Microsoft Content Management Server 2001

Authoring and Publishing Guide

Microsoft

Information in this document, including URL and other Internet Web site references, is subject to change without notice. Unless otherwise noted, the example companies, organizations, products, domain names, e-mail addresses, logos, people, places and events depicted herein are fictitious, and no association with any real company, organization, product, domain name, e-mail address, logo, person, place or event is intended or should be inferred. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording or otherwise), or for any purpose, wihout the express written permission of Microsoft Corporation.

Microsoft may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement with Microsoft, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

© 2001 Microsoft Corporation. All rights reserved.

Microsoft, Windows, Windows NT, MSDN, Site Server, Active Directory, NetShow, JScript, FrontPage, ActiveX, Visual Basic, and Visual InterDev are registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

Table of Contents

Using This Guide

What this guide is about iii
How to use this guide. iii
Conventions used in this guide. v
For more information vi

chapter 1 Introducing MSCMS 2001

Overview 3
MSCMS 2001's publishing process 4
How MSCMS 2001 works 5
How MSCMS 2001 pages are created 6
MSCMS 2001 roles, rights, and containers 7

chapter 2 Logging on to Your MSCMS 2001

Overview 13
Logging on for the first time 14
Viewing postings in channels. 15

chapter 3 Authoring a Basic Page

Overview 19
Accessing Help. 19
Getting started. 19
The author's role 20
Creating a page. 21
Saving a page 24
Statuses of pages and postings. 25
Submitting pages and postings for publication. 27
Creating a posting. 28

chapter 4 **Advanced Authoring Functions**

Overview 33
Using template families 34
Adding a view to a page 35
Adding hyperlinks 37
Creating a posting for the view 38
Save and submit your page 39
Give the page a description 39
Previewing revisions 39

chapter 5 **Editing a Page**

Overview 43
The editor's role 43
Editing a page 44
Approving a page 46
Declining a page 46
Deleting a page 47

chapter 6 **Managing Resources**

Overview 51
About resources 51
Viewing resources 52
Replacing a resource 53
Providing a resource description 54
Moving resources between galleries 54
Generating a Dependant Report 55
Deleting resources 56

chapter 7 **Moderating a Channel**

The moderator's role 59
Viewing postings 60
Modifying posting properties 61
Approving a posting 62
Declining a posting 62
Deleting a posting 62
More about the Approval Assistant 63

Glossary 65

Index 73

Using This Guide

What this guide is about

This guide contains information about authoring, editing, moderating, and managing resources using the Microsoft® Content Management Server 2001 Site Builder.

Most customers should choose to use our Microsoft® Content Management Server 2001 Web Author technology for doing their Web publishing. All functionality for authoring, editing, moderating, and managing resources is more usable with the Web Author—it offers a simpler and more manageable solution to Web content authoring.

How to use this guide

The sample Web site includes templates and examples of directory setups for a fictitious company called Method Systems. In this *MSCMS 2001 Authoring and Publishing Guide*, we have used screen shots from the sample site to help explain the basic tasks involved in working with pages, templates, and postings. Topics are outlined in the following table.

To do this...	Go to this chapter
Understand the concepts and components of the Microsoft Content Management Server (MSCMS) 2001 Web publishing process: how pages are created, and what roles and rights are available.	Chapter 1, "Introducing MSCMS 2001"
Log on for the first time, understand how pages are handled (posted) in channels.	Chapter 2, "Logging on to Your MSCMS 2001 Intranet"
Select a template, add content, save a page, submit a page, and create a posting. Access Help.	Chapter 3, "Authoring a Basic Page"
Understand concept of template families and posting multiple views of a page.	Chapter 4, "Advanced Authoring Functions"
Understand the editor's role in approving and declining a page.	Chapter 5, "Editing a Page"

To do this...	Go to this chapter
Work with resources in a Resource Gallery—view a resource, add or replace a resource, provide a description, move resources between galleries, and delete a resource.	Chapter 6, "Managing Resources"
Run a Dependant Report.	Chapter 6, "Managing Resources"
Use the Approval Assistant. Work with postings.	Chapter 7, "Moderating a Channel"

Conventions used in this guide

We have used several document conventions in this guide to help you identify and find information.

Two components of the Microsoft® Content Management Server 2001, the MSCMS 2001 Site Builder and MSCMS 2001 Web Author are always capitalized. However, references to the server and database are not capitalized: MSCMS 2001 server and MSCMS 2001 database.

Information that requires special attention comes in three types as described below: Caution, Tip, and Note.

! Caution
Caution means reader be careful. In this situation, you might do something that could result in loss of data or degradation of product performance.

Tip
Tips provide helpful suggestions for using Content Management Server 2001 effectively. Tips are not necessary to the basic understanding of the text.

Note
Note means reader take note. Notes emphasize or expand on important points in the main text around them. Notes can also provide information that applies only in special cases.

We also use typographical conventions to indicate specific information types in the documentation.

Convention	Usage in documentation
Bold	This style indicates menu items and buttons that must be clicked or selected. For example, "Once you have completed the form, click **Finish** to move to the next screen."
Italic	This style indicates the title of a book or manual. Most commonly it is used to refer to other documentation in the MSCMS 2001 information product suite.
Monospace	This style denotes source code and names of programming functions. For example, "When implementing image tags in HTML be sure to always use width and height attributes, as shown below." `<IMG SRC="PowerPanels.GIF" WIDTH="150" HEIGHT="150">`

For more information

The information products for Content Management Server 2001 are on the product CD and include the following:

- *MSCMS 2001 Publishing API Help*: detailed reference information about the Publishing Application Programming Interface (API) exposed by the MSCMS 2001 server. This API is used by Web programmers in building an MSCMS 2001 site.
- *MSCMS 2001 Content Connector for Commerce Server 2000 Framework API Help*: detailed reference information about the framework for the MSCMS 2001 Content Connector for Commerce Server 2000 API. This API is used by Web programmers in building a Content Connector site.

The above information is in the form of compiled help (.chm) files.

The following information comes in Portable Document Format (PDF). You need Adobe Acrobat reader to access the PDFs—download a free copy from the Adobe site at `www.adobe.com`.

MSCMS 2001 Setup Guide: provides prerequisite information for installing Content Management Server 2001 with the InstallShield® Wizard, installing a database, configuring your system with the SCA, installing the MSCMS 2001 Content Connector for Commerce Server 2000 and unpacking a site, and installing the MSCMS 2001 Site Stager.

MSCMS 2001 Administrator's Guide: assists site administrators in the technical setup of the customer Web site using Content Management Server 2001 and MSCMS 2001 Content Connector.

MSCMS 2001 Page Template Designer's Guide: provides details about all aspects of template-based publishing, including creating templates for use in a multi-authoring environment.

MSCMS 2001 Site Programmer's Guide: provides comprehensive information for site programmers including the Web interface, the MSCMS 2001 Site Builder and MSCMS 2001 Web Author, MSCMS 2001 Content Connector, and working with, and customizing the MSCMS 2001 Publishing API and Content Connector Framework API.

MSCMS 2001 Content Connector for Commerce Server 2000 Business Desk User's Guide: provides information about the MSCMS 2001 Content Connector for Commerce Server 2001 add-on and explains how to personalize your site's content. This includes creating and managing page profiles, personalized content objects, and rich content.

Check our corporate Web site at `www.microsoft.com/cmserver`, for a variety of useful information.

Chapter 1

Introducing MSCMS 2001

Overview

Microsoft® Content Management Server 2001 (MSCMS 2001) helps you create and maintain your company's Web sites. As a Web publishing process, Content Management Server 2001 makes it possible to:

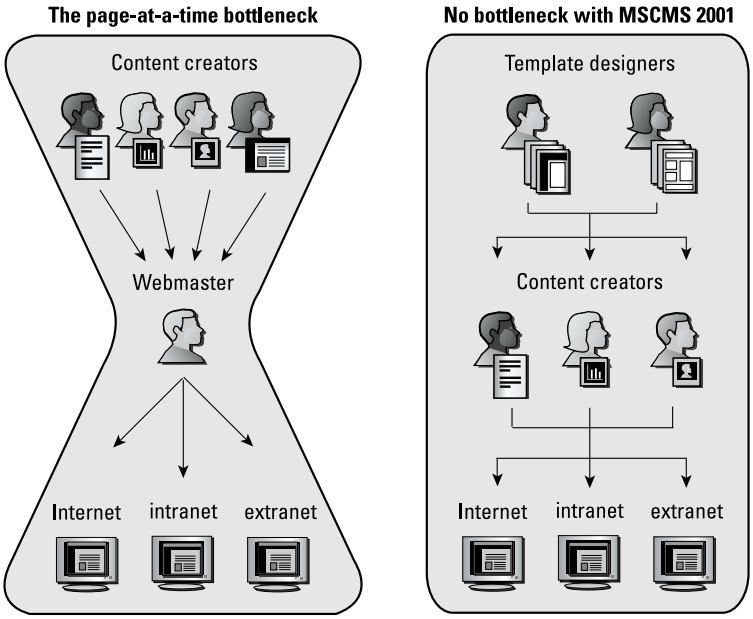
- target pages to specific audiences
- create and publish Web pages without learning a Web programming language
- set the start and stop publication dates of pages and postings
- tailor content to suit any browser
- simplify site administration.

To do the above tasks, employees in a company are assigned *roles*, such as template designer or author, in order to make the most of Content Management Server 2001's collaborative publishing process. Use this guide as a reference to read about a typical cycle of authoring, editing, moderating, and managing resources.

In this chapter, we outline concepts and terminology used in MSCMS 2001 to help you better understand and use the product.

MSCMS 2001's publishing process

Traditionally, all Web pages created in an organization depend on the specialized skill of a Webmaster. This method of production can cause delays and bottlenecks. MSCMS 2001 removes the bottleneck by enabling multiple users (content creators) to author their own Web pages.



By allowing anyone in your organization to author Web pages, you ensure that information is delivered on time and to the right audience.

How MSCMS 2001 works

MSCMS 2001 Site Builder software is used to develop all stages of an MSCMS 2001 Web site. The Web site elements created with the Site Builder software are stored in the MSCMS 2001 database.

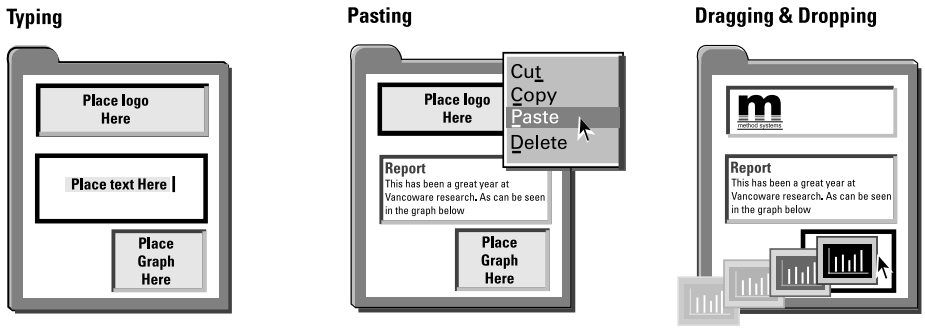
When a Web browser calls up an MSCMS 2001 page, all elements of that page are assembled from the database by the MSCMS 2001 server. Once they are assembled, a copy is displayed in the Web browser.

MSCMS 2001 reduces redundancy and duplication of effort. For example, once your company logo is stored in the database, anyone with rights to it can use it. There is no need to make copies because that one version is securely stored in the database. And, if updating or revising is required, it needs to be done in one place only.

How MSCMS 2001 pages are created

Unlike traditional Web pages, MSCMS 2001 pages separate the content from the design. And, to author a page, you do not need specialized programming skills or HTML experience.

