Microsoft® Content Management Server 2001

Page Template Designer's Guide

Microsoft®

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Using This Guide

Welcome to Microsoft® Content Management Server 2001 (MSCMS 2001).

This guide steps you through creating and publishing page templates using the Content Management Server 2001 software.

Who should use this guide

This guide is for Web designers who will be developing the Web page templates for their companies.

How to use this guide

This guide starts with general information about creating page templates and progresses through the detailed steps of using an HTML editor and the page template Design Palette, working with placeholders, and ends with the approval process.

To do this...	Go to this chapter
Understand the basics about MSCMS 2001 templates, including HTML and placeholders and how page templates and postings operate.	Chapter 1, "MSCMS 2001 Template-Based Publishing"
Select an HTML editor for template creation.	Chapter 1, "MSCMS 2001 Template-Based Publishing" Chapter 2, "Creating a Template"
Use the template Design Palette: add placeholders to a proto-template, add HTML, add scripting and server-side file inclusions.	Chapter 2, "Creating a Template"
Save a page template.	Chapter 2, "Creating a Template"
Add default content and fixed resources.	Chapter 3, "Adding Default Content"

To do this...	Go to this chapter
Assign custom properties to page templates. Set placeholder properties for items such as attachments. Set the type of content and size of placeholder. Create links from content in placeholders.	Chapter 4, "Setting Properties and Creating Links"
Publish multiple pages from a single source.	Chapter 5, "Creating Templates for Multi-Page Authoring"
Generate a Dependant Report. Use the Find feature. View page revision by date and compare revisions. Preview pages using templates and resources as they appeared in the past. Set publishing options including enabling postings and channels for Web robot access.	Chapter 6, "Making Templates Available to Authors"
Edit with an HTML editor or use the Template Design window.	Chapter 7, "Editing a Template"
Delete a page template and maintain the Deleted Items container. Purge a template.	Chapter 8, "Deleting a Template"

About the Method Systems sample data

Any reference to Method Systems sample data in this guide is intended as a generic example for illustrative purposes only. In the MSCMS 2001 Site Builder and MSCMS 2001 Web Author environments, the Method Systems sample site is representative—everything is configurable, including tool bars.

There have been considerable changes to the "look and feel" of the user interface so the examples quoted may not completely resemble what you see on screen.

Conventions used in this guide

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

Two components of Microsoft® Content Management Server 2000, MSCMS 2001 Site Builder and MSCMS 2001 Web Author are always capitalized. However, references to server and database are never 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 included 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 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 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

MSCMS 2001 Template-Based Publishing

Overview

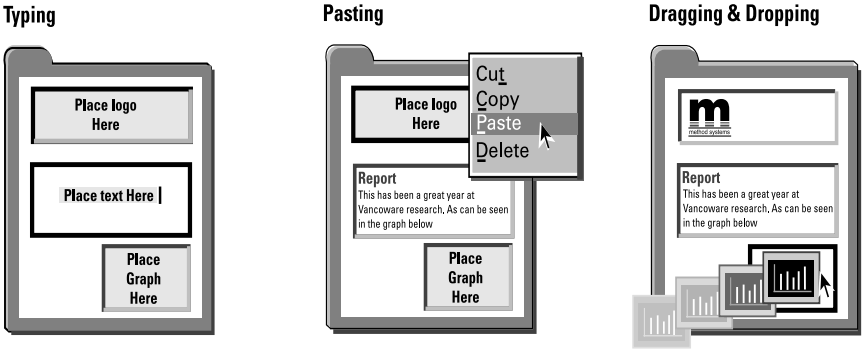
This chapter covers what you need to know about Microsoft® Content Management Server 2001 (MSCMS 2001) page templates before you begin creating and publishing them.

Understanding MSCMS 2001 templates

What are MSCMS 2001 templates?

There are two separate, but related, types of Content Management Server 2001 templates: page templates and navigation templates.

Page templates are Web page layouts used by authors to create views of pages.



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

Navigation templates provide the navigation interface for an MSCMS 2001 site when the site is viewed in a Web browser. The hierarchy of channels, the order of the pages published to those channels, and the navigation buttons are generally provided by navigation templates.

This guide covers page templates. For information on navigation templates, see the *MSCMS 2001 Site Programmer's Guide*. For simplicity, this guide refers to page templates as "templates."

Who uses templates?

Authors use page templates to create pages. An author adds content such as text, images, and videos to the template's placeholders.

Authors can add content to a placeholder by:

- typing
- dragging content from an application or the Windows desktop into an MSCMS 2001 resource gallery, then to the placeholder.

If the page is being targeted to several audiences on various channels, the author can use other templates to add different views to the page.

Tip
An MSCMS 2001 page is not a static HTML page but a collection of pointers to content and page templates.

What benefits do templates provide?

Templates allow Web designers to control site design, while providing authors, who may not know HTML, with the means to create Web pages.

Who creates page templates?

Templates are created by template designers—users with rights to create and edit templates in one or more template galleries. Page template designers are typically an organization's Web designers, although anyone with HTML design experience and appropriate rights in a template gallery can create a template.

What tools are required?

You need the following to create page templates:

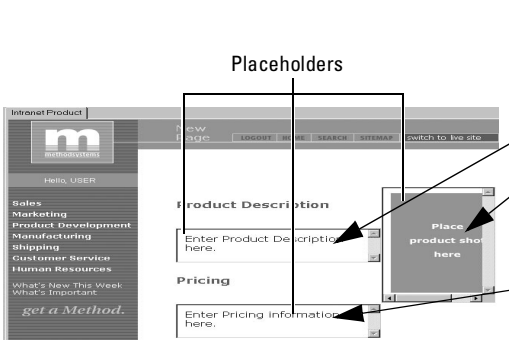
- access to a copy of the MSCMS 2001 Site Builder that has access to the MSCMS 2001 server
- an HTML editor (see "HTML editor compatibility" later in this chapter)
- Internet Explorer 5.x only.

Understanding the elements of a template

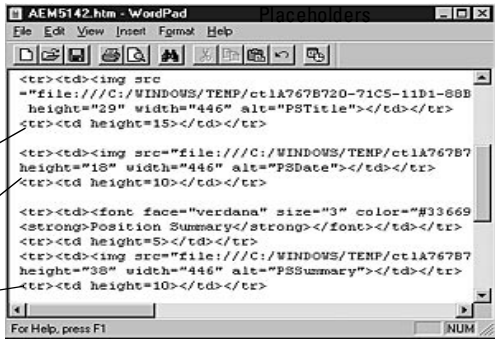
HTML and placeholders

Templates consist of authoring controls (placeholders) and supporting HTML. Template designers position placeholders in a template wherever they want authors to be able to add

content, and anywhere they want to add content themselves. (See Chapter 2, "Creating a Template" for more information about adding placeholders to templates.)



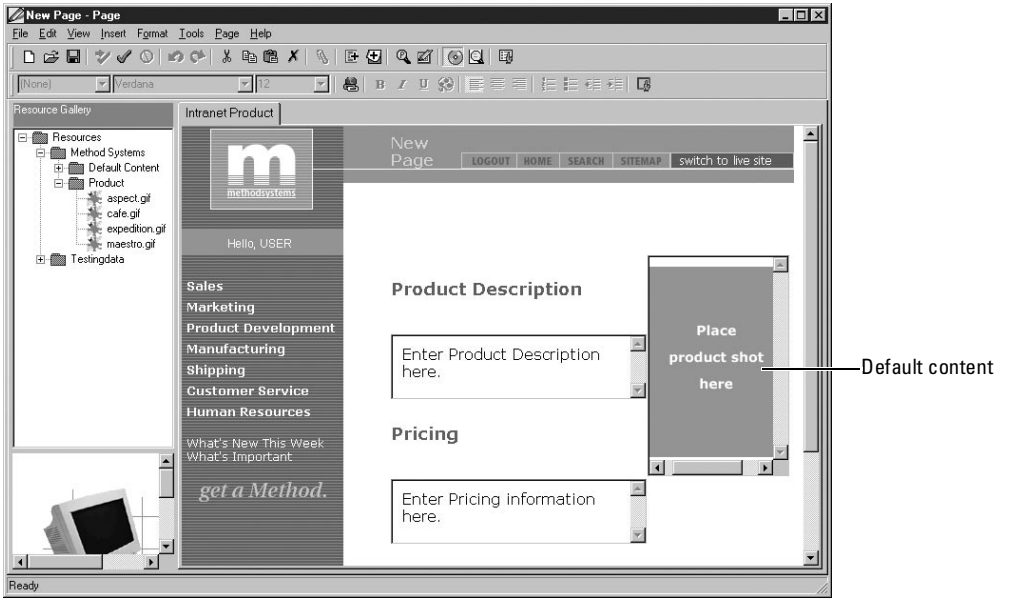
Placeholders as they appear in the Site Builder's Authoring window



Code for placeholders and layout as seen in an HTML editor

Default content: graphics and media

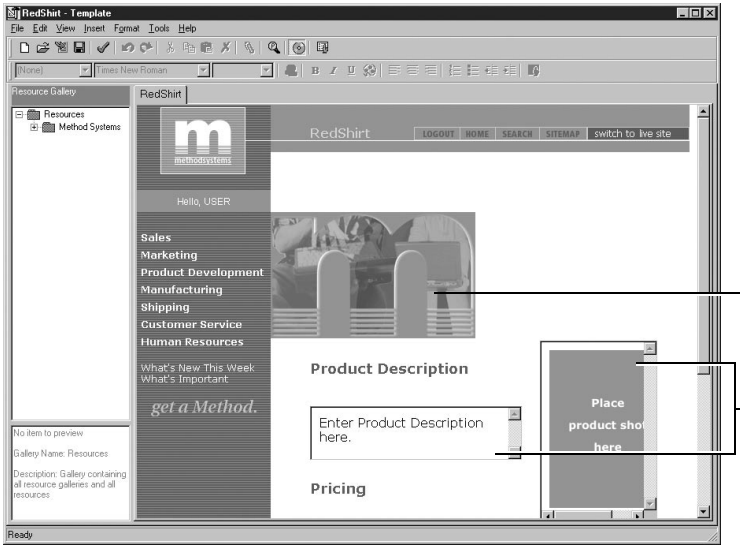
In placeholders that authors will use to add content, template designers add default content to suggest the placeholder's use. Chapter 3 covers adding default content to placeholders.



Default content in a page template opened in the Site Builder's Template Design window

Fixed resources

If a template designer doesn't want authors to be able to replace or alter content in a placeholder (for content such as a company logo), the content can be made a fixed resource. Methods for creating fixed resources are explained in Chapter 3, "Adding Default Content."



Content that can't be edited or removed by authors. Generally, a template designer will make a company's logo a fixed resource to ensure authors do not remove the logo from pages created from that template.

Content that can be edited or removed by authors. The template designer has added default content to indicate to authors that the content is editable.

Template with a fixed resource, and default content that can be edited

Content types that are supported by placeholders include:

- text: TXT, HTML, Rich Text Format (RTF)
- images: GIF, JPG, PNG
- videos: MOV/QT (QuickTime), ASF (NetShow), MPEG, AVI, ASX.

Other types of content must be inserted into placeholders as attachments.

Scripting

Template designers can use both client- and server-side (for example, Active Server Pages) JavaScript and VBScript within a template to interact with content in pages that use the template.

Forms and include statements

Content Management Server 2001 templates support the use of forms, and server-side file include statements. Forms and include statements are discussed in Chapter 2, "Creating a Template."

How page templates and postings operate

Unlike other Web pages, a key feature of Content Management Server 2001 is that the content (text, graphics, and video) of a page and its page template are stored separately in the MSCMS 2001 database. Content and template are only united temporarily while a posting of the page is viewed in a browser.

When an author creates a page and posts it to one or more channels, the page's posting contains the following information:

- which template is to be used for this posting
- what content is to be placed within each placeholder on that template
- the publishing schedule that includes the date the posting will be available for viewing, and when it will expire.

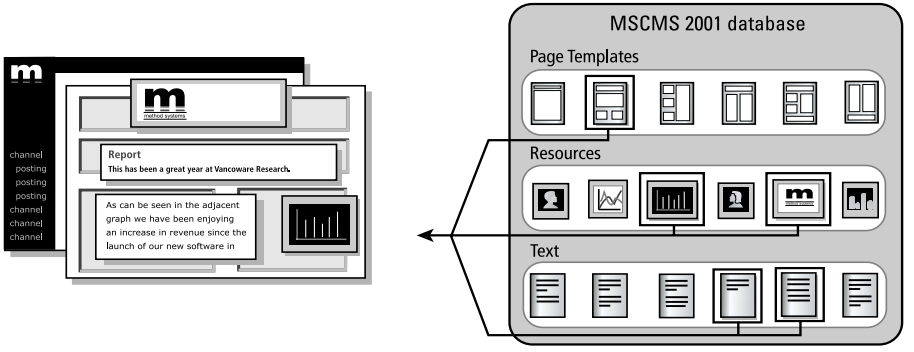
When a subscriber opens the posting, Content Management Server 2001 searches its database for the template associated with it. Then Content Management Server 2001 searches for the content associated with each placeholder in that template. It makes copies of the content and template, then uses these copies to assemble the posting in the browser.

Any updates to content are reflected in all postings and templates that refer to that content.

1. You click on a link to a posting in your browser window

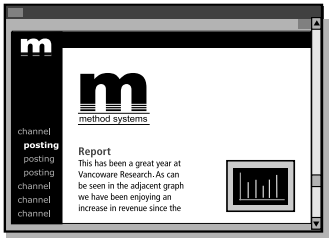


2. MSCMS 2001 searches the database



MSCMS 2001 locates the template(s) and content for the page associated with the posting.

3. MSCMS 2001 assembles the posting and sends it to the browser to display



A copy of the page is assembled dynamically by MSCMS 2001 and sent to the browser for display as a posting.

Changing content

When content in a resource gallery is changed, all published postings sharing that content also automatically change. For example, suppose a resource manager edits an image stored in the resource gallery. The modified image will automatically appear whenever a posting using that resource is opened in a browser.

In your role as a page template designer, there may be occasions when you'll want to change a template by adding content to it, such as a company logo. In this case, all postings of pages using that template will display the added content when opened in a Web browser.

Changing or renaming a template's placeholder

Changing or renaming placeholders for a template will affect postings of pages that depend on the template. The changed or renamed placeholder and its content no longer appears on the postings that depend on the placeholder. Also, content, format, and other attributes of the formatting template may be corrupted, thereby rendering the template unusable for existing postings. You can run a report (called a Dependant Report) to locate postings that will be affected by changes made to a template's placeholder.

Note
Changing default content will have no effect on existing postings/pages—even ones that never changed the default content to begin with.

HTML editor compatibility

The first time you create a template, Content Management Server 2001 will prompt you to select an HTML editor. The HTML editor you select becomes the default editor that opens for use when you create a new template.

Microsoft FrontPage 2000 is compatible with Content Management Server 2001 for the purpose of working with templates. When you choose New template from the File menu, the application will start the HTML editor you selected as your default editor. Your default editor will then create a "blank" HTML file with basic HTML tags.

The above editor offers drag and drop functionality which is required when using the template-creation tools provided by Site Builder. Also, Content Management Server 2001 detects a Save action in these applications, taking note of any file date changes to import and save the file in an MSCMS 2001 template gallery.

Note
You should configure a non-WYSIWYG (what-you-see-is-what-you-get) HTML editor such as Microsoft Visual InterDev™ or WordPad for working with ASP files such as navigation templates. WYSIWYG HTML editors typically insert extraneous text that must be manually removed.

Chapter 2

Creating a Template

Overview



Note
Make sure you've read Chapter 1, "MSCMS 2001 Template-Based Publishing" before creating templates.

This chapter and Chapter 3, "Adding Default Content" explain how to create a page template. In this chapter, you will learn how to:

- open a proto-template file from the Site Builder window
- select an HTML editor
- learn how to use the template Design Palette
- add controls (placeholders) to a proto-template
- add HTML to customize your template
- add scripting and server-side file inclusions
- save your page template.

This chapter also includes information on designing templates for use with Microsoft® Content Management Server 2001 Site Stager.

The two-stage template creation process

Creating a template consists of two stages.The first stage involves creating a proto-template file in an HTML editor and adding the HTML, scripting, and placeholder controls. Template designers add authoring controls (placeholders) and layout HTML to the proto-template file, in a joint session between Microsoft Content Management Server 2001 and an HTML editor. The proto-template file is imported into the Content Management Server 2001 when it is saved in the HTML editor. At that point, it becomes a template.

There are three ways to create a proto-template:

- import an existing HTML or ASP file
- copy an existing template and paste it into a template gallery
- create one manually.

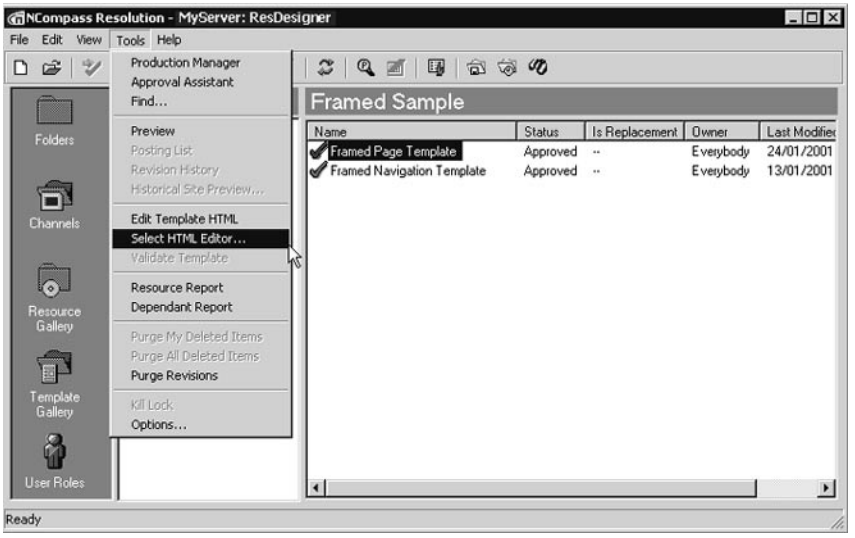
Creating a new template manually involves adding and positioning authoring controls (placeholders), adding scripting or extra HTML, and saving your work to an MSCMS 2001 gallery as a template.

Creating proto-templates

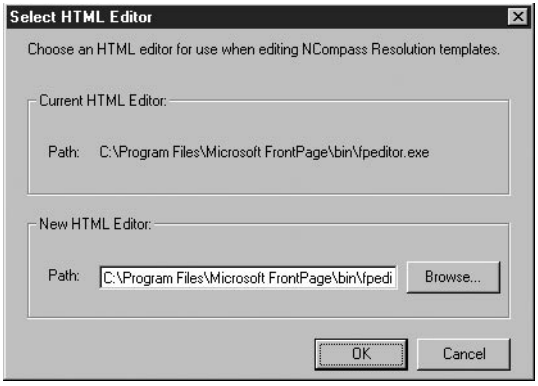
Configuring the default HTML editor

You will need to configure a default HTML editor for use with Content Management Server 2001. Whenever you create a new template, the application starts the HTML editor you selected as your default editor. You can change your default editor at any time.

