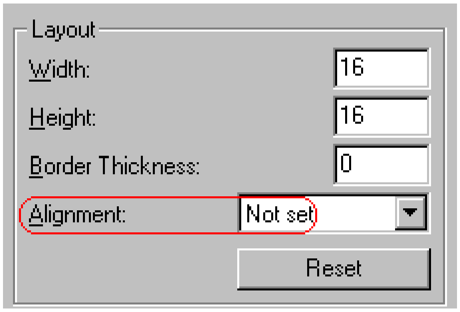
Here is a picture with a 1 pixel border. 

Here is the same picture with a 10 pixel border. 

If the picture is not a hyperlink, its border is black. If the picture is also a hyperlink, the border is the same color as a hyperlink (for example, blue or purple if visited).

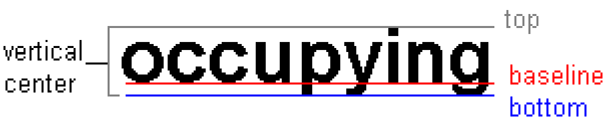
Aligning the Picture

To align a picture, use the **Alignment** field on the Picture Properties dialog box.

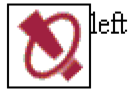
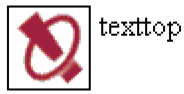
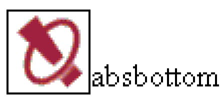


When deciding how to align a picture, you need to become familiar with these terms.

- *baseline* of text - the imaginary line on which the text lies. Some letters (such as g, p and y) have *descenders*, segments of letters that extend below the baseline
- *bottom* of text - the lowest section of a line to which a descender extends
- *top* of text - the highest spot of a line to which any segment of a letter extends
- *vertical center* - the midpoint between the top and bottom of the line

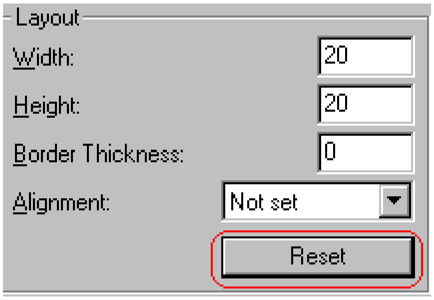


The following table lists your alignment choices.

To align	Click this in the Alignment field	Illustration
The picture on the left margin, allowing subsequent text to wrap around it	**Left**	
The picture on the right margin, allowing subsequent text to wrap around it	**Right**	
The top of the picture with the top of the text	**Text Top, Top**	
The vertical center of the picture with the *baseline* of the text	**Middle**	
The vertical center of the picture with the *vertical center* of the text	**AbsMiddle**	
The bottom of the picture with the *baseline* of the text (This is the default alignment)	**Bottom, Baseline**	
The bottom of the picture with the *bottom* of the text	**AbsBottom**	

Resetting Width, Height, Border Thickness, and Alignment

If you adjust the picture's width, height, border thickness, and/or alignment and later want to restore *all* of those settings to their original values, click the **Reset** button.

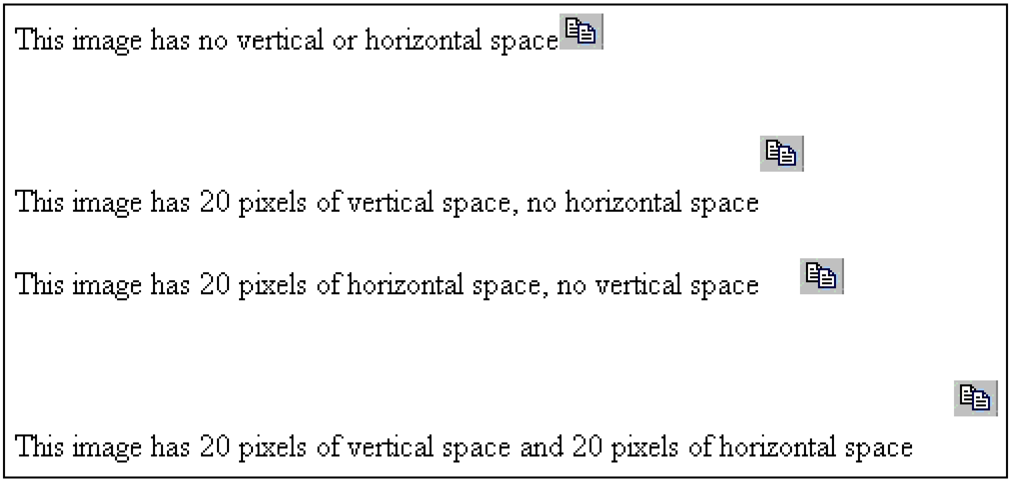


Note that you cannot selectively restore some settings -- the **Reset** button automatically restores all of them.

Adding Space around the Picture

On the Picture Properties dialog box, you can use the **Spacing** fields (**Horizontal** and **Vertical)** to add space around the picture. You enter a number of pixels to determine spacing value.

The following graphic illustrates the effect of adding spacing to a picture.



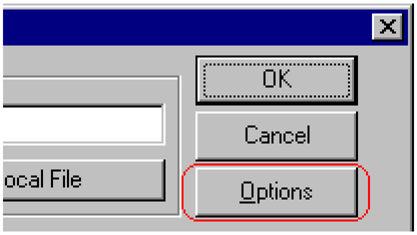
Editing the Picture's Title

The title that you entered in the Insert Media Item dialog box defaults into the **Title** field of the Media Selection dialog box. You can edit the title in this field if desired.

NOTE The title is also the `alt` text for the image. The `alt` text appears in place of the image on the Web page if the image itself cannot display for any reason.

The Options Button

When you click the **Options** button on the File Properties dialog box, the options dialog box appears. The box displays information about your connection to the Web server.

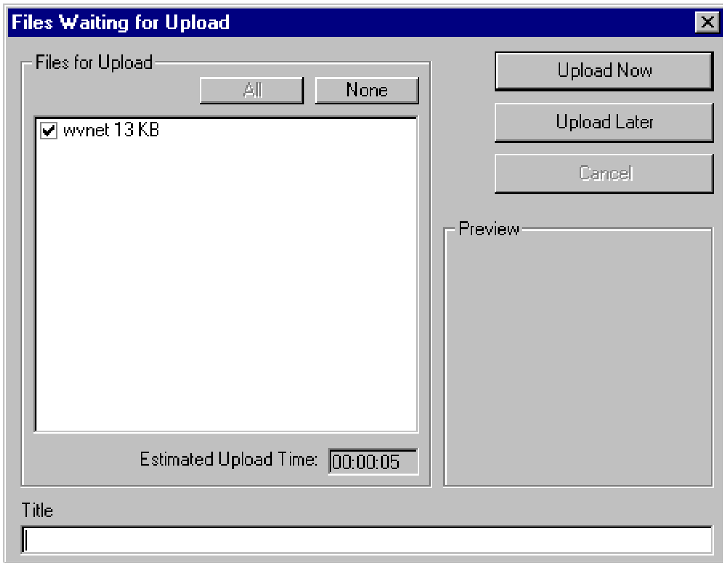


For information about these settings, see "Uploading Images" in the **eWebEditPro+XML** Developer's Reference Guide.

Moving an Image to the Server

If you insert an image from your computer into **eWebEditPro+XML** content, that image must be moved to the server when you save the content. The image can only appear on Web pages that display it after you move it to the server.

When you save content that incudes an image you inserted, the following dialog appears.



All inserted files appear in the dialog, which also estimates how long it will take to move the files to your server. If you do not want to wait that long to upload the files, click **Upload Later**. If you do this, the images will not appear on the published Web content until you move them to the server.

You can also enter a **Title** for the image near the bottom of the screen. If you do, this text appears when the user reading the Web pages moves the cursor over the image.

Deleting a Picture

If you want to delete a picture, follow these steps.

1. Move the cursor over the picture.
2. Click the mouse to select the picture.
3. Click the Cut button ().

Editing Images

WebImageFX lets you select an image from the content, edit that image, and then insert the updated image into the content. Editing consists of several functions available on the toolbar, such as

- brightening
- rotating
- changing the color depth
- inserting text

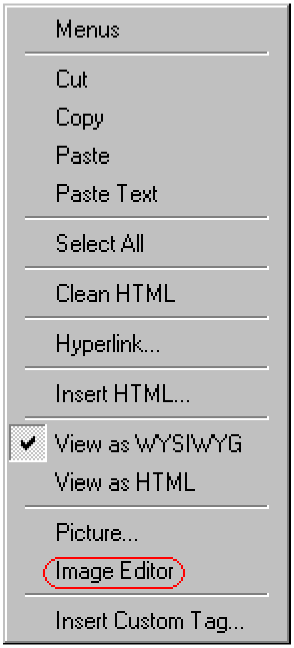
This section explains WebImageFX.

Important! WebImageFX is an external, add-on product available from Ektron.

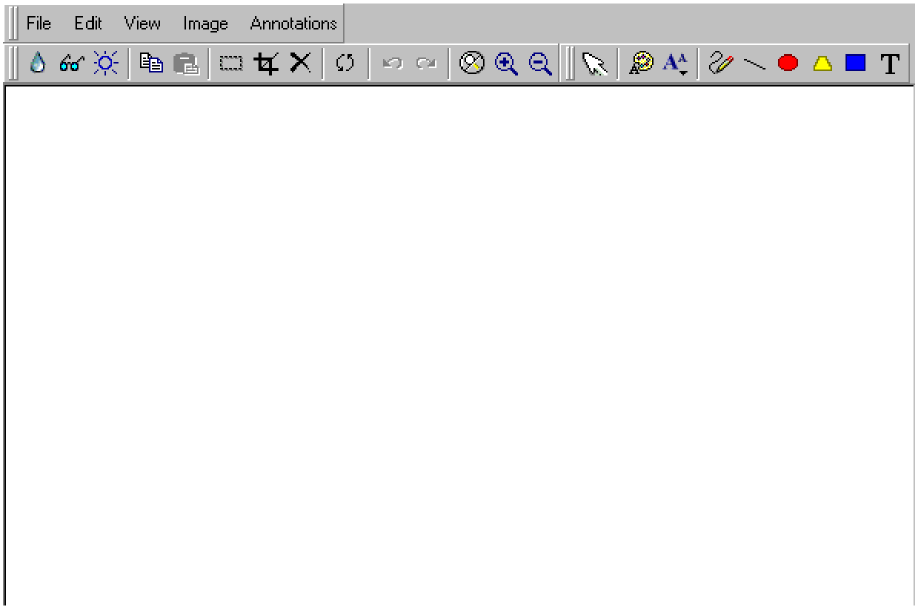
Using WebImageFX

Choosing the Image

If you double click an image, it appears within WebImageFX. You can also right click the mouse and choose **Image Editor** from the menu that appears.



WebImageFX looks similar to **eWebEditPro+XML** but has different menu and toolbar buttons.



If the Image Edit button () appears on your toolbar, you can click it to open WebImageFX. If no image is selected when you press the button or click the menu command, a blank editor appears, and you can use the **File -> Open** command to choose an image.

Once the image is in WebImageFX, you can use the buttons and menu options to edit it. The rest of this chapter describes those buttons and menu options.

Saving the Image

When you finish editing the image, you can insert it into the content by pressing the **Exit** button (). Alternatively, you can save the image to a local or network folder using the Save button ().

When you insert the image into the content, WebImageFX checks the file extension. If the image is a .gif file, it is saved as a .png file in your temporary directory. For example test.gif is saved as `C:\Documents and Settings\`*`your user name`*`\Local Settings\Temp\test.png`.

Any other file type is saved in your temporary directory without changing the file extension, *unless* you use the Save As option. For example, you save test.jpg as test.png.

Assigning a Name to a New Image

If you create an image in WebImageFX, and then exit WebImageFX and return to **eWebEditPro+XML**, the system assigns the image a random name, such as WIF50A.jpg.

If you want to assign a different name and/or folder to the image, use the Save as command.

See Also: "Save As" on page 356

Toolbar Buttons and Menu Commands

The following tables list each toolbar button and menu command. They are followed by a more detailed description of each function.

File Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	Create New	Creates a new image.	"Create New" on page 343
	Open	Selects an image to edit.	"Open" on page 349
	Save	Saves changes to an image.	"Save" on page 355
	Save As	Saves the current image under a different name or format.	"Save As" on page 356
	Twain Acquire	Performs a single page scan. Before scanning, you must select a source using the Twain Source command.	"Twain Acquire" on page 361
	Twain Source	Allows the user to select a source for acquiring an image, such as a scanner or digital camera.	"Twain Source" on page 361
	Exit	Save changes and return to **eWebEditPro+XML**.	"Exit" on page 346
	Exit without save	Ignore changes; return to **eWebEditPro+XML**.	"Exit without Save" on page 346
	Thumbnail	Creates a thumbnail of the current image. Note: A thumbnail is a miniature display of an image. Thumbnails allow fast browsing though images.	"Thumbnail" on page 360

Edit Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	copy	Copies a selected area of an image.	"Copy" on page 343
	paste as new image	Inserts copied image or area into a new file.	"Paste as New Image" on page 351
	undo	Reverses the most recent action.	"Undo" on page 362
	redo	Reapplies the changes from the command that occurred before you pressed Undo.	"Redo" on page 353
	select	Selects an area of an image. You can then perform actions on the area, such as blur and delete.	"Select" on page 357
	crop	Removes everything outside of selected area of an image.	"Crop" on page 344
	delete	Deletes selected area of an image.	"Delete" on page 344

View Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	reset zoom ratio	Displays image at full size.	"Reset Zoom Ratio" on page 354
	zoom in	Increases an image's magnification.	"Zoom In" on page 363
	zoom out	Decreases an image's magnification.	"Zoom Out" on page 363

Image Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	image info	Displays information about an image.	”Image Info” on page 348
	dimensions	Modifies an image’s width and height.	”Dimensions” on page 345
	color depth	Changes the number of colors available to an image.	”Color Depth” on page 341
	blur	Blurs or softens an image.	”Blur” on page 337
	sharpen	Sharpens edges within an image.	”Sharpen” on page 357
	brightness	Changes an image’s brightness.	”Brightness” on page 338
	contrast	Changes the difference between light and dark areas of an image.	”Contrast” on page 342
	horizontal flip	Reverses an image horizontally left to right.	”Horizontal Flip” on page 347
	vertical flip	Flips an image vertically top to bottom.	”Vertical Flip” on page 362
	rotate	Turns an image a specified number of degrees.	”Rotate” on page 354

Annotation Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	pointer selection	Click an annotation to select it.	”Pointer Selection” on page 351
	choose color	Sets the color for an annotation before you insert it.	”Choose Color” on page 339
	choose font	Sets the color of text before you insert it.	”Choose Font” on page 340
	freehand	Draws a line in any shape that you want.	”Freehand” on page 347
	line	Draws a straight line.	”Line” on page 348
	oval	Draws an oval.	”Oval” on page 350
	polygon	Draws a polygon (a closed figure surrounded by straight lines).	”Polygon” on page 352
	rectangle	Draws a rectangle.	”Rectangle” on page 353
	text	Inserts text.	”Text” on page 358

Blur

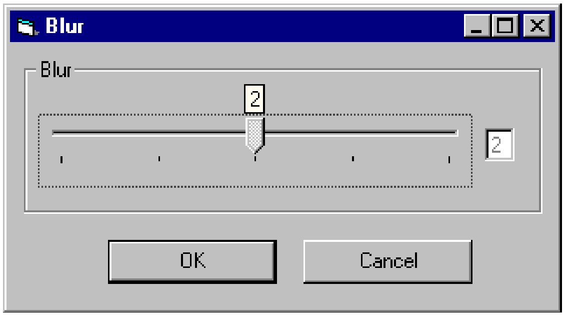
Standard Toolbar Button

Description

Blurs or softens an image. You can select a level of blur, from 0 through 4.

If you select an area of the image, the command only changes that area.

Dialog Box



Brightness

Standard Toolbar Button

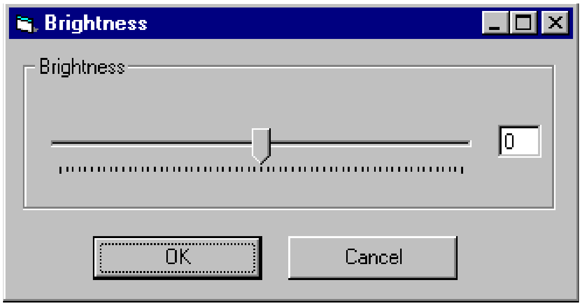
Description

Increases or decreases an image's brightness. You can select a brightness level from 32 (brightest) through -32 (darkest).

If you select an area of the image, the command only changes that area.

NOTE You cannot adjust brightness if the image's bit depth is 8 or fewer. *See Also:* "Specifying Color Depth" on page 363

Dialog Box



Choose Color

Standard Toolbar Button

Description

Lets you choose the color of an annotation before you insert it.

To change an annotation’s color *after* inserting it, place the cursor on the annotation and press the right mouse button to display the Attributes menu.

Dialog Box

Choose Font

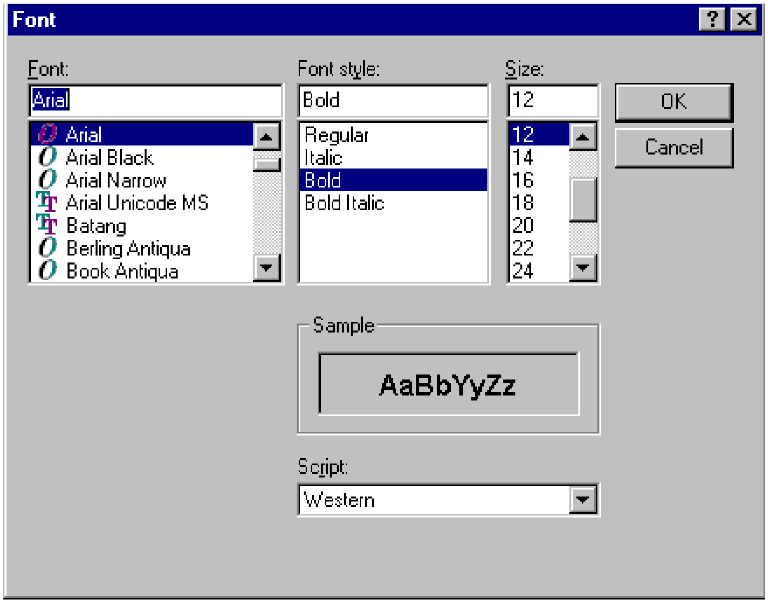
Standard Toolbar Button

Description

Lets you choose the color of annotation text before you insert it.

To change an annotation’s color *after* inserting it, place the cursor on the annotation and press the right mouse button to display the Attributes menu.

Dialog Box



Color Depth

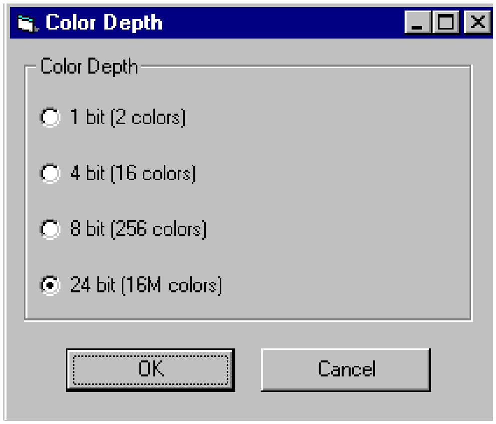
Standard Toolbar Button

Description

Changes an image's color depth.

See Also: "Specifying Color Depth" on page 363

Dialog Box



Contrast

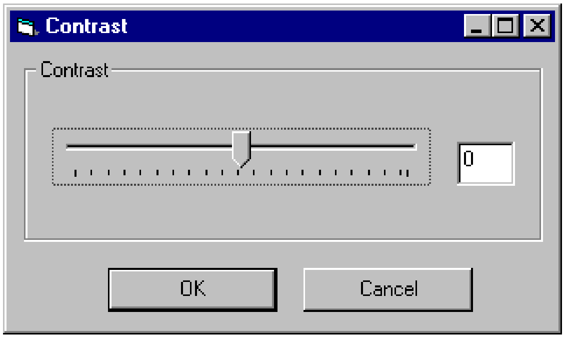
Standard Toolbar Button

Description

Increases or decreases an image's contrast (that is, the difference between light and dark areas of an image). You can select a contrast level, from 10 through -10.

If you select an area of the image, the command only changes that area.

Dialog Box



Copy

Standard Toolbar Button

Description

Copies a selected area of an image. After you copy an image, you can paste it using the paste command. *See Also:* "Paste as New Image" on page 351

To select an area of an image, use the Select command. *See Also:* "Select" on page 357

If you do not select an area, the entire image is copied.

Create New

Standard Toolbar Button

Description

Lets you create a new image. If you are editing an image when you press this command, you are asked if you want to save changes to it first.

By default, a new image's bit depth is 24, but you can change it if desired using the color depth command.

See Also: "Color Depth" on page 341

Crop

Standard Toolbar Button

Description

Keeps selected area of an image; removes everything outside that area.

To use the Crop command, follow these steps.

1. Select an area of an image that you want to keep.
2. Press the Crop button ().
3. Everything outside the selected area is removed.

Delete

Standard Toolbar Button

Description

Removes a selected area of an image. You must select an area before you delete it.

The deleted area is not saved for later pasting. In contrast, if you use the Cut command, you can later paste the cut area.

Dimensions

Standard Toolbar Button

Description

Lest you change an image's width and/or height, which are defined in pixels.

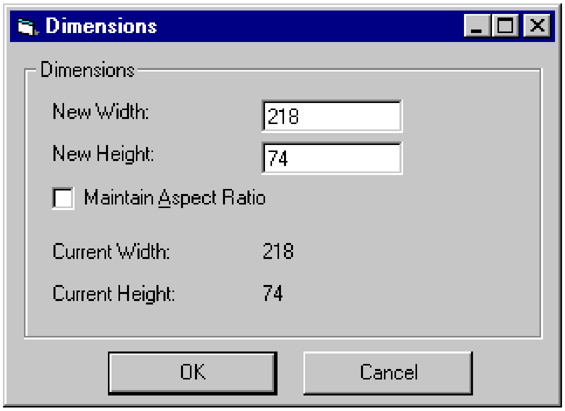
Maintaining Aspect Ratio

Use this check box to change an image's size while maintaining its *aspect ratio.*

Aspect ratio is the ratio of an image's width to height. For example, if a graphic has an aspect ratio of 2:1, its width is twice as large as its height.