Pages are created by adding content, such as text and images, to placeholders on a template. You can type text directly into a placeholder, or drag and drop text and images or other files from a folder or a desktop application such as a word processing program, provided the placeholder properties allow you to. Templates, and resources such as text or images, are stored in the database. When you view a page in your Web browser, MSCMS 2001 generates a copy of that page from the elements stored in the database.



Authors can create pages by typing, pasting, or dragging and dropping content into page template placeholders.

About placeholders

Placeholders are the areas on a template where you add content to create a page. The type of content and formatting options for content that a placeholder accepts, are set by a template designer. For example, you might add text to a placeholder, but not be able to change the font. This is because the template designer has designated an overall style for text within that placeholder.

Postings

To publish a page, it must be posted to a channel. A posting defines which view of a page is to be published, and when to publish it. (Actual publication is subject to the MSCMS 2001 approval process.)

When a view of a page is posted, a posting that indicates the publishing schedule and view is created and stored in the channel posted to. “Posting” can also refer to the process by which a page is posted.

MSCMS 2001 roles, rights, and containers

Authoring and publishing with MSCMS 2001 is a collaborative process in which there are formal roles. Users are assigned their roles by an administrator before they log on for the first time.

The rights you have are derived from your role and are tied to containers. Containers can be folders, channels, or galleries. The containers you see in your MSCMS 2001 Site Builder interface depend on your rights. For example, if you have rights to moderate only, you see only the channel container when you start the MSCMS 2001 Site Builder.

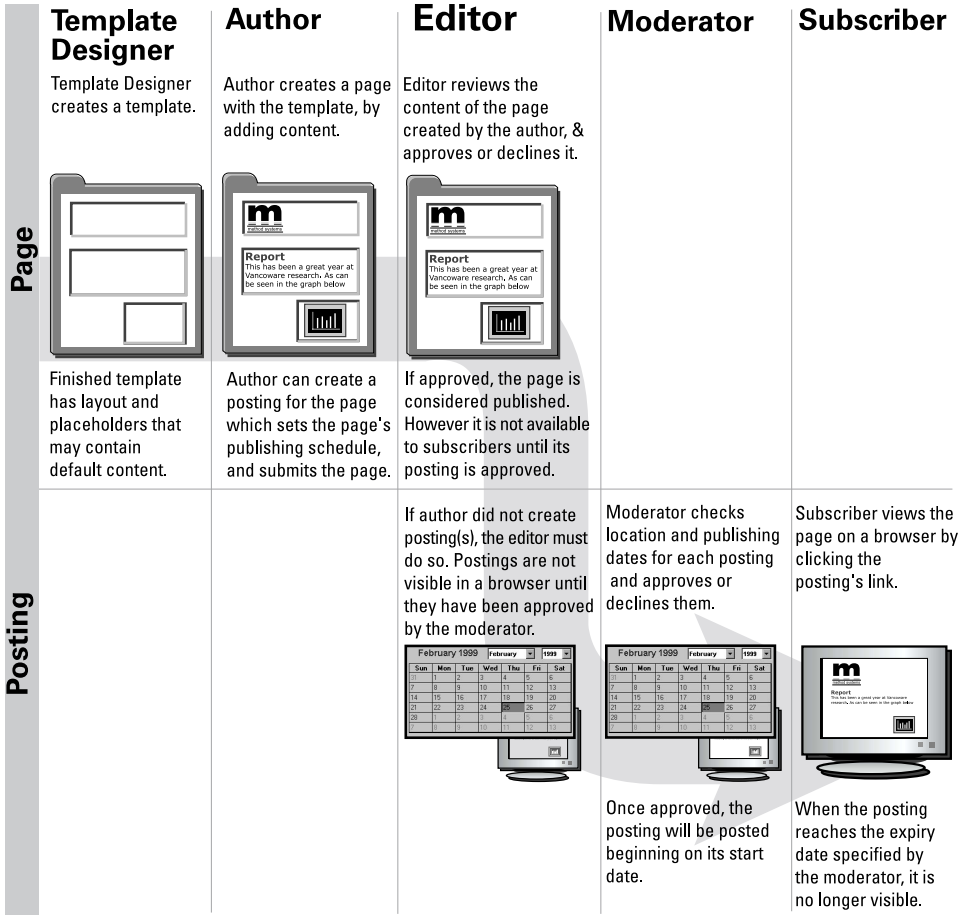
Role	Rights	Container
Subscriber	• browse to pages published to channels where they have rights	No access to MSCMS 2001 Site Builder
Author	• create, modify, and submit pages in folders • create and submit postings in channels • use page templates • use resources	 Folder  Template Gallery  Channel  Resource Gallery
Editor	• approve pages • delete pages • modify postings • create pages in folders and submit postings in channels • use page templates • use resources	 Folder  Template Gallery  Channel  Resource Gallery
Moderator	• modify posting schedules • approve postings	 Channel
Resource Manager	• add, remove, and replace content in a resource gallery	 Resource Gallery

Role (Continued)	Rights	Container
Template Designer	• design page and navigation templates • use resources	Template Gallery Resource Gallery
Administrator	• assign user roles and rights • create hierarchies • assign rights in all containers	Folder Template Gallery Channel Resource Gallery User Roles

Roles

The key points to remember about MSCMS 2001 roles are:

- You can have more than one role depending on how your company sets up the Web site. For example, you could be assigned an editor in one folder and a moderator in a channel.
- Some roles overlap others. For example, an editor in a particular folder can author pages in that folder, and can edit and approve (or decline) pages owned by other authors in that same folder.



Roles in the MSCMS 2001 publishing process

Rights

Rights allow you to work in a container. The task you can do in that container depends on your role. Rights are not system-wide (except for administrators). If you are an author, you have authoring rights only in the folders assigned to you.

Containers

A container is the work space where you do the tasks allowed by your role. All containers in which you have rights have colored icons. You can open a dimmed container to see containers nested underneath it, in which you might have rights.

Container Type	Used to Store
Folder	pages
Channel	posting
Gallery	templates and resources

Chapter 2

Logging on to Your MSCMS 2001

Overview

This chapter includes information about the following:

- logging on to the Content Management Server 2001 Web interface for the first time
- viewing a published page.

If your MSCMS 2001 administrator has installed the sample Web site on your site, you can follow through the examples in this chapter, provided you have the following:

- the URL (full network pathname) for your MSCMS 2001 site
- the domain through which you have network access and only those domains configured as visible by the Server Configuration Application or the InstallShield® Wizard
- your network user name and password.

If you don't know this information, check with your system administrator.

If the above doesn't apply, use the information in this chapter as reference material only.

Logging on for the first time

1 Enter the full URL (for example, `http://<server>/channels`) for your MSCMS 2001 site in your Web browser.

2 The next step in the procedure depends on the Web browser you are using.

- Internet Explorer (IE) 5.x users: If the IE security setting is medium or high, a Security Warning appears requesting permission to install and run the MSCMS 2001 AutoLogin Client. Click the **Yes** button. Your MSCMS 2001 site is displayed in your browser.
- Non-IE 5.x users: The MSCMS 2001 login page appears. Enter your domain, user name, and password. Click the **Continue** button. Your MSCMS 2001 site is displayed in your browser.



Netscape login page

Tip

If you're not using IE 5.x, bookmark this page so you can bypass the login page from now on. If you are using IE 5.x, the login page is bypassed from now on.

Note

If you receive a warning message from the manual login page, your connection to the server is not secure. Contact your system administrator if you need a secure connection.

Viewing postings in channels

MSCMS1 2001 pages are “posted” to channels where they can be viewed by subscribers. To view a page you must be subscribed to the channel it is posted to. A posting acts as a link to the page, so when a posting is clicked in the Web browser, the page is displayed.

The site administrator will have subscribed you to the appropriate channels. If the channel creator assigns a rights group to the new channel you’re in, you’ll be automatically subscribed to it.

Your site is displayed in the browser after you log on. You can view pages by clicking on their postings in channels.

Chapter 3

Authoring a Basic Page

Overview

This chapter presents the first steps in authoring a Content Management Server 2001 Web page with the MSCMS 2001 Site Builder, and helps you understand the publishing process. The next chapter deals with more advanced authoring features.

This chapter covers the following topics:

- logging on the Site Builder for the first time
- creating and saving a page
- using the Production Manager
- creating a posting for a page
- posting a page to a channel.

Accessing Help

You can access online help at any point while working with MSCMS 2001 by selecting **Help > Contents**.

Getting started

Before you start you need to know:

- your domain name
- your user name
- your password.

Starting MSCMS 2001 Site Builder

1 Open the Site Builder by clicking its icon on your desktop or choose **Start > Programs > Microsoft Content Management Server > Site Builder.** The Start Content Management Server dialog box opens.

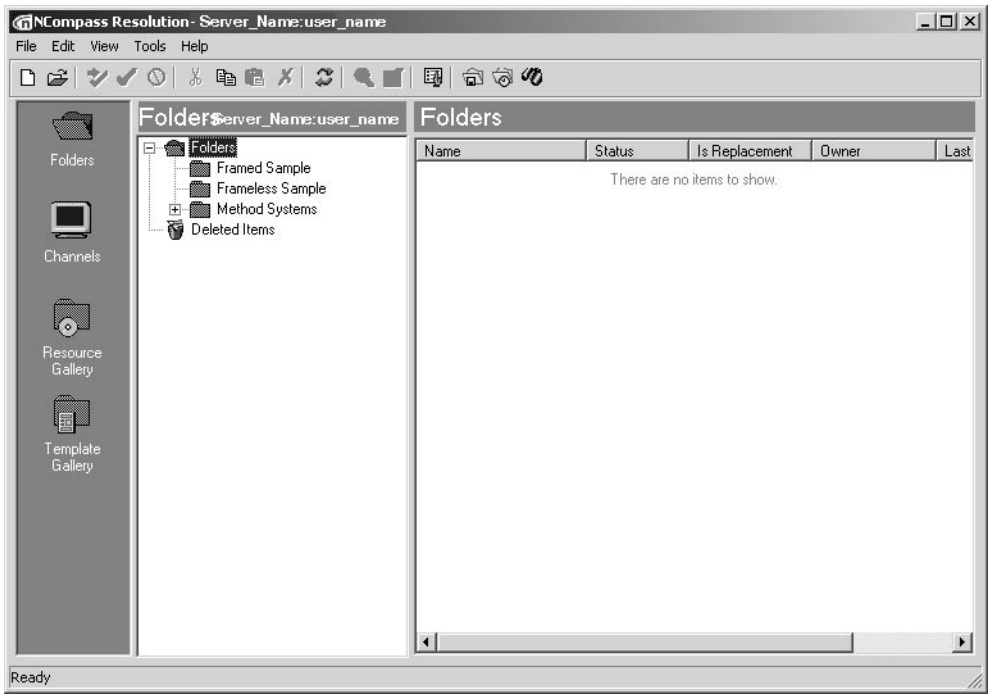
2 Verify the information in the dialog box.

- If your user name appears in the User Name field, click **Start**.
- If your user name does not appear in the User Name field, choose "Start Content Management Server as the following user." Select your domain and type your user name and password. Click **Start**.

The Content Management Server window opens. What you see next is determined by your assigned role.

About MSCMS 2001 windows

The screen shots in this chapter provide examples of typical windows that an author could see. The appearance of your interface is defined by how it was customized by your organization. How MSCMS 2001 looks when you start it up also depends on your rights—you will see only the containers in which you have rights.



The MSCMS 2001 window seen by an author

Tip
You can navigate through dimmed containers to subcontainers in which you have rights.

The author's role

MSCMS 2001 has a three-step publishing process—authoring, approving, and publishing.