1 In the Site Builder window, choose the **Select HTML Editor** command from the **Tools** menu. The Select HTML Editor dialog box opens.



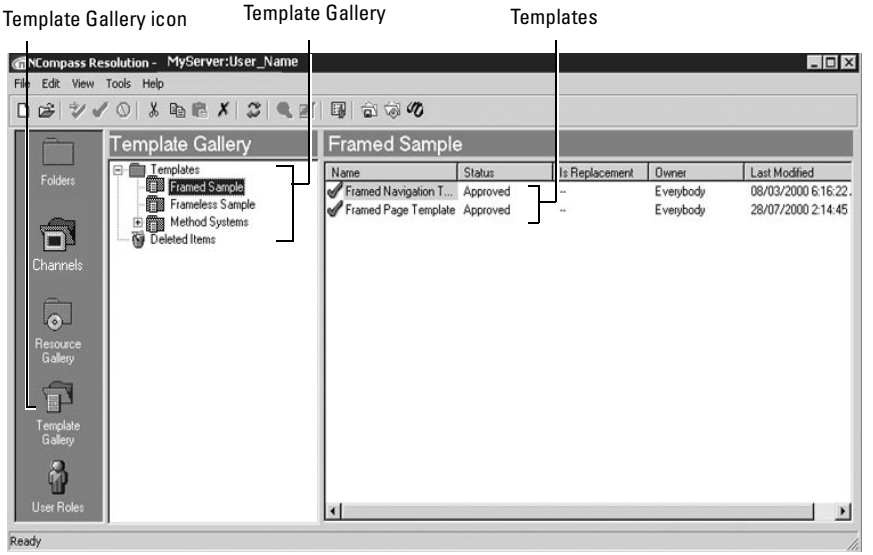
2 In the Select HTML Editor dialog box, type in the full pathname to your editing application, or use the Browse(...) button to locate it.



3 When finished, click **OK**.

Creating a proto-template manually

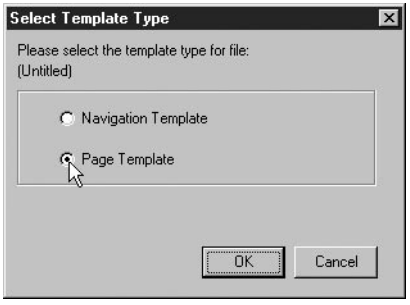
1 In the Site Builder window, display the hierarchy of the templates by clicking the Template Gallery icon.



Template Gallery hierarchy expanded, showing the templates it contains

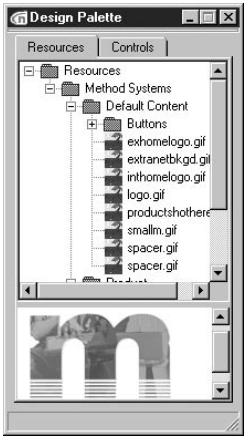
2 Select a template gallery you have rights in. The icon that appears next to a template gallery's name in the Site Builder window's list of items indicates what rights you have in the gallery. If the icon is blue, you can create and edit templates in the gallery. If the icon is dimmed, you have rights to edit or create templates in one of that gallery's sub-galleries.

3 Right-click the gallery or template, and choose **New > Template** from the pop-up menu. The Select Template Type dialog box displays.



Select Template Type dialog box

4 In the Select Template Type dialog box, select Page Template. Click **OK.** Your default HTML editor opens, followed by the template Design Palette.



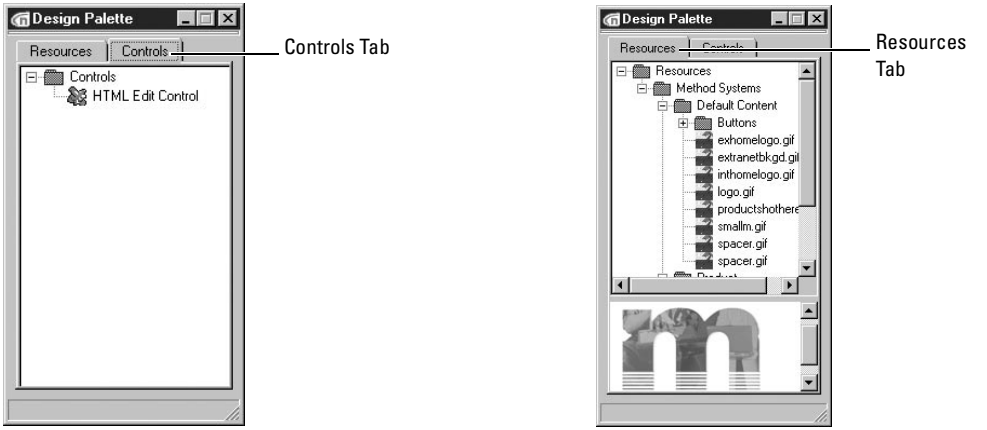
Template Design Palette

5 Content Management Server 2001 launches the editor you have configured and opens a new HTML file with the basic HTML tags. This HTML file is the proto-template. The next sections in this guide explain what a control is, and how to add a control and HTML before saving your work as a template to the template gallery.

Tip

To select a different default HTML editor, chose the **Select HTML Editor** command from the **Tools** menu in the Site Builder window.

About the template Design Palette



Template Design Palette, showing the Controls tab and the Resources tab

The template Design Palette opens automatically when you edit a template's HTML or create a new template manually. The Design Palette serves two principal functions.

- It allows you to drag and drop or copy and paste placeholders or resources into your template. The Controls tab shows the Authoring Control that contains the code that displays a placeholder when the template is displayed in the Authoring or Template Design window. A placeholder provides a designated area on a template where an author can add content in order to author a page.
- It manages the joint session between the HTML editor and Content Management Server 2001, importing and converting the HTML file when it's saved in the editor, thereby saving it as a template.

Note
The Design Palette must remain open while you are editing the template in your HTML editor. Changes made to a template after the Design Palette is closed will not be saved to the template gallery.

Adding an authoring control to proto-templates

What is an authoring control?

An authoring control contains the code that will display the placeholder when the template is displayed in the Authoring or Template Design window. An authoring control is in the Controls tab on the template Design Palette. These controls can be dragged or copied into the HTML file in your HTML editor.

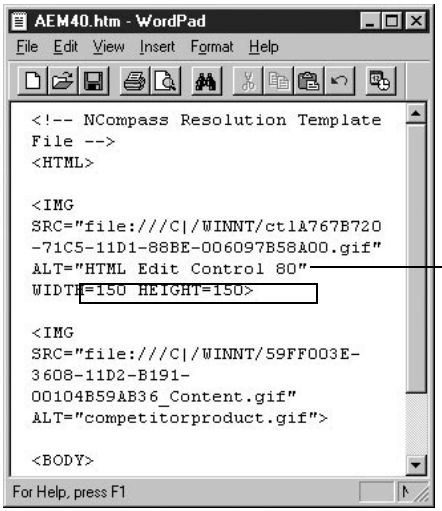
Add the authoring control

To add an authoring control, drag the HTML Edit Control from the template Design Palette's Controls tab and drop it in the appropriate place in the HTML file. Alternatively, you can copy the control (right-click the control, and select **Copy**), then paste it into your HTML file. The copy-and-paste method must be used if your HTML editor does not support drag-and-drop editing.

Tip
If adding several placeholders to a template, we recommend inserting them into a table. This makes it easier to control their position.

Naming the control for a placeholder

When a control for placeholders is added to the template HTML, it appears as an IMG tag. The ALT attribute of the IMG tag is used to store the placeholder's name. As placeholders are added, we recommend changing the default ALT value to a unique name that denotes the purpose of the placeholder's contents and possibly includes some reference to the template family the template belongs to.

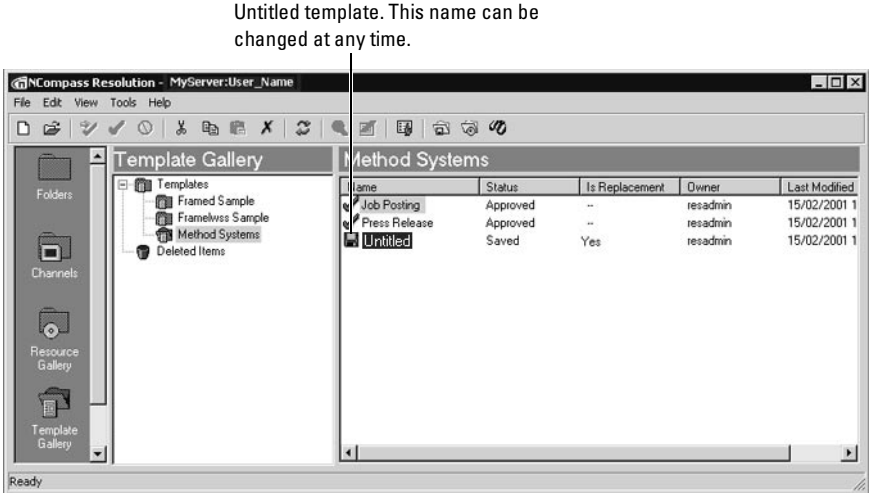


HTML for an Authoring Control in HTML editor

Be careful when renaming a placeholder. Any content added to a placeholder prior to its renaming will not be automatically added to the renamed placeholder. As a result, postings of pages using that placeholder may need to be edited and resubmitted.

Saving a proto-template as an MSCMS 2001 template

Using the Save command in an HTML editor running in a joint session with Content Management Server 2001 saves the file as an untitled template in the template gallery. Do not use the **Save-As** command to change the file name in your HTML editor. Content Management Server 2001 requires that the file retains the default (untitled) file name in the HTML editor.



After being saved in an HTML editor, the proto-template appears as an "Untitled," checked-out (not yet available for publishing) template in the template gallery.

When a template is saved to a gallery, Content Management Server 2001 imports the proto-template file from the HTML editing application. The importing process does the following:

- adds an ASP header (unless the file is already an ASP file)
- converts GIF representations of the authoring control to an actual control, naming them using the text contained in each GIF's ALT tag
- imports and handles, internally and automatically, the following types of resources referenced in the proto-template. Note that any other resources referenced in the proto-template must be referenced by a fully qualified URL.

Applet: values of the ARCHIVE, CODE, OBJECT attributes

Example:

```
<APPLET CODE="PieChart.class" archive="Survey.jar">
```

Object: values of the ARCHIVE, CLASSID, DATA attributes

Example:

```
<OBJECT ID="PowerPanels" WIDTH="150" HEIGHT="150" CLASSID="CLSID:039F8323-0FBF-11D0-
B21E-00A02443D8EF" CODEBASE="/NR/Shared/bin/npwrpnl2.cab#version=5,0,4,4">
```

Body: values of the BACKGROUND attribute

Example:

```
<BODY background="someimage.gif">
```

IMG: values of the SRC attribute

Example:

```
<IMG SRC="someimage.gif">
```

Note
To edit a template's HTML after you've saved the template to a gallery, right-click the template and choose **Edit Template HTML**.

Ending the joint session with the HTML editor

After you've saved the proto-template file, close the template Design Palette and then the HTML editor. Until you do so, you'll only be able to open the new template in the Site Builder in read-only mode.

Naming the template

In the Content Management Server 2001 window, display the template gallery hierarchy by selecting the Template Gallery icon. Click the gallery the template was created in, locate the new untitled template in the list on the right, and name it by right-clicking and selecting **Rename**.

Adding HTML to proto-templates

When creating a new template, Content Management Server 2001 adds the basic HTML tags (such as file type, head, and body tags) to the new file it opens in your HTML editing application. Dropping or pasting HTML Edit Controls from the template Design Palette adds appropriate placeholder code.

Any HTML or scripting for the following must be supplied by template designers in the HTML editor:

- layout of controls and other elements using techniques such as tables and borders
- client- and server-side JavaScript and VBScript
- forms and server-side includes
- background properties such as color, image, and sound
- Cascading Style Sheets (CSS)
- fonts, font styles, and font colors for text not contained in controls and not to be defined by style sheets
- fonts, font styles, and font colors specific to particular controls. Adding appropriate tags for this can be done before or after controls are added.
- pointers to external resources not stored in a resource gallery
- any other HTML elements that will form part of the template (as opposed to being contained in an authoring control).

Changes to the layout of a template are made by right-clicking the template in the Site Builder window, and choosing **Edit Template HTML** from the pop-up menu. This launches a joint session between Content Management Server 2001 and an HTML editor. After the template designer has edited the HTML file representing the template, it can be saved back to Content Management Server 2001 as a template again. To make the changed version of the template available for use by authors, the template must be resubmitted for publishing.



Note
If a template is currently being used by postings of pages, those postings will use the new template. As this could affect the content of those postings, a dialog box opens when you submit the template for publishing. The dialog box provides a link to a Dependant Report, which lists the template's dependencies. The dialog box offers the option to cancel template submission at any time.

Using external resources (CSS, JavaScript files)

Some file formats cannot be stored within the resource gallery. Cascading style sheet files, JavaScript and VBScript files, Java applets (.class files and.jar files), and ActiveX controls must be stored in a virtual directory on the server.

Links to resources stored outside of the Content Management Server 2001 resource gallery will require a full pathname. Since postings can be dynamically generated from any virtual directory on the server that has the proper ASP files, we recommend you *not* use relative paths. If you use relative paths, the target of the links may not be accessible under all circumstances.

If you use the Microsoft Site Stager, wrapping links with the `ResolveURL()` function is necessary if you want the target of the link to be staged. Consult the *MSCMS 2001 Site Administrator's Guide* if you are unsure whether or not your site must be stageable.

The requirements for linking to resources:

- on the same server (either inside or outside of the Content Management Server 2001 virtual directory), use the full path to links and, if necessary, include `ResolveURL` for links to be stageable
- on another server, use a fully-qualified URL.



Note
Content Management Server 2001 will produce a Link Error dialog box when saving a page template with links to file formats that cannot be imported into the MSCMS 2001 database. Click **OK** to continue to save the file. The link will be accessible to the Web browser that requests postings of pages created from that template.

External Cascading Style Sheets (CSS)

To add an external cascading style sheet file (.CSS) to your page template, insert the following lines of HTML within the Head element of your page where the HREF value is the path to your .CSS file:

```
<LINK REL="stylesheet" HREF="/nr/shared/css/style.css" TYPE="text/css">
```

External JavaScript files

External JavaScript files can be referenced inside the Head region of the HTML file. This reference, like others to resources not managed by the resource gallery, must use a full path:

```
<SCRIPT language ="JavaScript" SRC="/nr/shared/JS/Common.js"></SCRIPT>
```

Adding scripting to a proto-template

Scripts must not refer to resources, except with a full path to the resource, or a fully-qualified HTTP URL. Resources can be included in scripts in two ways other than a fully-qualified URL:

- Add an authoring control inside a script in a proto-template, and later add a resource to that placeholder in the Template Design window.
- If the resource is stored in a Content Management Server 2001 resource gallery, copy it from the template Design Palette and paste it into the script in the HTML editor.

Adding graphics and other resources to a proto-template

Instead of adding references to graphics, videos, and other resources in the template HTML, add resources to placeholders in the template when it is open in the Site Builder's Template Design window (see Chapter 3, "Adding Default Content").

It is possible to add references to resources to the template HTML in an HTML editor, but changing such references requires opening the HTML file of the template in a joint session between Content Management Server 2001 and an HTML editing application, and editing the references there.

Adding forms to a proto-template

Content Management Server 2001 templates support HTML forms just as standard Web pages do. However, if your site will ever use Site Stager, follow the guidelines later in this chapter for creating stageable forms.

Adding server-side include statements to a proto-template

Content Management Server 2001 templates support server-side file inclusions. An inclusion can be specified in a page template by inserting an include statement, as in the following example:

```
<!--#include virtual="/navbar.asp"-->
```

Frameless and framed Web site navigation

Content Management Server 2001 supports both frameless and framed navigation.

Web indexing: setting the title of a page template

Most search engines display the title of the pages they index. For framed and frameless sites, this title is created by the page template's <TITLE> tags. To use the posting name as the document's title, the Autosession object of the MSCMS 2001 Publishing API can be used within the page template:

```
<HTML>
<HEAD>
<TITLE>     <%=Autosession.ThisPosting.Name%></TITLE>
</HEAD>
```

Framed navigation

Because framed sites use navigation templates implemented in a frame to handle navigation, all page templates intended for use with framed sites must include the following tag between the <HEAD> and </HEAD> tags:

```
<BASE target="_top">
```

Frameless navigation

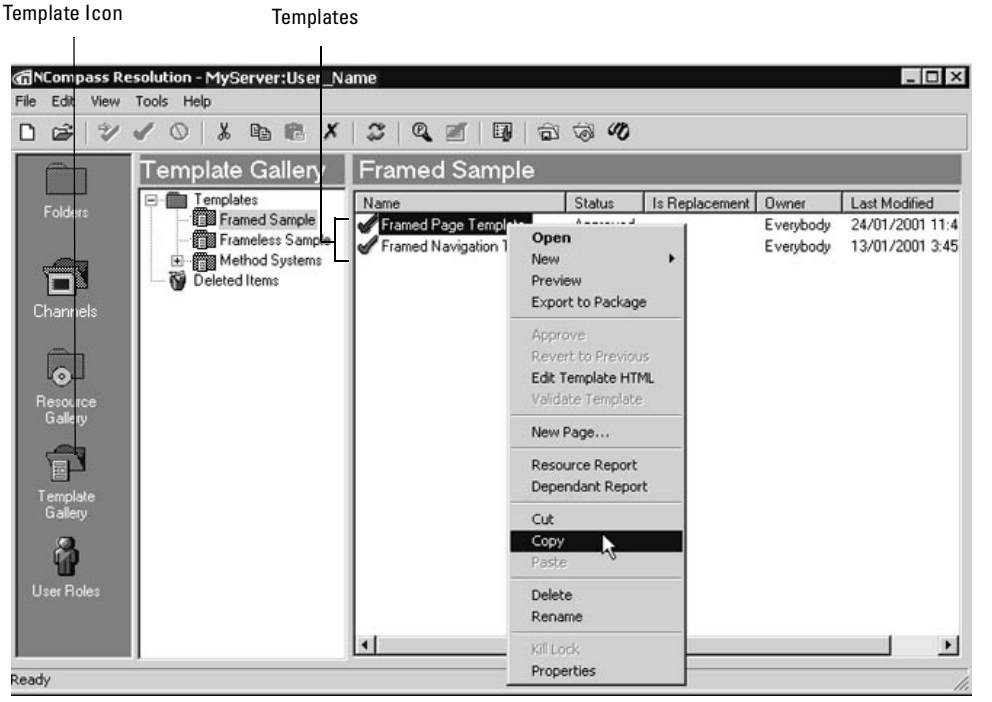
If you are designing for a frameless site, you must use server-side file includes in the page templates to add navigation files. The navigation files are created by a site programmer (a template designer who creates/edits navigation templates; site programming is covered in the *MSCMS 2001 Site Programmer's Guide*). Check with your organization's site programmers about including navigation elements in your template.