If you check the **Maintain Aspect Ratio** box, just specify a new width -- the height is calculated automatically.

Dialog Box



Exit

Standard Toolbar Button

Description

Save the change in the WebImageFX and return to **eWebEditPro+XML**, where the updated image appears.

Exit without Save

Standard Toolbar Button

Description

Ignore changes made to the image in WebImageFX. Return to eWebEditPro+XML.

Freehand

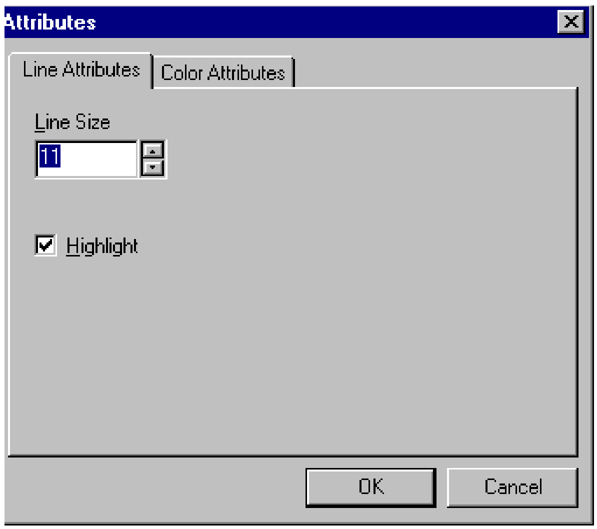
Standard Toolbar Button

Description

Lets you draw a line in any shape that you want, similar to using a pen on paper.

To use this command, click the freehand command, drag the line, and release the mouse. To change the line’s size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box



Horizontal Flip

Standard Toolbar Button

Description

Reverses an image horizontally left to right.

Click this command again to reverse the image horizontally right to left.

Image before horizontal flip 

Image after horizontal flip 

Image Info

Standard Toolbar Button

Description

Displays information about an image:

- image name
- height and width in pixels
- bit depth (*See Also:* "Specifying Color Depth" on page 363)
- file format

Line

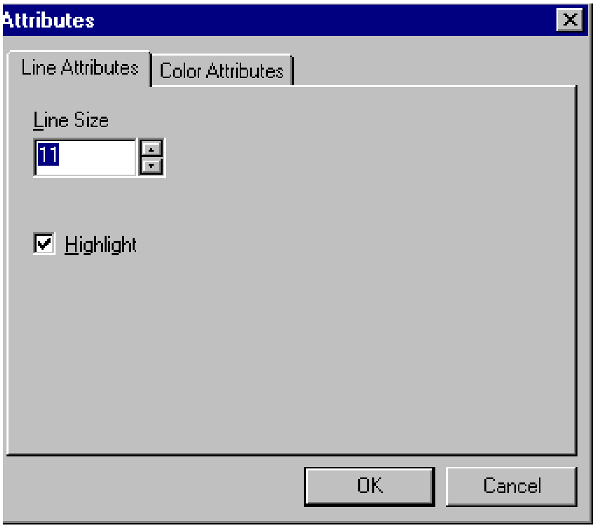
Standard Toolbar Button

Description

Draw a straight line. To change a line's size or color, right click it after drawing it.

To use this command, click the line command, drag the line, and release the mouse. To change the line's size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box



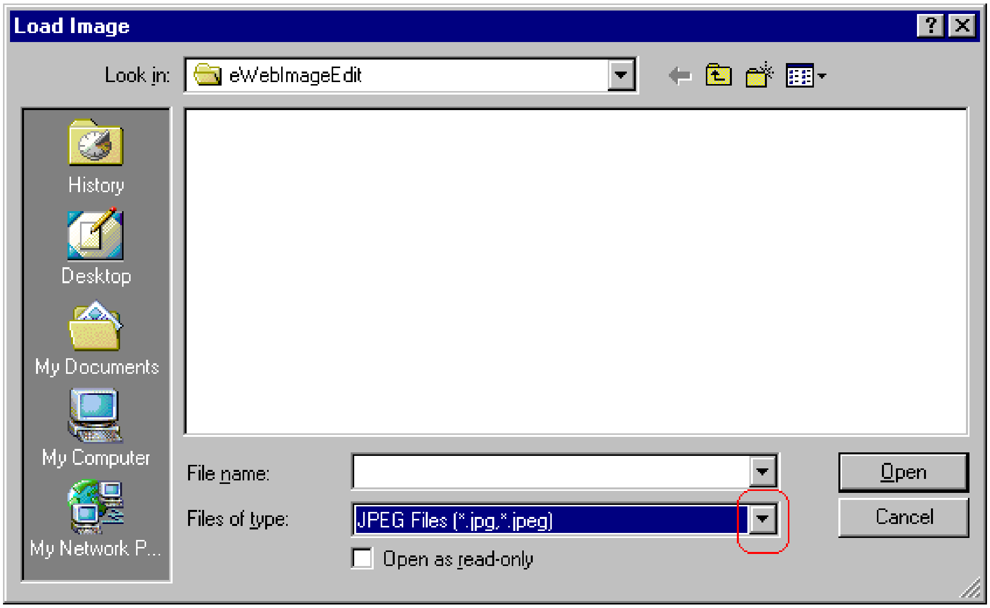
Open

Standard Toolbar Button

Description

Select an image for editing. The image can be on your computer or a local area network.

Dialog Box



To change the type of file that appears in the window, click the down arrow (circled above) to the right of the **Files of type** field. Your system administrator determines which types of files you can edit.

Oval

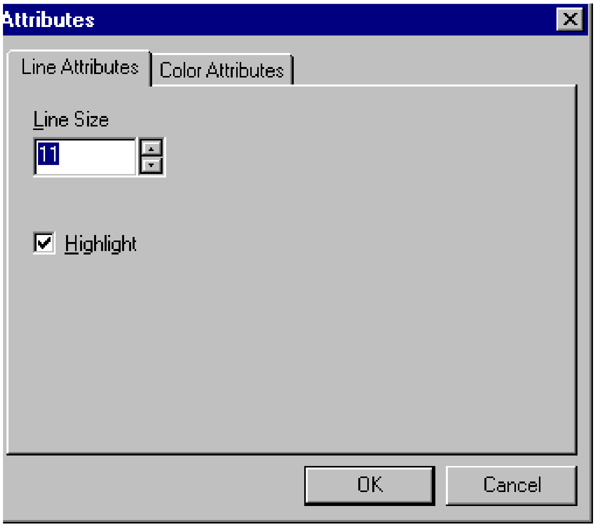
Standard Toolbar Button

Description

Draws an oval.

To use this command, click the oval command, drag the line, and release the mouse. To change the oval's line size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box



Paste as New Image

Standard Toolbar Button

Description

After you copy or cut an image or an area of an image, use paste as new image to insert it into a new file.

Before creating a new file, WebImageFX asks if you want to save changes to current file.

Pointer Selection

Standard Toolbar Button

Description

Click an annotation to select it. After you select an annotation, you can perform functions on it, such as delete it.

This command is a toggle, which means the the first time you click it, it is on, and the next time you click it, it is off.

Polygon

Standard Toolbar Button

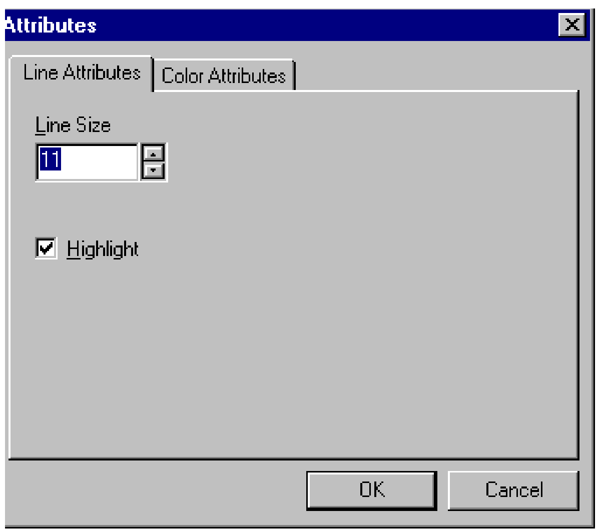
Description

Draws a polygon (that is, a closed figure surrounded by straight lines).

To use this command, follow these steps.

1. Click the polygon command.
2. Drag the line in one direction as far as you want.
3. Drag the line in the other directions to complete the polygon.
4. Double click the mouse to terminate the polygon.
5. To change the polygon’s line size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box



Rectangle

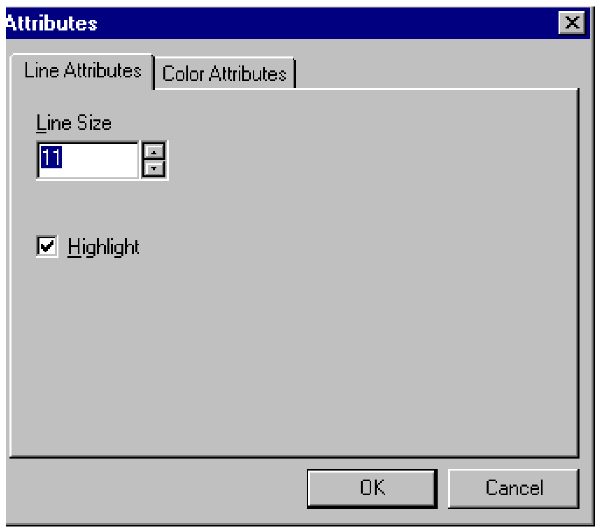
Standard Toolbar Button

Description

Draws a rectangle.

To use this command, click the rectangle command, drag a rectangle, and release the mouse. To change the rectangle's line size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box



Redo

Standard Toolbar Button

Description

If you use the Undo command and then decide that it was a mistake, use this command. It re-applies the changes from the command that occurred before you pressed Undo.

See Also: ”Undo” on page 362

Reset Zoom Ratio

Standard Toolbar Button

Description

Displays image at full size.

See Also: ”Zoom In” on page 363; ”Zoom Out” on page 363

Rotate

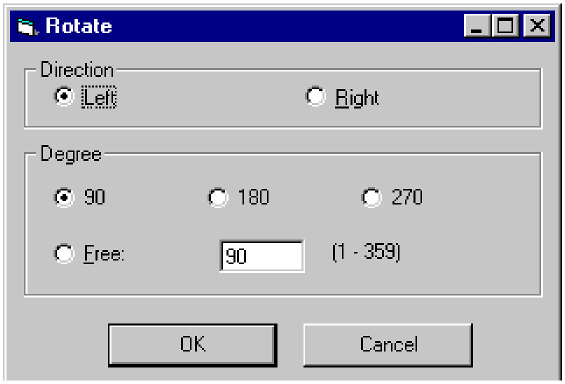
Standard Toolbar Button

Description

Turns an image a specified number of degrees. Note that the dialog box lets you rotate the image

- left or right
- 90, 180, or 270 degrees
- any number of degrees between 1 and 359

Dialog Box



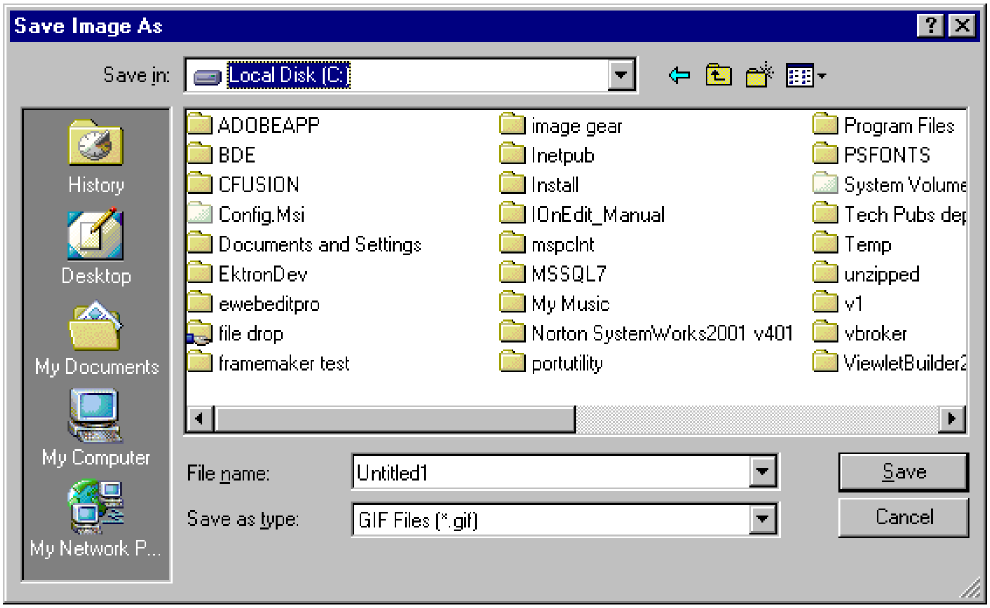
Save

Standard Toolbar Button

Description

Save changes to an image. If required information is missing, such as the image name, you are prompted for this information.

Dialog Box



NOTE The dialog box only appears the first time you save the image. If you later want to save it to a different folder, or under a different name or file type, use the Save As command.

Save As

Standard Toolbar Button

Description

Save the current image under a different name or format. For example, you might save mypicture.gif as mypicture.jpg.

Your system administrator determines which file formats are available.

Dialog Box

See ”Save” on page 355

Select

Standard Toolbar Button

Description

Selects an area of an image. You can then execute other commands on the selected area, such as blur, sharpen, cut, and delete.

NOTE Once you press the Select command, it remains selected and continues to be active until you press it a second time.

Sharpen

Standard Toolbar Button

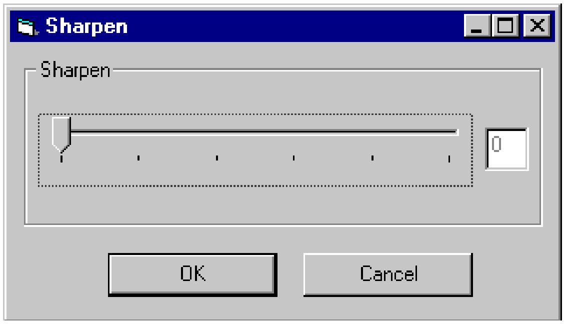
Description

Sharpens edges within an image. You can select a level of sharpness, from 1 through 5.

Sharpening brings an image into better focus and increases the detail.

If you select an area of the image, the command only changes that area.

Dialog Box



Text

Standard Toolbar Button

Description

Places text on an image. You can also change the text's size, font, color, and attributes (bold, italic, etc.).

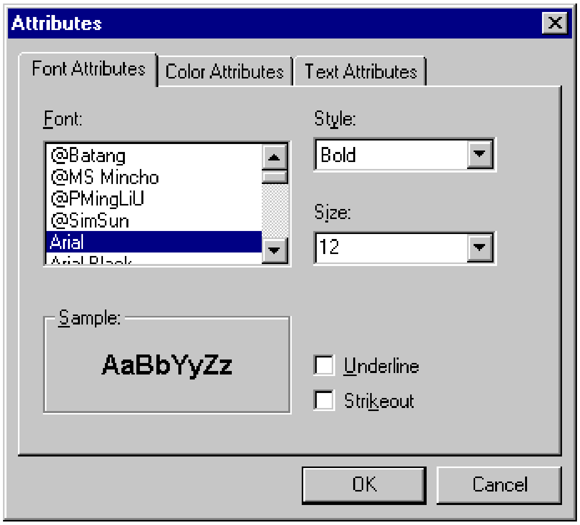
To use the Text command, follow these steps.

1. Click the Text button ().
2. Move the cursor to where you want to place the text.
3. Click the mouse button and drag a rectangle in which to insert the text.

NOTE Make sure the rectangle is large enough to accommodate your text. The rectangle disappears after you enter text.

4. Type the text.
5. Click outside the rectangle to close it.
6. To change the text or its font, size, style, color, etc., place the cursor over the text and right click the mouse. The text attributes dialog appears.

Dialog Box



The following table lists functions you can perform with this dialog.

To change this	Use this tab/field
font	**Font Attributes/Font**
font size	**Font Attributes/Size**
font style (**bold**, *italic*, etc.)	**Font Attributes/Style**
underlining	**Font Attributes/Underline**
strikeout (for example, ~~sample~~)	**Font Attributes/Strikethrough**
font color	**Color Attributes/Primary Color**
text	**Text Attributes/***white box*
if text wraps when it reaches the end of a line	**Text Attributes/ Wrap**

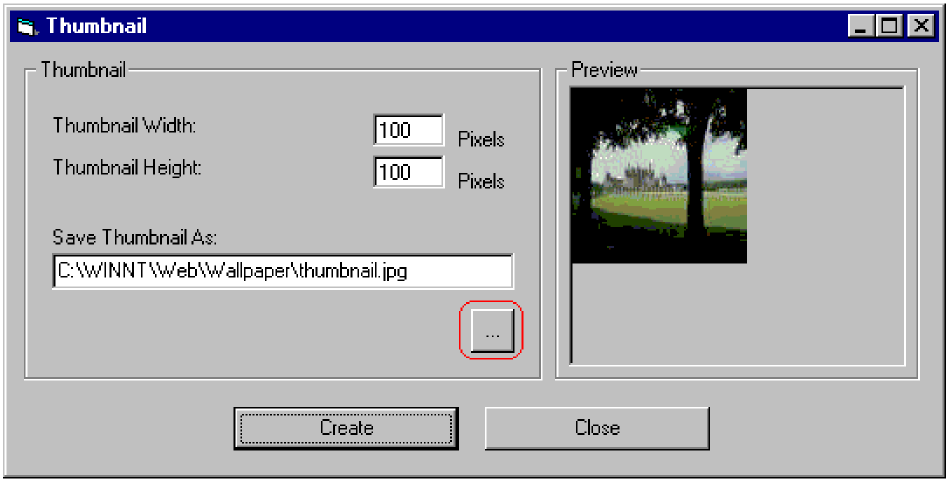
Thumbnail

Standard Toolbar Button

Description

Create a thumbnail of the current image. A dialog box prompts you to define the thumbnail.

Dialog Box



To create a thumbnail, follow these steps.

1. Define the size of the thumbnail. 100 x 100 pixels is the standard size, but you can change it.
2. Assign the thumbnail a name and folder location using the **Save Thumbnail As** field. To change the default name, you can either type the new file name into the field or click the button with the three dots (circled above) and navigate to a different folder.
3. Click **Create**. When you do, the image appears in the **Preview** box so that you can see what it will look like.

Twain Acquire

Standard Toolbar Button

Description

Perform a single page scan from a previously selected source.

See Also: "Twain Source" on page 361

Importing Scanned Images

WebImageFX lets you acquire images from a scanner or digital camera that supports the Twain standard. You select the source (using Twain Source) and do a quick acquire from that source (using Twain Acquire).

Limitations

- You can only acquire one page at a time
- Few digital cameras support twain. Usually, digital cameras resemble a hard drive or use proprietary software to extract images. Ektron does not support an interface to proprietary software.
- Not all scanners support the twain standard

Twain Source

Standard Toolbar Button

Description

Lest you select a source for acquiring an image, such as a scanner or digital camera.

See Also: "Twain Acquire" on page 361

Undo

Standard Toolbar Button

Description

Reverses the most recent commands within the current editing session.

You can undo several commands at once by pressing the undo command repeatedly. The first time you press the command, the most recently completed command is “undone.” The next time, the second most recently completed command is “undone”, etc.

See Also: ”Redo” on page 353

Vertical Flip

Standard Toolbar Button

Description

Flips an image vertically top to bottom.

Click this command again to reverse the image vertically bottom to top.

Image before vertical flip 

Image after vertical flip 

Zoom In

Standard Toolbar Button

Description

Increases an image's magnification.

You can press this command several times to continue to increase magnification.

See Also: "Zoom Out" on page 363; "Reset Zoom Ratio" on page 354

Zoom Out

Standard Toolbar Button

Decrease an image's magnification.

You can press this command several times to continue to decrease magnification.

See Also: "Zoom In" on page 363; "Reset Zoom Ratio" on page 354

Specifying Color Depth

To specify an image's color depth (that is, the number of colors available to an image), specify a *bit depth*. The color depth is derived from the bit depth. Here are the bit depth values.

Bit depth	Color depth
1	2 colors
4	16 colors

Bit depth	Color depth
8	256 colors
24	16M colors

Introduction to Tables

Sometimes, the information on your Web page looks better when displayed on a table. Here is an example.

City	Baseball Team	Hockey Team
Boston	Red Sox	Bruins
New York	Yankees / Mets	Rangers
Chicago	White Sox / Cubs	Black Hawks

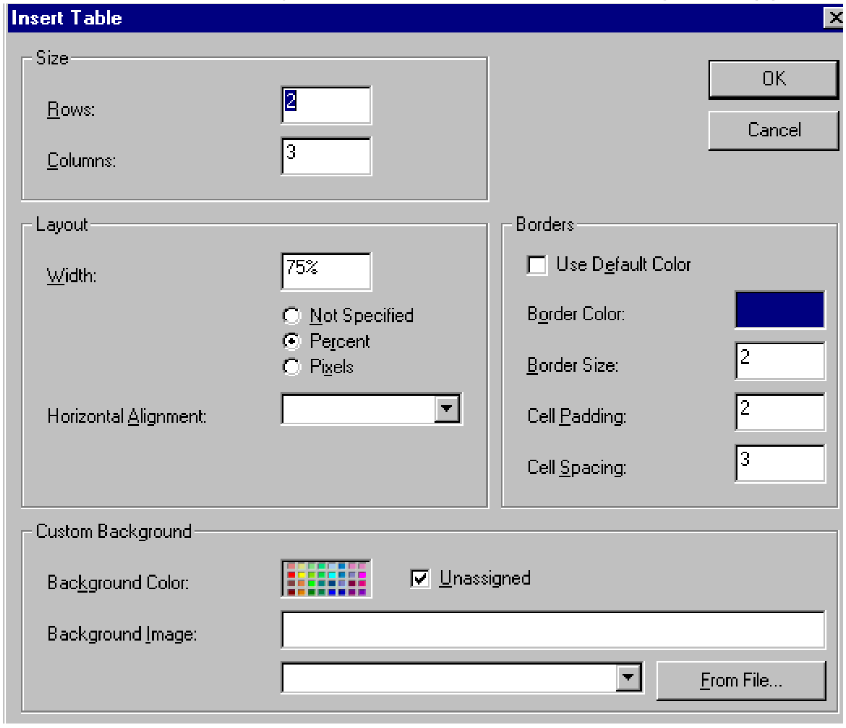
This section explains

- Creating a Table
- Deleting a Table
- Inserting a Table within a Table

See Also: “Table Dialog Boxes and Menus” on page 369, “Manipulating Your Table’s Format” on page 376, “Working with Table Cells” on page 391 and ”Section 508 Tables” on page 425

Creating a Table

To create a table, click the table button () then click **Insert Table** from the menu. When you do, the Insert Table dialog box appears.