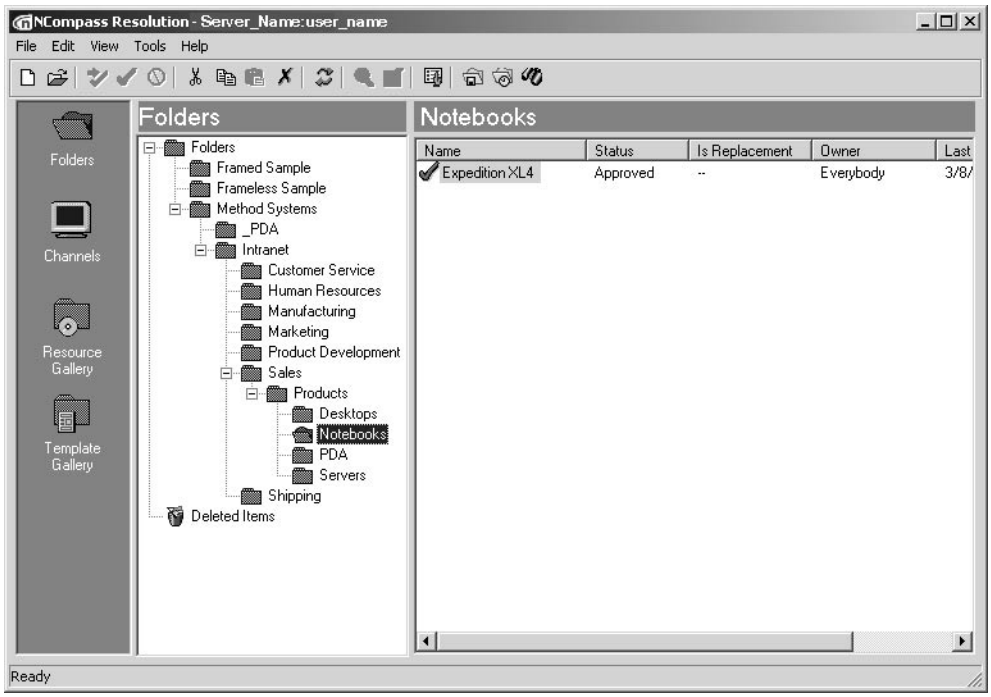
1 An author creates and submits a page and a posting for that page.
2 An editor approves the content for the page, and can either create or modify a posting. The editor can also modify the page created by an author.
3 A moderator approves the posting and the page is published.

Creating a page

We have used screen shots from a sample Web site for a fictitious company called "Method Systems." Method Systems sells computer equipment, including desktops, notebooks, PDAs (personal digital assistants), and servers. The screens throughout this user guide underlie a scenario that involves an author creating a page called a product description and then posting it to the company's intranet.

Choosing a folder in which to create a page

1 Display the Folders hierarchy by clicking the Folders icon. You have rights in folders that are colored blue. While you do not have rights in dimmed folders, you can expand dimmed folders, by clicking the (+) sign, to navigate to subfolders where you do have rights.

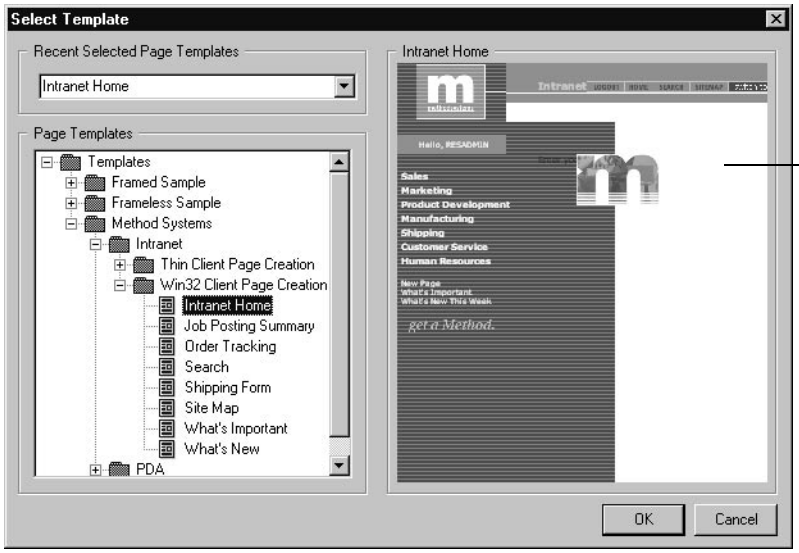


2 The above screen shows the expanded Method Systems folder, Intranet folder, Sales folder and Products folder. The Notebooks folder has been selected as shown in the above screen shot. This is where we will describe how to author an MSCMS 2001 page.

Selecting a template

1 Click **File > New > Page**. The Select Template dialog box opens.

2 Expand the folder in the Page Templates gallery where the template you want is stored. A preview of the page template appears on the right.



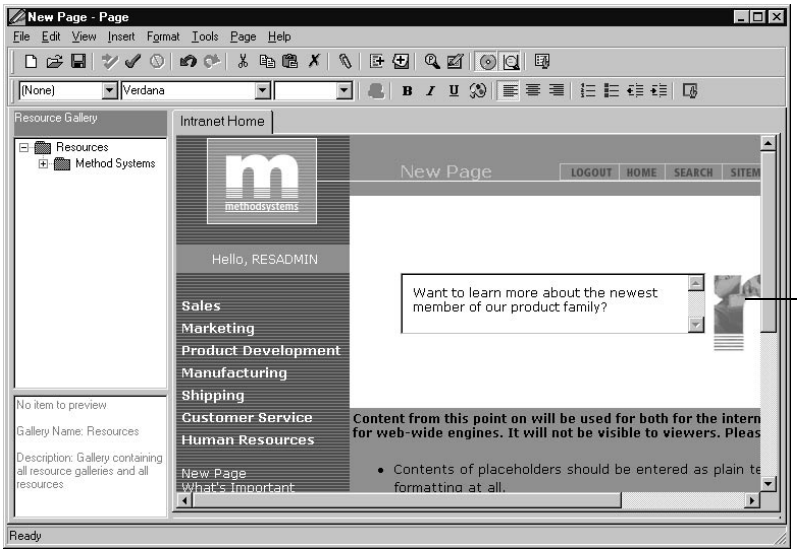
Select Template dialog box

3 Click **OK**. The Authoring window opens.

Adding content

Placeholders contain default content that indicates the possible uses for the placeholder. Unless the default content is applicable, you should delete it, otherwise it will appear on your Web page.

Note
When you are creating a page, you won't be able to play videos. However, when you preview the page, you can play videos.



Delete the default content and type your text inside the placeholder.

- Information for text boxes can also be copied and pasted from existing documents or from Internet Explorer 5.
- Use the **Preview** command to see how movie files such as QT or MPEG will appear and play.
- When you are selecting a video, you need to click inside the placeholder, not on the video itself.
- We recommend you limit the size of a placeholder to 300 KB of text. You could have storage problems when trying to save a page if the placeholder exceeds this size.

Previewing a page

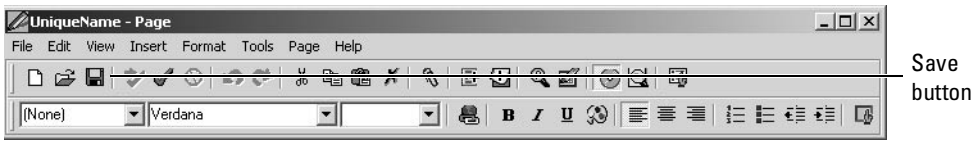
You can preview how added content will look in a Web browser by clicking the Preview button.



1 Click the **Preview** button on the Authoring window toolbar. The Web browser opens and displays your page.
2 Close the browser window.

Saving a page

1 Click the **Save** button. The Save As dialog box opens.



Authoring window toolbar

2 Click the folder where you created your page.
3 Enter a unique name for your page. We recommend you not use any of the following five characters in the page name. If a channel/posting name contains these characters, you will get unpredictable results when you type in the URL of a channel or posting.
   - = (equal sign)
   - \ (backslash)
   - , (comma)
   - . (period)
   - ? (question mark)
4 Click **Save**.
5 Close the Authoring window.

Statuses of pages and postings

MSCMS 2001 assigns states of ongoing publishing activity for pages and their postings. These statuses are listed below with a definition of the states. Note also that when a page is in the Saved state, there is an indication that a backup version exists in the list of pages in the Site Builder.

Status	State of the Page	State of the Posting
New	The state of a page when an author is authoring content, but before it is saved for the first time.	No approved version of the page exists. The state of a posting until its page is approved by an editor.
Saved	The state of a page after being saved for approval. but before being submitted.	
Waiting	The state of a page after being submitted for approval, but before being approved by an editor. A page usually enters this state from the Saved state, but a New, Declined, or Expired page can be created or re-edited then saved and submitted as a single action, thereby avoiding the Saved state.	The state of a posting after its page is approved, but before it has been approved by a moderator.
Approved	The state of a page after being approved by an editor.	The state of a posting after approval by a moderator, but when the current time is less than the effective date.
Declined	The state of a page after being declined by an editor and before being modified and resubmitted.	The state of a posting after it has been declined by a moderator and before it or its page has been modified and re-approved.
Expired	The state of an approved page after it has been approved by an editor, but where the current time is greater than the expiry time of the page.	The state of a posting after it has been approved by a moderator, but has reached its expiry date.

Status	State of the Page	State of the Posting
Published		The state of a posting after being approved by a moderator and where the current time is greater than the start time of the posting, but less than the expiry time of both the page and posting. This is the only state in which a posting can be seen by site subscribers.
Page Expired		The state of a posting after being approved by a moderator, but where the current time is greater than the expiry time of its page.
Page Deleted		The state of a posting after being approved by a moderator, but its page has been placed in the Deleted Items bin.

Submitting pages and postings for publication

Submitting a page

After authoring and saving a page, you need to create a posting for the page and submit it for an editor's approval.

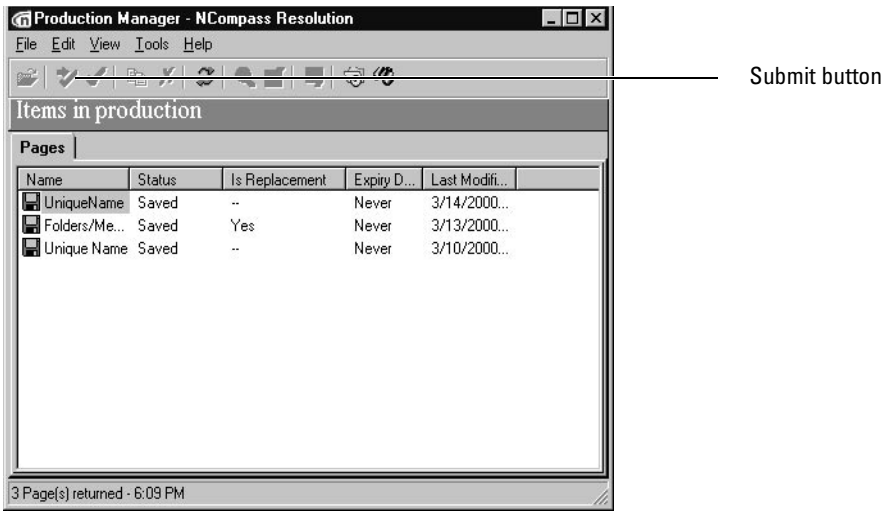
1 If you do not have it open, start the Site Builder.



2 Click the **Production Manager** button on the Content Management Server window toolbar. A list is displayed of all pages, postings, or templates owned by you that are Saved, Waiting for Approval, or Declined.