Copying templates

Often the simplest way to create a new template is to make a copy of an existing template similar in layout and number of placeholders used, and edit it as necessary.

Making a copy of a template

1 In the Site Builder window, display the template gallery hierarchy by clicking the Template Gallery icon.



Template gallery hierarchy

2 Click a gallery to display a list of templates in it.

3 Right-click the name of a template and select **Copy**.

4 Right-click the gallery you want to paste the template in and select **Paste**.

5 Right-click the template, select **Rename** from the pop-up menu, and rename if required.

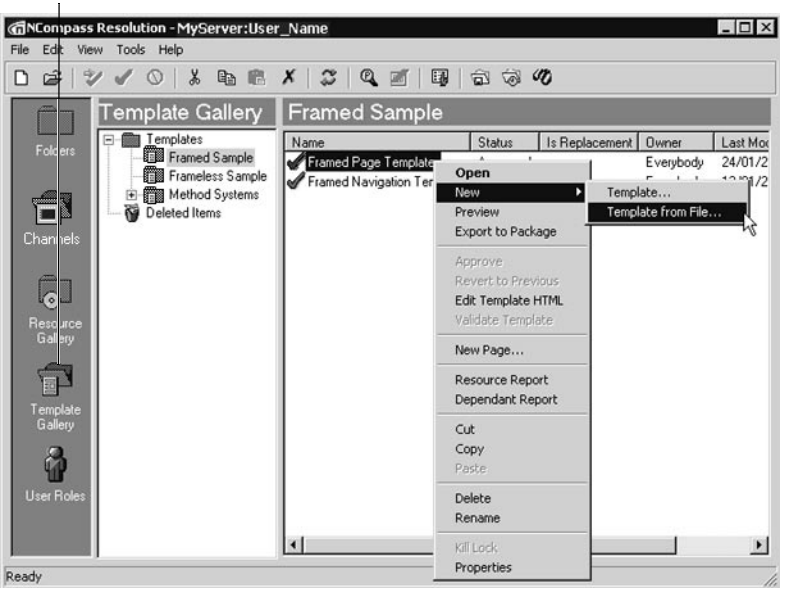
6 Edit the template.

Importing templates

You can import a suitable HTML (or ASP) file into a template gallery to add it as a template.

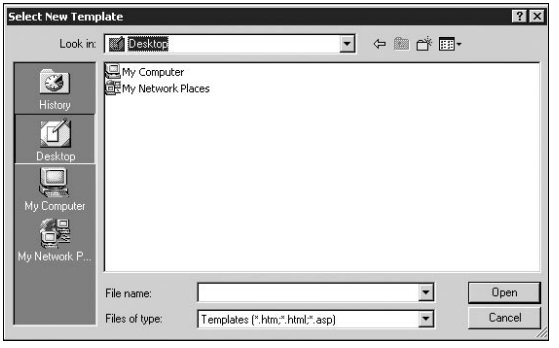
1 In the Site Builder window, display the template gallery hierarchy by selecting the Template Gallery icon.

Template Gallery icon



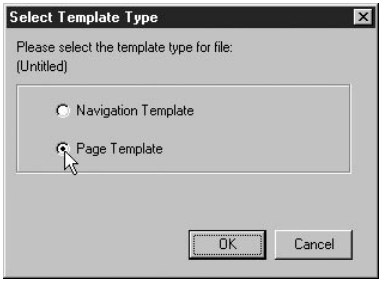
Template gallery hierarchy

2 Right-click the name of a gallery in the hierarchy and select **New > Template from File**. The Select New Template dialog box opens.



Select New Template dialog box

3 Select a suitable HTML (or ASP) file to import from a local or network drive. The Select Template Type dialog box opens.



Select Template Type dialog box

Choose to import the file as a page template. Content Management Server 2001 saves the file to the gallery you started the process from. If Content Management Server 2001 cannot find any particular control or resource that's called for in the file, it displays a dialog box asking if you wish to continue importing. Click **OK** to import the template with a broken link or **Cancel** to stop the importing process.

Note

When an HTML file is imported, the following types of resources referenced in the HTML file are also imported and handled internally and automatically by Content Management Server 2001 as indicated below:

Applet: values of the ARCHIVE, CODE OBJECT attributes

Example:

```
<APPLET CODE="PieChart.class" archive="Survey.jar">
```

Object: values of the ARCHIVE, CLASSID, DATA attributes

Example:

```
<OBJECT ID="PowerPanels" WIDTH="150" HEIGHT="150" CLASSID="CLSID:039F8323-0FBF-
11D0-B21E-00A02443D8EF"CODEBASE
"/NR/Shared/bin/npwrpnl2.cab#version=5,0,4,4">
```

Body: values of the BACKGROUND attribute

Example:

```
<BODY background="someimage.gif">
```

IMG: values of the SRC attribute

Example:

```
<IMG SRC="someimage.gif">\
```

Any other resources in the HTML file must be referred to by a fully qualified URL.

Designing templates to support multilingual authoring

If a template is enabled for a language in addition to English, this means:

- placeholder objects are fully readable and editable in that language
- all standard authoring and editing functions such as copying, pasting, importing, saving, deleting, previewing, and publishing can be performed in a language other than English if that language is installed on the server
- all aspects of the user interface embedded in the site (for example, Console and SiteMode Switch) and the navigation can be displayed in the language specified.

Summarizing the procedure

Enabling new or existing page or navigation templates to support multilingual authoring in both the Site Builder and Web Author involves the following steps:

- template designers must edit template HTML to set placeholder properties such as the fonts and character sets supported
- authors and editors must now use the new DisplayName property rather than the Posting.description or Channel.description property in the scripting of navigation links intended to appear in a language other than English.

Language and character sets supported

Microsoft Content Management Server 2001 currently supports any language or writing system that is part of the Unicode 2.0 standard. Languages and character sets include the following:

Japanese	Arabic	Thai
Korean (Hangul)	Hebrew	Vietnamese
Chinese Traditional	Greek	Turkish
Chinese Simplified	Baltic (Estonian, Lithuanian, Latvian)	
Cyrillic (Russian, Bulgarian, Ukrainian, Serbian)	Eastern European (Czech, Polish, Hungarian, Slovak, Slovenian, Romanian, Croatian)	

Editing template HTML to enable multilingual support

To enable multilingual support in the Web Author, template designers must:

- specify a CodePage directive at the top of the template ASP
- set the proper Charset value in the HTML < meta > tag. The CodePage directive and Charset meta tag must be inserted directly using the template HTML.
- ensure the font used in the HTML is compatible with the specified language. For example, a Japanese template should not use Arial as the font since it does not support the Japanese character set.

! Caution
If Codepage directive and the Charset value are pulled in using the include file or generated dynamically through server-side or client-side scripting, the multilingual support feature will not function properly.

Sample page template scripting

The following is a code sample to enable page template scripting in Japanese:

```
<%@ CodePage=932%>
<HTML>
<HEAD>
<META HTTP-EQUIV="Content-Type" CONTENT="text/html;charset=Shift_jis">
<STYLE>
body
   {
   background-color: lightYellow;
   }
   a
   {
   text-decoration: none;
   }
</STYLE>
<TITLE></TITLE>
</HEAD>
<BODY>
<h1><%= Autosession.This.Name %></h1>
<img src="file:///C:/TEMP/ctlA767B720-71C5-11D1-88BE-006097B58A00.gif" height="51"
width="500" alt="Multipurpose">
<br>
<img src="file:///C:/TEMP/ctlA767B720-71C5-11D1-88BE-006097B58A00.gif" height="48"
width="500" alt="SingleImage">
<br>
<img src="file:///C:/TEMP/ctlA767B720-71C5-11D1-88BE-006097B58A00.gif" height="48"
width="500" alt="SingleAttachment">
<br>
```

```
<img src="file:///C:/TEMP/ctlA767B720-71C5-11D1-88BE-006097B58A00.gif" height="51"
width="500" alt="SinglelineText">
</BODY>
</HTML>
```

Notes

- < %@ CodePage = 932% > is the Posting Frame. You can reference it from the frameset by using the Autosession.This.URLPostingFrame method.
- If the <BODY> tag is defined in an include file, then you must manually insert the following line, which is required for Web Author integration: `Call EmbedBodyBeginHook().`
- If the <HEAD> tag is defined in an include file, you must manually insert the following line, which is required for Web Author integration: `Call EmbedTmplHeadHook().`

Setting aliases for channels and postings

The DisplayName property provides a simplified means for enabling multilingual navigation. Content Management Server 2001 supports the use of the DisplayName property for postings, channels, and resources to display text for navigation links. Hierarchical URLs are unaffected by the DisplayName property.

For an example of navigation scripting, see Chapter 9, "Customizing Your MSCMS 2001 Web Author" in the *MSCMS 2001 Site Programmer's Guide*.

Multinational characters and fonts in channel, posting, and resource names

Template designers and authors can enter multinational character sets and fonts in the Display Name and Description fields and custom properties for postings, channels, and resources. Content is now editable in both the Site Builder and Web Author environments as follows:

	Channels	Postings and resources
Site Builder	Editable to enable the use of multinational font and character sets, but restricted to the operating system language of the client (for example, Japanese on a Japanese operating system).	Editable to enable the use of multinational font and character sets, but restricted to the operating system language of the client (for example, Japanese on a Japanese operating system).
Web Author	Require the language of the navigation template. Users can enter any multinational characters that are supported in their Web browsers.	Postings must be in the language of the template they are based on. Resources can be in any language. Users can enter any multinational characters that are supported in their Web browsers.

We strongly recommend that if you use multilingual characters and fonts in custom properties for templates and channels, you restrict yourself to one language per channel or template. If, for example, you have custom properties in more than one language per channel or template, it is possible to overwrite correct data with useless data.

Note

A font set must be installed on the server for it to support serving a page, posting, or channel in that language. For more information, search the Microsoft site (`www.microsoft.com`) under the topic of International Language Support.

For information about Windows 2000, select **Control Panel > Regional Options**. Choose the appropriate language pack from those listed in the International Language Support section.

Designing templates for use with Site Stager

Site Stager is a Microsoft application that converts Content Management Server 2001 content, navigation, and links to static HTML for use on any Web server. Ask your site administrator whether your site will be staged in the future and if so which of the following considerations you need to review. See the *MSCMS 2001 Site Administrator's Guide* for detailed information on using Site Stager.

- Any references to URLs not on the same Web server as the MSCMS 2001 server must be fully qualified and the URLs must be accessible from the server the staged site is deployed on.



Note
A fully-qualified URL is one that includes a protocol, followed by a server name (or IP address) and the full path of the file (for example, `<a href="http://wwwmicrosoft.com/default.asp/">`).

- Do not apply the ResolveURL method to links to targets external to the Microsoft Content Management Server 2001 system. For more information about ResolveURL, see the *MSCMS 2001 Site Programmer's Guide.*

Creating stageable forms

Use a fully-qualified URL for the form's action parameter.

- Do not apply the ResolveURL method from the Autosession object to this URL (for more information about ResolveURL, see the *MSCMS 2001 Publishing API Help*).
- This URL must be accessible from the server the staged site is hosted on.
- The input part of the form is staged; the processing part remains on the server that does the processing.

The following is an example of a stageable form:

```
<form action="http://formserver/scripts/someform.asp" method="post">
<input type="text" name="sometext"><br><input type="submit" value="Submit">
</form>
```

Chapter 3

Adding Default Content

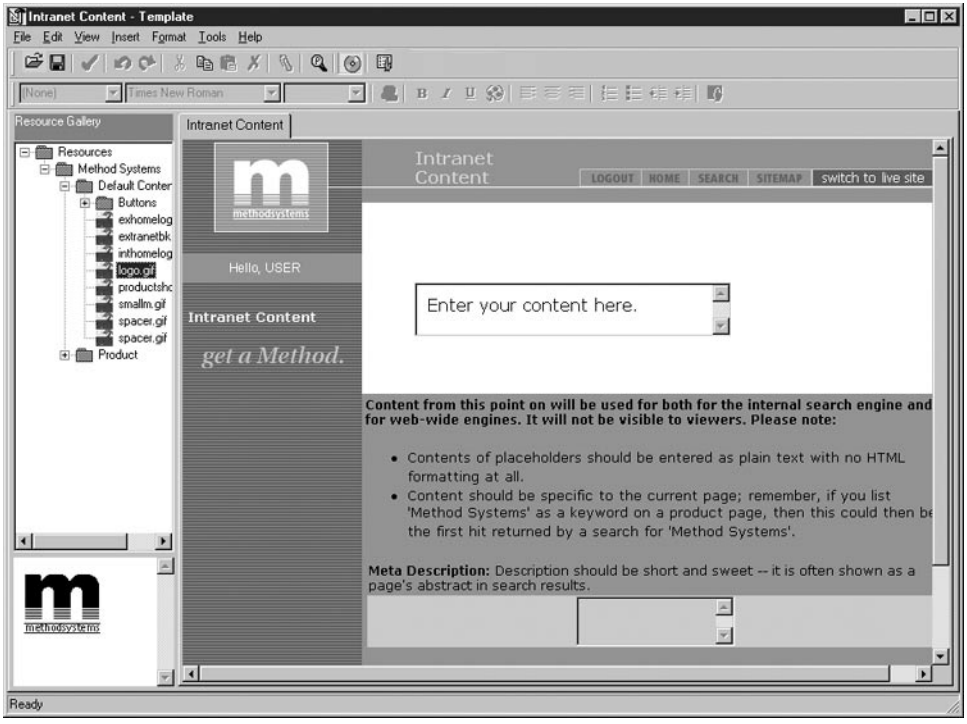
Overview

In Chapter 2, "Creating a Template" we discussed the first stage of creating a page template—creating a proto-template file. This chapter covers opening a page template in the Site Builder's Template Design window, and adding default content, and setting the properties of a template's placeholders.

Opening a template in the Template Design window

If the template Design Palette is open, close it now.

1 In the Site Builder window, right-click a template's name and select **Open**. The Template Design window opens, displaying the template.



A template in the Site Builder's Template Design Window

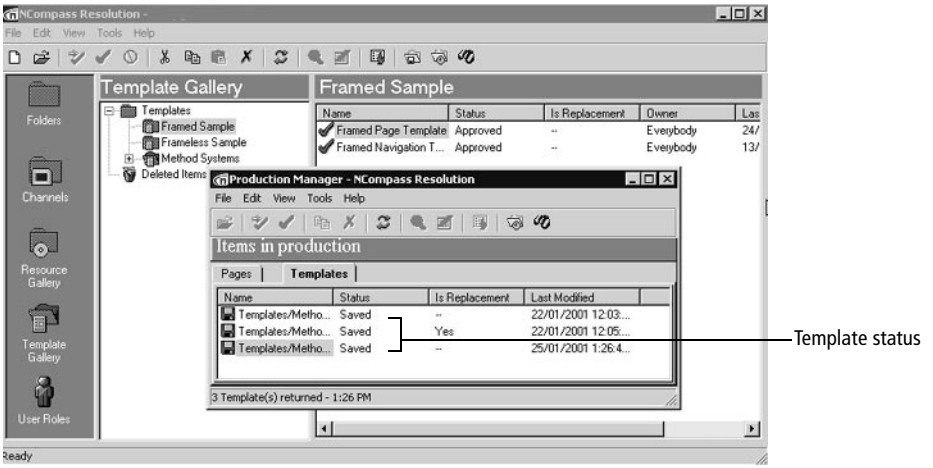
2 If you haven't ended the joint session between MSCMS 2001 and the HTML editing application by closing the template Design Palette, a dialog box opens asking if you'd like to open the template in read-only mode. Click **No**. Close the template Design Palette and the editor, then right-click the template's name and choose **Open**. The Template Design window opens, displaying the template.

Using the Production Manager to access your templates

The Production Manager provides a quick way to access templates that are not finished and, therefore, are not ready to be released for use by authors.

1 From the Tools menu in the Site Builder, select **Production Manager**.

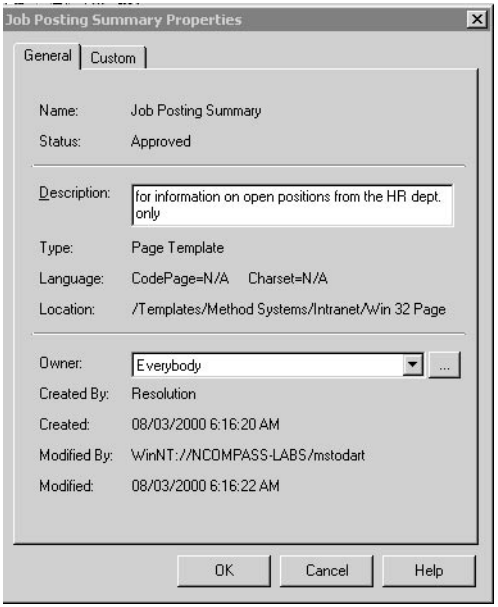
2 Click the Templates tab to view a list of all non-approved templates you own. You can open or otherwise act on templates in the list using toolbar buttons or menu commands.



Production Manager window, showing templates that are in the non-approved state

Giving the template a description

1 Right-click the template and select **Properties**. The template's Properties dialog box opens.



Description of a template in the template Properties dialog box

2 Enter a description of up to 256 characters in the Description field.

This description appears as a ToolTip when the mouse pointer is held over the template's name in the template gallery. Include a short list of suggested uses for the template, if they're not obvious. ToolTips prevent authors from having to open a template to determine what type of pages the template is intended for.

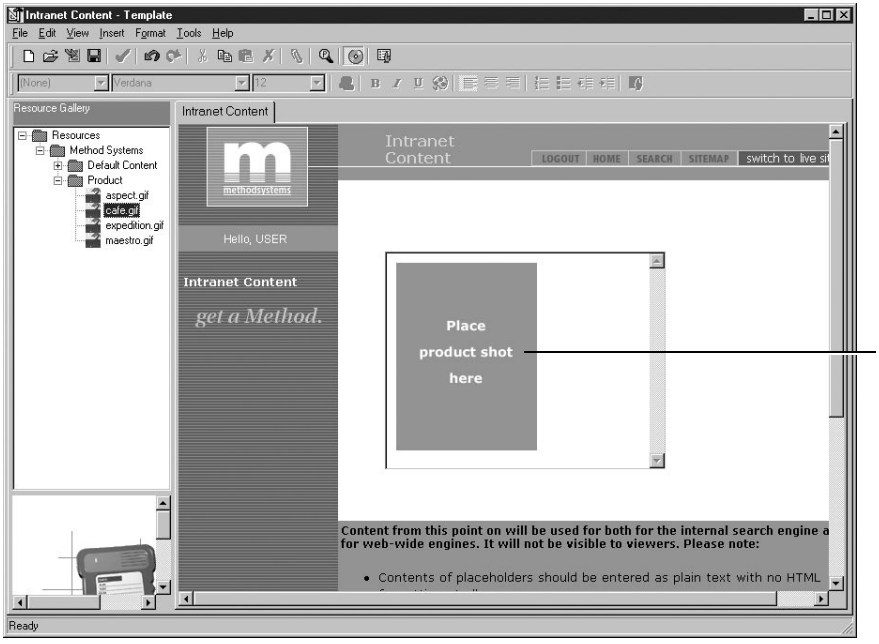
Note

For information about assigning other custom properties to your template, see Chapter 4, "Setting Properties and Creating Links."