You can also access this dialog box after you insert it. You would do this if you wanted to edit any of the information entered in the dialog.

To access this dialog after insertion, follow these steps.

1. Click the table.
2. Right click the mouse.
3. Click **Table Properties** from the menu.

When creating a table, you can specify the

- number of rows and columns

- width
- horizontal alignment on the page
- background color or background picture
- border size and color

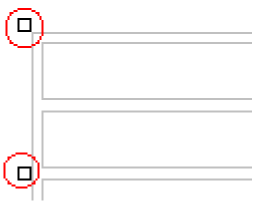
For more information about managing tables, see “Manipulating Your Table’s Format” on page 376.

For more information about managing individual cells within a table, see “Working with Table Cells” on page 391.

Deleting a Table

To delete a table, follow these steps

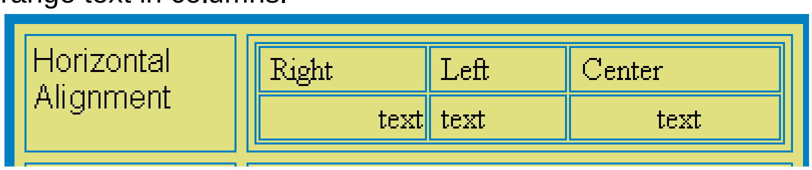
1. Move the cursor over the table until the cursor becomes a four-headed arrow ().
2. Click the mouse button. The table becomes selected (small squares appear around it).



3. Press <Delete>.

Inserting a Table within a Table

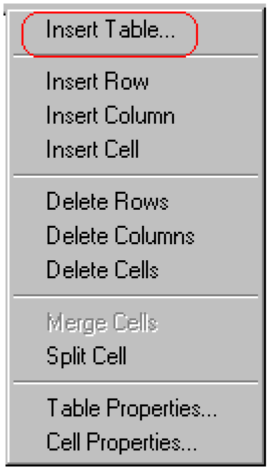
You can insert a table within a table. You might want to do this to arrange text in columns.



NOTE HTML does not let you use tabs or spaces to align text in columns. You must use a table to align columns. You can remove the table's border, so that no lines appear between the columns and rows.

To insert a table within a table, follow these steps.

1. Place the cursor in the cell into which you want to insert a table.
2. Click the Insert Table button ( ).
3. Click **Insert Table** from the menu.



4. The Insert Table dialog box appears.
5. Edit the fields in the dialog box as needed. Then, click **OK**.

Table Dialog Boxes and Menus

This section explains the menu options and dialog boxes you use to manipulate tables and cells. In most cases, you are referred to another section that describes the feature in more detail.

This section explains

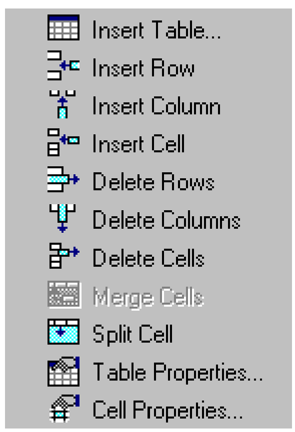
- The Insert Table Menu
- The Table Properties Dialog Box
- The Cell Properties Dialog Box
- The Table Context Sensitive Menu

The Insert Table Menu

You access the Insert Table menu by clicking on the Insert Table button ( ) while the cursor is inside a table.

NOTE Before you click the button, make sure the table is not selected (that is, the table is not surrounded by small boxes).

When you do, the following menu appears.

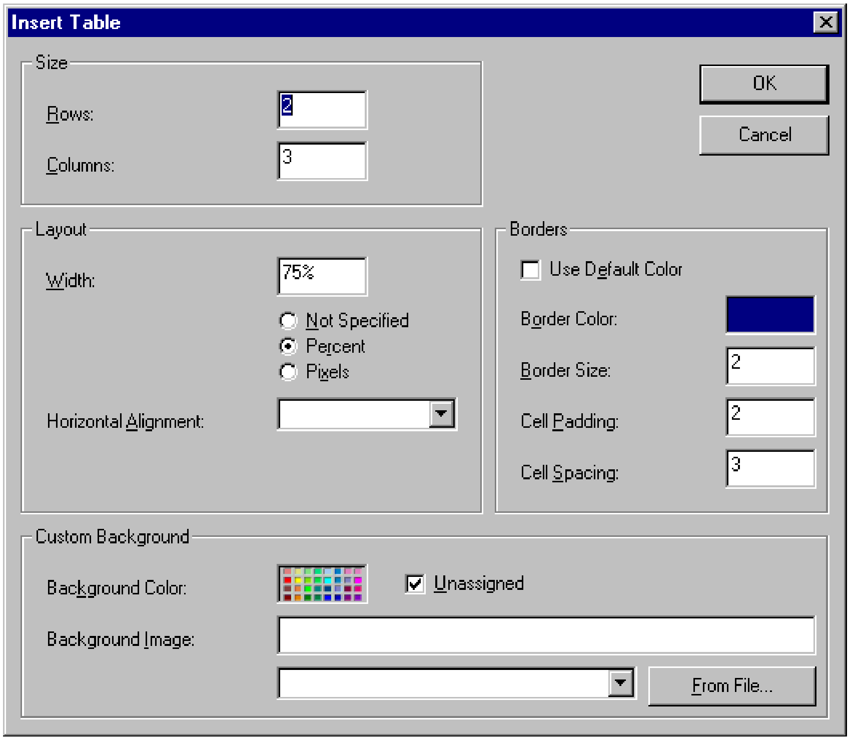


The following table lists the menu options and where to get more information on each.

Menu Option	Description	For more information, see
Insert Table	Inserts a new table where the cursor is currently resting	“Creating a Table” on page 366
Insert Row	Creates a new table row above the row in which the cursor is currently resting	“Adding or Removing Rows and Columns” on page 377
Insert Column	Creates a new table column next to the column in which the cursor is currently resting	“Adding or Removing Rows and Columns” on page 377
Insert Cell	Inserts a cell to the left of the cursor in a table	
Delete Rows	Deletes table row in which the cursor is currently resting	“Adding or Removing Rows and Columns” on page 377
Delete Column	Deletes table column in which the cursor is currently resting	“Adding or Removing Rows and Columns” on page 377
Delete Cells	Deletes the selected cells	
Merge Cells	Combines the contents of two or more selected cells into one	“Merging Two Cells” on page 405
Split Cell	Divides a cell into two. Each cell occupies one half the size of the original cell.	“Splitting a Cell” on page 404
Table Properties	Displays and lets you edit table properties, such as the number of rows and columns, cell padding, and borders.	“The Table Properties Dialog Box” on page 371
Cell Properties	Displays and lets you edit cell properties, such as width and alignment	“The Cell Properties Dialog Box” on page 373

The Table Properties Dialog Box

The Insert Table dialog box lets you manipulate most elements of a table's appearance.



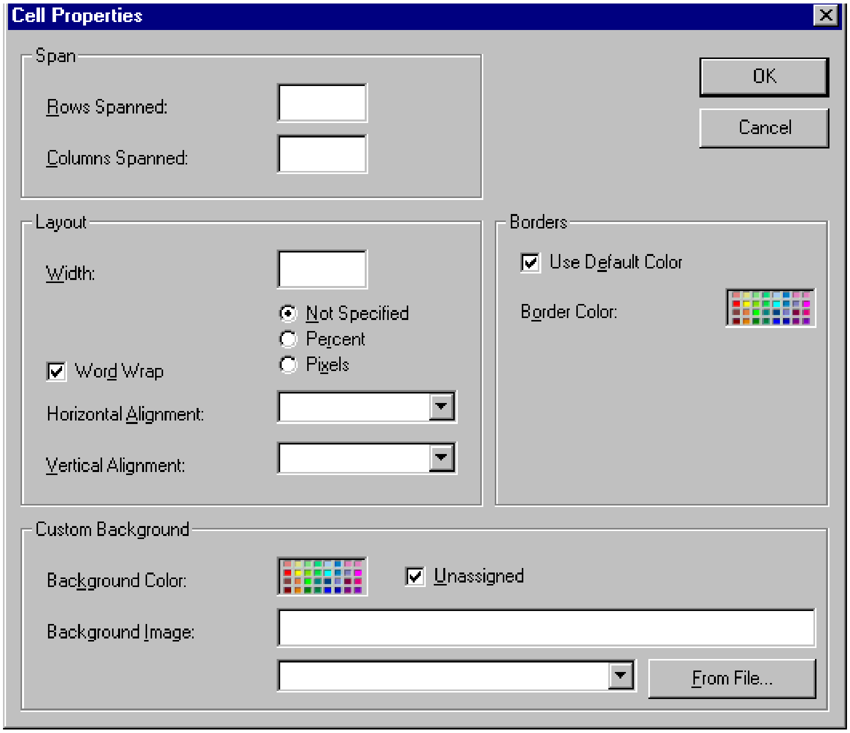
The following table lists the fields on this dialog box and refers you to the section that explains each field.

Field(s)	Lets you specify	For more information, see
Size: Rows, Columns	The number of rows and columns in the table	"Choosing the Number of Rows and Columns" on page 376
Layout: Width	Table width	"Specifying Table Width" on page 378
Layout: Horizontal Alignment	The table's alignment across the Web page	"Setting Horizontal Alignment" on page 401

Field(s)	Lets you specify	For more information, see
Background Color	The background color of the table	"Specifying a Table's Background Color" on page 384
Background Image	A background image for the table	"Specifying a Background Image for a Table" on page 386
Borders: Use Default Color	Whether or not to use the default color (gray) for table borders	
Border Color	If you do not use the default, the color of the table border	"Assigning Border Color" on page 387
Border Size	The size of the table border	"Assigning Border Size" on page 389
Cell Padding	The space (in pixels) between the cell text and a cell's border	"Assigning Cell Padding" on page 408
Cell Spacing	The space (in pixels) between a cell and surrounding cells	"Assigning Cell Spacing" on page 408

The Cell Properties Dialog Box

The Cell Properties dialog box lets you manipulate most elements of a cell's appearance.



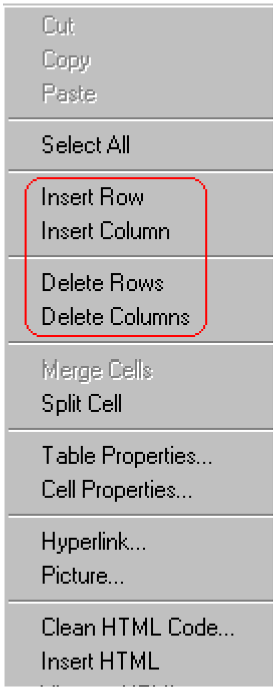
The following table lists the fields on this dialog box and refers you to the section that explains each field.

Field(s)	Lets you specify	For more information, see
Rows Spanned	If the cell spans two or more rows	"Spanning Rows or Columns" on page 399
Columns Spanned	If the cell spans two or more columns	"Spanning Rows or Columns" on page 399
Width	The minimum cell width	"Specifying the Width of a Cell" on page 391

Field(s)	Lets you specify	For more information, see
Word Wrap	Whether text moves down to the next line when it reaches the specified width of a cell	"Word Wrap" on page 406
Horizontal Alignment	The alignment of data across a cell	"Setting Horizontal Alignment" on page 401
Vertical Alignment	The alignment of data up and down within a cell	"Setting Vertical Alignment" on page 403
Background Color	The cell's background color, if you want it to be different from the table's background color	"Specifying a Cell's Background Color" on page 395
Background Image	A background image for the cell	"Specifying a Background Image for a Cell" on page 397
Use Default Color	Apply the table border color to this cell border	
Border Color	Apply a color other than the table border color to this cell border	"Setting a Cell's Border Color" on page 394

The Table Context Sensitive Menu

The following menu appears when you right click the mouse while the cursor is in a table.



All items on this menu are described in "The Context Sensitive Menu" on page 299 except **Tables**, which is described in "The Insert Table Menu" on page 369.

Manipulating Your Table's Format

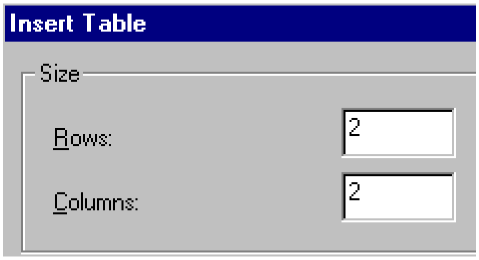
This section explains how to manipulate your table's format by specifying

- a number of rows and columns
- a width
- horizontal alignment
- a background color or image
- border color and size

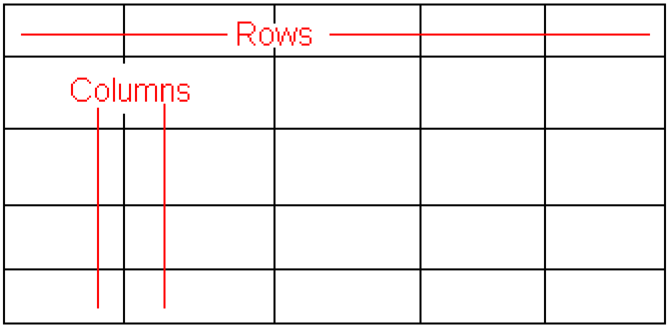
NOTE You can also apply most of these properties to individual cells within a table. See "Working with Table Cells" on page 391 for details.

Choosing the Number of Rows and Columns

Use the **Size** section of the Insert Table dialog box to specify the number of rows and columns in the table.



A row is a horizontal series of cells, while a column is a vertical series.



If you know how many rows and columns the table will be, enter those numbers. If you don’t know the number of rows and columns you need when you create the table, estimate how many you need. You can add or remove rows and columns later.

Placement of Inserted Row or Column

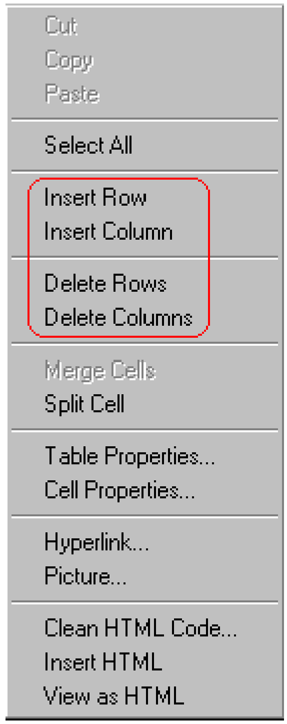
If you add a row, it appears above the row in which the cursor was resting when you pressed **Insert Row**.

If you add a column, it appears on the left side of the table.

Adding or Removing Rows and Columns

To add or remove rows and columns after you create the table, follow these steps.

1. Place the cursor in the cell from which you want to add or delete.
2. Right click the mouse. A menu appears.



3. Click the appropriate action from the menu. For example to add a row, click **Insert Row**.

NOTE If you are working with nested tables, and you add or remove a column then undo that action and redo it, you must press the redo button once for each cell in the row or column.

Specifying Table Width

When you create a table, you can set its width by specifying one of the following:

- *percentage* of the window: the table's width varies as a user adjusts the browser size
- *fixed number of pixels*, the table's width stays the same as a user adjusts the browser size

You can also *not* set a width but instead let information you enter into the table’s cells determine its width.

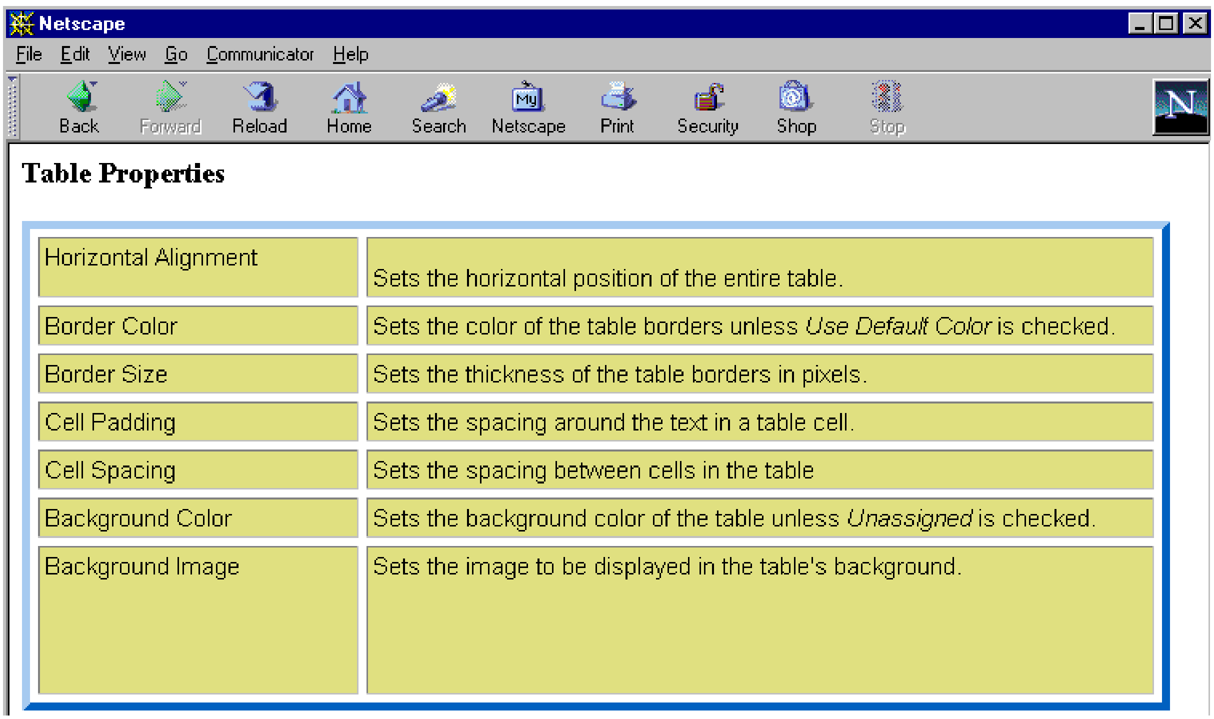
NOTE To set the width of a table column, adjust the width of one of the cells within the column (as described in “Specifying the Width of a Cell” on page 391). Usually, this change affects all other cells in the column.

Specifying Table Width by Percentage

Specify table width by percentage if you want the table to be resized as the user resizes the browser.

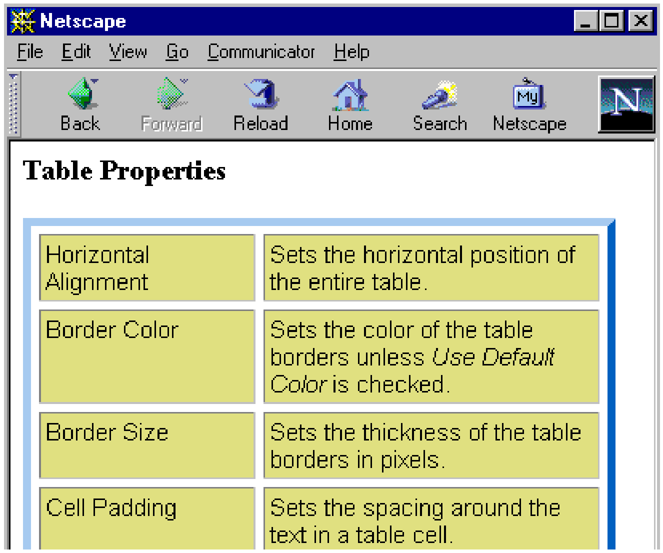
NOTE In order for the table to resize with the browser, the Word Wrap attribute must be turned on in all of a table’s cells. For details, see “Word Wrap” on page 406.

For example, if you specify that a table is 100% wide, and your browser displays 14 inches across when it is maximized, the table fills the screen (except for the browser border).



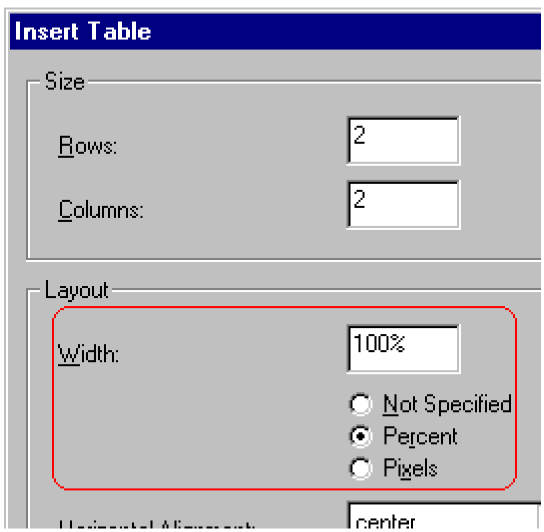
Horizontal Alignment	Sets the horizontal position of the entire table.
Border Color	Sets the color of the table borders unless *Use Default Color* is checked.
Border Size	Sets the thickness of the table borders in pixels.
Cell Padding	Sets the spacing around the text in a table cell.
Cell Spacing	Sets the spacing between cells in the table
Background Color	Sets the background color of the table unless *Unassigned* is checked.
Background Image	Sets the image to be displayed in the table's background.

If you resize the browser to half the screen, the table will be about 7” wide. You still see both columns, but some of the data is moved down.



Setting Table Width by Percentage

To specify table width by percentage, choose **Percent** in the layout section of the Insert Table dialog box. Then, specify the percentage at the **Width** field.