Note
You are automatically the Owner of the page you create. Changing the Owner to Everybody permits co-authoring of pages, in that other authors (who have the same rights as you) can change your page. The Production Manager displays only the items you own—pages owned by Everybody are not displayed in the Production Manager window.

3 The Status column of the Pages tab in the Production Manager window indicates your page is Saved.



Production Manager window

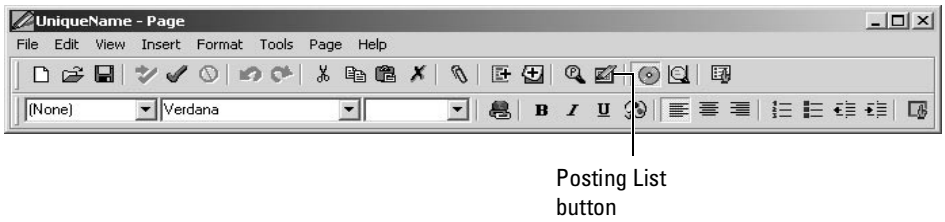
4 Double-click your page to open it from the Production Manager window. The page opens in the Authoring window.

5 Click the **Submit** button to submit your page for approval by the editor. If there is no editor for the folder, the page is approved automatically.

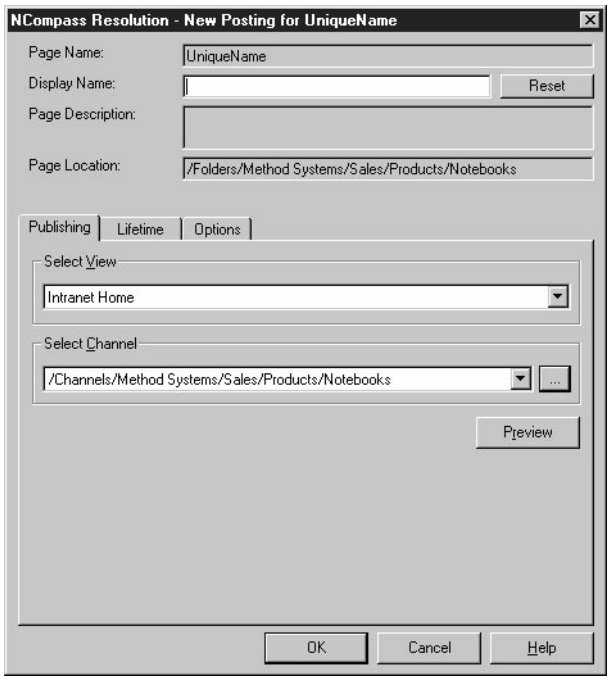
Creating a posting

1 If you have not yet created a posting for your page, you are prompted as to whether you want to create a posting to the page. Click **Yes**. The Posting List dialog box opens.

Tip
Another way to create a posting is to click the **Posting List** button on the Authoring window toolbar as shown below. Or you can click **File > New > Posting.**



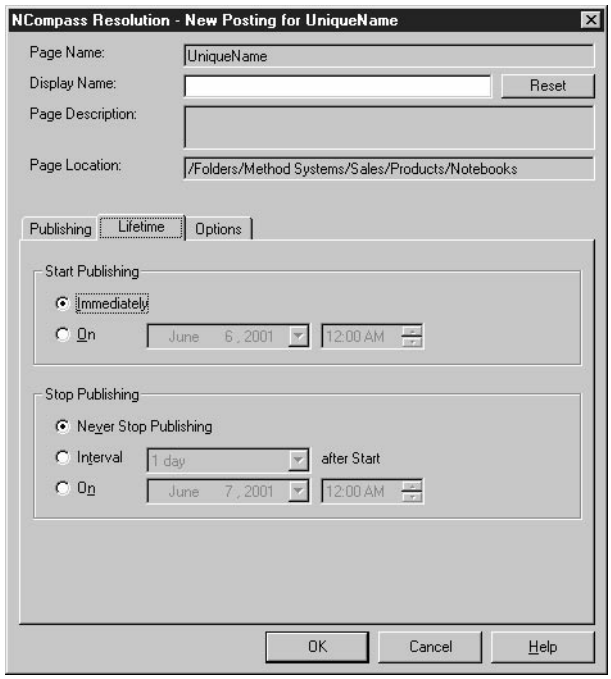
2 Click **New** and the New Posting dialog box opens.



3 On the Publishing tab, use the Select Channel drop-down list to specify a channel name. If there is a default channel setting, you can use that or click **Browse** to find a channel setting. If you don't know what channel to post to, your editor can create the posting when the page is approved. The page must have a posting for it to be published.

Note
Channels you have used recently can be quickly accessed using the drop-down list instead of Browse.

4 Select the Lifetime tab to set start and stop options.



5 Fill in the applicable information. Click **OK**.

6 If required, click the Options tab. In this dialog box you can choose to have the following options active:

- designate this as an Important posting
- hide the posting when published
- allow Web robots to crawl the links
- allow Web robots to index the posting.

7 Close the Authoring window.

This completes the basics of creating a page with MSCMS 2001.

Chapter 4

Advanced Authoring Functions

Overview

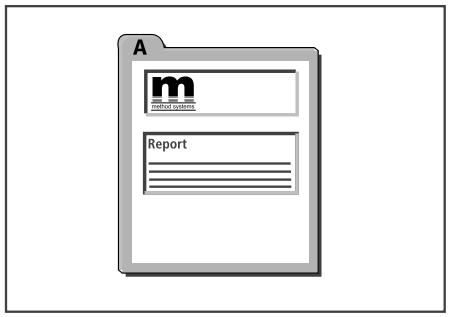
With Microsoft Content Management Server 2001 (MSCMS 2001), you can create several views of the same page targeted at different audiences.

This chapter is included for informational purposes only and contains procedures that indicate the steps typically followed when authoring with the MSCMS 2001 Site Builder and working with views, and covers the following:

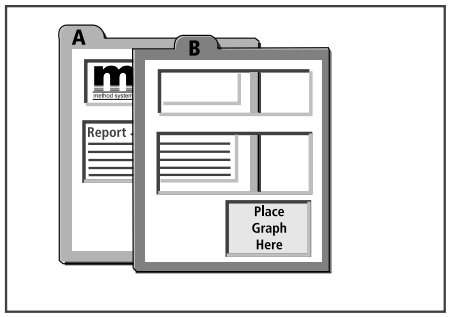
- adding a view to a page
- creating a hyperlink
- viewing placeholder properties
- providing a page description
- viewing previous versions of pages.

Using template families

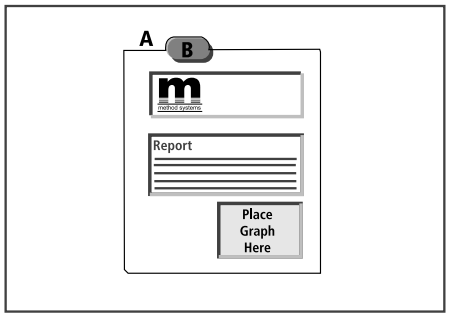
Template families are used to create multiple views of one page.



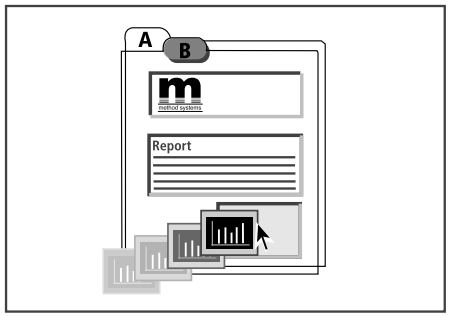
1. Every page is based on at least one template.



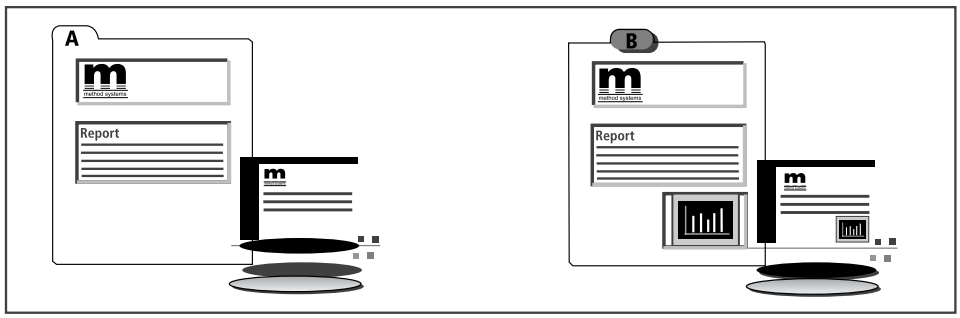
2. The author can create a second view of a page by applying a second template.



3. The author has created a page that has two views.



4. Each new view can have some common content, and some different. Author adds a graph to view B.



5. In the example above, view A (without the graph) can be posted to one channel, while view B (with graph) can be posted to another channel.

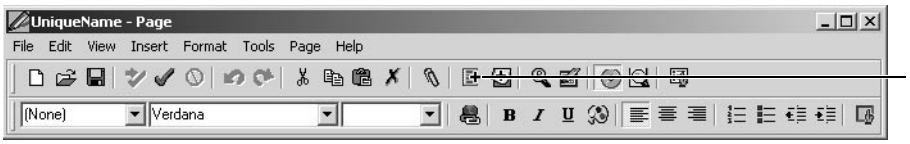
Template families are created by a page template designer. A template family is a group of templates that contains several placeholders with the same name. These same-named placeholders contain identical content. For example, if you place an image in one placeholder, that same image appears in all other placeholders with the same name.

Adding a view to a page

Your page may only have one view, but you can add more views to a page with the Site Builder following these procedures.

Note
You are limited to adding 15 views to a page. If you exceed 15, you will get an error message.

1 Start the Site Builder.
2 Expand the Folders hierarchy to find the page you previously authored.
3 Open your page by double-clicking its name in the Site Builder window. The Authoring window opens, displaying the page.
4 Click the **Add View** button on the toolbar. The Select Template dialog box opens. Expand the Page Templates gallery to where your template resides.



5 Double-click the required template. A new view opens in the Authoring window. A second tab appears next to the tab for the page already opened.

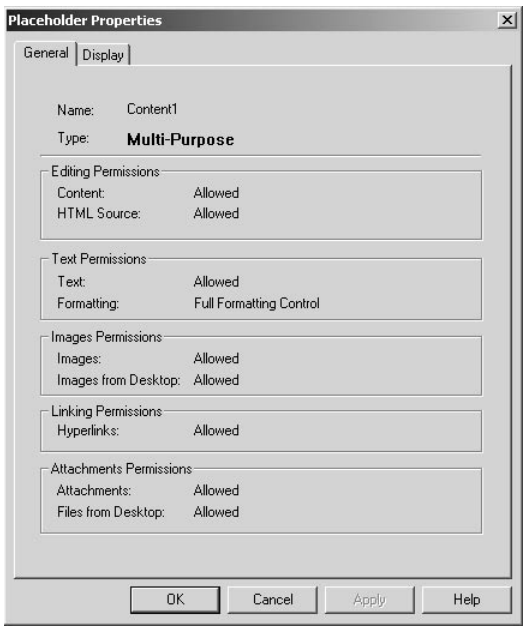
Tip

You can switch between views by clicking each view tab.

6 Add, drag and drop, or copy your new information to the appropriate placeholder.

About placeholder properties

If you are having trouble formatting your text or placing images, it is helpful to view the placeholder properties. The properties determine what contents are allowed in a placeholder, and what changes can be made to those contents. As an author, you can view placeholder properties by clicking the **Placeholder Properties** button, or right-clicking on the placeholder and selecting **Placeholder Properties** from the pop-up menu. The placeholder's Properties dialog box opens as shown in the following screen example.



Note
Template designers set the formatting options when the template is created.