Adding default content to placeholders

Page template designers should add default content to each placeholder in a template. Default content suggests to authors what type of content they should enter into placeholders. For example, if a placeholder in a template is intended to be used to display the title of a page, a template designer might enter the word "Title" in it. This tells authors that the placeholder accepts text, that it should have a title, and that it should be placed in the placeholder indicated.

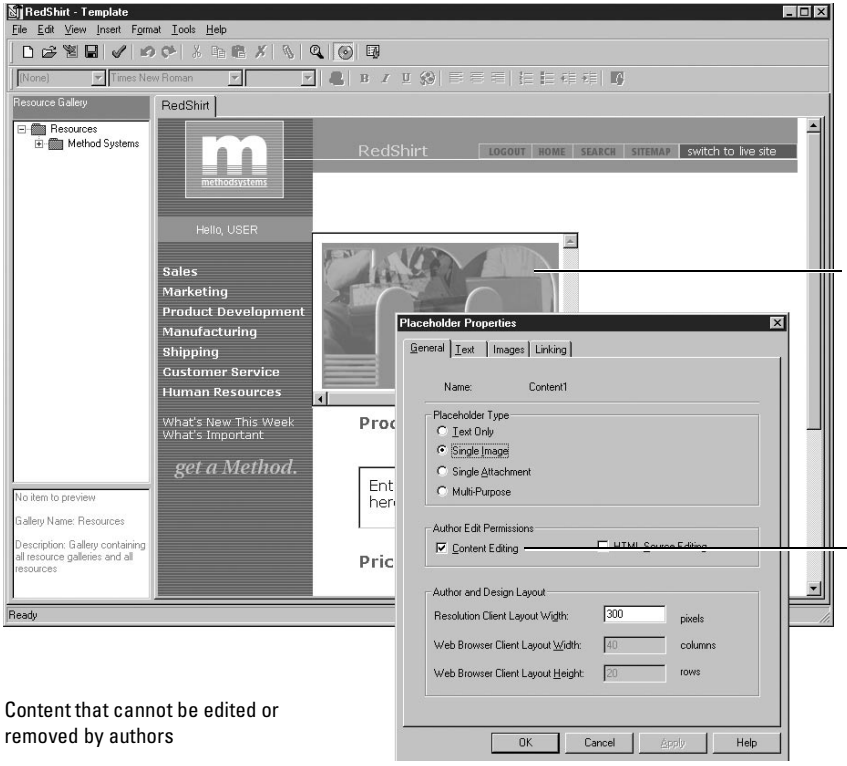
To speed up both template design and authoring, a set of GIFs that display words outlining the settings of a range of possible placeholder configurations can be used as shorthand. For example, one member of such a set might say "Single Image," indicating that any placeholder displaying it will accept only single images; another might say "Text and Multiple Images," indicating that text and/or one or more images will be accepted. Stored in a Default Content resource sub-gallery, these can be easily added to placeholders during template design after each placeholder's properties have been set.



A template in the Template Design window

Creating fixed resources: non-editable content

Content not generally intended to be replaced with other content is called a fixed resource. For example, if you want your company logo to always appear in a template, you can add the logo to a placeholder and make it non-editable. Authors will not be able to delete or change content in this placeholder. This condition can only be changed if a template designer subsequently changes either the placeholder's content or the Non-Editable Content option.



Content in this placeholder is non-editable

Option to set placeholder's content to non-editable by authors

Content that cannot be edited or removed by authors

Note
Changes to default content for a template's placeholders will not be reflected in pages previously created with that template.

Chapter 4

Setting Properties and Creating Links

Overview

In Chapter 3, "Adding Default Content" we discussed opening a page template in Site Builder's Template Design window, and adding default content. This chapter covers customizing your template and its placeholders as well as setting publishing options for channels and postings. Specifically, in this chapter, you will learn how to:

- view custom properties currently assigned to your template
- add new custom properties to your template
- modify any existing template properties
- specify what type of content the placeholders in your template accept
- indicate to what extent individual placeholder content is editable by authors
- create links from the placeholders in your template to URLs, channels, and postings.

Setting custom properties

All custom properties must be created through Site Builder. However, they can be edited using the Web Author. Custom properties for a page are added to the page template by the template designer. From the Properties dialog box, template designers can:

- view custom properties currently assigned to their template
- add their own custom properties
- modify or delete existing custom properties.

Benefits of using custom properties

Custom properties are user-defined properties with a specific set of names and values associated with channels and pages. Provided your custom properties are defined consistently and your Web programmer has added the applicable Application Programming Interface (API) search methods to the scripts, you can:

- create summary pages of posting and channel content
- create cross reference between pages, and channels
- categorize pages and channels based on content
- search all pages and channels
- facilitate customized scripting.

An example: categorizing your pages on the basis of content

You can set a range of values for a custom property that correspond to the types of pages on your site. For example, if you work in computer retail, you can define a list of values including laptops, PCs, and servers corresponding to the different types of computer equipment you stock. Authors then apply these values to their pages when they author. Next, site programmers insert programming logic to do searches based on a custom property used to group pages together. Site users are presented with customized lists of pages based on product preferences.

Guidelines for working with custom properties

Sharing custom property values on a page

- for a posting, the set of custom properties, the default value, and the set of allowed values (if applicable) are inherited from the page template. Inheritance of custom properties works in the same way as for placeholders.
- if two postings share the same page (for example, connected postings), regardless of whether they share the same page template, and their respective page templates have a custom property with the same name (considered to be the same property), then any override value for this custom property that is set through one of the connected postings is automatically reflected in the other connected posting.

Best practices for adding custom properties

To add the same custom property on several page templates (or channels), follow these guidelines:

- Give the custom property the same name. It is important that custom properties be named consistently if they are to be considered the same property during searches or across page templates.
- Make the custom property the same type (Text versus Selection).
- If the custom property is a Selection type, be sure to add the same set of allowed values in all page templates (or channels). Spelling is important.
- Avoid adding custom properties in different templates (or channels) with the same name but different types or allowed values. This makes searching not as effective.
- Use the same case for names and allowed values if your database defaults to doing case-sensitive searches.

Custom properties and the API

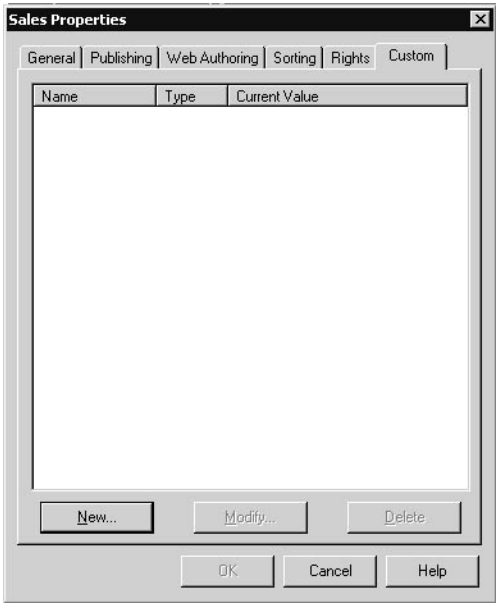
For more information on API methods and properties, see the *MSCMS 2001 Publishing API Help*.

Adding a custom property to a template for the first time

1 Access the Properties dialog box by one of the following three methods:

- Select your page template and choose **File > Properties**
- Select your template and click the **Properties** button
- Right-click your template and select **Properties**.

2 From the Properties dialog, click the Custom tab.



The Custom tab of the page template Properties dialog box

3 Select **New**. The Add Custom Property window appears.

4 Enter the name of your custom property in the Property Name field.

Note
If your new property has the same name as an existing property for that particular template, you receive an error message and cannot save your work until the name is changed.

5 Select a property type from the drop-down list.

- If you chose Text property type, specify the default text in the Default Value field below, and proceed to step 6.
- If you chose Selection property type, you must first define a set of allowed values. See the next section for details. Once the list is defined, select a value from the list, and click **Set As Default.** The value you selected then automatically appears in the Default Value field.

6 Click **OK**. The Page Template Properties window reappears. The property definition you added now appears in the list.

Creating a set of allowed values

1 From the Properties dialog, click the Custom tab. The Add Custom Property dialog box appears.

2 Specify "Selection" as the property type.

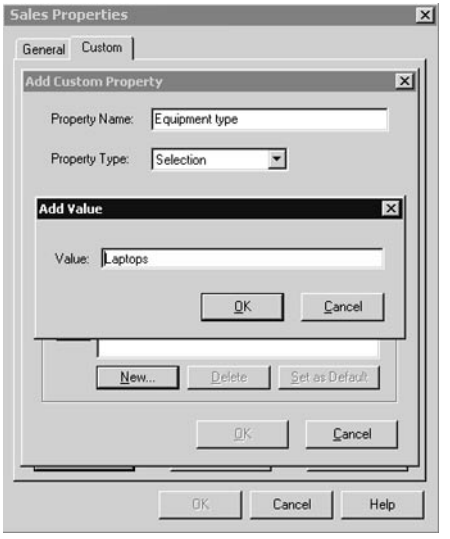
3 Enter a description for your new property in the Property Name field. For example if you were defining properties for the computer retail scenario cited earlier, the first property could be "Equipment type." Other related properties could be "Price," "Price Range," "Features," and "Availability."

4 Click **New**. The Add Value dialog box appears.

5 Now, start defining a range of allowed values for your new property. Enter the first value in the Add Value dialog box. For example, if you were defining values for the computer retail scenario, the first value in your list of values for the Equipment type property could be "Laptops." Others could be servers and PCs.

6 Click **OK.**

7 Repeat until all allowed values are defined. Use the up and down triangular arrows to order values within the list.



Tip
Each value must be unique within your list. An empty string value is permissible.

Modifying or deleting existing custom properties

To modify the custom properties currently assigned to your template:

1 From the Properties dialog box, click the **Custom** tab.
2 Select a property definition from the list displayed.
3 Click **Modify** or **Delete** as required.
   - If you clicked **Delete** the custom property disappears automatically from the list of values**.**
   - If you clicked **Modify,** proceed to step 4.
4 From the Edit Custom Property dialog box, modify your custom property.
5 Click **OK**.

Note
When deleting a property on a template in use, you will receive a warning message. If a posting or page is based on a template, and a custom property associated with the template is deleted, then the deleted custom property will not be reflected in that posting or page.

Tip
If you are creating the same properties in multiple templates, we recommend creating them in the first template and then copying and pasting the template. This enforces consistent names and allowed values for custom properties, which is a requirement for searching.

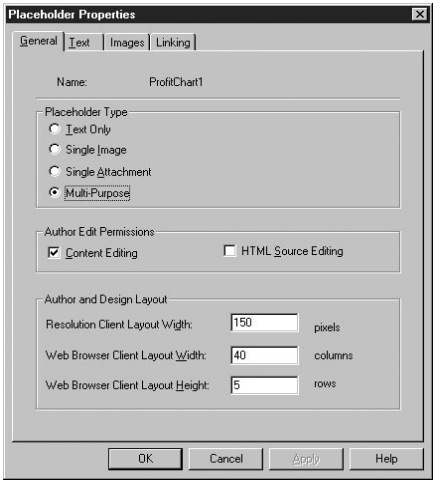
Setting placeholder properties

Each placeholder on a page template has properties you can set that determine:

- whether the placeholder accepts text, images, attachments (including videos), or hyperlinks
- the number of images and attachments the placeholder accepts (you can specify none or one or more)
- to what extent placeholder content is editable by authors
- the placeholder's size during authoring.

To define placeholder properties do the following procedure:

1 Open the page template in the Template Design window.
2 Right-click a placeholder, and select **Placeholder Properties**. The Placeholder Properties dialog box opens.



Placeholder Properties dialog box

Only template designers can set placeholder properties.

Note

If you change a placeholder's properties to accept one type of content only, previously added content remains in the placeholder on published pages using that template. For example, if you change the placeholder's properties to accept text only, but a page already using that template has an image in the placeholder, the image stays. The image is automatically removed if you edit the page in the Web Author. When a page is in Edit mode, the Web Author automatically removes illegal content from its placeholders. Always run a Dependant Report before making changes to an Approved template, to see if any pages are using it. See Chapter 6, "Making Templates Available to Authors" for information on Dependant Reports.

Cancelling modifications to placeholder properties

When selections are made in the Placeholder Properties dialog box, switching to one of the other tabs will commit the changes made on the previous tab. Selecting Cancel will not undo the changes made to properties on the tab after switching to another tab.

Attachments

If a template designer sets the properties of a placeholder to allow attachments and later removes that permission, in some cases attachments will not be removed from pages that use that template when the page is edited. For example, attachments will not be removed from placeholders that no longer allow attachments, but allow hyperlinks. This is because both attachments and hyperlinks use the `<A HREF>` tag.

Naming the placeholder

Placeholder names can be changed by editing the template's HTML (see Chapter 7. "Editing a Template").

Note
Renaming a placeholder in a template in use (that is, it has some default content) causes the content to be lost.

Setting permissions on the General tab

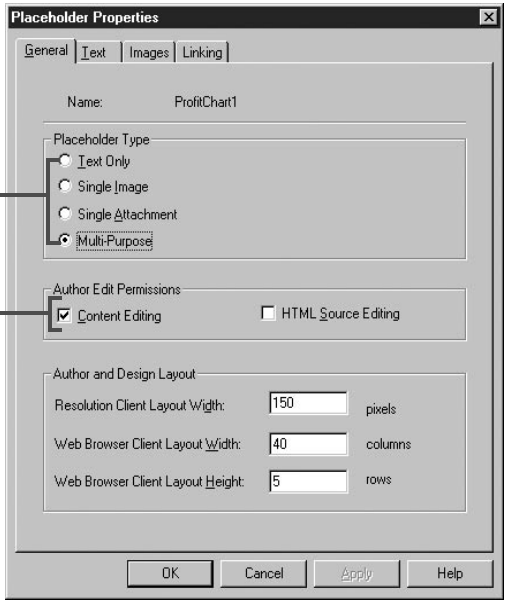
Options on the General tab determine:

- the type of content the placeholder accepts
- editing rights for authors
- placeholder's size.

Once you have set what type of content the placeholder accepts, you can select options on the Text, Images, and Linking tabs to specify how content is to be handled. A placeholder accepts text and allows editing permissions to authors, by default. You must change the Placeholder Type options before the placeholder can accept images or attachments.

Select a Placeholder Type option to set what content the placeholder accepts. "Text Only" is the default setting.

Allows authors to add content (as specified in the Placeholder Type area). By default this option is switched on when the page template is created.



The General tab on the Placeholder Properties dialog box

Setting the type of content

Note that the Placeholder Type options apply to all users, even template designers. Hyperlinks can be allowed for both Text Only and Single Image types.

- **Text Only:** accepts text, either typed or pasted. No images or attachments allowed.
- **Single Image:** accepts one image. No text or attachments allowed.
- **Single Attachment:** accepts one attachment. No text or images allowed. The option to allow hyperlinks (on the Linking tab) is not available.
- **Multi-Purpose:** accepts all content types: text, multiple images, attachments, and hyperlinks.

In the Linking tab under Attachment Defaults, if a template designer selects the Represent Attachments as Text option, authors will be able to add attachments to the placeholder, but won't be able to edit the text that represents the attachment. For example, if an author browses to a .img file and inserts it as an attachment in the placeholder. The attachment will be represented by the .img file name and the author won't be able to change that text.

Setting permissions for authors

Use the options in the Author Edit Permissions area to determine whether authors can add and edit content.

- **Content Editing:** authors can add and edit the type of content specified by the Placeholder Type option. This option must be selected if you also want authors to add hyperlinks or attachments to the placeholder.
  Not allowing authors to edit the placeholder's content can be another way to create read-only content. Content such as a company logo, or a permanent title for a page template is often used as fixed content.
- **HTML Source Editing:** authors can use the Site Builder's Authoring window's HTML Source Code Edit tool to edit HTML tags to a placeholder's content.

Setting the size of the placeholder

Options in the Author and Design Layout area determine the size of the placeholder in the Site Builder and Web Author.

- **Site Builder Layout Width:** sets the width, in pixels, of the placeholder in the Site Builder's Authoring window. This does not affect the placeholder's width in a Web browser.



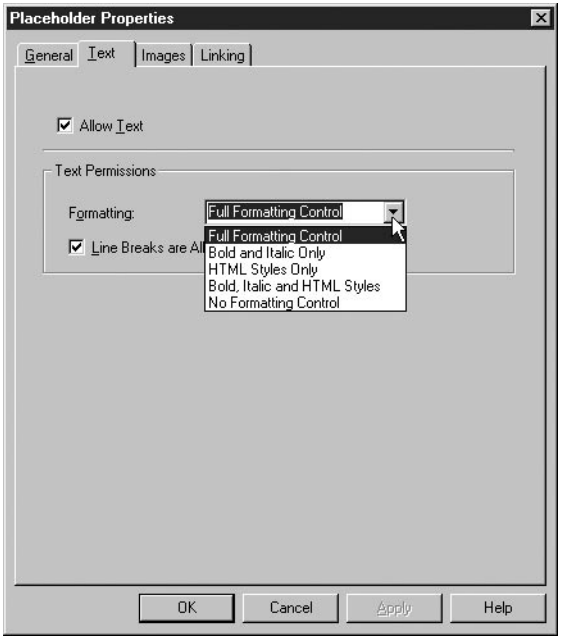
Note
The height of a placeholder in the Site Builder adjusts automatically to its content.

- **Web Author Layout Width:** sets the width in characters, not pixels, of the placeholder during authoring only. This does not affect the placeholder's width on published pages. (Character width is the unit of size for rows and columns of the TEXTAREA HTML element that Content Management Server 2001 uses to represent the placeholder in the Web Author.)

- **Web Author Layout Height:** sets the height in characters, not pixels, of the placeholder during authoring only. This does not affect the placeholder's height on published pages.

Setting the text permissions

Options on the Text tab determine how authors can format text. Note that the placeholder's general permissions (General tab) must be set to "Text Only" or "Multi-Purpose" type and "Content Editing" must be checked.