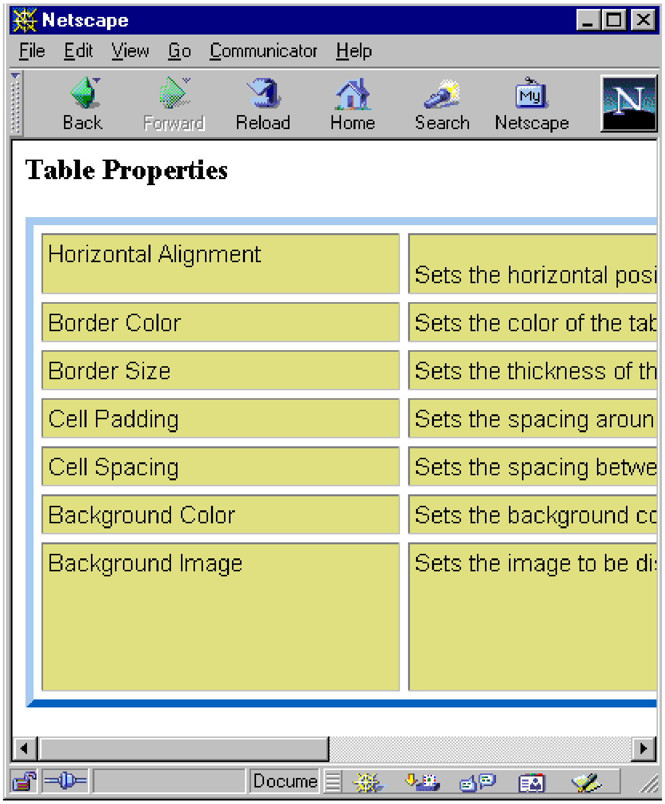


Specifying Table Width by Pixels

Specify table width by pixels if you want the table to remain the same size if a user resizes the browser.

For example, if you specify that a table is 610 pixels wide, and the user's browser is set to low resolution (640 x 480 pixels), the table occupies the full width of the browser when it is maximized.

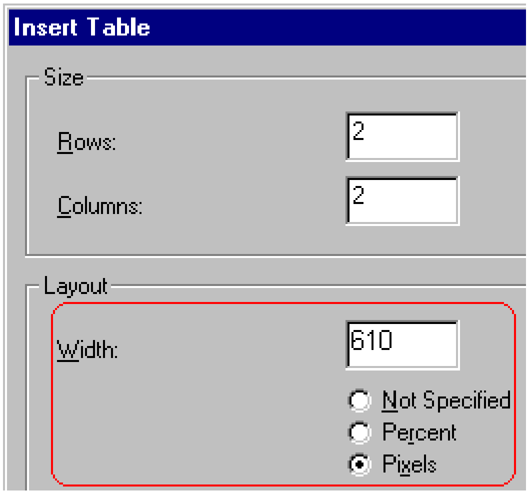
If the user resizes the browser so that it only occupies the left half of the screen, only the left half of the table appears. A scroll bar appears at the bottom of the browser. The user must move the scroll bar to see the rest of the table.



If you set table width by pixels, do not set it to more than 610 pixels. Otherwise, the table will not fully display on a monitor set to low resolution (640 x 480).

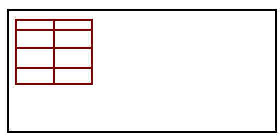
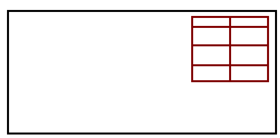
Setting Table Width by Pixels

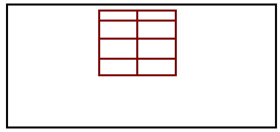
To specify table width by pixels, choose **Pixels** in the layout section of the Insert Table dialog box. Then, specify the number of pixels at the **Width** field.



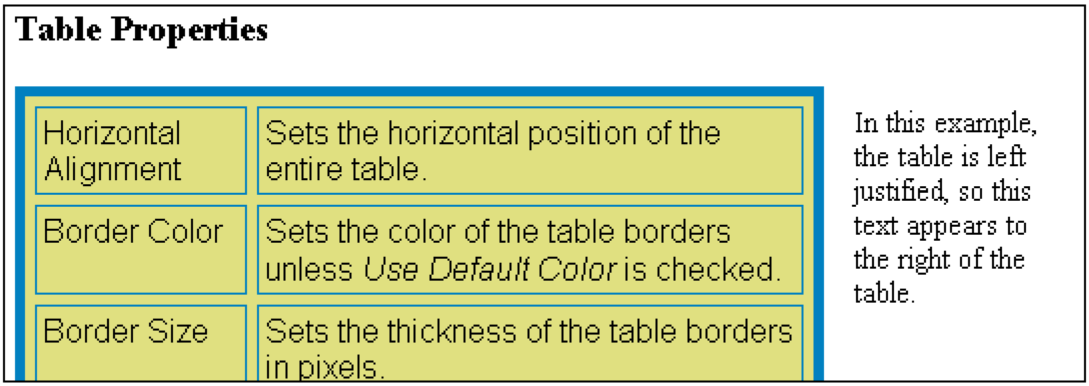
Specifying Horizontal Alignment

You can specify your table’s horizontal alignment (left, right, or center) within the browser.

Alignment	Example
left	
right	

Alignment	Example
center	

If you specify right or left justify, you can wrap text around the table. To do this, move the cursor to the right or left of the table and begin typing.



Specify the table alignment at the **Horizontal Alignment** field on the Layout area of the Insert Table dialog box.

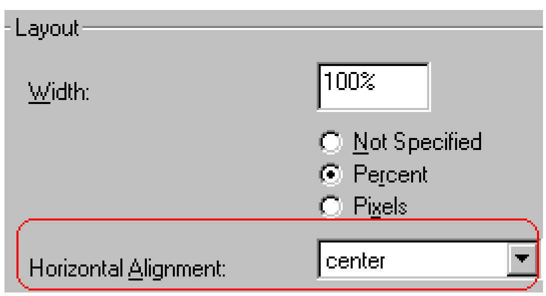


Table Backgrounds

You can specify a background color or image for your table.

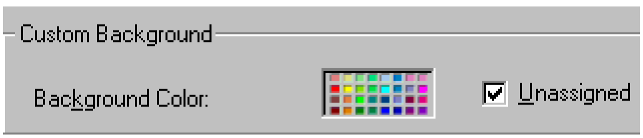
Specifying a Table's Background Color

You can assign a background color to a table to make it more pleasing to the eye. Here is an example.

Width	Sets the width of the table on the page in terms of a percentage or by pixel width.
Horizontal Alignment	Sets the horizontal position of the entire table. For example, left, center, right.
Border Color	Sets the color of the table borders unless *Use Default Color* is checked.

NOTE If you apply a dark background color to a table, you may want to apply a light foreground color to the text. Use the font color button ( ) to change the text color.

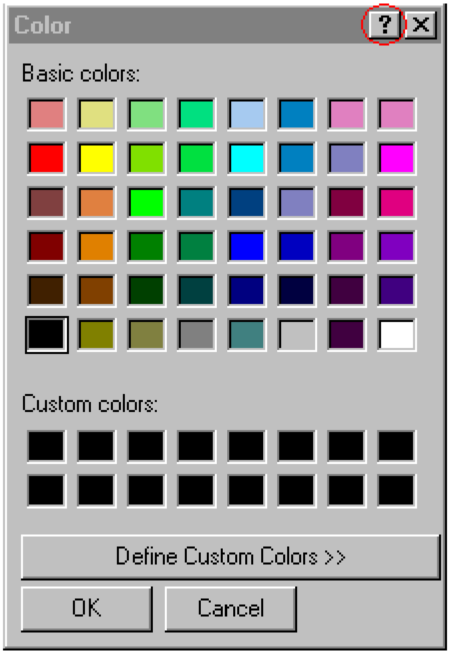
To assign a background color to your table, click the **Background Color** field on the Insert Table dialog box.



When you click that field, a color dialog box appears. Click the color that you want to apply to the background of the table.

Follow these steps to get help on how to use the color box.

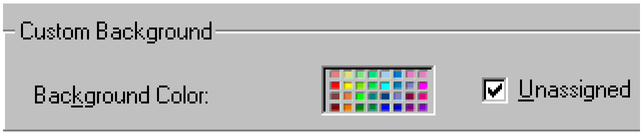
1. Click the question mark in the top right corner.



2. A large question mark appears next to your cursor.
3. Drag the question mark to the area of the dialog box that you want to learn about.
4. Click the mouse button. A box appears with instructions for that area.

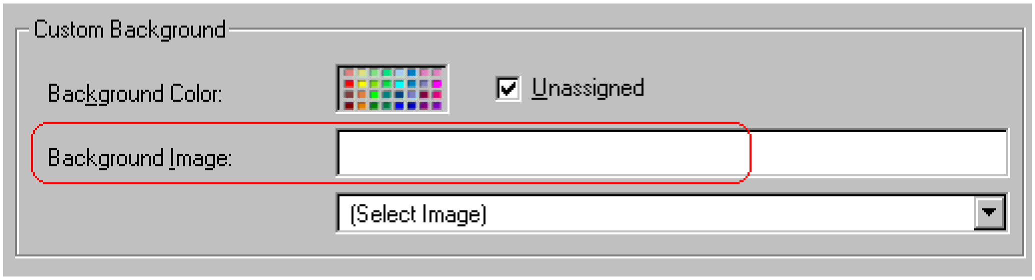
Deleting a Table's Background Color

To delete a table's background color, click the **Unassigned** box in the **Custom Background** area of the Insert Table dialog box.



Specifying a Background Image for a Table

If you want a background image to appear in all table cells, use the **Background Image** field of the Insert Table dialog box.



Your Webmaster determines which images are available to you.

To insert a background image

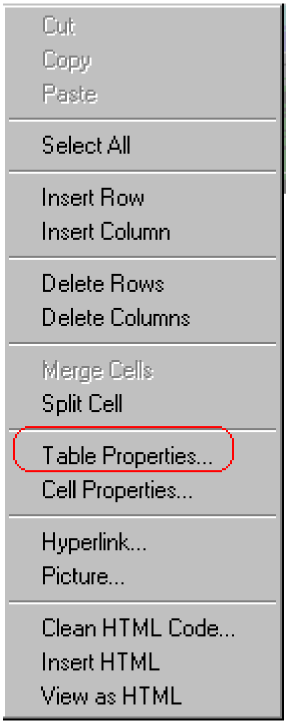
1. Click the down arrow to the right of (**Select Image**). A list of background images appears.
2. Click the image of your choice.
3. Click **OK**.

Note that when you apply a background image to a table

- it applies to the entire table, including the borders.
- if the table is larger than the image, the image repeats until it fills the table.
- if the image is larger than the table, the top left corner of the image aligns with the top left corner of the table. The rest of the image fills as much of the table as possible.
- you can also apply an image to individual cells (see "Specifying a Background Image for a Cell" on page 397).
- make sure that the image does not obscure user's ability to read the table text.

Deleting a Background Image

1. Move the cursor to any cell on the table and right click the mouse.
2. Click **Table Properties** from the menu.



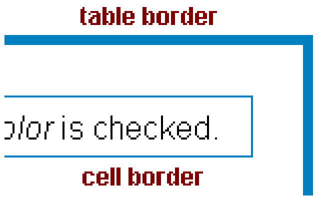
3. Select the value in the **Background Image** field and press <Backspace>.
4. Click **OK**.

Setting Table Borders

You can specify a border color or size for your table.

Assigning Border Color

A table border is the line that separates the table from the rest of your Web page. By default, table borders are gray. You can change the color of table borders.

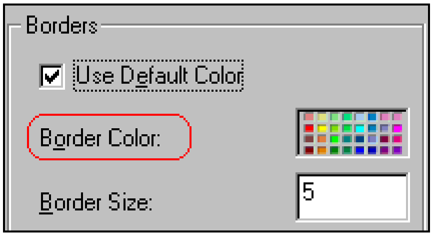


If you want a table's border to "disappear," set it to the same color as the page's background color. This technique is often used to format text on a Web page.

Assigning a Cell Border Color

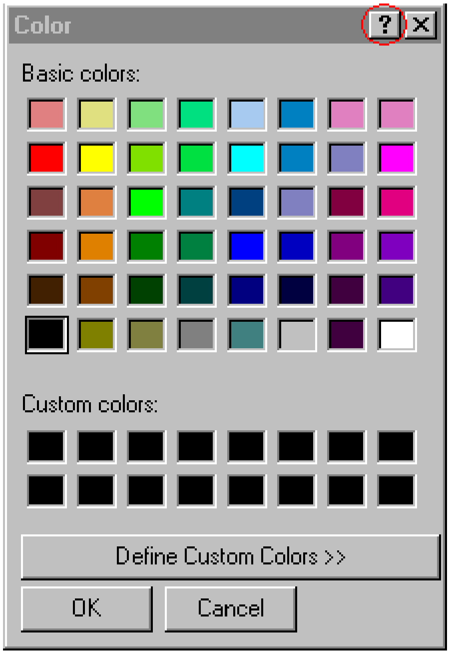
Each cell also has a border that separates it from the other cells and the table border. By default, a cell's border color matches the table border. However, you can individually change a cell border color (see "Setting a Cell's Border Color" on page 394).

To assign a color to your table's border, click the **Border Color** field on the Insert Table dialog box.



When you click that field, a color selection box appears. Click the color that you want to apply to the table's border. Follow these steps to get help on how to use the color box.

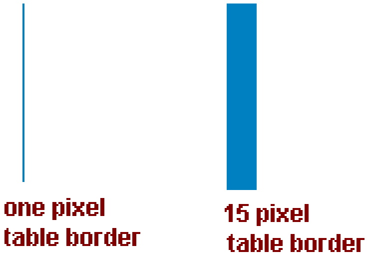
1. Click the question mark in the top right corner.



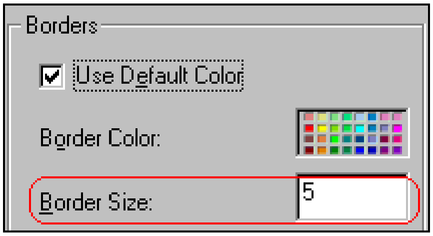
2. A large question mark appears next to your cursor.
3. Drag the question mark to the area of the dialog box that you want to learn about.
4. Click the mouse button. A box appears with instructions for that area.

Assigning Border Size

You can also adjust the size of a table border. Size is measured in pixels.



To assign a border size to your table, enter a number of pixels into the **Border Size** field on the Insert Table dialog box.



If you set a table's border size to zero (0) but wish to view the table's boundary lines while you are editing it, select the table and click the border button (). Boundary lines will appear while you are editing but disappear when a user views the page.

Working with Table Cells

Along with functions for managing tables (described in “Introduction to Tables” on page 365 and “Manipulating Your Table’s Format” on page 376), **eWebEditPro+XML** also lets you perform actions on individual cells within a table.

You can perform the following actions on individual table cells.

- Specify a width.
- Insert or delete cells.
- Specify a border color.
- Specify a background color or image.
- Have a cell span two or more columns or rows.
- Specify horizontal and vertical alignment of the data within the cell.
- Split a cell into two cells.
- Merge two cells into one.
- Turn word wrap on or off.
- Set cell padding and spacing.

NOTE HTML does not allow you to adjust the width of a cell’s border.

You can also select several cells or a row of cells and change them as described above. However, you cannot select and change a column of cells.

Specifying the Width of a Cell

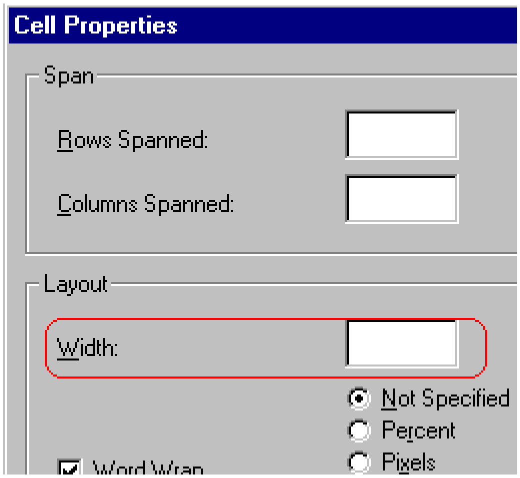
As described in “Specifying Table Width” on page 378, there are several ways to set the width of a table. Within a table, you can also specify the width of an individual cell.

When you set a cell width, there is no guarantee that the cell will occupy that width when displayed in a browser. This is because the cell is part of a column, and changes to other cells in the column can affect the cell whose width you set. Setting cell width only guarantees that the cell will not be *less than* the width you specify.

If you want to ensure that a cell's size does not change, set all cells in a column to that width.

To specify a cell's width, follow these steps.

1. Place the cursor in the cell whose width you want to set.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog box appears.



6. In the layout section of the dialog box, enter the cell width at the **Width** field. You can enter the width in pixels or percentage. These choices are explained in "Specifying Table Width" on page 378.
7. Click **OK**.

Inserting a Cell

To insert a cell, follow these steps.

1. Move the cursor to the right of where you want the new cell to appear.
2. Right click the mouse.
3. Click **Insert Cell** from the menu.

The new cell appears to the left of the cell in which the cursor resides when you click **Insert Cell**. The cursor cell and all cells to its right shift right to make room for the new cell.

In this example, the cursor was in cell “b” when the user clicked **Insert Cell**.

Before

a	b cursor	c
d	e	f

After

a	new cell	b	c
d	e	f	

Deleting a Cell

To delete one or more cells, follow these steps.

1. Move the cursor to the first cell you want to delete.
2. To delete only that cell, proceed to the next step. To delete several contiguous cells, select them. Contiguous cells can cross rows.
3. Right click the mouse.
4. Click **Delete Cells** from the menu.

Any cells to the right of the deleted cells shift left to occupy the vacant space.

In this example, the cursor was in cell “b” when the user clicked on **Delete Cells**.

Before

a	b cursor	c
d	e	f

After

a	c	
d	e	f

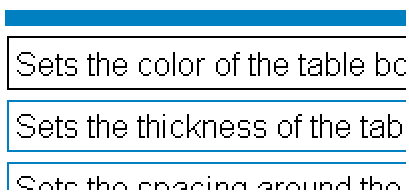
Setting a Cell's Border Color

A cell border is the line that separates it from other cells.

By default, the color of a cell's border matches the color of the table border. However, you can change the color of any cell border individually.

NOTE When viewed in Netscape Navigator, cell borders are gray, regardless of any change you make on the Cell Properties dialog box.

This example illustrates the effect of different cell border colors within a table.



If you want a cell's border to "disappear," set it to the same color as the table's background color.

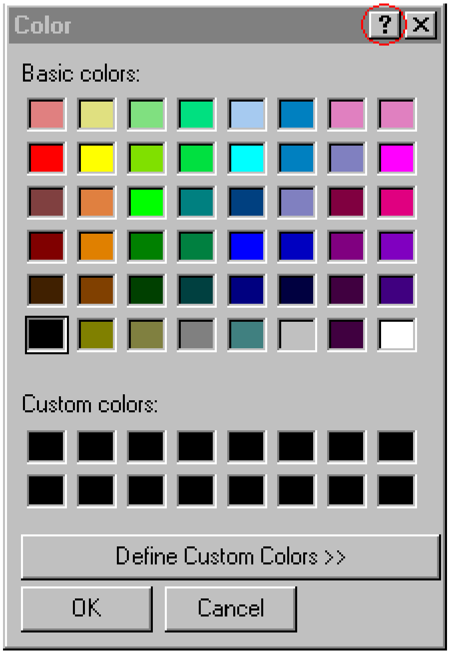
To change the color of a cell's border, follow these steps.

1. Move the cursor to the cell and right click the mouse.
2. Click **Table** from the menu.
3. Click **Cell Properties** from the menu.

4. Click the **Border Color** field on the Cell Properties dialog box.

5. When you click that field, a Windows Color selection box appears. Click the color that you want to apply to the cell border.

   See Also: "Using the Color Box" on page 398

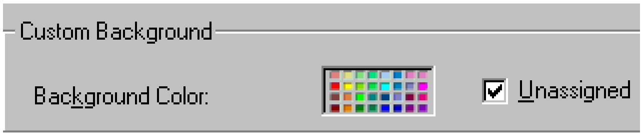


Specifying a Cell's Background Color

"Specifying a Table's Background Color" on page 384 explains how to apply a background color to a table. You can also apply a background color to a cell.

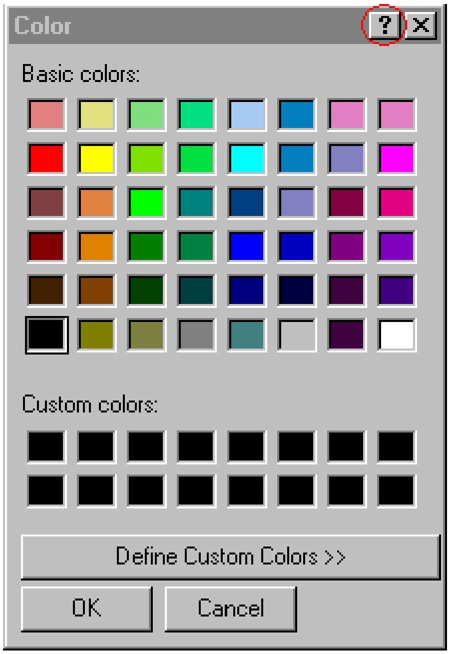
To apply a background color to a cell, follow these steps.

1. Move the cursor to the cell and right click the mouse.
2. Click **Table** from the menu.
3. Click **Cell Properties** from the menu.
4. Click the **Background Color** field on the Cell Properties dialog box.



5. When you click that field, a Windows Color selection box appears.

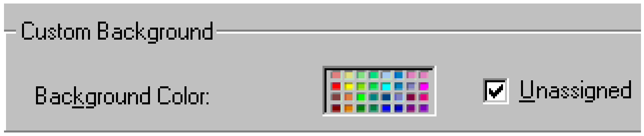
   See Also: "Using the Color Box" on page 398



6. Click a color to apply to the background of the cell.

Deleting a Cell's Background Color

To delete a cell's background color, click the **Unassigned** box in the **Custom Background** area of the Cell Properties dialog box.



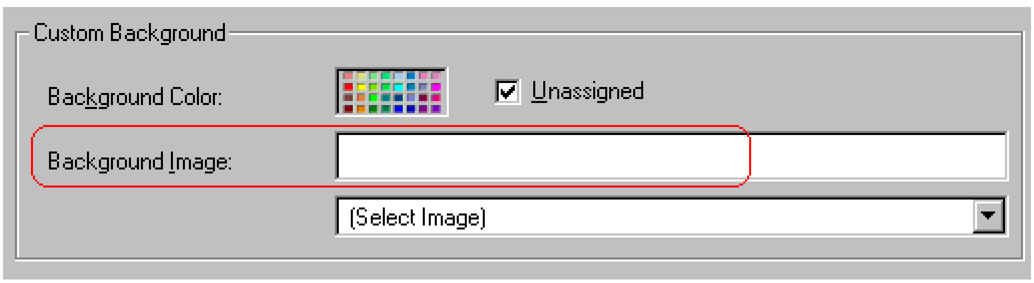
Specifying a Background Image for a Cell

"Specifying a Background Image for a Table" on page 386 explains how to apply a background image to a table. You can also apply a background image to a cell.