Adding hyperlinks

You can add hyperlinks to your page by selecting some text in the text placeholder and clicking the **Edit Hyperlink** button on the Authoring window formatting toolbar.



The Edit Hyperlink dialog box opens where you can fill in the appropriate information and click **OK**. The text you selected is now hyperlinked.

Note
To link an external URL, enter a valid URL. This URL must include an acceptable protocol scheme such as http://, https://, ftp://, news:, mailto:, gopher://, and about://. To indicate a relative path on the current server use a forward slash (/).

Tip
Be aware that if you link to an internal posting in the URL box using the protocol scheme http://server_name/channel/posting, your link to the posting will break if the hierarchy of channels or postings changes.

Verifying the hyperlink



1 Click the **Preview** button on the Authoring window toolbar. The Web browser opens, displaying your page.
2 In the Web browser window, verify the hyperlink to your posting by clicking on the linked words.
3 Close the Web browser window.

Note
To delete a hyperlink, right-click the hyperlink name and select **Remove Hyperlink** from the pop-up menu.

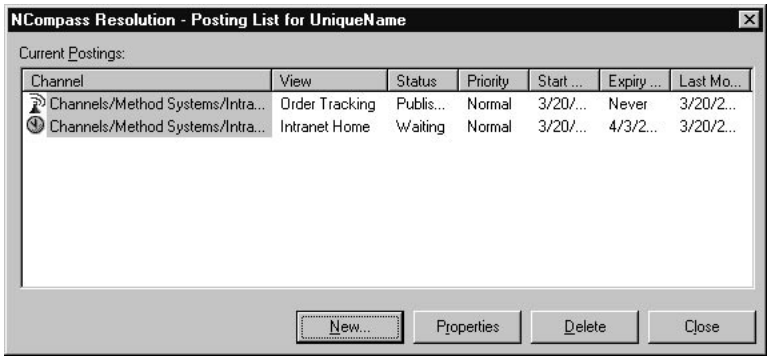
Creating a posting for the view

After you create a posting for the first view of a page, you need to create a posting for each view of a page in order for that view to be published.

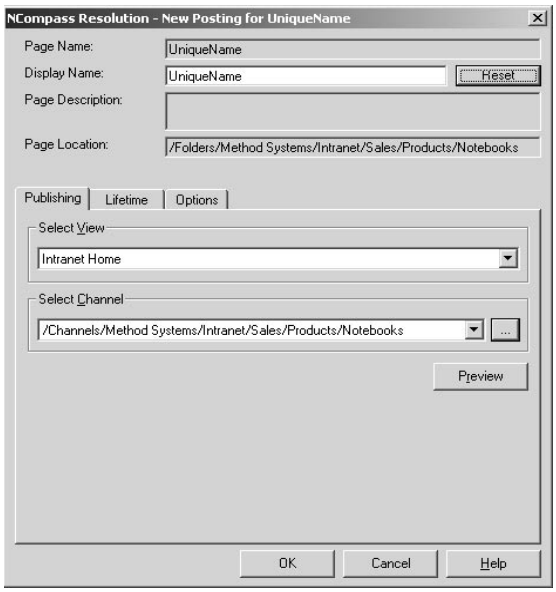
1 Click the **Posting List** button on the Authoring window toolbar. A Posting List dialog box for the page opens.



2 Select the required page view. Click **New**.



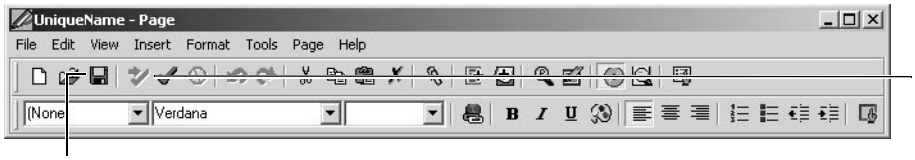
3 In **Select Channel**, choose either the default channel or click the Browse (...) button to select the channel you want to post to. Click **OK**.



4 The Posting List is displayed showing the current postings, including the one you've just created. Click **Close**.

Save and submit your page

1 Select the page you want to save. Click the **Save** button on the Authoring window toolbar.



2 Click the **Submit** button to submit your page for approval by the editor for this folder. If there is no editor for the folder, the page is approved automatically.

3 Close the Authoring window.

Give the page a description

1 Expand your folders in the Folders hierarchy until you get to the folder your page is in. Your page is displayed on the right.

2 Open the Page Properties dialog box by either:

- right-clicking the name of your page, and choosing Properties from the pop-up menu
- selecting your page and clicking the **Page Properties** button on the toolbar.

3 In the Description field, enter a description of up to 256 characters. Click **OK**.

4 Hold the cursor over the name of your page. A ToolTip will display the page's description. The description allows other users to quickly see what a page is about and who the intended audience is.

Previewing revisions

With MSCMS 2001, you can view previously approved page revisions. The revisions are archived by date and time. Refer to Chapter 6, "Making Templates Available to Authors" in the *MSCMS 2001 Page Template Designer's Guide* for information about working with revision pages.

Chapter 5

Editing a Page

Overview

Users with editor's rights can edit and approve, decline, or delete pages submitted to the folders in which they have editing rights. Editors have the same rights as authors to create pages. To edit an MSCMS 2001 Site Builder page, you must first know how to create one, so read through Chapters 3, "Authoring a Basic Page" and 4, "Advanced Authoring Functions" if you haven't already done so.

This chapter covers the following:

- using the Approval Assistant to find pages submitted for your approval
- opening and reviewing a page submitted for your approval
- revising a page
- approving a page
- adding notes for an author
- declining and deleting a page.

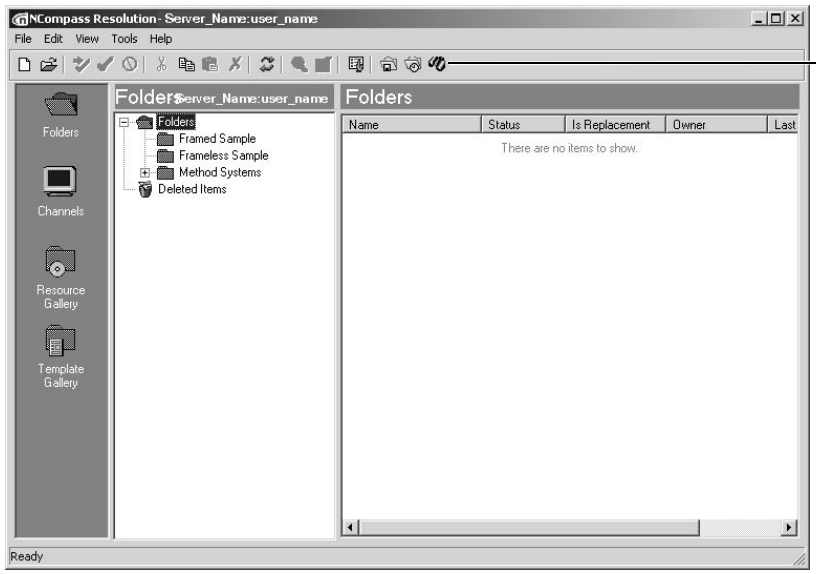
The editor's role

After an author has submitted a page, a user with editor rights is responsible for checking that page for content accuracy and overall suitability. The editor can make changes to the page and either approve or decline it. As an editor you can create or modify the postings for a page; you cannot approve postings.

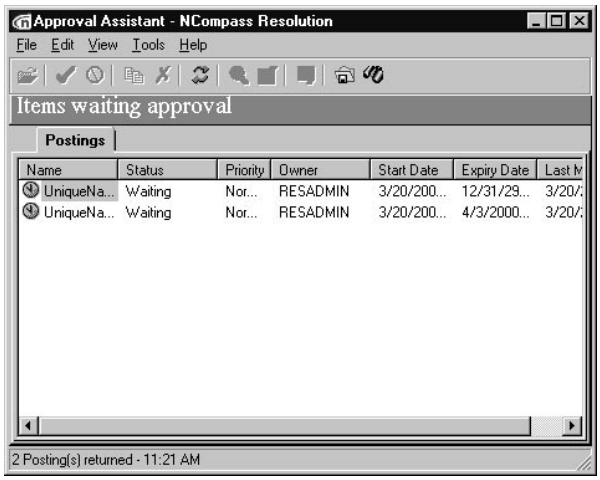
Editing a page

The screen shots in this chapter show examples of typical Site Builder windows that an editor sees when pages are waiting approval.

1 Start Site Builder.



2 Click the **Approval Assistant** button on the Site Builder window toolbar.



Note
The Approval Assistant generates a list of all items submitted for your approval. This includes pages that are Waiting. The Approval Assistant displays pages from folders only where you have editing rights. If there is nothing waiting for your approval, the Approval Assistant window briefly displays the message "There are no items waiting for your approval."

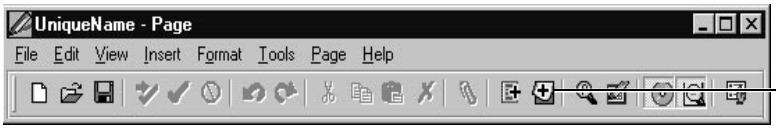
3 To view the contents of a page, double-click its name in either the Approval Assistant window or the Site Builder window. The Authoring window opens.

4 Check each view of the page for accuracy and suitability, by clicking on its tab.

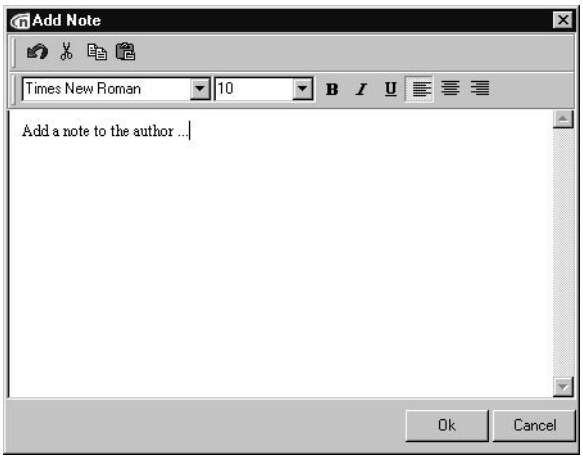
Note
If you change the content in a placeholder, the change occurs in the same placeholder on each view of that page.

Adding a note to the author

1 Click the **Add Note** button on the Authoring window toolbar.



2 Type a note to the author.



3 Click **OK**. The Add Note dialog box closes and your note appears in the note pane, on the bottom of the Authoring window.

4 Click **Save** to save the changes you've made to the page.

Approving a page

When a page is approved, postings for each of its views become available for approval by a moderator. Once the moderator has approved a posting, its view is published according to the posting schedule.

Note
On channels where you have moderating rights, or where there is no moderator, the posting is published as soon as you submit it.

1 With the page open in the Authoring window, click the **Approve** button or **File > Approve**. This approves the page and all its views. Individual views cannot be approved.



Approve button

- If the page doesn't have postings, when you click Create Posting button, you get a No Postings Exist dialog box.

Note
A posting must be created for each view so that view can be published. See Chapter 3, "Authoring a Basic Page" for more information about creating a posting.

Declining a page

You decline a page if the page, or one of the views of the page, isn't acceptable.

1 Select a page from the Site Builder or Approval Assistant window.
2 Click the **Decline** button on the toolbar. When you decline a page, the status is set to Saved. Also, when you decline a page, you decline all its views.