Text tab on the Placeholder Properties dialog box

Enabling the placeholder to allow text

- **Allow Text:** authors can insert text in the placeholder. This option is checked by default, and must remain so to select the text formatting options.
- **Line Breaks are Allowed:** this option is available when the placeholder type has been set to Text Only (General tab). When disabled, the placeholder's vertical scroll bars will not appear, and the visibility of text that authors add to the placeholder will depend on the width set on the General tab.

Note
To ensure that authors do not add HTML styles to a single-line text placeholder (doing so can cause line breaks), select a formatting option that does not allow HTML styles to be added to the placeholder. See the next section, "Setting the text formatting options," for details.

Authors can get around the single-line restrictions by using styles. If they really want to ensure that no linefeeds can be entered, even using methods like this, they can turn off all text formatting or at least HTML styles. For most single-line placeholders, this is the recommended course of action.

Setting the text formatting options

- **Full Formatting Control:** authors can change the font size and color, and format it to their liking, and apply HTML styles and bold and italic effects.
  Note that for an author to paste a document that contains text, images or attachments, the Placeholder Type option (General tab) must be set to "Multi-Purpose."
- **Bold and Italic Only:** authors can apply bold and italic, but can't change the font or apply other formatting.
- **HTML Styles Only:** authors can apply HTML styles. (Authors apply HTML styles from the Authoring window's HTML styles drop-down list.)
- **Bold, Italic, and HTML Styles:** authors can use the Authoring window's Bold and Italic formatting options, and also apply HTML styles.
- **No Formatting Control:** authors can add and delete text, but can use the font and formatting style chosen by the template designer only. Pasted text will be reformatted to plain text.

The maximum amount of text allowed in one placeholder is 750 KB. This includes all characters used for HTML formatting so if there are many formatting tags, and tables for example, the actual limit that is visible is lower.

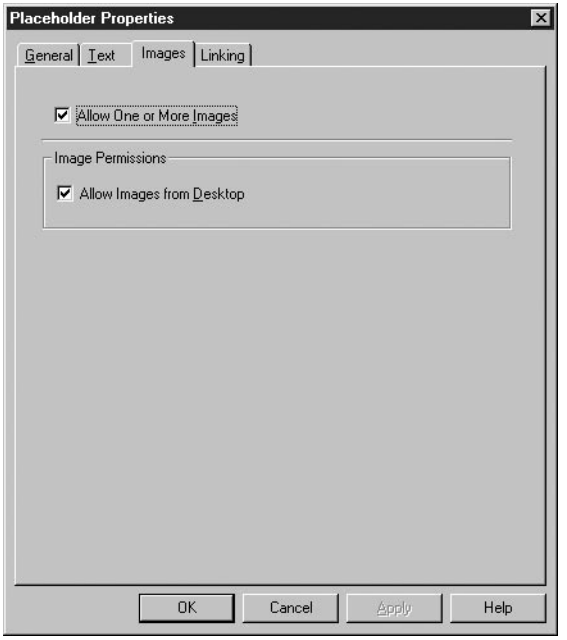
Note
A placeholder's vertical scroll bars, which appear in the Page Template Designer window, disappear in a Web browser.

Tip
Permissions only apply to editing text within the placeholder itself. If you copy from a rich-text application, these restrictions are not necessarily applied. The formatting will be stripped out upon saving.

Tip
Microsoft Word 2000 style sheets are not copied over when users paste text into a placeholder. The workaround is to set the template to use the same styles as those used in the Word 2000 document.

Setting the Images permissions

Options on the Images tab determine how many images that authors can add, and from where images can be added (user's Windows desktop or a Content Management Server 2001 resource gallery). Note that you must first set the placeholder's General permissions on the General tab to Single Image or Multi-purpose and Content Editing must be checked to allow authors to add content.



Images tab on the Placeholder Properties dialog box

- **Allow One or More Images:** authors can add one or more images to the placeholder. If an author adds more than one image, the images are positioned side-by-side, provided the placeholder's width (on the General tab) has been set wide enough to fit them. If the placeholder is not wide enough, the placeholder's height auto-adjusts, and the images are positioned vertically one above the other. How the images are positioned in the placeholder during authoring is how they will appear on the published page.

Note
Authors cannot copy and paste items from their desktop into a single-image placeholder.

- **Allow Images from Desktop:** authors can drag an image from their Windows desktop into the placeholder. If this option is not selected (button is cleared), authors can insert images from Content Management Server 2001 resource galleries only.

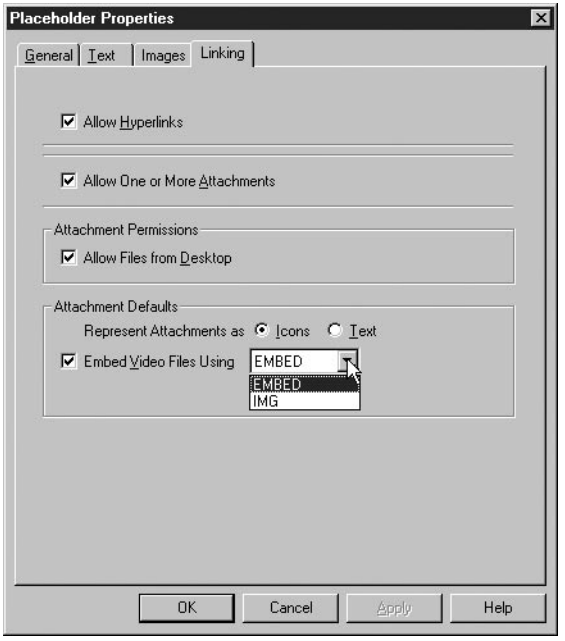
While this option gives authors added flexibility when creating a page, there are a few things you should know about local-source images:

- resource managers cannot manage local-source images, because images dragged from an author's desktop are not stored in the Resource Gallery
- the address for local-source images will be longer than that of an image stored in the Content Management Server 2001 Resource Gallery
- if a page that uses the local-source image is deleted, the local-source image is permanently removed from the database during background clean-up.

The placeholder accepts the following image formats, if images are permitted: gif, jpg, jpeg, and png.

Setting the Linking permissions

Options on the Linking tab allow authors to insert hyperlinks and attachments in the placeholder.



Linking tab on the Placeholder Properties dialog box

- **Allow Hyperlinks:** authors can click the Authoring window's Hyperlink button to add a link from text or images to a document on the network or their local drive, to a URL, an internal link within the page, or to a channel or posting. All hyperlinked items attached to an image

are copied to the database. Content Management Server 2001 supports hyperlinks to the following URL protocols:

- HTTP
- HTTPS
- FTP
- mailto
- gopher
- news
- about
- file

Note
To enable hyperlinks, the "Content Editing" option (General tab) must be enabled.

- **Allow One or More Attachments:** authors can attach a file from an outside application, such as Microsoft Word. All attachments are copied to the database. Note that if this option is enabled, authors can still attach or insert images, but they will show as attachments.
- **Allow Files from Desktop:** authors can attach files that are on the network or their local machine. Leave this option unselected to allow authors to attach files located in the Resource Gallery only.
- **Represent Attachments as Icons or Text:** attachments added to the placeholder are represented by their program icon and name, or by their name only.

Note
If attachments were previously allowed to be represented as icons, and the placeholder allows images, any attachments that have been added to the placeholder will remain represented as icons. In such cases, we recommend representing attachments as text.

- **Embed Video Files Using:** video files inserted into the placeholder will play within the placeholder, rather than link to an outside application such as Windows Media Player.

Note
Videos are a type of attachment and are handled as any other type of attachment by default, unless they are embedded.

Click **Preview** on the Authoring window toolbar to see how video files will appear and play in a browser. Note that by default, Content Management Server 2001 will resize videos to 175 by 150 (pixels) once inserted in a placeholder. Authors can resize the video.

! Caution
The embedding feature is provided for backward compatibility but we strongly recommend that authors not be allowed to embed a video. Be aware that embedding a video degrades page downloading time, depending on the size of the video. As well, embedding videos causes problems when Content Management Server 2001 templates and pages are edited.

We do recommend restricting the placeholder's properties so video files can be added as attachments only. If you do enable the Embed Video option, authors must be aware of different conditions with respect to movie plug-ins. To let authors add videos to a placeholder, make the placeholder wide enough to allow a margin around the video. Authors need this margin to click on it to select the video.

Click the drop-down list to select a tag that is compatible with the users' browsers. You can choose between EMBED or IMG.

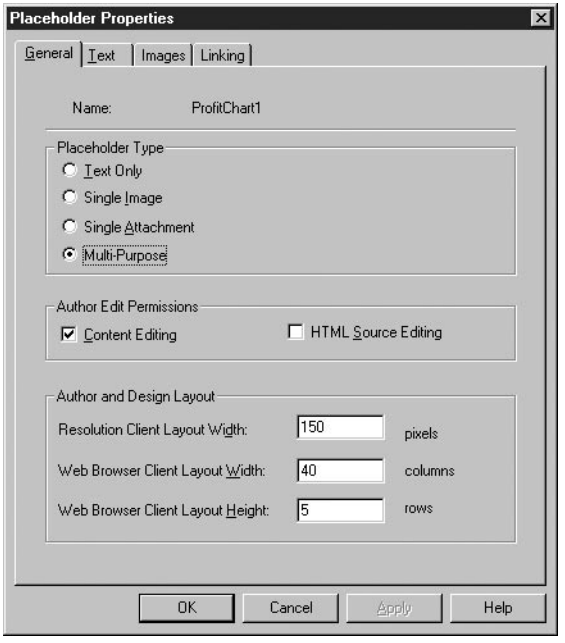
! Caution
Avoid creating placeholders that use EMBED and IMG tags in the same template. Internet Explorer supports both EMBED and IMG tags. The EMBED option should be used if you're inserting ASX files into the placeholder. Netscape 4.0 and higher supports EMBED only.

Single attachment placeholders have one extra property on this tab—**Only Allow Video Files in Placeholder**. At the EMBED-IMG drop-down list, this check box is available only if the template designer allowed embedded videos. If the check box is checked, the placeholder will contain a single embedded video file and nothing else.

Creating links from content in placeholders

Creating a link

1 With a template open in the Template Design window, right-click a placeholder, then select **Placeholder Properties**. The Placeholder Properties dialog box opens.



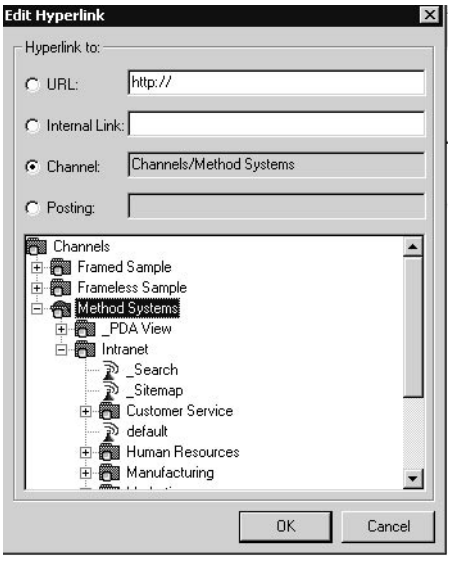
The General tab on the Placeholder Properties dialog box

2 Ensure the "Content Editing" option on the General tab is enabled. If you do not want authors to change the placeholder's properties, you can clear this option after creating the link.

Note
Links cannot be added to placeholders set to permit Single Attachment only.

3 Ensure the "Allow Hyperlinks" option on the Linking tab is selected. Click **OK**. The Placeholder Properties dialog box closes.

4 In the placeholder, select the text or image to be linked, then click the **Edit Hyperlink** icon on the window's Formatting toolbar. The Edit Hyperlink dialog opens.



Edit Hyperlink dialog box

5 To link to:

- A URL, select the **URL** option and enter the required information in the URL box.
- An internal link (an anchor within the same placeholder, or to another placeholder within the same page), select the **Internal Link** option and enter the internal link name.
- A channel, select the **Channel** option, expand the channels hierarchy in the dialog box, and click the channel you want to link to. Click **OK**.
- A posting, select the **Posting** option, expand the channels hierarchy in the dialog box, and click the posting you want to link to. Click **OK**.

If you link to a URL, you must use a full path that starts with one of the following:

- http://
- https://
- ftp://
- /
- news:
- about:
- mailto:
- gopher
- file://

Note
If authors will need to add links to text in a placeholder, we recommend setting that placeholder's properties to be editable. If an author creates a link to a posting, and that posting is later changed or deleted, the link will be broken. Setting the placeholder property to be editable allows authors to edit the link.

Changing a link

With a template open in the Template Design window, right-click the link you want to change and select **Edit Hyperlink**. If the selection is not available, select **Properties**, enable "Content Editing", click **OK,** and start again. The Edit Hyperlink dialog box opens. (If necessary, clear the "Content Editing" option after you change the link.)

Removing a link

With a template open in the Template Design window, right-click the link you want to remove and select **Remove Hyperlink**. If the selection is not available, select **Properties**, enable "Content Editing," click **OK**, and start again. (If necessary, clear the "Content Editing" option after you remove the link.)

Disabling hyperlinks in placeholders

Template designers can disable the "Add Hyperlinks" property for a placeholder, so that authors will not add hyperlinks in the placeholder using the **Insert > Hyperlink** menu commands. Authors can, however, type URLs directly into the placeholder, and they will function as hyperlinks. Because the "Add Hyperlinks" property is disabled, hyperlinks entered in this way cannot be modified using the "Edit Hyperlink" command. Pasting content into a placeholder is not permitted and the content will not be saved.

Copying hyperlinked images

When using Site Builder, if a user copies an image that contains a hyperlink from Internet Explorer, the hyperlink is not copied into the placeholder. This is not an issue if you have Internet Explorer 5.5 and above installed.

Chapter 5

Creating Templates for Multi-Page Authoring

Overview

This chapter describes the concepts behind publishing multiple postings from a single source page and describes how to:

- customize the look and feel of your intranet
- control content sharing between pages.

About content connected pages in MSCMS 2001

Pages with multiple views are described as "connected" and can be created and edited in both the Site Builder and the Web Author.

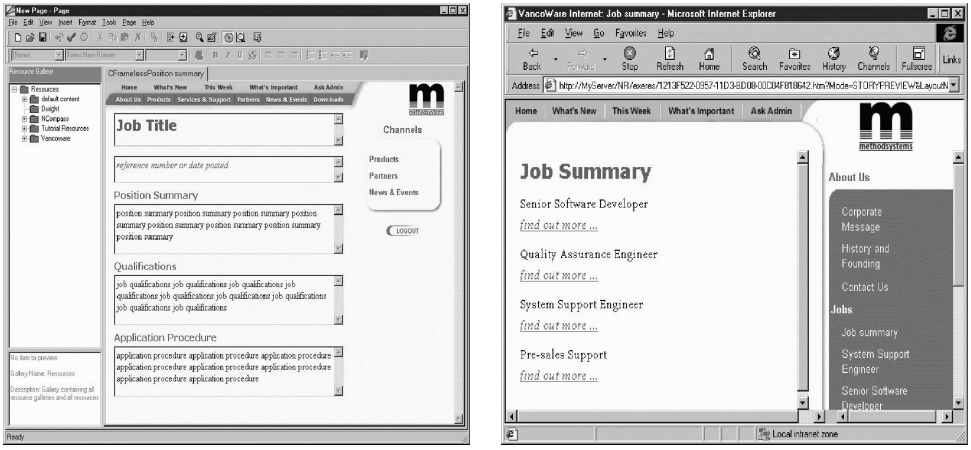
Understanding page template families

To make full use of the power and flexibility of Content Management Server 2001 publishing and content management, you should create templates in "families." Template families are groups of templates that share characteristics, either in the way they look and feel, or in the type of content they contain.

Template families can share one or more of the following characteristics:

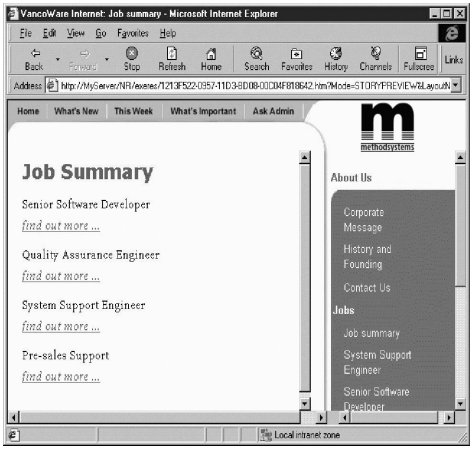
- navigation (framed or frameless)
- look and feel
- information-type.

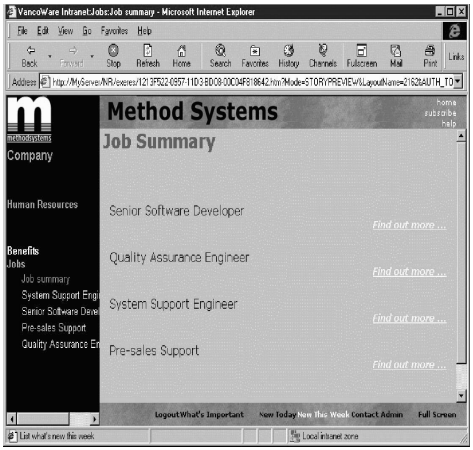
Example: framed and frameless template family



A template family can contain frameless and framed versions of a template. This page template uses the same placeholders, but one is for a frameless Web site, while the other is for a framed site.

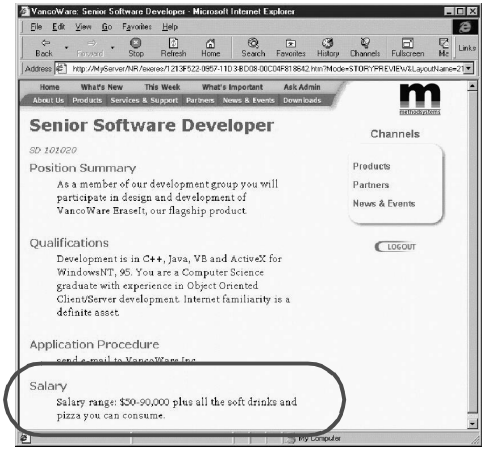
Example: look and feel template family





Different look and feel template types. In this example, two framed page templates with different appearances share the same content.

Example: information-type template family





Information-type families will share common content through common placeholders. In this example, the internal version of the job posting includes salary information that is not present on the public version.

Information-type template families

This chapter is principally concerned with the third type of template family—"information-type." Information-type template families present different degrees of information to a variety of audiences. They do this through selective sharing of content in identically-named placeholders. The parent template in an information-type family contains the complete set of placeholders for that family; each child template contains a subset of those placeholders. Child templates are created by removing placeholders from a copy of the parent.

An example of an information-type template family

To publish different but related versions of a sales report for different audiences, you would design an information-type template family. Start by creating the parent template, then create a child template by making copies of the parent template. This ensures content sharing, because the placeholders in the child template will be identical to those in the parent. Finally, to control what content the child shares with the parent, selectively remove placeholders from the child.