Your Webmaster determines which images are available.

To insert an image into a cell, follow these steps.

1. Move the cursor to the cell and right click the mouse.
2. Click **Table** from the menu.
3. Click **Cell Properties** from the menu.
4. Move the cursor to the **Background Image** field of the Cell Properties dialog box.



5. Click the down arrow to the right of **(Select Image)**. A list of background images appears.
6. Click the image of your choice.
7. Click **OK**.

Note that when you apply a background image to a cell

- If the cell is larger than the image, the image repeats until it fills the cell.
- If the cell is smaller than the image, the top left corner of the image appears in the top left corner of the cell. The rest of the image fills as much of the cell as possible.
- Make sure the image does not obscure a user's ability to read the cell text (if any exists).

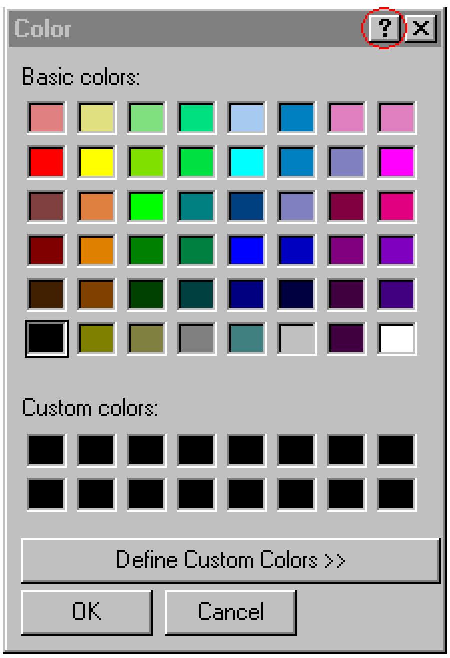
Deleting a Background Image

1. Move the cursor to the cell and right click the mouse.
2. Click **Table** from the menu.
3. Click **Cell Properties** from the menu.
4. Select the value in the **Background Image** field and press <Backspace>.

Using the Color Box

Follow these steps to get help on how to use the color box.

1. Click the question mark in the top right corner.



2. A large question mark appears next to your cursor.
3. Drag the question mark to the area of the dialog box that you want to learn about.
4. Click the mouse button. A box appears with instructions for that area.

Spanning Rows or Columns

You can create a table cell that stretches across more than one row or column. In the following table, notice how the row that contains “Sports Teams” spans three columns.

Sports Teams		
City	**Baseball Team**	**Hockey Team**
Boston	Red Sox	Bruins
New York	Yankees	Rangers
Chicago	White Sox	Black Hawks

You can also create a column that spans several rows, as illustrated below. Notice that Boston spans three rows.

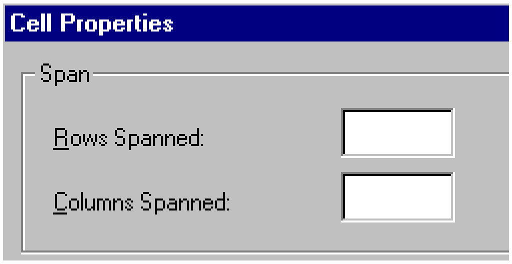
Colleges	
City	**Name**
Boston	Boston College
	Northeastern University
	Boston University

Colleges	
City	**Name**
New York	Columbia University

Spanning More than One Row or Column

To have a table cell span more than one row or column, follow these steps.

1. Place the cursor in the cell that will span rows or columns.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog box appears. In the **Rows Spanned** or **Columns Spanned** field, enter the number of rows or columns that you want this cell to span.

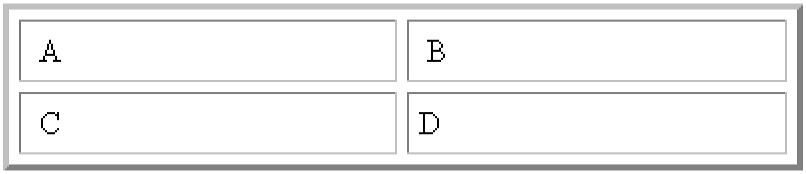


6. Click **OK**.

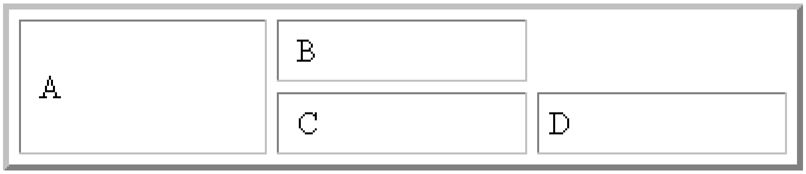
Effect of Spanning a Cell

When you set a cell to span rows or columns, the editor does not remove the cells that are in the way. Instead, it moves those cells across or down to the next available position.

For example, the following table has two rows and two columns.



If you set cell A to span two rows, note that cell C moves across to make room for cell A. This action pushes cell D to the next column.



Aligning Text Within a Cell

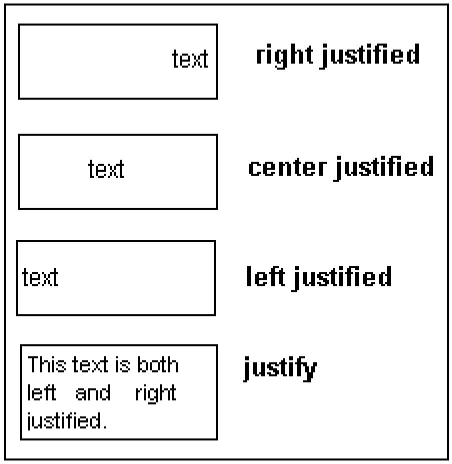
Within a cell, you can specify how your text aligns horizontally and vertically.

Setting Horizontal Alignment

In the Cell Properties dialog box, you can specify the horizontal alignment of a cell. You have set the alignment to left, center, or right, or

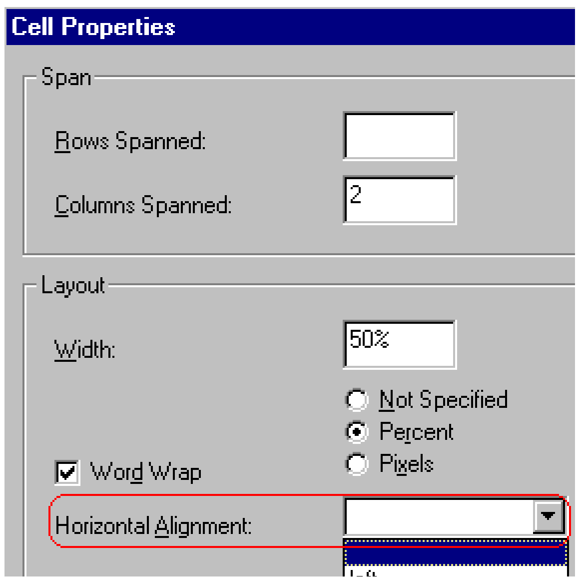
- left
- center
- right
- justify - the text is justified down both left and right edges. Many books use this alignment style. (This alignment is not supported by all browsers.)

This example illustrates these choices.



To set horizontal justification of a table cell, follow these steps.

1. Place the cursor in the cell that you want to edit.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu
5. The Cell Properties dialog box appears. Click the down arrow to the right of the **Horizontal Alignment** field.



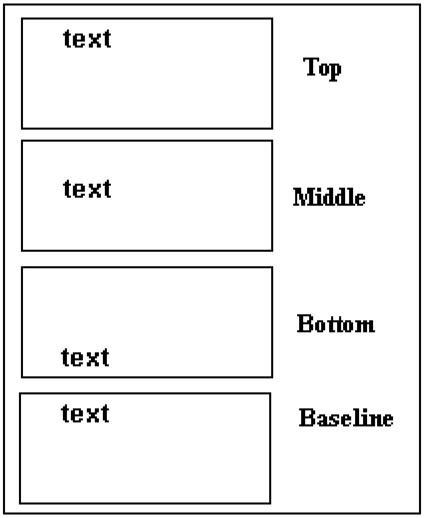
6. Click your choice from the list and click **OK**.

Setting Vertical Alignment

In the Cell Properties dialog box, you can specify the vertical alignment of a cell. You have four choices.

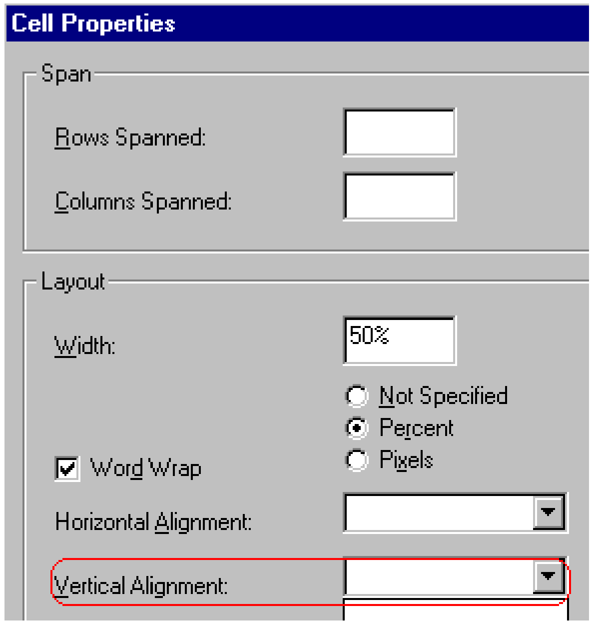
- top
- middle
- bottom
- along the baseline of the first line of text (the term “baseline” is defined in “Aligning the Picture” on page 325)

This example illustrates the choices.



To set vertical justification for a table cell, follow these steps.

1. Place the cursor in the cell that you want to edit.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog box appears. Click the down arrow to the right of the **Vertical Alignment** field.



6. Click your choice from the list and click **OK**.

Splitting a Cell

You can divide a cell into two. If you split a cell, each cell occupies one half the size of the original cell.

Row before split

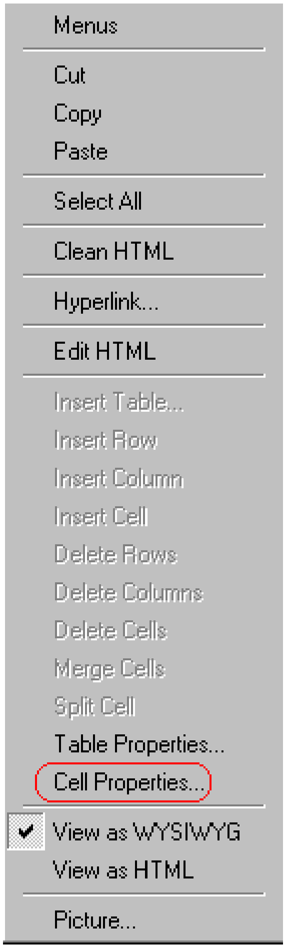
A	B

Row after split

A1	A2	B

To split a table cell into two cells, follow these steps.

1. Place the cursor in the cell that you want to split.
2. Right click the mouse.
3. Click **Split Cell** from the menu.



4. Two cells now appear where only one appeared before.

Merging Two Cells

You can merge two cells into one. If you merge two cells, the new cell contains all of the information from both. The new cell's width equals the sum of the two cells that were merged.

Cells Before Merge

A	B

Cell After Merge

AB

To merge two or more cells, follow these steps.

1. Select the cells that you want to merge.
2. Click the Insert Table button ( ).
3. Click **Merge Cells** from the menu.

Word Wrap

Word Wrap is a text formatting feature of tables. It causes text to move down to the next line when the width of the characters on a line equals the column width. For example, if you set column width to 50%, with word wrap turned on, a table looks like this.

Horizontal Alignment	Sets the horizontal position of the entire table. For example, left, center, right.
Border Color	Sets the color of the table borders unless *Use Default Color* is checked.

If you turn Word Wrap off for the same table, you get this result.

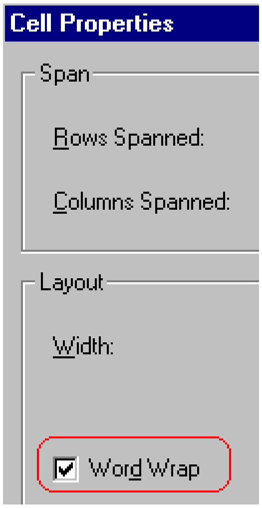
Horizontal Alignment	Sets the horizontal position of the entire table. For example, left, center
Border Color	Sets the color of the table borders unless *Use Default Color* is checke

If Word Wrap is turned off, text stays on one line until the user entering table text presses <Enter>. That keystroke causes text to move down to the next line.

By default, all cells have the Word Wrap feature turned on.

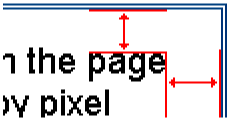
To turn Word Wrap on or off for a cell, follow these steps.

1. Place the cursor in the cell that you want to edit.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog box appears. Click or off the **Word Wrap** checkbox and click **OK**.

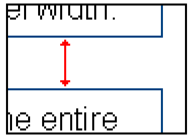


Setting Cell Padding and Spacing

Cell *padding* is the space between a cell's data and its border.

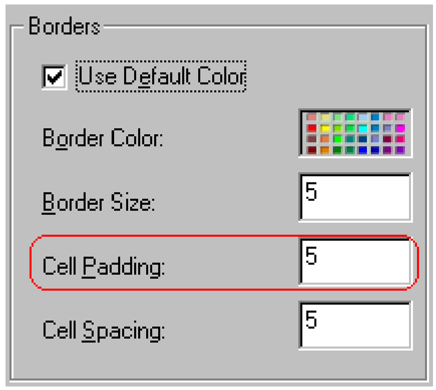


Cell *spacing* is the space between a cell and surrounding cells.



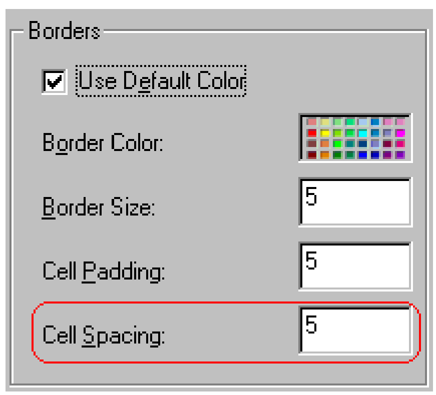
Assigning Cell Padding

To assign cell padding to your table, click the **Cell Padding** field on the Insert Table dialog box. Enter the number of pixels.



Assigning Cell Spacing

To assign cell spacing to your table, click the **Cell Spacing** field on the Insert Table dialog box. Enter the number of pixels.



Using Bookmarks

Use a bookmark to let a user “jump” from any word, phrase, or image to another place in a file. On your Web page, text appears in a different color to indicate that additional information is available at the bookmark’s location.

For example, if your Web page includes meeting minutes, the top of the page could list the meeting dates. You could then assign a hyperlink to each date and a bookmark to each set of minutes.

The user sees that a date is in a different color, so clicks the date to “jump” to the bookmark that marks the location of the meeting minutes.

“Creating a Bookmark” on page 409 describes how to set up a hyperlink to a bookmark within a file. You can also set up hyperlink to

- another Web page. This procedure is described in “Using Hyperlinks” on page 413.
- a bookmark within another Web page. This procedure is described in “Creating a Hyperlink to a Location Within a Web Page” on page 417.

This section explains

- Creating a Bookmark
- Changing the Destination Window

Creating a Bookmark

When creating a bookmark, you must specify a

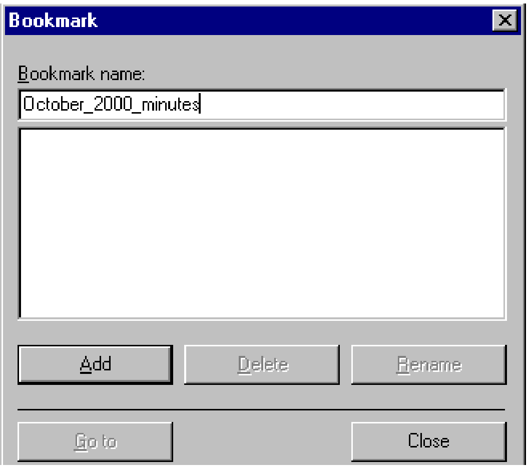
- *source,* the text or image that the user clicks to move to the bookmark

- *bookmark*, the place to which the cursor jumps when the user clicks the source

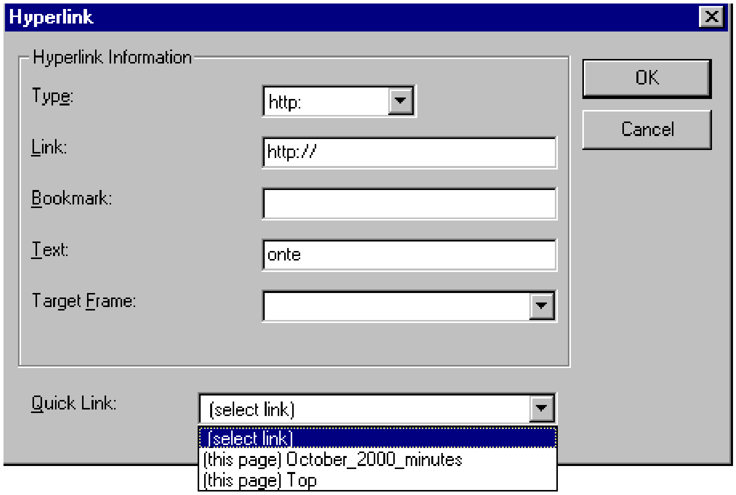
To continue with the above example, a meeting date is the source, and the meeting minutes are the bookmark.

To create a bookmark, follow these steps.

1. Select the bookmark text or image.
2. Click the Bookmark button ().
3. The Bookmark dialog box appears. Enter the name of the bookmark. The bookmark can include the following non-alphabetic characters: ; / ? : @ & = + $, - _ . ! ~ * ' ( ).



4. Click **Add**.
5. The editor screen returns. (The bookmark does not appear on the page.) Select the source text or image.
6. Click the Hyperlink button ().
7. The Hyperlink dialog box appears.
8. Click the down arrow to the right of the **Quicklink** field and click the bookmark you created in Step 3.



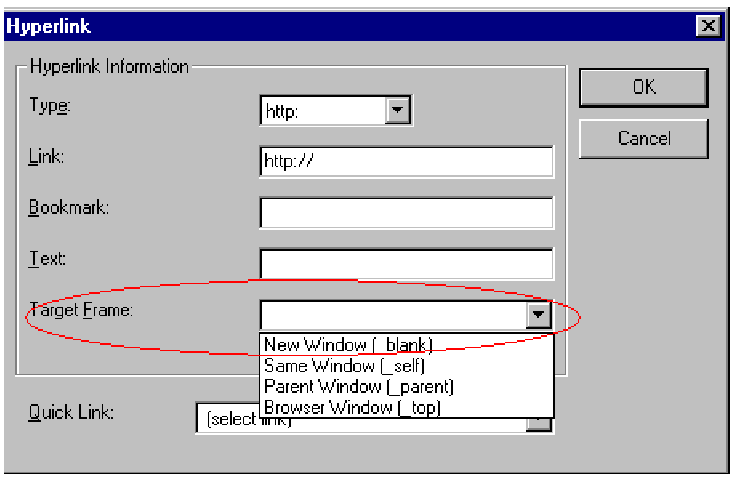
9. If desired, you can use the **Target Frame** field to change the window in which the destination text appears. For details, see "Changing the Destination Window" on page 411.

   If you leave the **Target Frame** field blank, the new window replaces the current window.

10. Click **OK**.

Changing the Destination Window

While defining hypertext, you can use the **Target Frame** field on the Hyperlink dialog box to change the window in which the destination page appears.



The possible values that you can enter into the **Target Frame** field are explained below.

If you want the destination page to appear	Click this in the Target Frame field
In a new browser window, on top of the current browser.	**New Window(_blank)**
In the same position within the browser window. The new window replaces the current one.	**Same Window(_self)** Note: this is the default.
If your page contains frames, in the frame that contains the frame with the hyperlink.	**Parent Window(_parent)**
If your page contains frames, in the full display area, replacing the frames.	**Browser Window(_top)**
If your page contains frames, in the frame with the specified name.	Enter the name of the frame.

Using Hyperlinks

Use hyperlinks to let a user “jump” from any word, phrase or image to another Web page. The page can be within your network (that is, on an intranet) or anywhere on the internet.

NOTE If you want to create jumps within a file, see “Using Bookmarks” on page 409.

For example, if your Web page includes a jump to the Ektron Web site, you would enter the text to indicate the jump (for example **Ektron Web Site**), then create a hyperlink to `www.ektron.com`. When users see **Ektron Web Site** in a different color, they can click the text to “jump” to the site.

Although most jumps go to the top of another Web page, you can also jump to a bookmark within a Web page.

This section explains

- Creating a Hyperlink
- Testing a Hyperlink
- Creating a Hyperlink to a Location within a Web Page
- Editing a Hyperlink
- Removing a Hyperlink
- Preventing a URL from Becoming a Hyperlink

Creating a Hyperlink

When creating a hyperlink, you must specify a

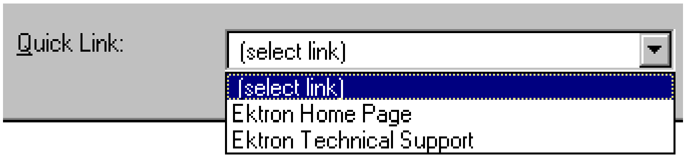
- *source,* the text or image the user clicks to move to the destination
- *destination*, the Web page to which the display moves when the user clicks the source

To continue with the above example, Ektron Web Site is the source, and the Web page available at `www.ektron.com` is the destination.

To create a hyperlink, click the Hyperlink button (). When you do, the Hyperlink dialog box appears. From there, you can select from a list of Web pages (also known as *Quicklinks*). Or, if the page you are jumping to is not on the list, enter the url address of the destination Web page. Each choice is described below.