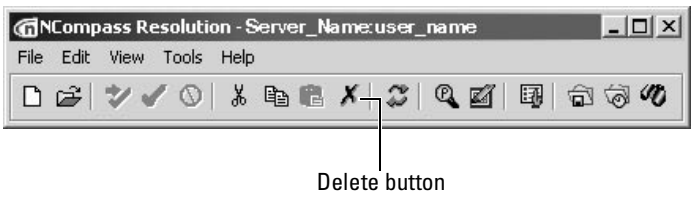


Decline button

Tip
Add a note indicating why you declined the page, and what could be changed to make it publishable. This is useful only if some of the views of the page were not acceptable.

Deleting a page

1 With the name of the page selected, click the **Delete** button on the window's toolbar. The page is moved to the Deleted Items container.



2 If the page is published, a dialog box appears asking you to confirm deleting the item. Click **Yes** to delete the page.

A page cannot be successfully deleted if:

- the page is locked (being modified by another user)
- you do not have rights to delete the page
- you do not have rights to delete the postings associated with the page
- the associated postings are locked.

Tip

Anything in Deleted Items can be restored by dragging it out of Deleted Items and dropping it into a container.

3 To permanently delete or purge items from Content Management Server 2001, do one of the following:

- Right-click on Deleted Items and choose **Purge My Deleted Items.**
- Right-click on the name of the item in the Site Builder window and choose **Delete**.

A page that has been permanently deleted cannot be restored.

Note

An item in the Deleted Items bin retains the same user permissions it had when it was active. This ensures that only authorized users to the item can undelete it.

Chapter 6

Managing Resources

Overview

Resource managers maintain and update resources in the galleries where they have rights. This chapter covers the following information:

- the types of resources
- displaying and adding a resource to the Resource Gallery
- replacing an old resource with a new resource
- providing a resource description
- moving resources between galleries
- running a Dependant Report
- deleting a resource.

About resources

A resource is any content stored in a resource gallery. Resources consist mainly of multimedia enhancements that can be added to a page or template. Only resource managers and administrators have read and write access to the files in a resource gallery. All other users have read-only access to resources, provided they have been granted access rights.

Supported file types

Resource types that are supported by placeholders and can be viewed in a browser are:

- images: GIF, JPEG/JPG, PNG
- videos: ASF/ASX (Netshow), AVI, MPEG/MPG, MOV/QT (QuickTime).

Note
Not all browsers natively support MOV/QT (QuickTime) and ASF/ASX (Netshow) files. You may need a third-party plug-in.

Tip
Use the **Preview** command to see how movie files such as QT or MPEG will appear and play.

All other files appear as an icon in both the placeholder and browser, and act as an attachment.

Using other file types

Any file type can be saved to a resource gallery for use in authoring a page. However, if it is not one of the types listed above, the file is displayed as a link (attachment), not an inline image on the page. How the linked file is viewed is determined by a subscriber's browser and the applications on their computer.

Example: If you place an Excel file in a page's placeholder, it will be viewed as a link (attachment) in both the placeholder and the subscriber's browser. If the browser is configured to view Excel files, the file can be viewed when the link is clicked. If the browser does not support Excel files, a dialog box opens asking you to save the file to disk, or choose an application with which to view it.

Viewing resources

1 Start the Site Builder.

2 Display the Resource Gallery hierarchy by clicking the Resource Gallery icon.



3 Expand the Resource Gallery hierarchy to display a gallery where you have rights. You don't have rights in dimmed containers, but you can open them to navigate to subgalleries in which you have rights.

4 Click a gallery to display its resources.

5 Add an image file using one of the following methods and drop it in a gallery where you have rights to:

- drag and drop
- copy/cut and paste.

Refreshing the Site Builder window

You may want to refresh your Site Builder window periodically. If there are other resource managers adding resources, you won't be able to view these resources until you refresh your window by clicking the **Global Refresh** button.



Replacing a resource

The Replace Resource feature is used to globally update resources being used by pages or templates. For example, you could use the Replace Resource feature to update the company's logo. The existing pages and templates that use the old logo don't need to be individually updated. Replace Resource maintains the links and automatically updates all pages and templates with the new logo.

1 Select and right-click a resource you want to replace.

2 Click **Replace Resource** from the pop-up menu. The Select New Resource dialog box opens.

Note
If you change the size of an image, the change affects the pages that use that image. The image in the page will be the same size as the image it replaced.

3 Find and select an image file on your computer to import. Click **Open**.

4 A dialog box opens asking if you want to replace the Resource Gallery item with the new file. Click **Yes**.

- the name of the replaced resource is changed to the name of the new resource
- the new resource must be the same file type as the old resource
- an informational message is displayed if the resources are different file types and the requested replacement operation will be cancelled.

Note
Resources cannot have the same name in a Resource Gallery. If you drag and drop a new resource into a Resource Gallery where there is already a resource with the same name, a dialog box prompts you to replace the existing resource.

Previewing a resource

1 Select a resource. Click the **Preview** button on the toolbar.



Tip
To preview a resource you can also:

- right-click the resource and click **Preview** from the pop-up menu
- double-click the resource
- Select **Tools > Preview** from the Site Builder window.

2 The Web browser opens and displays the resource.

3 Close the Web browser.

Providing a resource description

Providing a description for a resource allows other users to quickly see what the intended use is for the resource.

1 Select a resource from a Resource Gallery.



2 Click the **Properties** button on the toolbar. The resource's Properties dialog box opens.

3 In the Description box, type a description that makes the intended use for the resource clear to other users. The description can be up to 256 characters. Click **OK**.

4 Position the cursor over the name of the resource. A ToolTip displays your description of the resource.

Moving resources between galleries

Using MSCMS 2001 you can move and reorganize resources without breaking links to any pages or templates referencing that resource. You can move resources within the Site Builder window by dragging and dropping, or copying/cutting and pasting.

1 Expand the hierarchy to display a gallery where you have rights.

2 Select one or more resources.

3 Drag the resource from its gallery and drop it in another gallery where you have rights.

Generating a Dependant Report

When you generate a Dependant Report on a resource, you are shown whether there are pages or templates that use the resource. If only the dependants are archived, the report indicates this. Consider generating a Dependant Report:

- before deleting a resource; deleting could affect pages and templates that are using the resource
- when replacing a resource to show which existing pages and templates will be affected when the resource is replaced.

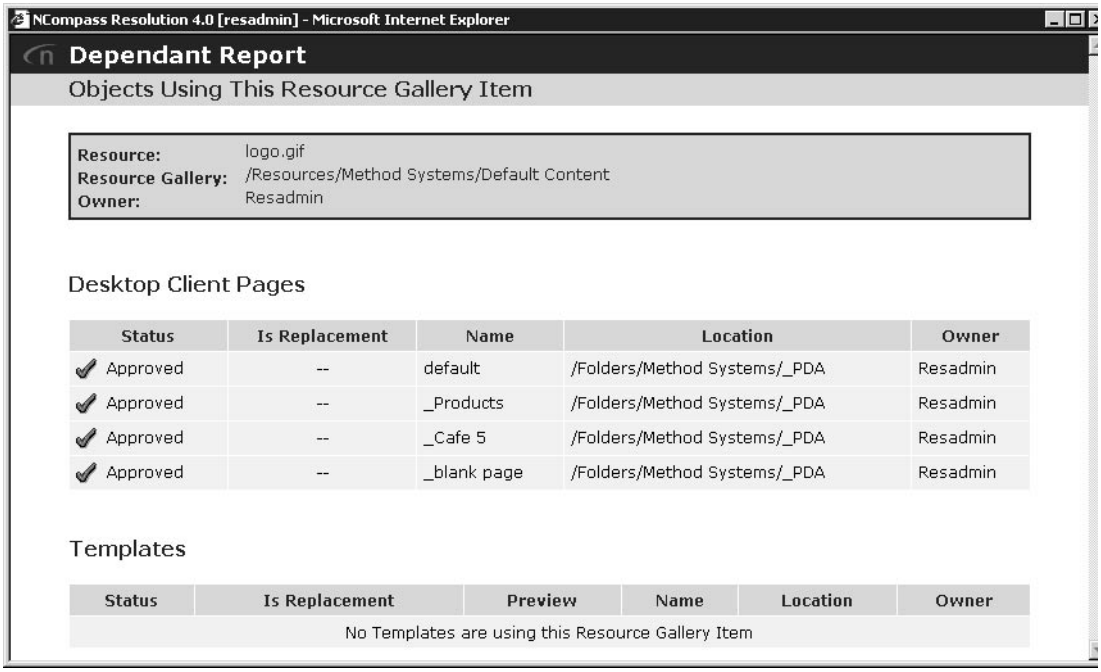
To generate a Dependant Report:

1 Find the resource for which you want to generate a Dependant Report. Browse through the Resource Gallery or use the Find feature.

2 Select and right-click the name of the resource and choose **Dependant Report** from the pop-up menu. Or, select **Dependant Report** from the **Tools** menu.

3 The Dependant Report is displayed in the Web browser.

4 Print the Dependant Report by right-clicking and selecting Print from the pop-up menu.



Deleting resources

! Caution

Be careful when deleting resources, even if they aren't currently being used. For example, in a situation where User 1 deletes a resource, but User 2 still sees the resource as available to use because the Site Builder isn't refreshed, User 2 might then add the resource to the template. Later, when Site Builder is refreshed, the resource disappears from the template. Therefore, consider moving the resource to a do-not-use archive for a short period before finally deleting it.

1 Preview the resource in the browser to confirm it is the one to be deleted. Close the browser.

2 With the name of the resource selected, click the **Delete** button on the toolbar. The resource is moved to the Deleted Items container.

! Tip

You can restore anything in the Deleted Items container by dragging it out of Deleted Items and dropping it in a gallery.

3 To permanently delete or purge items from MSCMS 2001 you can:

- Right-click on Deleted Items and click **Purge My Deleted Items.**
- Right-click on the name of the item in the Site Builder window and click **Delete**.

MSCMS 2001 asks if you want to permanently delete the items in Deleted Items. Clicking **Yes** purges the resource from the MSCMS 2001 database. Once items are purged from Deleted Items, they cannot be restored.

Note that an item in the Deleted Items bin retains the same user permissions it had when it was active. This ensures that only authorized users to the item can undelete it.

Chapter 7

Moderating a Channel

The moderator's role

A moderator approves or declines postings that are waiting for approval in channels where they have moderating rights. A posting sets the publication schedule for the view of a page and determines to which channel a view will be posted. If a posting is approved, the view is published on that channel according to its schedule. Before approving a posting, a moderator ensures that the information in each view is appropriate, timely, and relevant for the channel's subscribers.

This chapter covers moderator's tasks, such as how to:

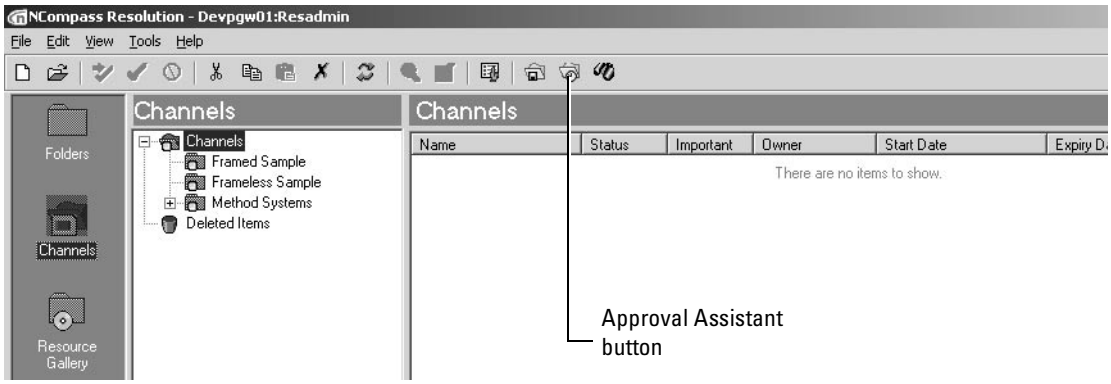
- use the Approval Assistant
- open a posting that is waiting for approval
- modify the properties of a posting
- approve, decline, and delete a posting.