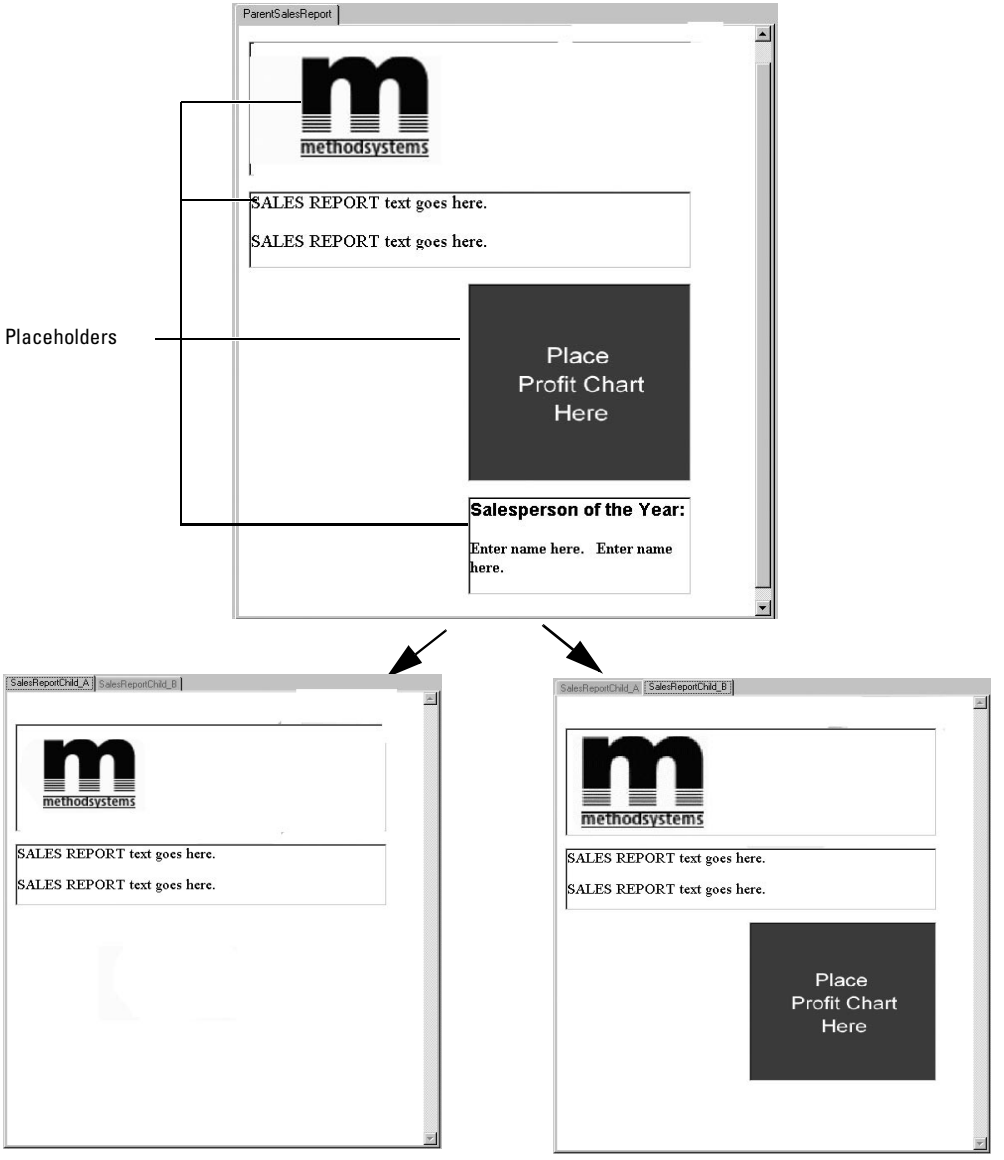
For example, to publish two versions of a sales report, one for shareholders and one for all employees, you would begin by creating a parent template, consisting of all placeholders needed to display:

- the company logo
- text for annual report
- a profit chart
- the name of the Salesperson of the Year.

To create the child template for pages that shareholders will read, you'd make a copy of the parent template, and give it a unique name. You would then remove the placeholder for the Salesperson of the Year from the child template. To create the template for all employees, you would create a copy of the parent template, give it a unique name, and remove the placeholder for the profit chart.



Tip
You can also make copies of child templates, in order to expand the template family.



Child template "A": is for all employees. Profit chart and Salesperson of the Year placeholders have been removed.

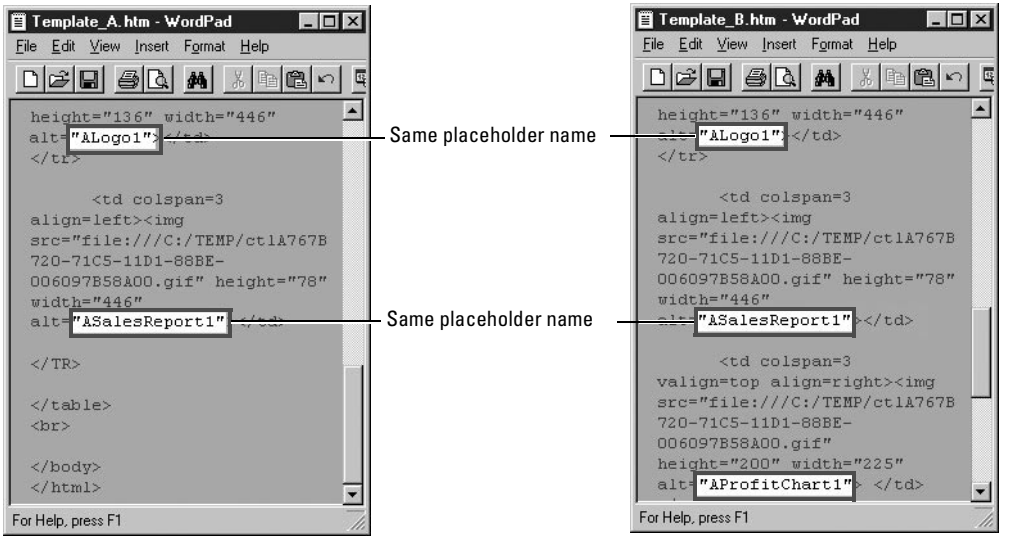
Child template "B": is for shareholders only. Salesperson of the Year placeholder has been removed.

Naming placeholders

Placeholders will share content if they have the same name, and the templates they belong to are used together to create multiple views of a page. This is because placeholders with the same name reference the same content in the database. The fact that page templates belonging to the same family contain some, but not all, of the same-named placeholders allows template designers to control content sharing.

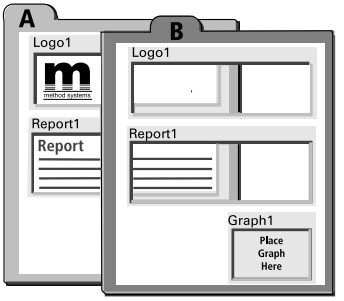
When naming placeholders, remember:

- Each placeholder in a parent must have a unique name.
- To share content, a placeholder in a child template must have the same name as the corresponding placeholder in the parent template.
- Placeholders in page templates outside the family must be given unique names, to prevent automatic sharing of content between different template families.
- Placeholder names are not case-sensitive. A placeholder named “Profit Chart” and a placeholder named “profit chart” will share the same content.

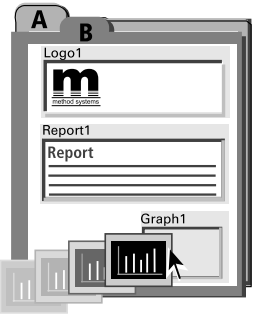


HTML code for two templates that share placeholders. Note the placeholder names in the first two alt tags for each template have the same names.

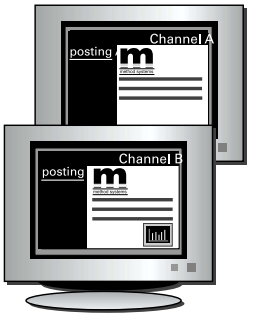
How template families share content



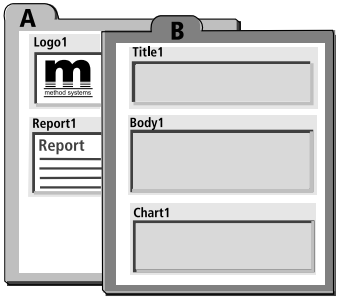
Template family: these templates share the same placeholders. The first placeholder in template A is named "Logo1", and the first placeholder in template B is named "Logo1". Hence, content for "Logo1" appears in both templates.



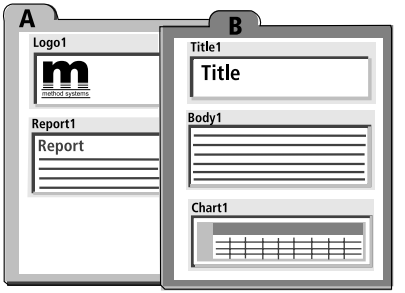
An author can add content to view "B".



Each view can be posted to a different channel.



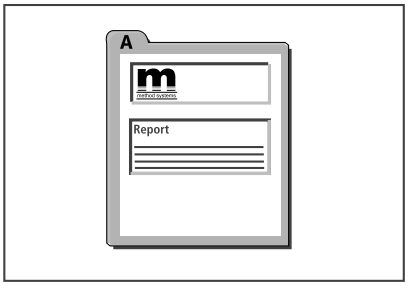
These templates are not from the same family, because they do not share the same placeholders. The first placeholder in template A is named "Logo1", while the first placeholder in template B is named "Title1".



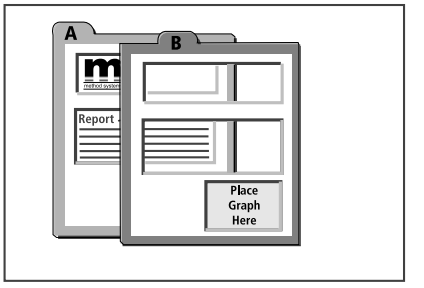
Because the placeholders in these templates do not share the same names, the templates will not share content if an author were to use them together to create two views of a page.

Example of how authors use information-type template families

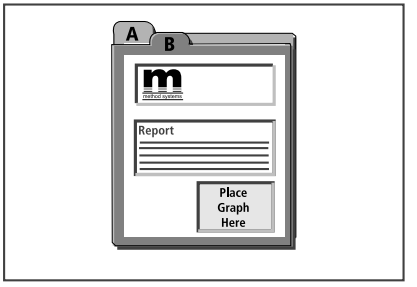
In this example, an author must create a sales report for shareholders, and another for all employees. The author creates a new page, by selecting child template A and inserting the sales report. To create the shareholders' page, the author adds a second view, choosing child template B. The placeholders for View B automatically absorb copies of the logo and sales report, because the placeholders in Views A and B have the same names. The author adds the Profit chart in View B, and has authored two pages for different audiences.



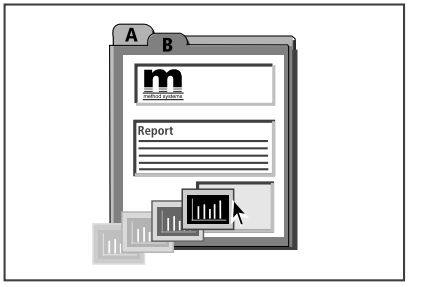
1. Every page is based on at least one template.



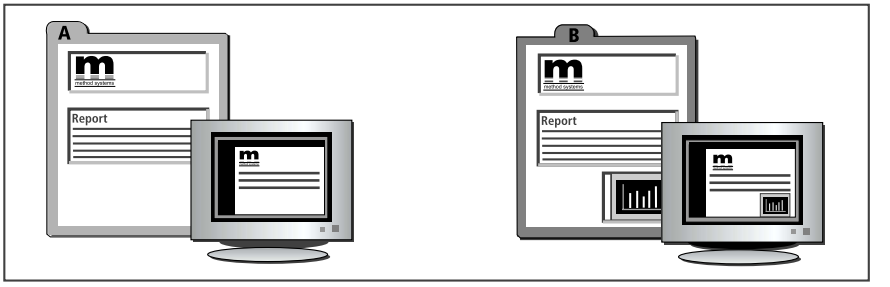
2. The author can create a second view of a page by applying a second template.



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.

Chapter 6

Making Templates Available to Authors

Overview

The templates you create are not available to authors until you approve them for general use. Unlike pages, which must be approved by an editor, templates in Content Management Server 2001 are approved by their page template designer.

Template status

All templates are given a status that indicates whether they are under construction or available for general use by authors.

Template status		Definition
	Saved	A new template that has not been approved and is not yet available for use by authors.
	Approved	A template that has been approved by a template designer. It is immediately available for use by authors.

Edited Templates

If you make changes to an approved template, its status changes to Saved. When you complete the changes, you need to approve the template again. Once approved, the revised version will be available for use by authors.

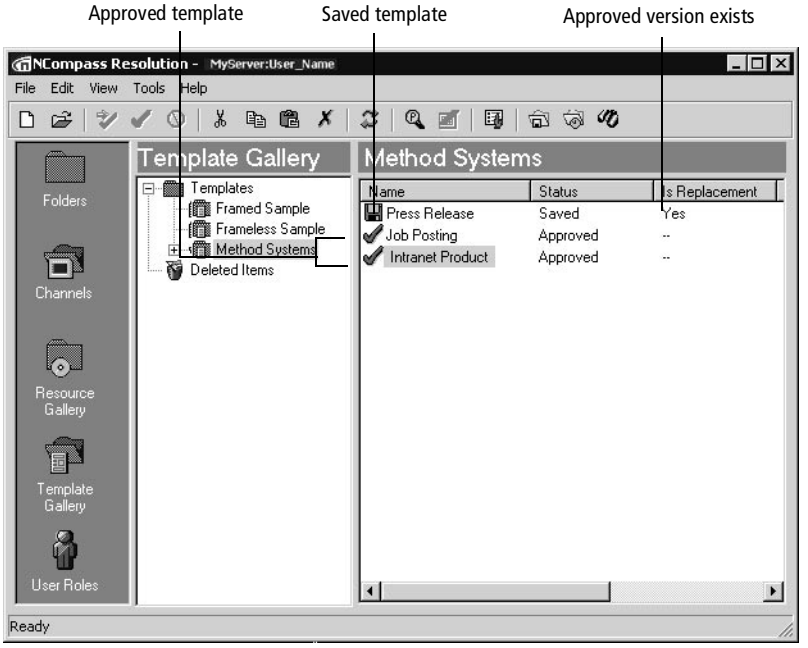
If you decide not to commit the changes you have made to the template, you can undo the changes by using the "Revert to Previous" command. All changes made to the template will be removed, and the Saved template returns to its Approved state.

When a Saved template is approved, postings created when the page was using the approved template switch to the new version.


Note
Changes to a placeholder's properties *do not* affect postings, but changes to a template do.

Checking the status of a template

1 In the Site Builder, display the template gallery hierarchy by selecting the Template Gallery icon.



Template Gallery in the Site Builder window

2 Select the name of a gallery in the hierarchy. A list of templates in the gallery (if any) appears on the right.

The icon beside each template's name and the Status column indicates the template's status.

3 An approved template that has been edited, but not reapproved yet, has a Saved status and a "Yes" in the Is Replacement column. The Approved version remains ready for use by authors, until the Saved version is approved.

Approving page templates

When you approve templates, they are ready for immediate use by authors. Edited templates must be approved before changes made to them take effect.

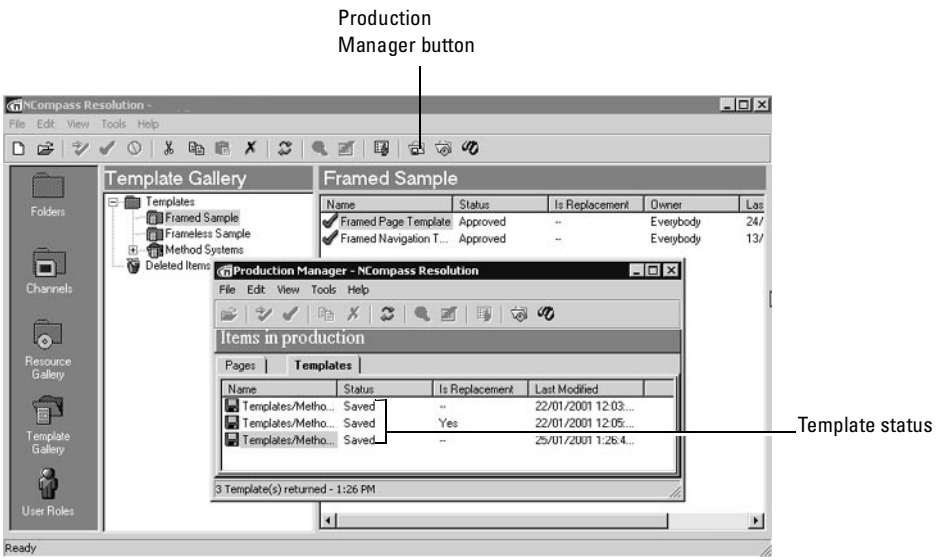
Every time a template is approved a revision is created. Template revisions appear as revisions of a posting's Revision History report.

Using the Production Manager

The Production Manager is an efficient way to see which pages, postings, and templates have not been completed and approved. While it is possible to browse the container hierarchy to find templates you are working on, in most cases it will be easier to use the Production Manager. This is especially true if you are working on many items at one time. The Production Manager creates a list of all page templates whose status is Saved.

Approving a template

1 Click the **Production Manager** button on the toolbar in the Site Builder window (or right-click a template, and select Production Manager). The Production Manager window opens and displays a list of your templates (including those in the Deleted Items container) whose statuses are marked as Saved.

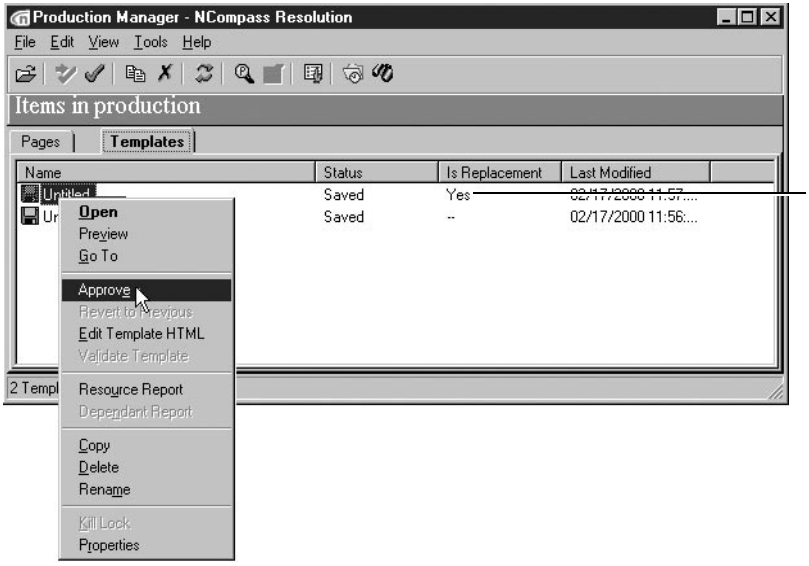


Production Manager window

Tip

The Approval Assistant is next to the Production Manager. The Approval Assistant is used by editors and moderators to search for pages and postings awaiting their approval.