Using a Quicklink

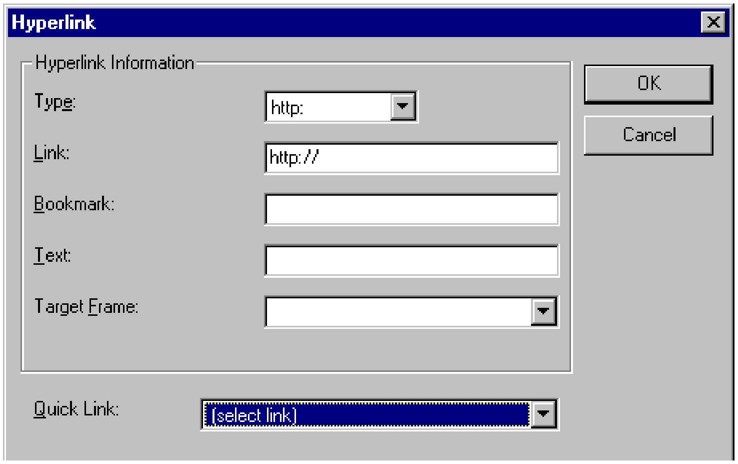
Your Web master can add to the Hyperlink dialog box any number of Quicklinks, that is, Web addresses that you can link to simply by selecting an item from a drop down menu.



Quicklinks are “quick” because you do not need to enter or know the url of the destination Web page -- your Web master has already stored that information for you.

To apply a Quicklink, follow these steps.

1. Select the source text or image.
2. Click the Hyperlink button (). The Hyperlink dialog box appears.



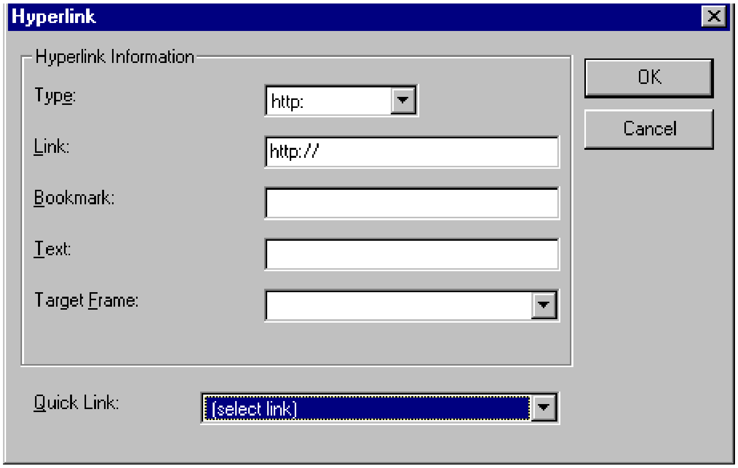
3. Click the down arrow to the right of the **Quicklink** field. A list of Web pages that your Web master has pre-loaded appears.
4. Click an item from the list to select it.
5. If desired, you can use the **Target Frame** field to change the window in which the destination text appears. For details, see "Changing the Destination Window" on page 411.

   If you leave the **Target Frame** field blank, the new window replaces the current window
6. Click **OK**.

Entering a Hyperlink Manually

To create a hyperlink, follow these steps.

1. Select the source text or image.
2. Click the New Hyperlink button ( ). The Hyperlink dialog box appears.



3. Click in the **Link** field after `http://`. Then, enter the address of the destination Web page. For example, to enter a hyperlink to the ektron Web site, enter `www.ektron.com`.
4. If desired, you can use the **Target Frame** field to change the window in which the destination text appears. For details, see "Changing the Destination Window" on page 411.

   If you leave the **Target Frame** field blank, the new window replaces the current window
5. Click **OK**.

Testing a Hyperlink

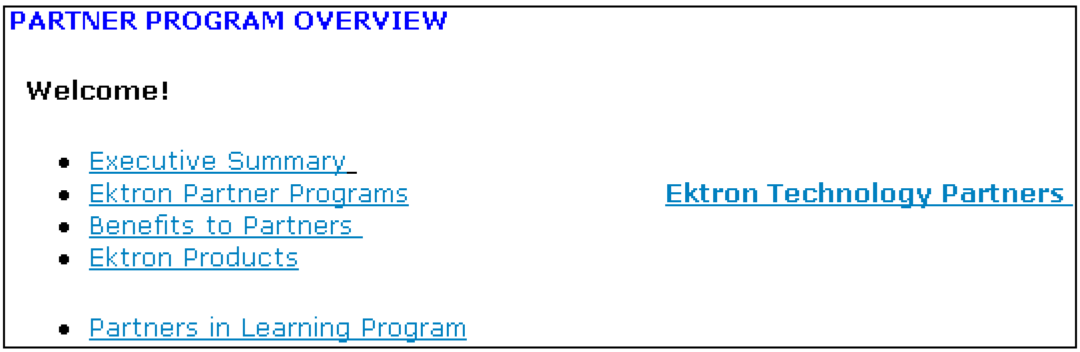
Within the **eWebEditPro+XML** editor, you can test a hyperlink. To do this, select the hyperlink then double click it. That action launches the Web page assigned to the hyperlink.

Creating a Hyperlink to a Location Within a Web Page

Sometimes, the destination Web page contains bookmarks, and you want to jump from your page to a bookmark on another page. (Bookmarks are described in "Using Bookmarks" on page 409.)

To create a hyperlink that jumps to another page's bookmark, follow these steps.

1. Go to the destination Web page.
2. Click the bookmark that you want to jump to. For example, on the illustration below, the text **Benefits to Partners** jumps to a bookmark further down on the page.



3. When you click the bookmark, its full address appears in your browser's address bar. This bookmark's address looks like this.
   `http://www.ektron.com/single.cfm?doc_id=35#Benefits2`
4. Click the address bar. The address is selected. Press <Ctrl>+<C> to copy the address into the Windows clipboard.
5. Go to **eWebEditPro+XML**.
6. Select the text or image from which you want to jump to the bookmark.
7. Click the Hyperlink button ( ). The hyperlink dialog box appears.
8. Move the cursor to the **Link** field.

9. Press <Ctrl>+<V> to paste the address you copied in Step 4 into the **Link** field.
10. Click **OK**.

Editing a Hyperlink

If you need to change a hyperlink's destination Web page or target frame, follow these steps.

1. Click the Hyperlink button ( ). The hyperlink dialog box appears.
2. Edit the **Link** or **Target Frame** field as needed.
3. Press **OK**.

Removing a Hyperlink

If you want to remove the hyperlink from text or an image, select the text or image and press the Remove Hyperlink button ( ).

Preventing a URL from Becoming a Hyperlink

If you enter a URL or an email address into **eWebEditPro+XML**, it automatically becomes a hyperlink. To prevent this, enter an extra space in the URL or address.

For example, instead of entering **sales@ektron.com**, enter **sales**<blank>**@ektron.com**.

Working with HTML

eWebEditPro+XML creates pages for display on the World Wide Web or an intranet. These pages use HTML (hypertext markup language) to format text and images for display in a browser. You do not need to know HTML to use **eWebEditPro+XML**.

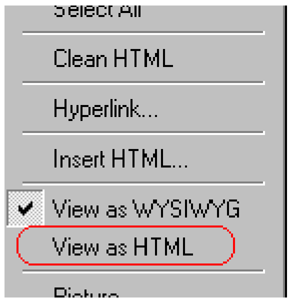
However, if you know HTML, you can view, insert or edit your Web page's HTML code.

Viewing and Editing HTML

When you choose to view your page as HTML, the editor cleans the content using a method determined by your Webmaster. (For more information, see "Cleaning HTML" in the **eWebEditPro+XML** Developer's Reference Guide.)

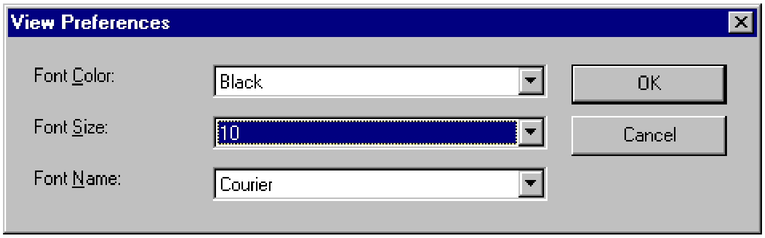
To view your page's HTML, follow these steps.

1. Click the View as HTML button (), or right click the mouse and click **View as HTML** from the menu.



2. The HTML code appears. While viewing the code, you can edit it using editor functions such as Cut, Copy, Paste and Replace. To select all content, press <Ctrl>+<A>.

   You can also set default values for the style, size and color in which the HTML appears. To do this, right click the mouse and click **Preferences**. When you do, a dialog box appears in which you can enter formatting information about the HTML code.



These settings will be used whenever you view as HTML.

The settings are ignored when you view the page in WYSIWYG mode and when the user views the page.

3. To return to normal view, click the **View as WYSIWYG** button ( ) or right click the mouse and click **View WYSIWYG**.

Editing a Section of a Page

If you want to edit only a section of the HTML on your Web page, follow these steps.

1. Select the portion of your Web page that you want to edit.
2. Right click the mouse.
3. Click **Edit Source** from the menu. The HTML code appears.
4. Edit the HTML code as desired.
5. Click **OK**.

Inserting Source

If you want to insert HTML source code into your Web page, follow these steps.

1. Place the cursor at the spot on the page where you want to insert the HTML.
2. Right click the mouse.
3. Click **Insert Source** from the menu.
4. The Insert Source dialog box appears. Paste or type your HTML code.
5. Click **OK**.

Cleaning Source Code

eWebEditPro+XML lets you “clean” the HTML source code for your Web page. You would typically use this feature after entering HTML text or pasting HTML code into **eWebEditPro+XML** from another application.

The Clean Source option removes unnecessary HTML tags, ensures that all tags begin and end properly, and maximizes the page for efficiency. As a result, the page should be error-free and load more quickly in a browser. Also, the appearance of clean HTML is more consistent when viewed in different browsers.

To clean your HTML, follow these steps.

1. Right click the mouse.
2. Click **Clean Source** from the menu.
3. **eWebEditPro+XML** cleans your Web page’s HTML content.

Inserting Content from MS Office 2000

If you paste text into **eWebEditPro+XML** from a Microsoft Office 2000 application, such as Microsoft Word, the following window appears.

For best results, click **Yes**.

Section 508 Compliance

This section explains how **eWebEditPro+XML** complies with Section 508 of the Rehabilitation Act (a law enacted by the United States government that requires Federal agencies to make their electronic and information technology accessible to people with disabilities).

Specifically, this section explains how to

- move the cursor into the **eWebEditPro+XML** editor
- use **eWebEditPro+XML** without a mouse
- work with Section 508 tables

Moving the Cursor into eWebEditPro+XML

Using Internet Explorer

If the **eWebEditPro+XML** editor is one of several fields on a page, and your browser is Internet Explorer, move to **eWebEditPro+XML** by pressing <Tab> until the cursor lands in the editor.

To move from the editor to the next field, press <Ctrl>+<Tab>.

Using Netscape

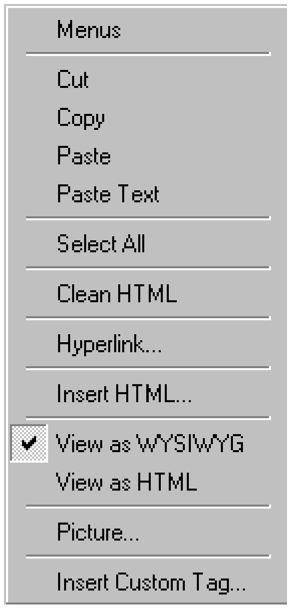
If the **eWebEditPro+XML** editor is one of several fields on a page, and your browser is Netscape, your Webmaster needs to create custom toolbar buttons that let you move into and out of the editor. (This procedure is described in the **eWebEditPro+XML** Developer's Reference Guide.)

Using eWebEditPro+XML without a Mouse

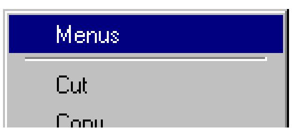
As explained in "Customizing Your Toolbar" on page 291, the **eWebEditPro+XML** toolbar consists of one or more toolbar menus. Menus have buttons that you click with the mouse to perform actions, such as copying text.

This section explains how to perform those actions without using the mouse.

1. With the cursor in the **eWebEditPro+XML** editor, press the application key ( ).
2. A menu appears.

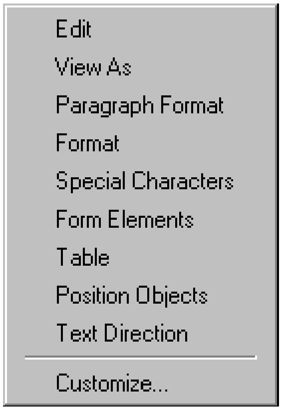


3. Press the down arrow key (↓)to select **Menus**. **Menus** becomes highlighted.



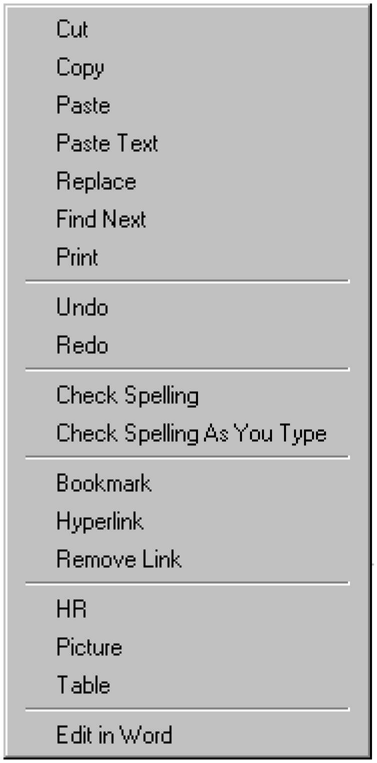
4. Press <Enter>. A new menu lists all toolbar menus available to you.

   If your Webmaster has given you access to all standard toolbar menus, the menu looks like this.



5. Press the down arrow key (↓)to select the toolbar menu that has a button that you want to use.

6. A new menu appears, listing all options on the selected menu. The following menu displays what might appear if you select the Edit Menu. (Your Webmaster determines which menu options are available to you).

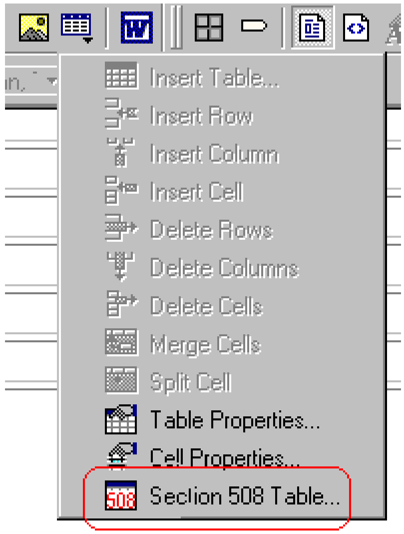


7. Press the down arrow key (↓) until the desired option is highlighted. Then, click the option to perform the action.

Section 508 Tables

You cannot create Section 508 compliant tables using the standard Table Properties dialog box. Specifically, the dialog does not let you define a caption, summary, and table heading. To define these elements (needed for Section 508 compliant data tables), use the Section 508 Table option of the Table menu (illustrated below).

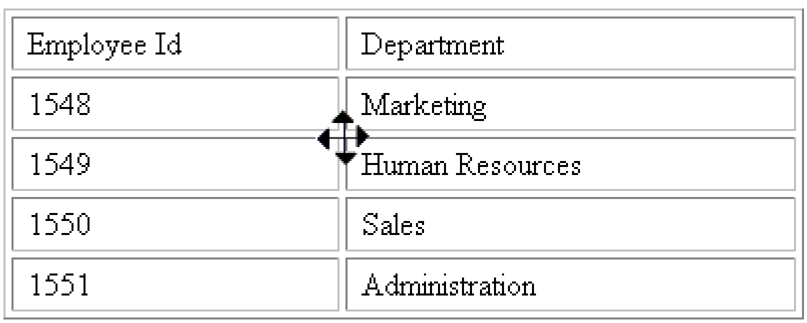
WARNING! The Section 508 Table Properties dialog only works with Internet Explorer version 5.0 or higher. It does not work with Netscape.



WARNING! Even if you change no values on the screen, you *must* open this dialog box whenever you modify a table (for example, add a new row). The table's properties, required for Section 508, are generated when you click OK to close the dialog box.

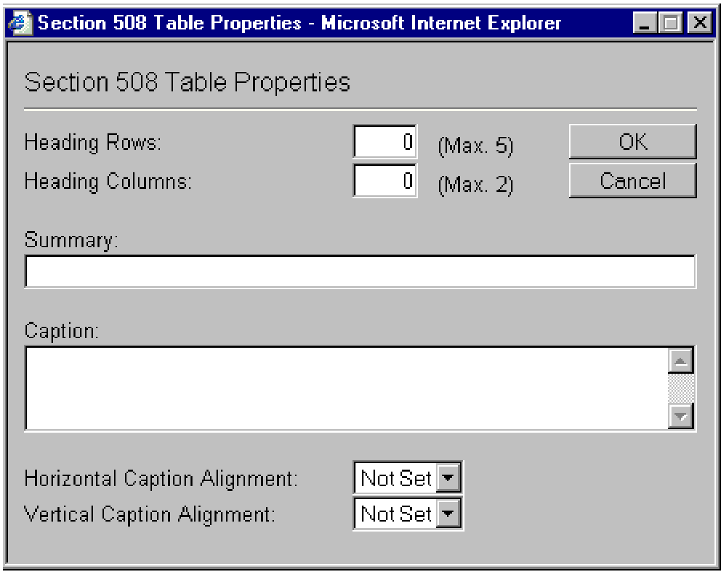
To create a 508 compliant table, follow these steps.

1. Create a table, as explained in "Introduction to Tables" on page 365.
2. Select the table by moving the cursor to a table border until you see a four headed arrow (illustrated below). When a table is selected, small squares surround it.



Employee Id	Department
1548	Marketing
1549	Human Resources
1550	Sales
1551	Administration

3. Click the Tables button () then select **Section 508 Table**.
4. The Section 508 Table Properties dialog box appears (illustrated below).



Respond to the fields in the dialog. They are described below.

Field	Description
Heading Rows	If you want your table to have a horizontal header, enter the number of rows that it should occupy. Beginning with the top, all cells in the specified number of rows are designated as table headers.
Heading Columns	If you want your table to have a header, enter the number of columns that it should occupy. Beginning with the left column, all cells in the specified number of columns are designated as table headers.
Summary	If desired, enter the table summary. Non-visual browsers can use the summary to explain the contents of the table.
Caption	If desired, enter the table caption. The caption appears centered below the table when viewed.

Field	Description
Horizontal Caption Alignment	If desired, enter the caption's horizontal alignment: • center • left • right
Vertical Caption Alignment	If desired, enter the caption's vertical alignment: • bottom • top

After you complete the Table Properties dialog, click **OK** to make the table comply with Section 508.

Editing XML Web Pages

Your Web developers have a lot of flexibility in how they implement **eWebEditPro+XML**. As a result, this documentation cannot describe exactly how your system works.

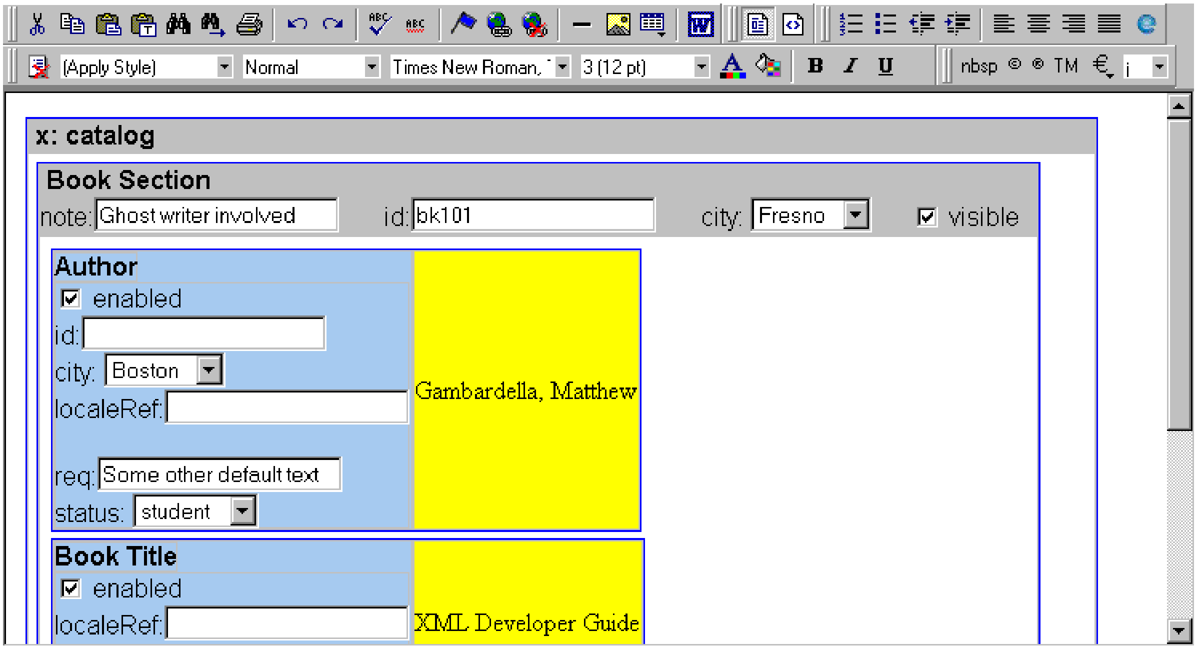
This section explains the screens, menus and dialog boxes that you will likely encounter when working with **eWebEditPro+XML**.

This section describes the following topics.

- A Typical XML Screen
- Custom Tag Menu Options
- Inserting XML Tags
- The Custom Tag Attributes Dialog
- The Insert Custom Tag Dialog Box

A Typical XML Screen

The following screen, a sample that Ektron provides with **eWebEditPro+XML**, has features that may appear within your browser. The screen consists of XML *tags* and fields into which you can insert *tag values.* (Tags are elements that collect XML content, such as **Author** and **Book Title** in the screen below.)

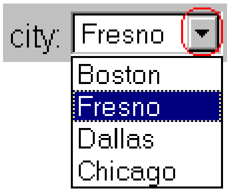


Types of Tags

Here is some information about the types of tags that can appear on an **eWebEditPro+XML** screen.

- Some tags accept text, such as .
- Some tags accept a check mark if the condition is true, and no check mark if it is false. For example, .