Viewing postings

Using the Approval Assistant

The Approval Assistant generates a list of all postings, pages, or templates that are waiting for your approval. It can return up to 500 items in a search. Do the following to use the Approval Assistant.

1 Start Content Management Server 2001.



2 Click the **Approval Assistant** button on the window toolbar. Any pages, postings, or templates waiting for your approval appear in separate, tabbed windows. If there are no items waiting for approval, a message box appears briefly to indicate this.

Note
If there are no items requiring your attention within a category, the tab for that category will not be visible.

Tip
You can browse the channel hierarchy to find postings waiting your approval, or use the Find feature.

Preview a posting

1 With the posting name highlighted in an Approval Assistant window, click the **Preview** button on the toolbar, or double-click the name in the window.

2 The view of the page opens in your Web browser. Check the view to ensure it is appropriate and relevant to the channel.

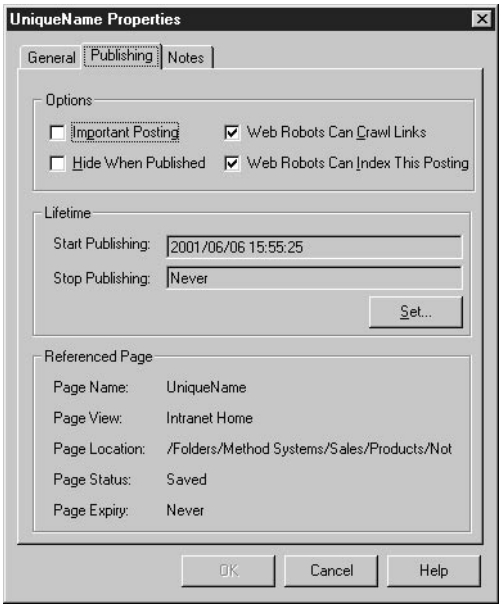
3 Close your Web browser.

Modifying posting properties

1 Select the name of the posting you are reviewing and click the **Properties** button.



2 The Properties dialog box for the posting opens. To modify the start and stop publishing dates for the posting, click the Publishing tab. Click **OK**.



Change the owner of the posting

1 Change the owner from the General tab. Administrators can click the **Browse** button to choose any user. Other users are limited to themselves and Everybody.

2 Click **OK**.

Adding notes to a posting

1 Click the Notes tab in the Posting Properties dialog box.

2 Click the **Add Notes** button. The Add Note dialog box opens.

3 Add a note and click **OK**.

Tip
Your note will be added to the page to which the posting points.

4 On the Posting Properties window click **OK**. The window closes.

Approving a posting

1 Select a posting from either the Site Builder window or the Approval Assistant window.
2 Click the **Approve** button on the toolbar.

The status of the posting changes to Published or Approved, depending on the start date.

Note
When you approve a posting, its view becomes available to subscribers, according to the postings schedule.

Declining a posting

1 Select a posting from the window or the Approval Assistant window.
2 Click the **Decline** button on the toolbar.

Declining a posting sets it back to Waiting.

Tip
Add a note to the posting indicating why you declined the posting and what could be changed to make it publishable on your channel.

Deleting a posting

1 Select a posting from the Content Management Server window or Approval Assistant window.
2 Click the **Delete** button on the toolbar. The posting is moved to the Deleted Items container.
3 If the posting was Approved, a dialog box opens confirming this action. Click **Yes** to delete the posting.

Tip
Anything in the Deleted Items container can be restored by dragging it out of Deleted Items and dropping it in a channel.

4 To permanently delete or purge items from Content Management Server 2001 you can:
- Right-click on Deleted Items and choose **Purge My Deleted Items.**
- Right-click on the name of the item in the Deleted window and choose **Delete.**

Note
Content Management Server 2001 asks if you want to permanently delete the items in Deleted Items. Choosing **Yes** purges the item from the MSCMS 2001 database. Purged items cannot be restored.

Note that an item in the Deleted Items bin retains the same user permissions it had when it was active. This ensures that only authorized users to the item can undelete it.

More about the Approval Assistant

Copy button

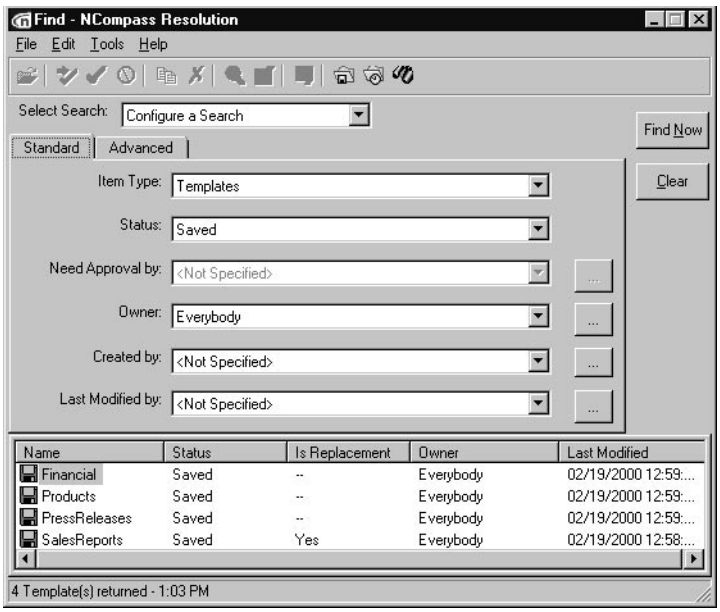
The **Copy** button allows you to copy a posting for pasting into a channel where you have moderating rights. This action sets the new posting to Saved.

Refresh button

The **Refresh** button refreshes the Approval Assistant window. This is useful if new items have been submitted for your approval since you opened Content Management Server 2001.

Find button

In addition to providing predefined searches, the **Find** button also allows custom searches for pages, templates, and postings. This is especially useful when pages, postings, and templates are owned by Everyone. After you've provided search information, click **Find Now**. From here you can select an item or make a multiple selection of returned items.



Using pre-defined searches

1 Click the **Find** button on the toolbar. The Find window opens, displaying the Standard search tab.

2 Choose one of the pre-defined searches from the Select Search drop-down list.

3 Click the **Find Now** button. The search results are displayed at the bottom of the window.

Creating custom searches

1 Click the **Find** button on the toolbar. The Find window opens, displaying the Standard search tab.

2 Choose "Configure a Search" from the Select Search drop-down list.

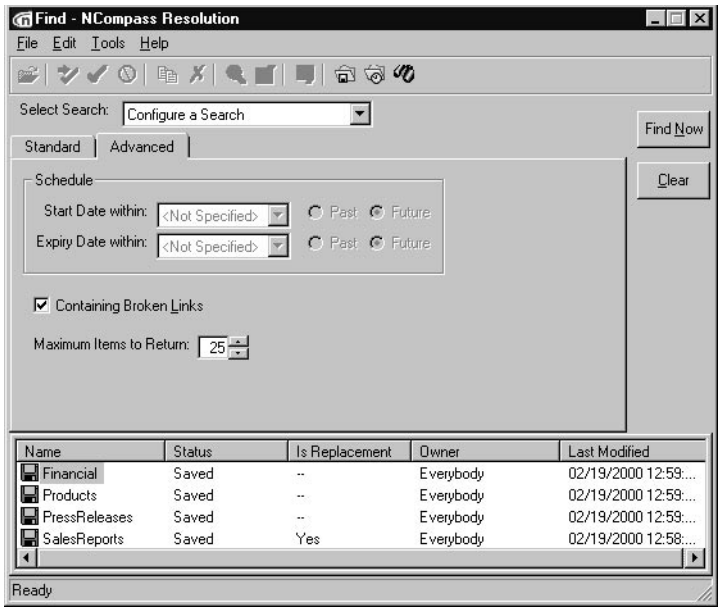
3 Set the drop-down lists on the Standard tab to the values you want to find. Click the Advanced tab to further refine the search.

4 Click the **Find Now** button. The search results are displayed at the bottom of the window. From here you can select from the returned items or make a multiple selection of returned items.

Using the Advanced search tab

The Advanced search tab allows you to further customize your search by:

- confining the search to specific dates
- specifying broken links or other elements
- setting the maximum number of items to be returned in the search.



Glossary

Note that comprehensive glossaries of Microsoft terminology can be viewed at the following Web site: www.msdn.microsoft.com/siteguide/glossaries.asp.

A

Administrator, Content Management Server 2001

The Content Management Server 2001 (MSCMS 2001) administrator's job is to set up and manage publishing in the MSCMS 2001 environment. Administrators have full privileges (including the right to create, edit, and approve pages and postings) in all MSCMS 2001 containers.

Approval Assistant

In the MSCMS 2001 Site Builder only. The Approval Assistant is a feature, accessible with the Approval Assistant button on the MSCMS 2001 window toolbar, that generates a list of all postings, pages, or templates waiting approval.

(See also *Production Manager*.)

approve, approval

Publishing Content Management Server 2001 pages follows a two-part approval process. Pages are approved by editors for accuracy of content. Postings for the views of these pages are approved by moderators for relevancy to the channels to which they are posted.

(See also *auto-approve*.)

author

Content Management Server 2001 authors create pages in folders, and submit postings in channels. The role of author is one of the formal roles in Content Management Server 2001.

(See also *role*.)

Authoring window

In the MSCMS 2001 Site Builder only. Pages are authored in the MSCMS 2001 Authoring window, which displays a view or views of a page, to which you add content such as text or images.

auto-approve

When an author submits a page to a folder that does not have an editor, Content Management Server 2001 automatically approves the page. Pages are also automatically approved when

submitted by editors for the folder, or by administrators. Postings for approved pages are auto-approved (on an individual basis) if they are:

- created by an administrator, or created in a channel where the creator has moderator rights
- created in a channel where no moderator is configured.

(See also *approve, approval.*)

C

channel

In typical implementations of Content Management Server 2001, the channel structure forms the navigational architecture of the Web site and can be thought of as a site map. A channel is designed to control both how the browsing user navigates through the site and how these users are restricted from accessing various parts of the site, depending on their authorization level.

container

Virtual storage spaces (folders, channels, or galleries) used to organize pages, postings, resources, and templates. Pages are stored in folders; postings are stored in channels; resources and templates are stored in galleries.

content

Text, an image, or any embeddable item that can be used to fill the placeholders in a page.

cover page

Refers only to Content Management Server 2001 channels that use frames. The cover page is the page that appears when a subscriber clicks the channel name in their Web browser. A cover page typically displays a brief outline of the type of information posted to the channel. For frameless channels, the channel navigation template is displayed when the user clicks a channel link, which then takes the place of a cover page.

D

decline

The alternative to approving a page or posting is to decline it. Editors and moderators can decline pages or postings that are inaccurate or otherwise unsuitable for the channel they are intended to be viewed on. Declining changes the status of the page or posting from "Waiting" to "Declined." An author can then make changes, and resubmit.

default content

Default content is an image, or text, or a combination of images and text that a page template designer has added to a placeholder. This indicates to authors what type of content the placeholder should be filled with. For example, in a placeholder designated to display the title

for a page, the page template designer might enter “Place title here” as the placeholder’s default content.

Dependant Report

(See *Report, Dependant*.)

description

Descriptions should be entered in the Properties dialog box of each page, folder, channel, gallery, template, and resource. Descriptions are displayed in ToolTips and are valuable for providing quick but meaningful identification of these items and their intended uses.

E

editor

The main responsibilities of an editor are approving or declining pages based on accuracy and overall suitability, revising them as required, and managing pages in all folders where the editor has editing rights.