2 To approve a template, right-click its name in the Production Manager window and select **Approve**.

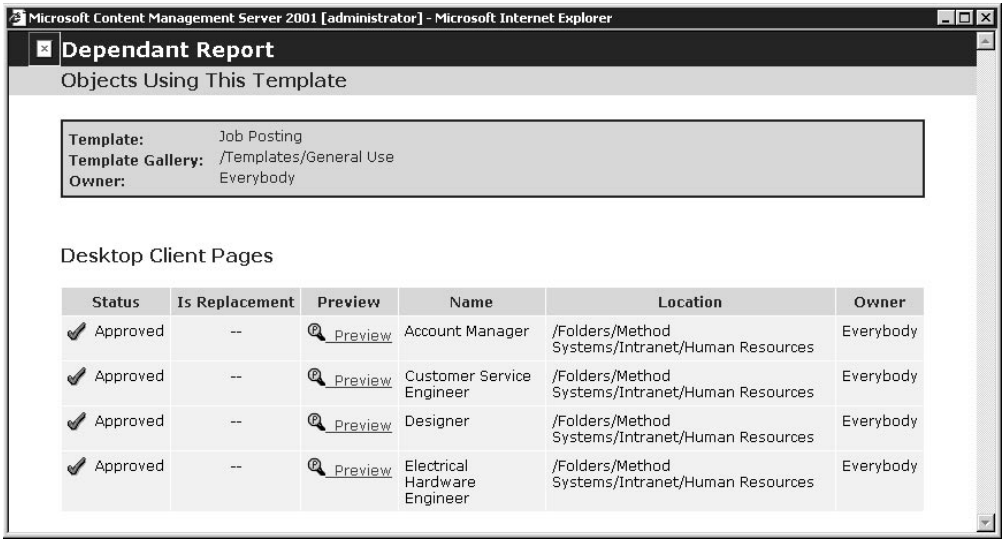


Approving Saved templates from the Production Manager window

3 If the template has not been Approved before, the template is approved, and its status changes to Approved.

4 If the template has been Approved before, the Template Approval Warning dialog box opens, suggesting that you may want to do a dependencies check before you continue, in order to see what pages the changes might affect. To obtain a Dependant Report, click the **Dependant Report** button. Otherwise, click **Approve**.

5 The Dependant Report shows pages and postings (if any) that used the template. Click the **Preview** button beside the name of the dependant item to view it in a Web browser.



Dependant Report for a page template

6 When ready to approve the template, close the Dependant Report and click **Approve** on the Template Approval Warning dialog box. The template's status changes from Saved to Approved.

Tip
See Chapter 7, "Editing a Template" for instructions on viewing the Approved version (if any) of a Saved template.

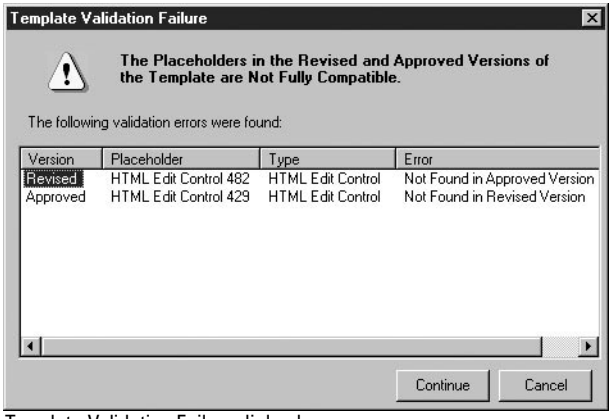
7 Discrepancies between a template's Saved version and Approved version could affect pages and postings that use the Approved version. If Content Management Server 2001 finds discrepancies, the Template Validation Failure dialog box opens. See the next section, "Template Validation Failures."

Tip
You can also use the Find feature to search for Saved (or Approved) templates and approve them. See "Using the MSCMS 2001 Find feature" in this chapter.

Template validation failures

Understanding the implications of the two kinds of validation errors will help you determine whether you want to approve a Saved template or revert it to its last approved version.

Tip
Generally, if a Dependant Report shows there are pages that rely on a template, adding or removing placeholders is not recommended.



Template Validation Failure dialog box

Not Found in Approved Version

If a placeholder is added to the revised version of the template, validation detects that the new placeholder doesn't appear in the template's Approved version. If the revised version is approved, pages and postings created with the old template version switch to the new version, and use the new placeholders.

Content in the new placeholder appears in the template, as well as any postings created with the old version. These postings display default content until they are modified by an author, and resubmitted and approved by an editor and moderator.

Not Found in Revised Version

If a placeholder is removed during revision of the template, validation detects that the old placeholder doesn't appear in the approved version of the template. If the revised version is approved, postings of pages created with the old template version no longer contain the removed placeholder and its content.

Reverting a Saved template to its Approved version

If an edited template has not been reapproved (it is still in its Saved state), you can cancel the edits and revert the template to its former Approved status.

1 If the Template Validation Failure dialog box is open, click **Cancel** to close it.

2 Right-click the template in the Site Builder window, and select **Revert to Previous**. The template's Saved version is removed, and the template reverts to its Approved version.

Approving a template with validation errors

To ignore the validation errors, and approve the template anyway:

3 Click **Continue** on the Template Validation Failure dialog box. The Saved template is approved.

Manually validating a template

A validation check is performed automatically when you approve a template. It determines whether pages created with the approved version of the template will work properly with the revised version. You can also manually validate a Saved template at any time.

Manually validating a template

1 Click the **Production Manager** button on the window toolbar.



The template tab on the Production Manager window displays a list of templates whose statuses are marked as Saved.

2 Right-click the name of a template in the Production Manager window and select **Validate Template**.

3 After doing the validation check, the Template Validation Complete dialog box indicates whether the validation was successful.

4 If not successful, the Template Validation Failure dialog box opens. See the previous section, "Template Validation Failures."

Generating a Dependant Report on a template

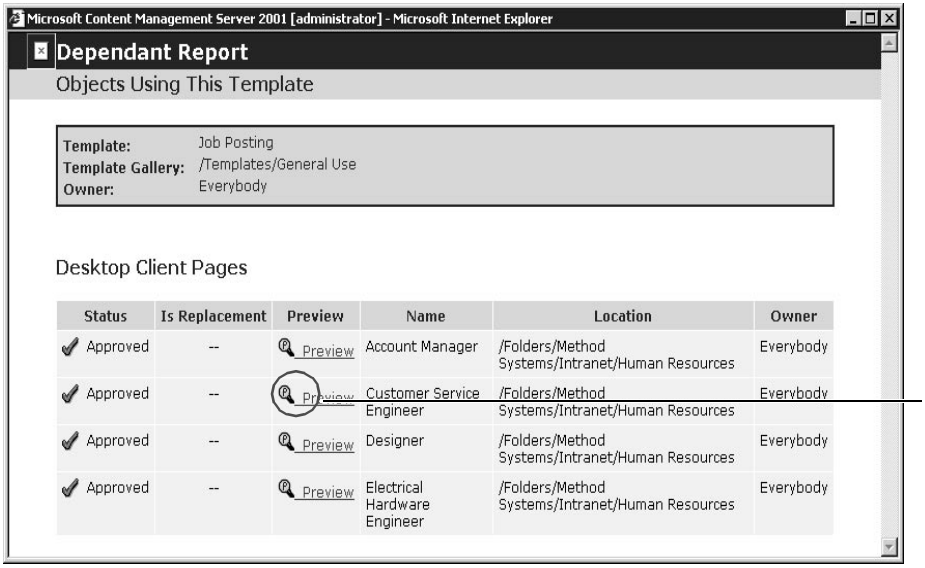
Running a Dependant Report on a template will show whether there are postings of pages that rely on the template. You should generate a Dependant Report before deleting a template, as deleting may affect Content Management Server 2001 postings. Also, when approving a template that was previously available for use by authors, a Dependant Report can show you which existing postings will use the new template version if it is approved.



Note
Content Management Server 2001 will not allow a template to be deleted if postings use that template.

To generate a Dependant Report:

1. Print the Dependant Report from your browser by selecting Print from the browser's File menu.
2. Find the template for which you want to generate the Dependant Report. You can do this in one of several ways: browsing through the template gallery; using the Production Manager; or using the Find feature.
3. Right-click the template name and select **Dependant Report**.
4. The Dependant Report is generated and displayed in your Web browser. Preview dependant items found by clicking the **Preview** button.



A Dependant Report on a template displayed in a Web

Generating Revision Histories

Revisions are posting based. Change to the posting itself are not versioned, but changes to a posting's page, template, or resource gallery items can be viewed as revisions of a posting that uses them.

About Revision Histories

Page Revision Histories now display the following additional information for maintenance and tracking purposes:

- For the latest unapproved page revision (if one exists):
  - date and time the revision was last modified
  - status.
- For approved revisions:
  - date and time the revision was approved
  - name of user who approved the revision.
- For both approved and unapproved revisions, there are options to preview and compare to another revision.

Enabling the versioning feature

This feature is always enabled. There is no user-defined numeric maximum for the length of the revision history as revision histories are versioned
nb by date and time.

About upgrades

Page archives become revisions of any postings that use those pages. Revisions that were upgraded will use the template revisions that were approved at the time when the application was upgraded.

About site deployment and versioning

A posting's revision history can reflect changes to its dependants. If a page containing two resource gallery items is deployed and during deployment the page and its template and the two resources are replaced, then any posting that uses this page will have four new revisions in its revision history: one for the page replacement, one for the template and two for the resources. Revision histories cannot be exported.

For more information on site deployment issues, see Chapter 7, "Using the Site MSCMS 2001 Site Deployment Manager" in the *MSCMS 2001 Site Administrator's Guide.*

Previewing revisions using the Site Builder

To view a revision of a page, you must have rights to preview the revision and have authoring rights somewhere in the site.

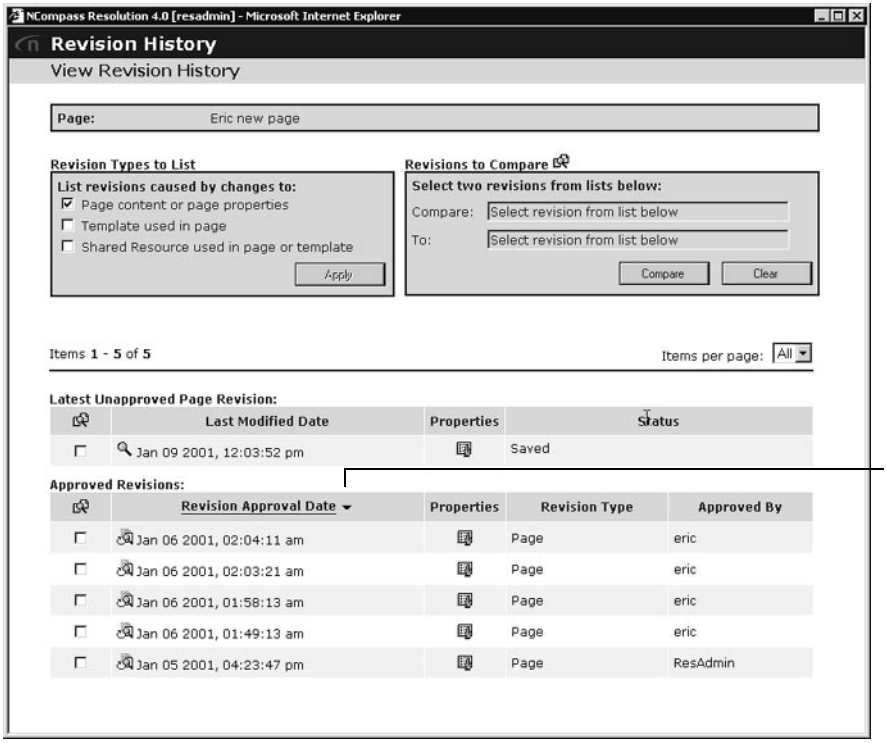
1 With the channel hierarchy displayed, select the posting to be viewed.

2 From the **Tools Menu**, select **Revision History** or right-click on the posting and choose **Revision History**. The Revision History window appears.

3 Using the check boxes displayed, select the revision types you want to list.

4 Click **Apply.**

5 From the list displayed, click the preview link corresponding to the revision to be viewed. It opens in a new window.



Site Builder's Revision History window

Note

The Revision Type column indicates the cause of the revision. For example, all the revisions listed were caused by changes to page content or page properties.

Creating and working with revisions

For both the Web Author and Site Builder, a posting displays a revision when first published only if created *before* the associated page is approved. In the Web Author, the posting and page are created such that the posting is always created before its associated page is approved. A newly published revision created and approved in the Web Author always has one revision in its revision history. By contrast, in the Site Builder, it is possible to create a posting from a page that has already been approved. In that case, the posting will not have a revision in its revision history when it is first published.

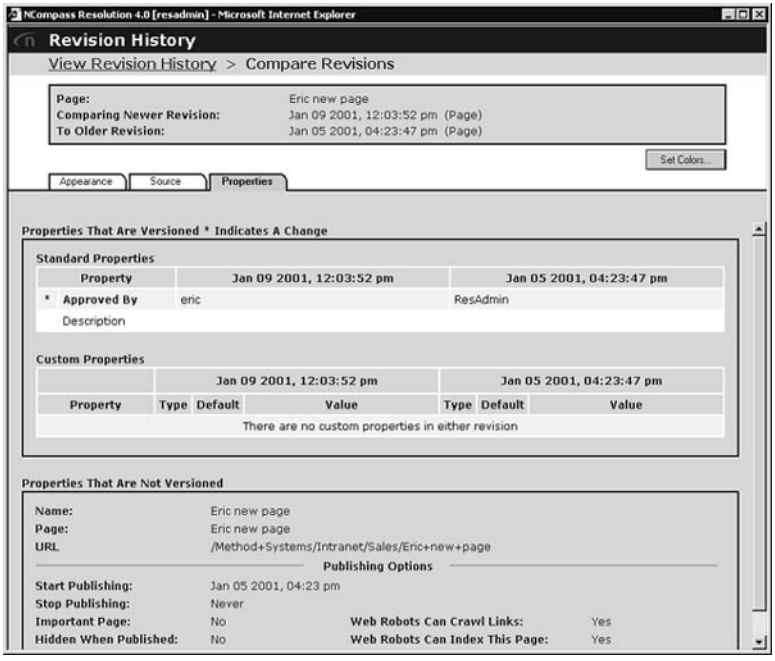
A copy operation is the same as creating a new object in the versioning sense. Creating a copy of a template, for example, does not create a revision of the original template. Further, if a template with revisions is copied, those revisions do not get copied.

Comparing revisions

Changes to a page, template, or resource can not be compared directly, but must be viewed in the context of an associated posting that uses them.

1 From the Revision History window, select the revision types to be displayed. Click **Apply.**

2 From the revision list displayed, select any two revisions and click **Compare**. Click the tabs to compare the appearance, source code, or properties of the two revisions.



Comparing revision properties in the Site Builder

About revision tracking

Changes are shown in a different color or with strikethroughs. The "Source" option compares the HTML code. The "Property" option compares text-based properties such as the person who approved the revision and custom properties.

If you were to click the Appearance tab and compare two revisions of a posting in the Method Systems Marketing channel called "Next Gen Computers," the revision tracking would resemble the following:



Tracking revisions on the NextGen Computers posting in the Method Systems Marketing channel

Viewing revisions by date

To select the date and time for viewing posting revisions, you must have authoring rights for the site. You will be allowed to see those postings for which you have at least subscriber rights from within the Site Builder.

With the View Revisions by Date option, in the Site Builder, you can preview a posting at a point in the past. The revision history of a template or resource report cannot be viewed directly, but must be viewed as part of a posting revision history.

1 With the channel hierarchy displayed, select the posting to be viewed.

2 From the **Tools Menu**, select **View Revisions by Date** or right-click on the posting and choose **View Revisions by Date**.

3 Select a date and time for the preview from the drop-down list.

4 Click **Preview.**

When viewing a revision history or viewing revisions by date, the revisions may not appear exactly as they did when created. For example:

- postings that have been moved appear in their current location
- non-versioned properties, such as Owner and Name, contain their current values
- current rights are applied to all items
- anything that has been deleted or purged is not visible.

Purging revisions by timestamp

From within the Site Builder (and only the Site Builder) administrators can permanently delete all object revisions that were archived before a specific time. The application purges all revisions in the site that are older than the date and time specified.

1 From the **Tools Menu,** select **Purge Revisions.** The Purge Revision dialog box appears.

2 Using the calendar's drop-down lists, select the month, date, and time corresponding to the revisions you want to purge.

3 Click **Purge.** A confirmation message appears.

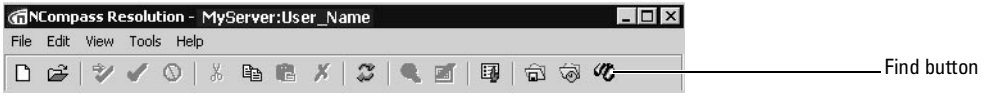
4 Click **Yes.** All revisions before the date you specified are now purged.

Notes

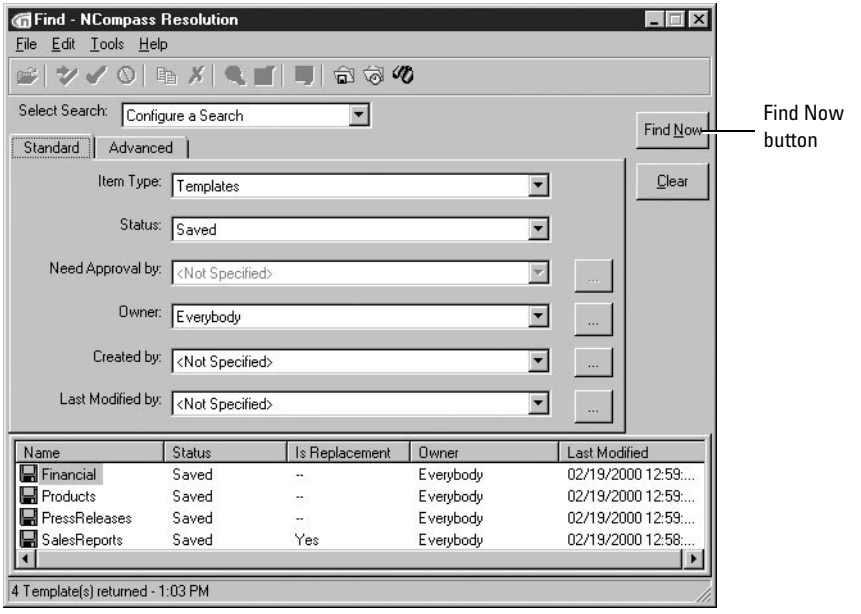
- The default value for the date is three months before the current date.
- Purging revisions permanently deletes all revisions made before the selected date and time. To maintain a copy of the revisions, back up the database before purging.
- It is not possible to purge revisions in only a part of the site.