- Some tags provide a list of choices. To view the list, click the down arrow to the right of the tag (circled in the illustration below). Scroll through the list until you find the correct choice. Then, click it to enter it. For example:



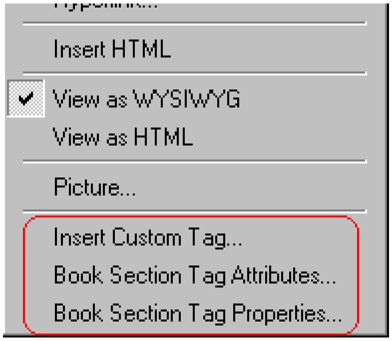
These tags can provide a most likely "default" value, which is the value of the tag when you first see it.

Custom Tag Menu Options

If you move the cursor to an area of the screen where you can insert XML tags and right click the mouse, three new menu options appear:

- Insert Custom Tag
- *(tag name)* Tag Attributes
- *(tag name)* Tag Properties

For example:



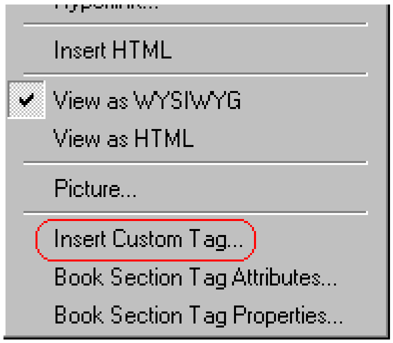
The Insert Custom Tag option is explained in "Inserting XML Tags" on page 432.

The *(tag name)* Tag Attributes option is explained in "The Custom Tag Attributes Dialog" on page 433.

The *(tag name)* Tag Properties option is intended for developers, so is not explained in this documentation. This option is documented in the Developer's Reference Guide section "Custom XML Dialog Boxes."

Inserting XML Tags

Some XML screens let you insert additional XML tags at certain locations. If you move the cursor to a location where you can insert tags and right click the mouse, the **Insert Custom Tag** option appears.

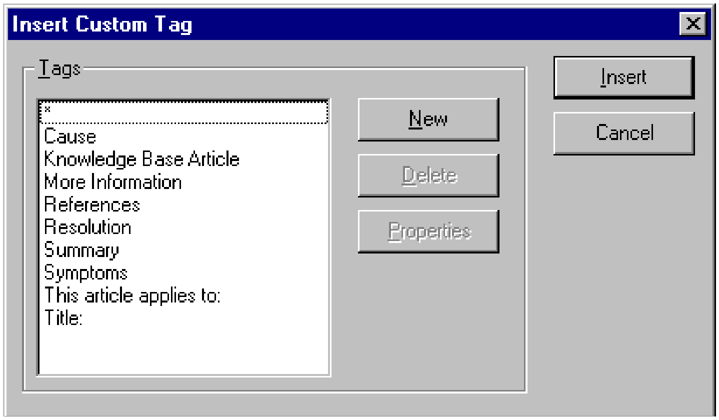


When you click **Insert Custom Tag**, another menu appears. The top of the menu may list tags that can be inserted at your cursor's location, according to the XML schema or DTD being used. (A schema or DTD describes the hierarchy of tags in XML.) For example:

In the above illustration, the first three menu options (**Author**, **Book Title**, and **Description**) are tags that can be inserted. When you click a tag to insert it, the Custom Tag Attributes dialog box appears. For more information, see "The Custom Tag Attributes Dialog" on page 433.

After you finish working with the Custom Tag Attributes dialog box, the selected tag is inserted at the location of the cursor. Additional tags and/or attributes may be inserted at the same time if your developer has set up the selected tag to do so.

You may also be able to insert a tag whether or not it can be inserted at the cursor location. If you click **Insert Custom Tag** from the above menu and the following dialog box appears, you can insert any tag on the list.



The Custom Tag Attributes Dialog

XML tags can have *attributes*, which are used to further define an XML tag. For example (in which "importance" is the attribute):

```
<element importance="high">Text</element>
```

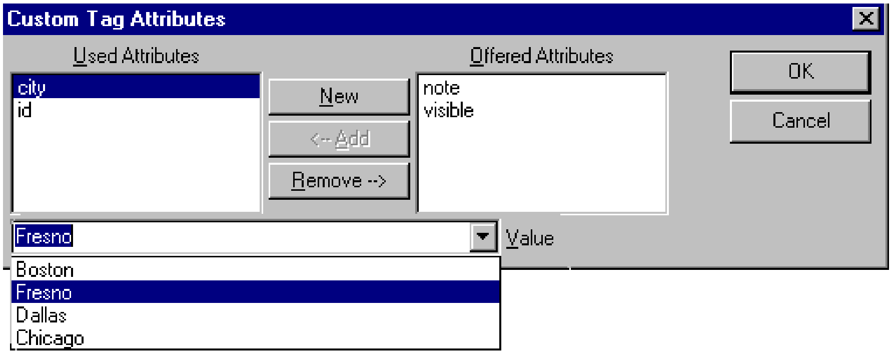
The Custom Tag Attributes dialog box appears when you

- insert a new tag, or
- place the cursor in an XML tag that does not show attributes, right click the mouse, and choose **Custom Tag Attributes** from the menu.

The dialog box allows you to

- view attributes that are assigned and that can be inserted
- remove assigned attributes

- add available attributes
- add new attributes
- enter or modify an attribute's value



Removing an Attribute

To remove an assigned attribute, follow these steps.

1. Click the attribute within the **Used Attributes** column.
2. Click **Remove -->**.
3. Press **OK** to close the dialog box and remove the selected attribute.

Inserting an Available Attribute

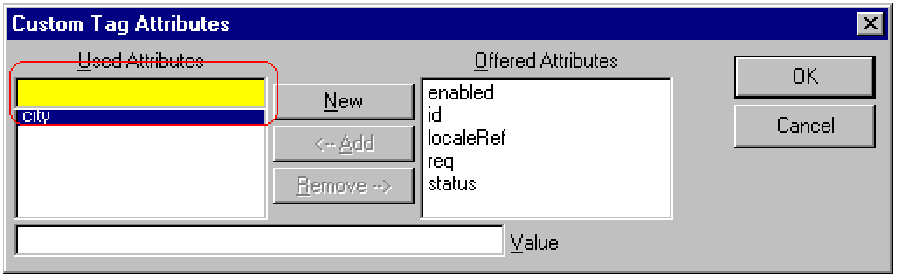
To insert an attribute that can be inserted at the cursor location, follow these steps.

1. Click the attribute from the **Offered Attributes** column.
2. Click **<--Add**.
3. Press **OK** to close the dialog box and insert the attribute.

Inserting a New Attribute

To insert an attribute that does not appear in the Custom Tag Attributes dialog box, follow these steps.

1. Click **New**.
2. A new line is added to the top of the **Used Attributes** column to make room for the new attribute.
3. Enter the attribute into the new line (circled in the illustration below).

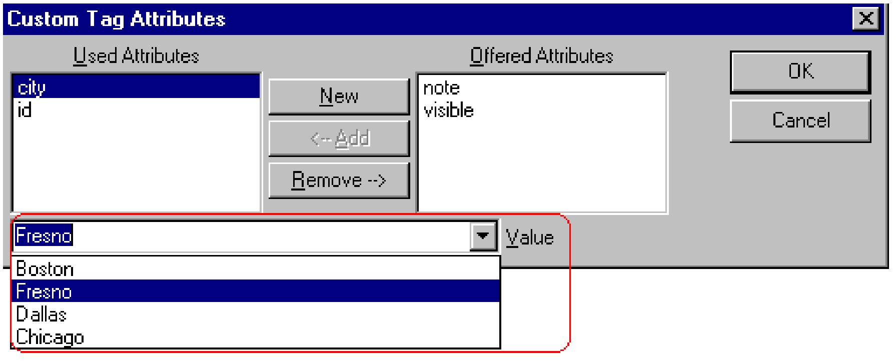


4. Press **OK** to close the dialog box and insert the attribute.

Entering or Modifying an Attribute Value

To modify or enter an attribute value, the attribute must be in the **Used Attributes** column. To change or enter the value, follow these steps.

1. Click the attribute.
2. Change or enter the text in the **Value** field (circled in the illustration below).

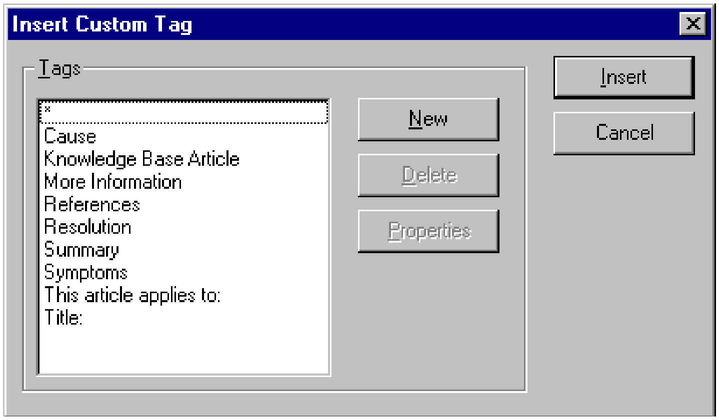


3. Press **OK** to close the dialog box and change the attribute value.

The Insert Custom Tag Dialog Box

Use this dialog box to insert a custom tag that may or may not be available at the cursor location, according to the schema or DTD.

NOTE Because the Properties button on this dialog box is intended for developers, it is not explained in this documentation. The Custom Tag Properties dialog box is documented in the Developer Reference Guide section "Custom XML Dialog Boxes."



Inserting an Available Tag

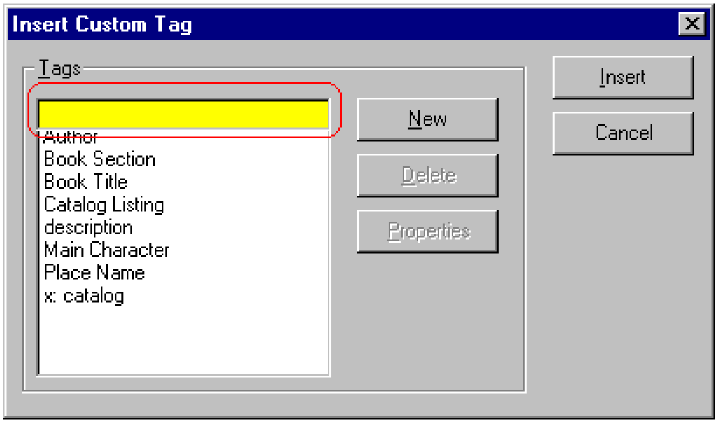
To insert any tag from the current schema or DTD, follow these steps.

1. Click the tag from the **Tags** column.
2. Click **Insert**.
3. The Custom Tag Attributes dialog appears. To learn how to use that, see "The Custom Tag Attributes Dialog" on page 433.

Inserting a New Tag

To insert a new tag, follow these steps.

1. Click **New**.
2. A new line is added to the top of the **Tags** column to make room for the new attribute.



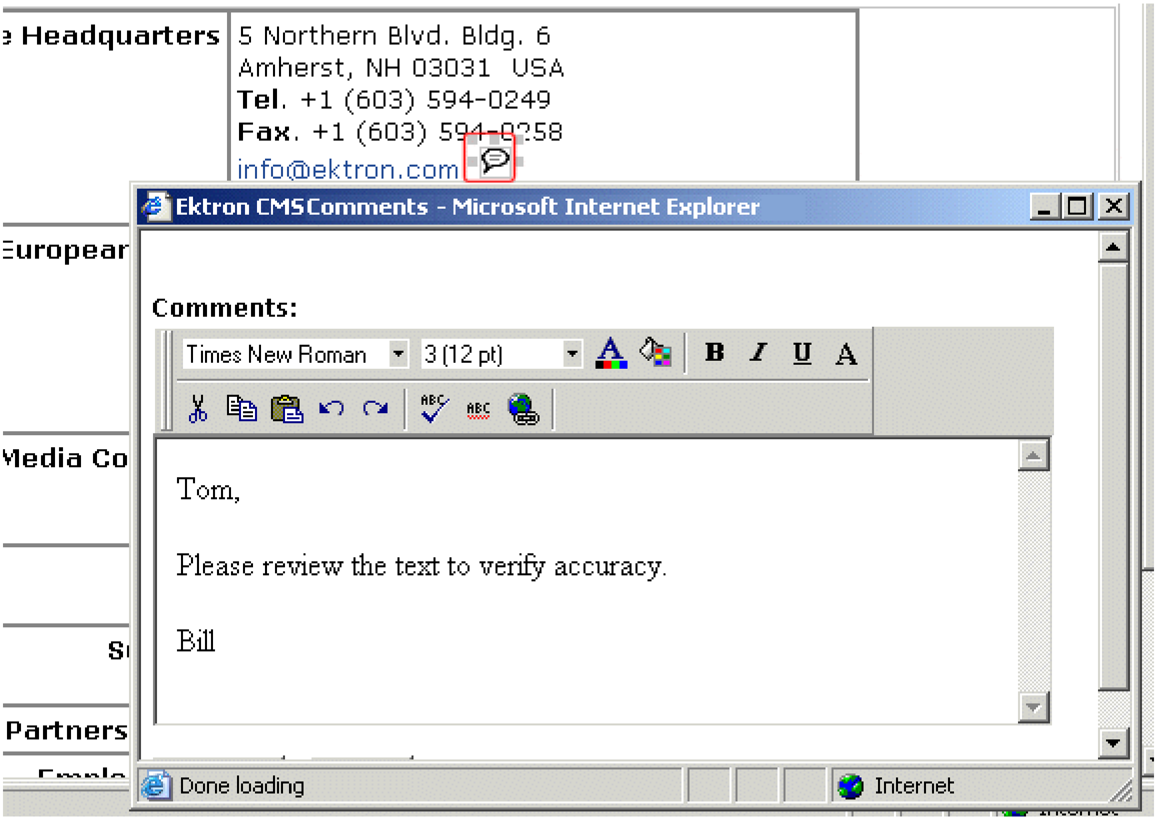
3. Enter the attribute into the new line (circled in the illustration above).
4. Press **Insert** to close the dialog box and insert the tag.

NOTE If you insert some new tags to this screen and then decide you do not want to insert one of them, click the unwanted tag and press the **Delete** button to remove it from the list.

Inserting Comments within Content

While editing **Ektron CMS300** content, you can insert comments to the content. Comments might be an author's note to himself or other authors about the content block. For example, you could insert a comment explaining why you are using a certain style class.

Comments are only visible during editing -- they do not appear when the content is published on your Web site.



Other users can add comments to your comments. This feature is know as “Content Collaboration.”

Similar to other word processing programs, comments can be added, updated, and tracked to audit changes being made.

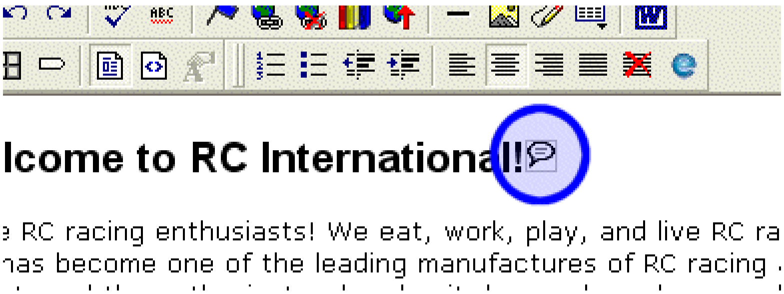
This section explains the content collaboration feature.

WARNING! Do not confuse these comments, which are inserted within the content, with history comments, which are inserted outside the content and used to indicate what changed during an editing session.

Adding Comments to Content

To add a comment to a content block, follow these steps.

1. Create a new content block or edit an existing one. *See Also:* ”Adding a Content Block” on page 37
2. In the editor, place the cursor where you want to insert the comment.
3. On the *editor* toolbar, click the **Insert Comment** button ( ).
4. The Ektron CMS Comment window opens.
5. Insert a comment. Use the toolbar to format the text if desired.
6. Click the **Insert** button.
7. The comment is saved.
8. Click the **Close** button.
9. The comment window closes, and a comment icon is placed where the comment was added to the content.

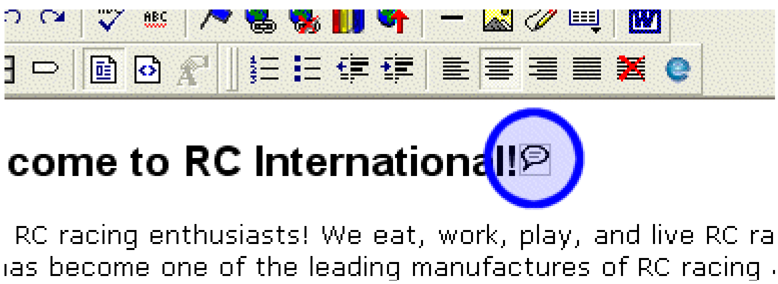


Each comment appears in the table at the top of the window. From this window, you can add another comment and update an existing one. See the next section for more details.

Viewing a Comment

After a comment is inserted into a content block, it can be viewed by any user who can edit the content block. To view a comment, follow these steps.

1. Edit the content block that contains the comment.
2. Within the content, double-click the comment icon.



3. The Comments window opens.

Adding Another Comment

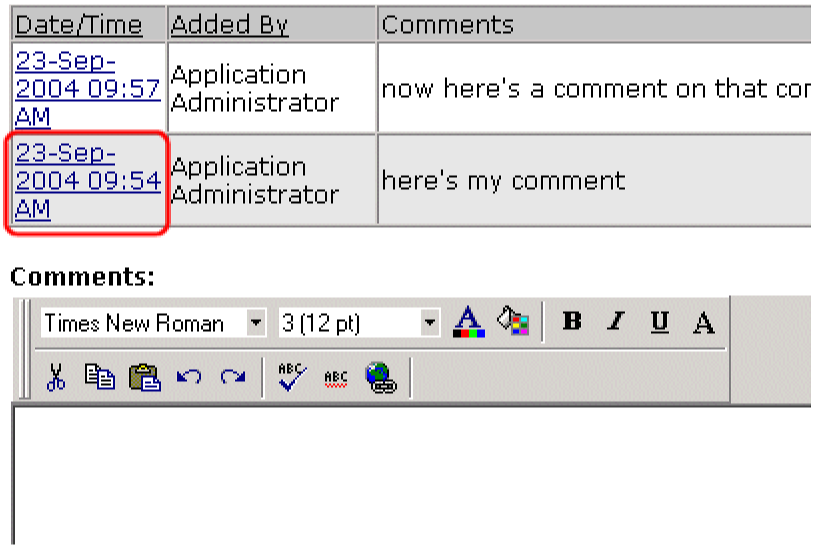
To comment on an existing comment, follow these steps.

1. Access the View Comment window for the comment, as described in ”Viewing a Comment” on page 440.
2. Insert the comment.
3. Click the **Insert** button**.**
4. The comment is saved and added to the top row of the comment table.
5. Click the **Close** button.

Updating a Comment

You can change a comment if needed. To update a comment, follow these steps.

1. Access the View Comments window for the comment that needs to be updated.
2. Click the **Date/Time** link of the comment you want to edit.



3. The comment editor opens with the selected comment in it.
4. Update the comment.
5. Click the **Update** button to save the changes.

Appendix A: Content Statuses

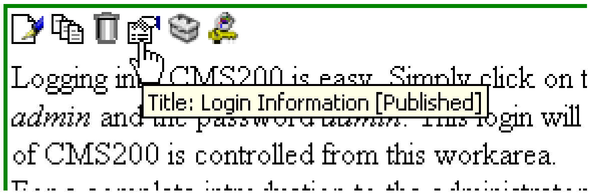
The table below describes all possible content statuses. The rest of this appendix explains each status in more detail.

Letter	Border Color	Meaning	Content state	More Information
A	green	**Approved**	Through the workflow and published on the Web site.	"Active Content" on page 443
O	red	**Checked Out**	Currently being edited. Has not been checked in.	"Checked Out Content" on page 446
I	green	**Checked In**	Checked in for other users to edit.	"Checked-In Content" on page 444
S	yellow	**Submitted for Approval**	Saved and submitted into the approval chain. *See Also:* "Approving/ Declining Content Blocks" on page 76	"Submitted Content" on page 446
M	yellow	**Marked for Deletion**	Requested for deletion.	"Marked for Deletion Content" on page 448
P	grey	**Pending Go Live Date**	Approved but the Go Live date hasn't occurred yet.	"Pending Start Date Content" on page 448
T		**Awaiting Completion of Associated Tasks**	Task(s) assigned to content are not complete	

Letter	Border Color	Meaning	Content state	More Information
D		**Pending Deletion**	Content block 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 block is deleted.	

Active Content

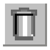
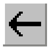
If a content block has a green border, it is live on the Web site.



When content is active, you can perform the following actions on it, depending on your permissions.

The content block's status remains active until it is checked out and changes are made to it.

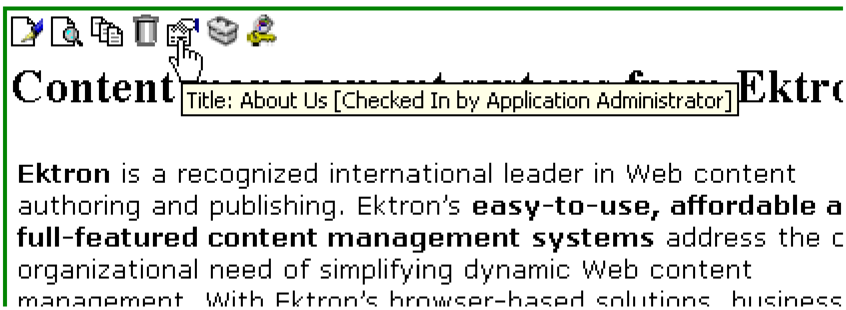
Button	Name	Description	For more information, see
	Edit	Check-out the content block to change it.	”Editing a Content Block” on page 40
	Edit Summary	Edit the brief summary used to describe the content.	”Adding a Content Block Summary” on page 64
	Edit Search Data	Change the content block's search data.	”Adding or Editing Search Data” on page 68

Button	Name	Description	For more information, see
	Delete	Submit a request to delete the content. If you are the last or only approver, the content is immediately deleted. *See Also:* ”Example of an Approval Chain” on page 79	”Deleting a Content Block” on page 44
	Back	Go to previous window.	

Checked-In Content

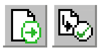
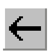
If a content block has a green border, it could mean that the content block is checked in. A checked-in content block is one to which changes were made, after which it was checked in instead of being submitted or published. When a content block is checked in, it is accessible to all users who have permissions to edit it. They can check it out and change it.