F

fixed resource

To prevent content providers from editing or deleting a given resource on any page based on a particular template, the template designer can make it a “fixed” resource. There are two ways to create fixed resources:

1 A template designer can create a link to the resource in the template’s HTML.

2 A template designer can place the resource in a placeholder, and clear the placeholder’s “Content editing” property.

folder

The folder hierarchy is defined according to how an organization needs to control the authoring and editing process. A folder is a storage space (a container) where authors and editors store pages. If there are one or more editors configured for a folder, pages in that folder must be approved by one of those editors (or by an administrator) before they can continue through the publishing process. If there is no editor configured for a folder, Content Management Server 2001 auto-approves pages for that folder when authors submit them. Pages for administrators and for editors in folders that they edit, are always auto-approved.

G

gallery

A gallery is an MSCMS 2001 storage space (a container) for either templates or resources (such as images). Templates and resources are stored in separate galleries.

M

moderator

Moderators are responsible for postings in all Content Management Server 2001 channels in which they have moderating rights, with the main responsibilities being:

- approving (or declining) postings, based on relevancy and suitability for the channel's subscribers
- revising posting schedules (if required)
- managing all postings in any channel where they have moderating rights.

N

Note field

In the MSCMS 2001 Site Builder only. You can add a comment for an author, editor, or moderator to read in the Note field of a page or one of its postings. Although visible in the Authoring window, notes are not published and cannot be seen by subscribers.

P

page

Pages in Content Management Server 2001 are created by adding content, such as text or images, to the placeholders on templates. The MSCMS 2001 pages are different from most Web pages in that different views can be generated from a single page and each view of the page can be posted to a different channel. Each view is the HTML page dynamically assembled and delivered when a subscriber selects an MSCMS 2001 posting. Because pages can use several views, each one based on a different template, the content of the views can be customized to suit different audiences.

(See *placeholder, view.*)

page revision

A page revision or historical revision is a "snapshot" of a Content Management Server 2001 object (page, posting, template, or resource) that can be previewed and reverted to. An individual revision of an object also maintains links to all dependencies that were in effect when the revision was approved.

page status

(See *status*.)

page template

Content Management Server 2001 page templates create a view of a page that includes one or more placeholders in a pre-configured layout. Authoring a page involves adding content (text, images) to the placeholders. When creating a page, an author can add more views to it. This way an author can quickly create different versions of the page to suit different audiences. Only template designers and administrators can create or make changes to templates.

(See also *navigation template, view, placeholder.*)

placeholder

Placeholders are ActiveX® controls or predefined areas of a view where you add content to create a page using Content Management Server 2001. Placeholders may contain default content, put there by template designers to show authors the type of content a placeholder accepts, or to suggest an appropriate use for the placeholder. The page template designer can put restrictions on placeholders for authoring.

(See also *default content, page template, view.*)

post, posting

A page must be posted to a channel in order for it to be published. A posting defines which view of a page is to be published and when to publish it. (Actual publication is subject to the Content Management Server 2001 approval process.)

"Posting" can also refer to the process by which a page is posted.

(See also *approve, view.*)

posting status

(See *status*.)

priority, important

If you create postings or channels that contain timely information you want read as soon as possible, you can assign an Important priority status to these postings or channels. Navigation programmers can create pages that display only Important priority postings, and can sort lists of channels and postings so that important objects are shown at the top of the list.

Production Manager

The Production Manager feature displays a list of all pages, postings, or templates owned by you that are New, Saved, Waiting for Approval, Approved, Declined, or Expired.

R

Report, Dependant

Generating a Dependant Report on an object (such as a resource, page template, or navigation template) displays a list of all objects that are using it.

Report, Resource

Generating a Resource Report on a page or template displays a list of all resources it uses. When you replace a resource, all pages that use that resource will have that resource replaced; therefore it is important to do a Resource Report on items before replacing them so you can determine what the overall effect is of replacing that resource.

resource

A file that is added to a template or a page from somewhere other than a gallery. Once nothing is referencing it, it is deleted by background processing.

Resource Gallery

A container used within Content Management Server 2001 to organize and control access to resources.

Resource Gallery item

Any file that is stored within a Content Management Server 2001 resource gallery. To build a page, a user adds resources to placeholders in a view. Template designers can also create references to resources within a template's HTML code.

resource manager

Resource manager is one of the formal Content Management Server 2001 roles and is someone who maintains and updates resources in the galleries where they have rights. Only the resource managers and administrators have read and write access to the files in a resource gallery and can therefore add, replace, preview, and delete resources.

Resource Report

(See *Report, Resource.*)

rights

A Content Management Server 2001 user's rights are derived from their membership in one or more rights groups and the roles (subscriber, author, editor) they have in the containers (folders, channels, galleries) assigned to those rights groups. All containers you have rights in or rights to have colored icons.

- The rights group(s) you belong to determines which containers you have rights in.
- The role of the rights group(s) you belong to determines the types of tasks (create, modify, approve) you can do with items in a container.

(See also *rights group, role.*)

rights group

A rights group is a group of users assigned to one of the Content Management Server 2001 predefined roles. Members of a rights group hold privileges to containers, based on the role the rights group represents. Authors, for example, can create pages in a folder, while editors can both create and approve pages in folders. Access to specific containers (folders, channels, galleries) is set for a rights groups by an MSCMS 2001 administrator.

(See also *rights, role*.)

role

In Content Management Server 2001, your role (subscriber, author, editor, moderator, template designer, administrator, resource manager) determines what actions you can carry out in containers. The different roles and the tasks allowed by those roles, are key components of the collaborative content management process.

(See also *rights*, *rights group*.)

S

Site Builder, MSCMS 2001

A client-side, WSIWYG (what-you-see-is-what-you-get) authoring environment that operates on a Windows 32-bit platform. The MSCMS 2001 Site Builder is used to develop pages and navigation templates, develop code with the API, and do site administration tasks. The MSCMS 2001 Web Author should be used for all authoring, editing, and moderating functions.

status

The status or state of a page (in the MSCMS 2001 Web Author) or a page or posting (in the MSCMS 2001 Site Builder) indicates how far along it is in the Content Management Server 2001 publishing process. You can check the status of pages and postings in the status column next to its name in the MSCMS 2001 window's list frame. As well, there is a column titled Backup Exists that further explains status.

Subscriber

Content Management Server 2001 subscribers have access through their Web browser to view MSCMS 2001 pages in the channels to which they're subscribed.

T

ToolTip

ToolTips are the small, colored text boxes that appear when the cursor rests over buttons and other components of a program's user interface. In Content Management Server 2001, the ToolTip text usually states the name of the button. If filled in, the Description field of pages, folders, channels, galleries, templates, and resources also appear as ToolTips.

V

view

A page in Content Management Server 2001 is a set of one or more views and the content that appears in those views. Content can be shared between all views of a page or any subset of them, or can appear in one only. A view can be considered to be an instance of a page template.

(See also *page, template.*)

W

Waiting

The status of a page after it has been submitted for approval and before it's approved (or declined). The status of a posting after the page it's for is approved and before the posting itself is approved (or declined).

(See also *status.*)

Web Author, MSCMS 2001

The MSCMS 2001 Web Author allows authors, editors, and moderators to create and approve pages from a Web browser. The MSCMS 2001 Web Author is a Web application that uses server-side and client-side scripting to generate an editable version of an existing or new posting.

Index

A

Add Note button 45
Add Notes button 61
Add View button 35
adding
  content 23
  view to a page 35
administrators
  modify placeholder properties 36
  read/write access to files 51
  tasks 8
Advanced search tab. *See* Find Feature
Advanced tab 64
Approval Assistant
  function 60
  view page contents 45
Approval Assistant button 44, 60
Approve button 46, 62
Approved status 25
approving pages 46
attachments 51
Authoring window 22
authors
  role in publishing process 20
  tasks 7
AutoLogin Client 14
automatic approval 27, 39

B

bookmarking 14
Browse button 38
browsing
  dimmed containers 20
  folders 21
buttons
  Add Note 45
  Add Notes 61
  Add View 35
  Approval Assistant 44, 60
  Approve 46, 62
  Browse 38
  Continue 14
  Copy 63
  Decline 46, 62
  Delete 47, 56, 62
  Find 63
  Find Now 63
  Global Refresh 52
  Page Properties 39
  Placeholder Properties 36
  Posting 38
  Preview 24, 53, 60
  Production Manager 27
  Properties 54, 61
  Refresh 63
  Save 24
  Submit 27, 39

C

channel hierarchy 60
channels
  default setting 28
  pages posted to 15
  views posted to 59
containers
  browsing dimmed containers 20
  work space 10
Continue button 14
Copy button 63
creating postings 38
custom searches 63, 64

D

Decline button 46, 62
declining
  a page 46
  a posting 62
Delete button 47, 56, 62
Deleted Items container 47, 56, 62
deleting
  pages 47
  postings 62
  resources 56
Dependant Report 55
descriptions
  adding to resource 54
dimmed containers 10
domains 13, 14

E

editing a page 44
editing rights 44
editors 7, 20, 39
Expired status 25
external URL 37

F

Find button 63
Find feature 55, 60
Find Now button 63
folders
  browsing 21
formatting
  effect of placeholder properties 36

G

Global Refresh button 52
globally updating resources 53

I

IE.*See* Internet Explorer
images
  placing 36
  types supported 51
interface
  defined by organization 20
Internet Explorer 14

L

logging on
  browser differences 14
  through Web browser 14
login page 14

M

moderators
  approve postings 46
  role 59
  tasks 7
MSCMS 2001 database 5
MSCMS 2001 server 5
multiple views 34

N

navigating to sub-folders 21
New status 25

P

Page Properties button 39
page templates
  previewing 22
  selecting 22

pages
adding notes 45
approving 46
declining 46
deleting 47
limit of views per page 35
opening from Production Manager 27
previewing 24
saving 24
selecting a page template 22
status 25
submitting 27
permanently deleting or purging items 62
Placeholder Properties button 36
placeholders
designed by template designer 6
effects of changing content 45
in template families 34
link attachments 51
modifying properties 36
properties modified by administrators 36
purpose 23
recommended size limit 23
resource types supported 51
postings
adding notes 61
approving status 62
auto-approving 46
creating 38
declining 62
for each view 46
moderator role 59
modifying properties 61
page 28
previewing 60
set schedule 59
status 25
Postings button 38
Preview button 24, 53, 60
previewing pages 24
Production Manager button 27
Properties button 54, 61
publication schedule 59
Published status 62
purging
deleted items 47, 62
resources 56

R

Refresh button 63
refreshing the MSCMS 2001 window 52
Replace Resource feature 53
Resource Gallery 52
resource managers 7, 51
resources
adding a description 54
deleting 56
Description box 54
file types supported 51
intended use 54
modifying 53
previewing 53
purging 56
replacing 53
supported types 51
viewing 52
restoring
deleted items 62
deleted pages 47
rights 7, 9
roles
assigned by administrator 7
overlap 8

S

Save button 24
Saved status 25
saving pages 24
search results 64
Security Warning 14
selecting a video 23
Site Builder
starting 19
status
of pages 25
of posting 62
of postings 25
Status column
of Pages tab 27
Submit button 27, 39
submitting pages for approval 27
subscribers 7, 15
Subscription page 13

T

template designers 8
template families
    created by template designer 34
    creating multiple views 34
ToolTip
    for resource descriptions 54

U

updating resources 53
URL
    for your site 13
    logging on 14

V

verifying hyperlinks 37
videos
    types supported 51
viewing
    postings in channels 15
    resources 52
views
    limitation per page 35
    switching between 35

W

Waiting status 25
Web browser 6
    for previewing a page 24
    previewing a posting 60