Keep in mind that the content seen on the template is not the same as the content in the editor view.



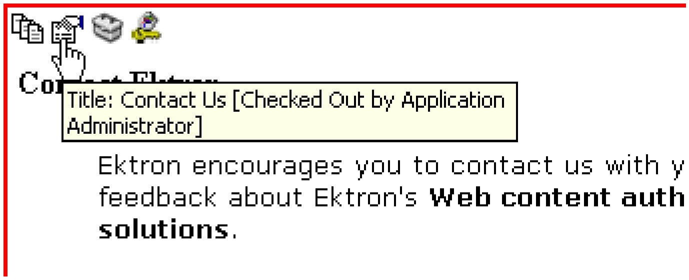
See Also: ”Example of an Approval Chain” on page 79

Each option you may perform on a checked-in content block is described below.

Button	Name	Description	For more information, see
	Edit	Check-out the content block to change it.	”Editing a Content Block” on page 40
	Edit Summary	Edit its summary.	”Adding a Content Block Summary” on page 64
	Edit Search Data	Edit its search data.	”Adding or Editing Search Data” on page 68
	Submit/Publish	Submit content block into approval chain. If you are last approver in the approval chain, the publish button appears. If you click it, the content is immediately posted to Web site.	
	View Staged/ Published	**View Staged** button - displays content that hasn’t been published yet. **View Published** button - displays content live on the Web site.	”Staged Content” on page 449
	Delete	Submit a request to delete the content into approval chain. If you are the last or only approver, the content is immediately deleted.	”Example of an Approval Chain” on page 79
	Back	Go to previous window.	

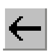
Checked Out Content

If a content block has a red border, its status is checked out, which means another user is editing it. While in this status, no other users can edit the content.



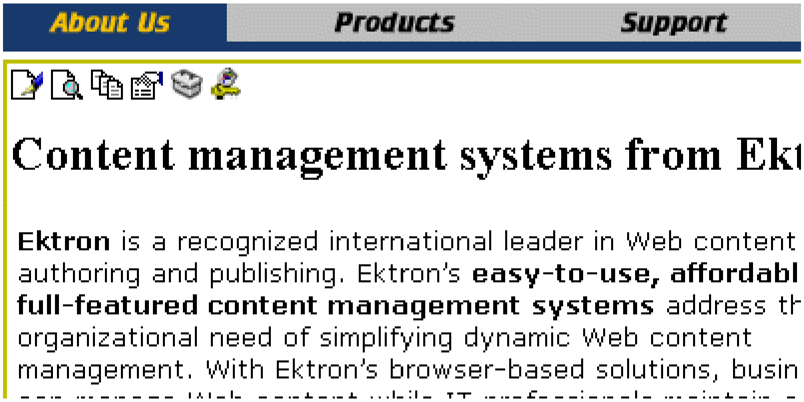
The content remains checked out until it is checked in by the check-out user or your system administrator.

Each option you may perform on a checked-out content block is described below.

Button	Name	Description
	Check In	Check in content block.
 	View Staged/ Published	Click the **View Staged** button to view the content that has not yet been published. Click the **View Published** button to view the content that is live on the Web site. *See Also:* "Staged Content" on page 449
	Back	Go to previous window.

Submitted Content

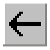
A yellow border shows that a user has submitted the content block into the approval chain. The border remains yellow until the content is published or declined. While the content is in the approval chain, no user can check it out.



See Also: "Example of an Approval Chain" on page 79

Each toolbar button is described below.

Button	Name	Description
	Submit	Submit the content block into the approval chain. *See Also:* "Example of an Approval Chain" on page 79
	Publish	Approve and publish the content block to the Web site. Note: You have this option only if you are the last approver in the chain. *See Also:* "Example of an Approval Chain" on page 79
	Decline	Refuse to publish the submitted content block, and change its status to checked-in.
	Edit	Check out the content block and make changes to it. Note: If you edit the content block, you need to re-submit it to the approval chain.
 	View Staged/ Published	Click the **View Staged** button to view the content that has not yet been published. Click the **View Published** to view the content that is live on the Web site. *See Also:* "Staged Content" on page 449

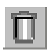
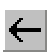
Button	Name	Description
	Back	Go to previous window.

Marked for Deletion Content

Content that is *marked for deletion* has been requested to be removed from the Web site by a user. When a content block is marked for deletion, it goes through the approval chain like a content block that is submitted for publishing. When the content completes the approval chain, it is deleted from the Web site.

See Also: "Example of an Approval Chain" on page 79

The table below describes the toolbar buttons.

Button	Name	Description
	Delete	Approve the deletion request. Note: If you are the last user in the approval chain, the content is deleted when you click this.
	Decline	Refuse the deletion request. This sends the content block back into a checked-in status.
	Back	Go to previous window.

Pending Start Date Content

Content that is pending a Go Live date has been approved, but its scheduled "go live" date and time have not occurred yet.

You cannot perform any action on a content block with a pending start date.

Staged Content

A staged version of a content block is one that is not published. It can be a content block that is checked in, or one that is approved with a pending a start date.

Staging lets you make changes to a content block, while keeping it from the Web site until you are ready to publish it.

Index

508 compliance 422

A

about eWebEditPro box 281
absolute positioning of objects 283
add
  button
    calendar event 28
    library items 28
    task 28
    workarea toolbar 28
  content
    block button 28
    folder button 28
    screen
      options 39
      responding to fields 38
  content block 37
address, email, user, editing 264
alignment
  cell 401
  image 325
  table 382
  text 281
approval chain, example 79
approvals toolbar button 28
approve
  all, toolbar button 28
  button
    floating toolbar 4
    workarea toolbar 28
  one content block 77
  several content blocks 79
approving content 76
  from approval report 106
approving file
  asset management system 260
archived content, toolbar button 28
archiving
  definition 61
  options 61
  restoring archived content 62
asset management system
  adding asset to collections 260
  adding assets to menus 260
  approving file 260
  checking in document 244
  creating managed file 252
  creating Office document 240
  editing managed file 257
  editing Office document 250
  exit without saving changes 245
  file types 237
  importing document 245
  importing several documents 247
  Office document properties,
    editing 243
  overview 236
  reports of asset by status 260
  saving recent changes 245
  saving to local computer 245
  security 239
  submitting for publication 244
  viewing documents in AMS 259
  work offline 245, 250
  workflow 259
assign task button, floating toolbar 4
auto hide, feature of Smart Desktop 21

B

background color
  applying to text 282
  cell
    applying 395
    deleting 396
  removing from text 282
  table
    applying 384
    deleting 385
background image
  cell
    deleting 398
    inserting 397
  table
    deleting 387
    inserting 386
bidirectional editing 283
blur, WebImageFX command 337
bold, toolbar option 282
bookmarks 409
border
  image
    color 324
    thickness 324
border color
  cell 394
  content block, meaning 442
  table 387
border size
  cell 391
  table 389
brightness, WebImageFX command 338
broken links, finding 44
bullet, toolbar option 280
button text, displaying in title bar 265
buttons
  adding to menu 293
  rearranging on menu 295
  removing from menu 293

C

calendars
  add event button 28
  authorization for creating 192
  button to display in Workarea 30
  definition 190
  event types 203
  events
    adding 199
    adding new content block for 205
    assigning event types 203
    button for viewing 31
    deleting 211
    display times 202
    editing 209
    insert hyperlink 202
    location 202
    recurring, adding 203
    start date 202, 204, 205
    viewing 208
  screen, information on 194
  viewing 197
cells
  background color 395
  background image
    deleting 398
    inserting 397
  border
    color 394
    invisible 394
  deleting 393
  inserting 392
  merging 405
  padding 407
  spacing 407
  splitting 404
  text alignment 401
  width 391

check in, toolbar button 29
check out, toolbar button 29
checked in content
definition 444
report 107
checked out content
definition 446
report 108
choose color, WebImageFX comm and 339
choose font, WebImageFX comm and 340
cleaning HTML 421
collaboration, content 438
collections
adding content 147
changing sequence of links 30
compared with menu and List Summary 155
creating 144
creating new content block for 149
default template 145
definition 138
deleting 152
editing content blocks 150
finding 139
folder, using to find collection 141
information, editing 152
multi-language 153
removing content 150
reordering content blocks 151
toolbar button 29
toolbar buttons 143
using default template or quicklinks 146
viewing 142
color
background
cell
applying 395
deleting 396
table
applying 384
deleting 385
cell border 394
default 374
content block border, meaning 442
depth, specifying 363
font, changing 282
picture border 324
table border 387
default 372
columns
table
adding 377
deleting 377
spanning 399
specifying 376
comments
adding another 440
adding to a task 230
inserting into content 438
updating 441
viewing 440
Compare source code field, eWebDiff 91
Compare visual aspect field, eWebDiff 90
comparing content 87
content area explained 92
Diff tab 92
how status affects comparison 88
published tab 92
setup window 90
staged tab 93
toolbar 89
view tabs 92
when available 87
window explanation 88
content
see also content block
active, definition 443
adding as menu option 167
adding to collection 147
approval process 79
archived, toolbar button 28
archiving see archiving
awaiting approval 15
checked in, definition 444
checked out, definition 446
collaboration 438
comparing, see comparing content
currently checked out 16
declining, see declining content
difference
view, button, floating toolbar 4
viewing 87
editing, toolbar button 29
end date, setting 60
folder
add button 28
screen display 26
View History, Restore 99
history
accessing from Web page 95
accessing via Workarea 95
marked for deletion, definition 448
pending start date 448
previous version, viewing 94
publish see publish
reports
checked in content 107
checked out content 108
content pending start date 111
content to expire 113
expired content 112
new content 109
refresh reminder 111
submitted content 109
restoring previous version 94
scheduling 57
search data, see search data
searching for within site 45
start date, setting 57
statuses 442
approved 442
submitted, definition 446
summary see summary
to expire report 113
workflow reports see reports
content area, expanding 42
content block
see also content
add button 28
adding 37
creating 37
definition 1
deleting 44
several at once 29
editing 40
overview 5
finding 5
lifecycle 6
properties 36
translating 41
viewing 33
contrast, WebImageFX command 342
copy
information from other applications 303
toolbar and menu option 278
WebImageFX command 343
copyright character, inserting 282
create new, WebImageFX comm and 343
creating
document, asset management system 252
Office document, asset management system 240
crop, WebImageFX command 344
custom tag
attributes dialog 433
menu options 431
customizing toolbar 291
cut, toolbar and menu option 278

D

decline
content

from approval report 106
from publishing 78
one content block 77
several content blocks 79
delete
button, floating toolbar 4
content, toolbar button 29
folder, toolbar button 29
toolbar button 29
WebImageFX command 344
deleting
cell 393
folders 55
table 367
Detect All field, eWebDiff 91
difference
content
view, toolbar button 4
dimensions, WebImageFX comm and 345
Do not apply XSLT button 29
document
creating, asset management system 252
importing into DMS 245
importing several into AMS 247
Office, creating, asset managem ent system 240
documentation, online, accessing 267

E

edit button, floating toolbar 4
editing
content block, overview 5
content, toolbar button 29
HTML 420
email
address, user, editing 264
instant
modifying 24
requirements 23
sending 22
where available 24
notification, disabling 264
end date, setting for content 60
eWebDiff window 90
exit without save, WebImageFX comm and 346
exit, WebImageFX command 346
extensions
file, allowed in library 118
image, allowed in library 118

F

file
extensions, library, setting 118
library, editing title 125
upload path, library, setting 118
files
copying to library 120
library
inserting into content 130
overwriting 126
viewing 123
finding
content block 5
text 304
floating toolbar 3
folders
adding sub-folders 54
button for deleting 29
delete 55
information available when viewing 32
viewing 31
fonts
background color 282
color 282
heading size 281
size 282
style 281
form elements toolbar 284
forms
adding to content 135
replacing form or element inform ation 285
updating form or element inform ation 284
viewing 136
freehand, WebImageFX command 347

G

gray, content border color, meaning 442
green, content border color, m eaning 442

H

height, work page, customizing for user 265
help, online, accessing 267
history
button, view, floating toolbar 5
content
accessing from Web page 95
accessing via Workarea 95
screen options 98
viewing 31
window 96
horizontal flip, WebImageFX comm and 347
horizontal line, inserting 279
HTML
cleaning 421
editing 420
inserting 420
viewing 419
hyperlinks 413
adding as menu option 169
creating 413
definition 115
editing 418
entering manually 415
library
adding 133
adding to content 134
editing 134
viewing 133
preventing 418
removing 418
testing 416
to a bookmark in another web page 417
to content block, finding 30
using a Quicklink 414

I

icon menu 3
Ignore All field, eWebDiff 91
Ignore Case field, eWebDiff 91
Ignore Format Attributes field, eWebDiff 91
image extensions, library, setting 118
image info, WebImageFX command 348
image upload
from Microsoft Word docum ent 314
inserting picture from com puter 319
media file selection 317
path, library, setting 118
images
adding space around 327
aligning 325
background
cell, inserting 397
table, inserting 386
border
color 324
thickness 324
deleting 329
deleting from server 319
editing 331
inserting 316
from server into editor 318
inserting from your computer 319
library
adding to content 135
editing titles 134
overwriting 134

uploading 134
viewing 134
locking in position 283
moving to server 329
scanning 361
specifying color depth 363
indent, toolbar option 280
insert custom tag dialog 436
insert library item, toolbar button 29
insert table, toolbar button 369
inserting
cells 392
HTML 420
instant email, see email, instant
Internet addresses, spell checking 311
italic, toolbar option 282

J

jumps, see bookmarks and hyperlinks
justify, toolbar option 281

L

landing page after login, customizing for user 265
language, user, editing 264
library
accessing 116
add items button 28
asset, adding as menu item 168
copying files to 120
definition 115
file extensions 118
file upload path 118
files
editing 125
inserting into content 130
overwriting 126
viewing 123
folder properties 117
forms
adding to content 135
viewing 136
hyperlinks
adding 133
adding to content 134
editing 134
viewing 133
images
adding to content 135
editing titles 134
extensions 118
overwriting 134
upload path 118
uploading 134
viewing 134
physical path 118
quicklinks
adding to content 135
viewing 136
searching 119
license keys, viewing 281
lifecycle, content block 6
line, WebImageFX command 348
link check button 30
links, broken, finding 44
ListSummary, compared with collection and menu 155
lock table or image in position 283
log in 8
log out 10
button, floating toolbar 4

M

manuals, online, accessing 267
marked for deletion content 448
menus
accessing 159
add new content block via navigation link 171
adding new
via content folder 161
via Menus module 163
adding to toolbar 292
appearance
to content contributor 157
to site visitor 157
changing orientation 298
compared with collection and List Summary 155
creating 296
in any language 189
definition 157
deleting 185
editing 172
via content folder 172
via menus module 172
via navigation link 173
icons 3
items
adding content block as 167
adding external hyperlink as 169
adding library asset as 168
adding submenu 169
adding to submenu 170
adding via content folder 164
adding via modules folder 165
adding via navigation link on Web page 166
definition 158
deleting
via content folder 186
via menus module 187
editing
content block 176
external hyperlink 178
library asset 178
submenu items 179
via content folder 174
via menus module 175
via navigation link 175
rearranging 184
moving from toolbar 297
multi-language issues 187
rearranging on toolbar 295
removing from toolbar 292
structure 158
submenu, definition 159
template link field 163
translating 188
URL link field 162
viewing
via content folder 180
via menus module 183
via navigation link 183
merging cells 405
Microsoft Word
editing in 313
editing XML documents 314
uploading image from 314
multi-language menus 187

N

number, toolbar option 280
numbers in words, spell checking 311

O

objects, absolute positioning 283
Office 2000, inserting content from 421
open, WebImageFX command 349
oval, WebImageFX command 350
overwrite button 30

P

padding, cell 407
paste
toolbar and menu option 278
paste as new image, WebImageFX command 351
paste text
toolbar and menu option 278
pending start date content 448
physical path, library, setting 118
pictures
inserting see image upload
properties, image upload 317
pixels 323
pointer selection, WebImageFX command 351

polygon, WebImageFX command 352
position objects menu 283
prerequisites 8
preview
  button 30
    floating toolbar 4
  feature 10
print editor content 278
profile
  users
    updating 262
    viewing 262
properties
  button, floating toolbar 4
  content block 36
publish
  button 30
  content to web site 78
published
  content block, viewing 31

Q

quicklinks 414
  adding to content 135
  broken, finding 44
  definition 116
  using for a collection 146
  viewing 136

R

rectangle, WebImageFX command 353
red, content border color, meaning 442
redisplay toolbars 295
redo, WebImageFX command 353
registered trademark character, inserting 282
remove button 30
remove XSLT from XML content block 98
reorder button 30
replacing text 304
reports
  content
    approving content from report 106
    awaiting approval 105
    checked in content 107
    checked out content 108
    content to expire 113
    declining content from report 106
    editing content blocks 105
    expired content 112
    new 109
    pending start date 111
    refresh reminder 111
    sorting and filtering 103
    submitted 109
    viewing content blocks 105
    workflow 101
  folder, accessing 101
restore, toolbar button 30
restoring content 99
right to left editing 283
rotate, WebImageFX command 354
rows
  table
    adding 377
    deleting 377
    spanning 399
    specifying 376

S

save
  toolbar button 30
  WebImageFX command 355
save as, WebImageFX command 356
scanning an image 361
scheduling content 57
search 304
  considering case of search term 306
  content folder 45
  direction 305
  library 119
  toolbar button 30
  whole word match 307
search data
  creating 72
  definition 68
  editing 72
section 508
  compliance 422
  tables 425
select all, menu option 300
select, WebImageFX command 357
selecting text 276
server, moving picture to 329
sharpen, WebImageFX command 357
shortcuts, keyboard 277
show calendar, toolbar button 30
Smart Desktop
  definition 14
  hiding left panel 20
  modifying folder display 18
  navigating 17
  set as start location for user 266
Smart Detect field, eWebDiff 91
space character, inserting 282
spacing, cell 407
spanning
  table columns 399
  table rows 399
special characters, inserting 282
spelling
  check a single word 310
  check as you type 308
  check on demand 309
  check selected text 310
  checking file addresses 311
  checking Internet addresses 311
  checking uppercase words 311
  checking words with numbers 311
  fix errors 309
splitting a cell 404
staged content block, viewing 31
start date
  content block, setting 57
  setting, results 59
style class, assigning to text 281
sub-folders, adding 54
submenus
  adding as menu item 169
  adding items 170
  definition 159
  deleting 186
submit, toolbar button 30
submitted content, definition 446
summary
  adding 64
  content
    creating for existing content block 66
    creating for new content block 65
    editing 66

T

tables
  alignment 382
  background color
    applying 384
    deleting 385
  background image
    deleting 387
    inserting 386
  border
    color 387
    invisible 388
    size 389
  columns
    adding 377
    deleting 377
    spanning 399
    specifying 376
  creating 366
  deleting 367
  inserting within a table 367
  locking in position 283
  rows
    adding 377
    deleting 377
    spanning 399

specifying 376
section 508 425
width
setting by percentage 379
setting by pixels 381
tasks
add button 28
assign button, floating toolbar 4
assigning
to content block 216
to user 216
comments
adding 230
updating 232
creating
via content block 224
via task folder 215
definition 213
deleting 233
due date 217
editing 230
priority, assigning 216
relationship to content blocks 213
start date 217
state, assigning 217
toolbar buttons 235
viewing 224
options 225
sorting options 229
template link
field on Add/Edit Menu screen 163
text
aligning 281
in columns 368
within a cell 401
direction menu 283
indenting 280
remove formatting 282
replacing 304
searching 304
selecting 276
WebImageFX command 358
thumbnail, WebImageFX command 360
title bar, displaying button text 265
toolbars
buttons 28, 277
collections 143
customizing 291
floating 3
buttons 4
redisplay 295
restore 295
trademark character, inserting 282
twain acquire, WebImageFX command 361
twain source, WebImageFX command 361

U

underline, toolbar option 282
undo
toolbar option 279
WebImageFX command 362
upload
file, path 118
image, path 118
uppercase words, spell checking 311
URL link
field on Add/Edit Menu screen 162
user
email address, editing 264
language, editing 264
users
profile
customizing work page height 265
customizing work page size 264
customizing work page width 265
landing page after login 265
see profile
set Smart Desktop as start location 266

V

version number, viewing 281
vertical flip, WebImageFX command 362
View Content Awaiting Approval 105
view content difference 87
button, floating toolbar 4
screen, first use 93
view date, toolbar button 31
view difference, toolbar button 31
view history
button, floating toolbar 5
toolbar button 31
view published, toolbar button 31
view staged, toolbar button 31
viewing HTML 419

W

WebImageFX
assigning new name to image 333
choosing image 331
commands
blur 337
brightness 338
choose color 339
choose font 340
contrast 342
copy 343
create new 343
crop 344
delete 344
dimensions 345
exit 346
exit without save 346
freehand 347
horizontal flip 347
image info 348
line 348
open 349
oval 350
paste as new image 351
pointer selection 351
polygon 352
rectangle 353
redo 353
rotate 354
save 355
save as 356
select 357
sharpen 357
text 358
thumbnail 360
twain acquire 361
twain source 361
undo 362
vertical flip 362
zoom in 363
zoom out 363
introduction 331
menu commands 333
saving image 333
specifying color depth 363
toolbar buttons 333
whole word match 307
width, table
setting by percentage 379
setting by pixels 381
width, work page, customizing for user 265
word wrap 406
Word, Microsoft
editing in 313
editing XML documents 314
inserting from 421
uploading image from 314
work offline, asset management system 245, 250
work page size, customizing for user 264
workarea
accessing 13
button, floating toolbar 5
definition 13
toolbar buttons 28
add 28
add calendar event 28
add content block 28
add content folder 28
add library items 28
add task 28

approvals 28
approve 28
approve all 28
archived content 28
calendar 29
check in 29
check out 29
collections 29
delete 29
delete content 29
delete folder 29
do not apply XSLT 29
edit 29
insert library item 29
link check 30
overwrite 30
preview 30
publish 30
remove 30
reorder 30
restore 30
save 30
search 30
show calendar 30
submit 30
view date 31
view difference 31
view history 31
view published 31
view staged 31
WYSIWYG, view as 280

X

XML attribute
inserting 434
removing 434
value, entering or modifying 435
XML tags, inserting 432
XML Web pages, editing 429
XSLT, removing from XML content block 98

Y

yellow, content border color, m eaning 442

Z

zoom in, WebImageFX command 363
zoom out, WebImageFX command 363