Using the MSCMS 2001 Find feature

To configure the Find feature to search for templates, do the following.



1 Click **Find** on the toolbar of the Site Builder window. The Find window opens. Select the Standard tab on the Find window.



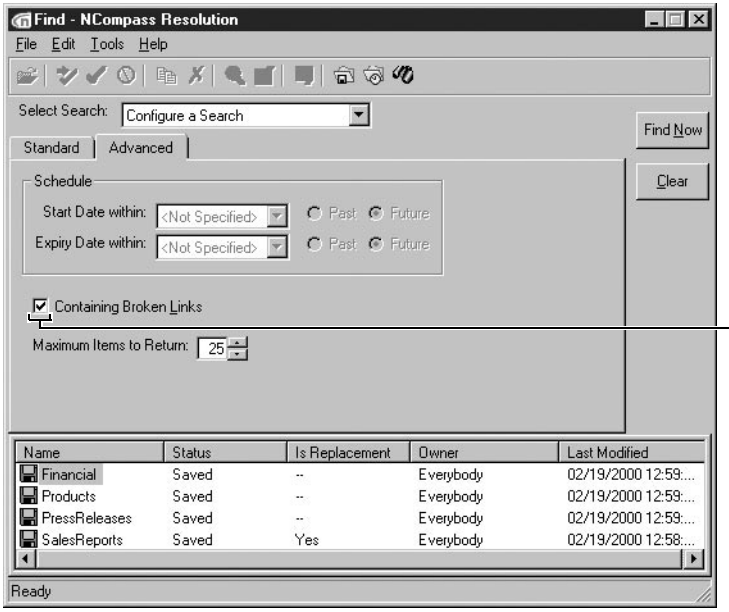
Find window

2 Click the **Item Type** drop-down list, and select **Templates**.

3 If you have used Find before, click the **Owner** drop-down list and select your name. If this is the first time you have used the Find feature, click the **browse** button beside the Owner drop-down list. The Select User dialog box opens. On the Select User window, choose the appropriate domain, and select your name from the list of domain users. Click **OK**. For subsequent searches, your name will appear in the Owner drop-down list.

4 On the Find window, click **Find Now**. A frame opens at the bottom of the window, listing all items matching your search. For example, the search described in the preceding steps will return all page templates and navigation templates that you own. Any templates in the Deleted Items folder matching the search criteria also will be returned

5 To search for templates that contain broken links, select the Advanced tab.



Site Builder's Find window

6 Click the Containing Broken Links option to enable it, and click **Find**.

Setting publishing options for channels and postings

Administrators can easily customize channel and posting display options using the Site Builder. Any user that has rights to set posting properties can set these values. From the Properties dialog box, administrators can:

- specify display text for multilingual navigation links
- mark a channel or posting as important
- hide Web pages at run time
- allow Web robot access and heighten search capabilities.

Enabling multilingual navigation display

Content Management Server 2001 supports the use of the DisplayName property for postings, channels, and resources to display multilingual navigation links in the Web Author. The Display Name field has a maximum length of 250 characters and is on the **General** tab of the Properties dialog box. For complete details on how to design a template for multilingual authoring, see "Designing templates to support multilingual authoring" in Chapter 2, "Creating a Template."

Viewing channels or postings marked as hidden or important

New channel icons indicate whether a channel has been marked as "Hidden" or "Important." Similarly, an "Important" column in the posting list frame replaces the "Priority" column of earlier releases. Right-click a channel or a posting to access the Properties dialog box and view these status indicators.

Allowing Web robot access

With Content Management Server 2001 you can automatically enable Web robot behavior without scripting. By selecting check boxes on the Publishing tab of the channel or posting dialog box you can specify the following:

- whether a channel or a posting should be indexed by Web robots
- whether hyperlinks in a channel or a posting should be followed by Web robots.



Note
Not available on Frameless channels.

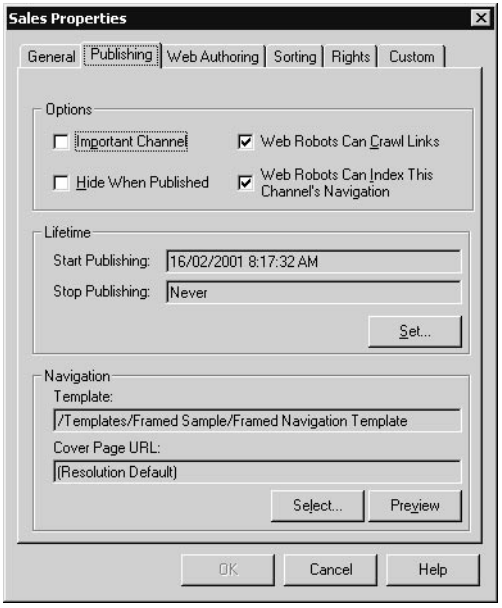
To allow Web robot access from the Site Builder:

1 Access the Properties dialog box by one of the following methods:
   - Right-click a channel or posting and select **Properties**
   - Select a channel or posting and click the **Properties** button
   - Select a channel or posting and then choose **File > Properties**.

2 Click the **Publishing** tab.

3 Select the appropriate check box.

4 Click **OK**.



Publishing tab on the Site Builder's Channel or Posting Properties dialog box

The Hidden flag

If a channel or posting has been marked as hidden by checking the Hide When Published check box, this means the channel or posting is hidden from the navigation in the Web Author. This does not mean that your ability to access the given channel or posting is restricted in published mode.

For example, an author can create a hyperlink to the hidden posting from another posting or channel, and, by following this hyperlink, the posting or channel can be accessed. Similarly, if a site user knows the URL of the hidden item and they have rights to view it, they can navigate to it.

The hidden flag should not be used to prevent users from viewing a channel or posting. If you do need to prevent users from viewing, then alter their user rights.

Chapter 7

Editing a Template

Overview

This chapter describes the tools used to edit page templates.

Two types of template editing

- Using an HTML editor, you can edit any HTML aspect of the template (for example, anything other than placeholder properties and their content) and add fixed resources.

  ! Caution
  When renaming or deleting a placeholder in an HTML editor, any content added to a placeholder before its renaming will not be automatically added to the renamed or deleted placeholder. As a result, pages using that placeholder may need to be edited and resubmitted.

- Using the Template Design window, you can edit the properties of placeholders, edit content in those placeholders, and edit the template's description. Chapter 3, "Adding Default Content" and Chapter 4, "Setting Properties and Creating Links" explain how to edit templates in the Template Design window and set their placeholder properties.

Editing a template's non-placeholder HTML

To add a placeholder to an existing template, or to change the template's non-placeholder HTML, edit the template in an HTML editor with the template Design Palette.

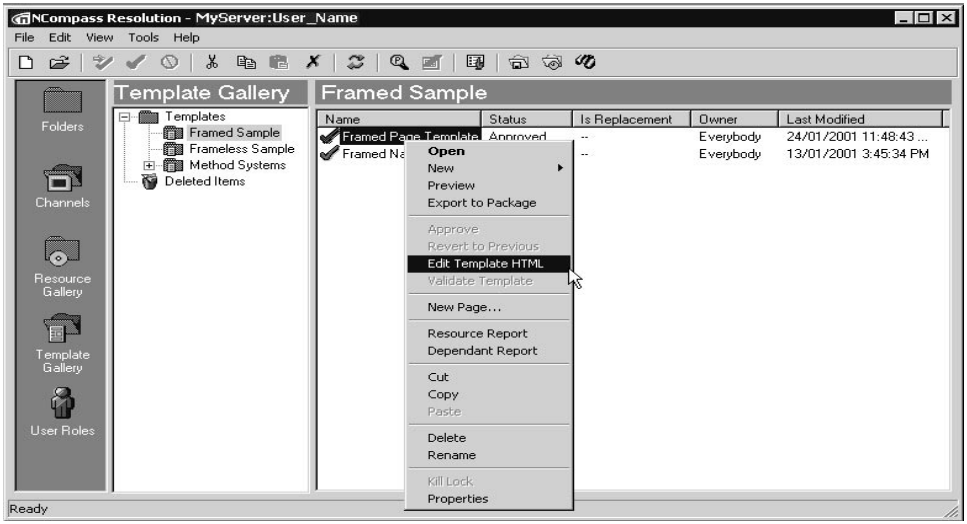
Tip
To cancel changes you've saved, but haven't approved (the template is still in its Saved state), right-click the template and select the **Revert to Previous** command.

Editing an existing template in an HTML editor

1 Display the template gallery hierarchy by selecting the Template Gallery icon.

2 Click a gallery to display a list of templates in it.

3 Right-click the name of a template and select **Edit Template HTML**.



Template Gallery in the Site Builder window

If this is the first time you've created or edited a template, the Select HTML Editor dialog box opens to let you choose the HTML editing application to use with Content Management Server 2001. The Design Palette and your HTML editor then open. The HTML editor displays the template code.

Editing the placeholder HTML

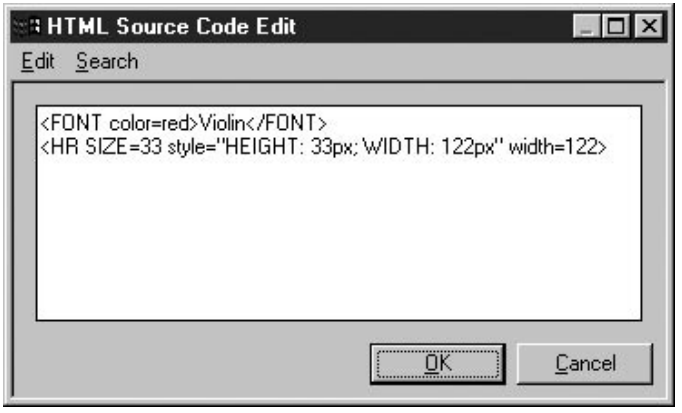
To customize placeholder aspects that are not available as options on the Placeholder Properties dialog box, you can directly edit the placeholder's HTML.

One example where you could make use of this feature is when linking to external URLs. On a framed Web site, the external link will open a new page within the MSCMS 2001 frameset. To specify that the external link opens in a new browser window, you must add the `target=_blank` attribute to the anchor tag.

1 Open the template in the Template Design window.

2 Right-click the placeholder to be edited and select **Edit Source**. The HTML Source Code Edit window displays the placeholder's HTML.

3 Type the changes to the placeholder HTML.



Editing a placeholder's HTML within the HTML Source Code Edit window

4 Click **OK** to save your changes and close the Source Code Editing window.

Tip
To create a line break in the HTML Source Edit window, press CTRL + Enter.

Note
When the size of a placeholder is changed on a published template that is currently in use by postings of pages, Content Management Server 2001 maintains the integrity of the published postings. Changing the size of a placeholder will take effect in new pages that are created with the template.

Editing published templates

You can edit a template that is published and therefore available for use by authors, however certain changes you make will affect postings currently using the template:

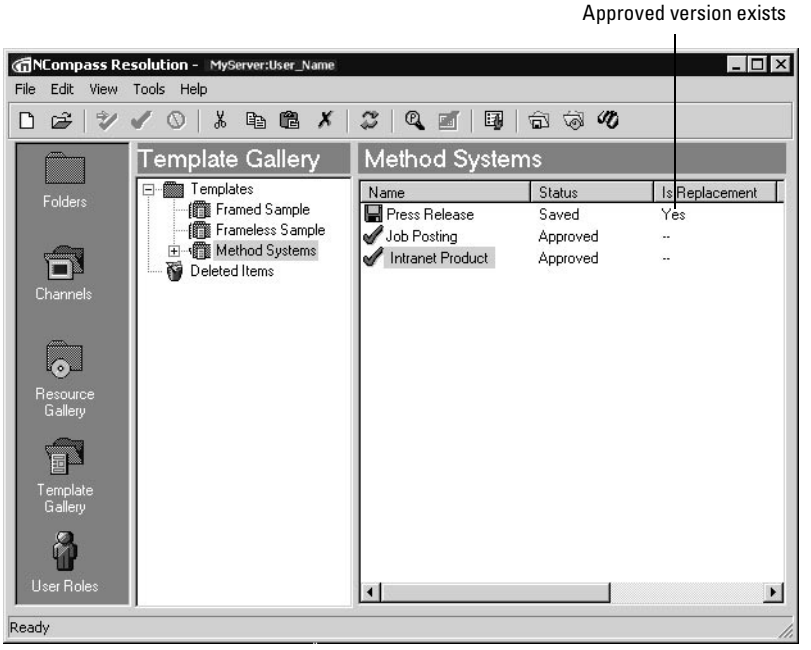
- adding or removing a placeholder will affect postings of pages that use the template
- changing the properties of a template's placeholder affects only those pages created after the change is made.

The implications of approving edited templates are in the "Approving page templates" section in Chapter 6, "Making Templates Available to Authors."

Viewing published and edited versions of templates

If you have edited a published (Approved) template, but have not yet submitted the edited version, two versions of the template exist: its Approved version and its Saved version. The Approved version remains available to authors until you or another template designer approves the Saved version.

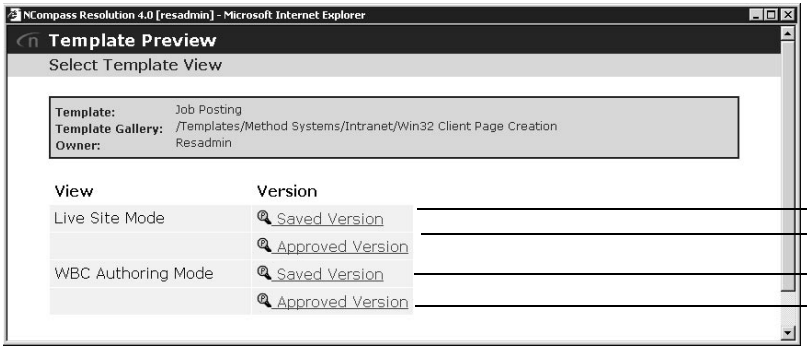
When a template has an Approved version and a Saved version, the Site Builder window indicates this in the Is Replacement column.



Approved version of a template

To view the published (Approved) version of an edited template:

1 Right-click the template and select **Preview**. The Preview window opens.



Preview window, opened from the Site Builder

2 Click the preview icons to view the Saved and Approved versions of the template as they would appear in the Template Design window, and as they would appear in Authoring mode in the Web Author.

3 To cancel edits for a template, see "Reverting a Saved template to its Approved version" in Chapter 6, "Making Templates Available to Authors."

Chapter 8

Deleting a Template

Overview

This chapter covers how to delete templates, and the implications of removing them from the Content Management Server 2001 system.

Deleting a template vs. purging a template

When a template is deleted in the Site Builder, it is moved to the Deleted Items container, where it is no longer available to authors. To make the deleted template available again, move it from the Deleted Items container back into a template gallery. To delete a template, you must first remove all pages (new and archived) and postings that were created from that template.

When a template is purged, it is permanently removed from the Deleted Items container.

! Caution
There is no similar distinction between deleting and purging in the Web Author. In the Web Author, pages get purged when a user clicks **Delete** from the authoring console. If an author deletes previously approved content, that content cannot be recovered.

Maintaining the Deleted Items container

We recommend regularly purging templates you have moved to the Deleted Items container. Because Content Management Server 2001 is a multi-user system, all users who have access to the Deleted Items container have access to its contents.

Deleting a template

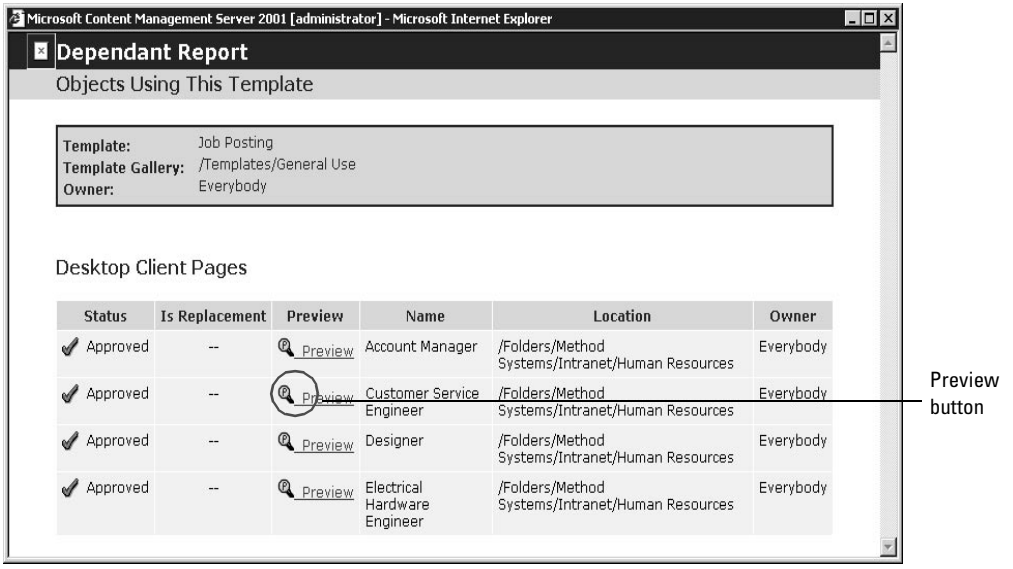
1 In the Site Builder, display the templates hierarchy by clicking the Template Gallery icon.

2 Right-click the template to be deleted and select **Delete**.

If the template is not in use by any views of pages, it is deleted. Otherwise, an error message informs you that there are postings of pages that depend on the template. These dependencies must be removed before the template can be deleted.



To see a list of the dependant pages and their locations, click the **Dependant Report** button on the error message. The report will be displayed as an HTML file in your Web browser.



Dependant Report on a template, showing dependant pages

3 If no postings of pages depend on the template, the template is moved to the Deleted Items container and is no longer available to authors. In the Deleted Items container, the template name includes the address of the gallery where it came from.

Purging a template

To permanently delete a template it must be deleted ("purged") from the Deleted Items container. Before a template can be purged, you must move the template to the Deleted Items container.

To purge a template:

1 In the Site Builder window, click the Template Gallery icon to expand the hierarchy of templates.

2 Click the template gallery from where the template was deleted.

3 Right-click the Deleted Items container, and select **Empty Deleted Items**. Only the templates that belong to you will be purged.

4 If the template to be purged is contained within a sub-gallery in the Deleted Items container, expand the gallery, right-click the sub-gallery to be purged, and select **Empty Deleted Items**.

5 A dialog box opens asking whether you wish to permanently delete the template. Click **Yes** to continue with the purge.

Glossary

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

A

API – Application Programming Interface

In the same way that most applications will have a user interface (often a graphical one), many applications will also present an Application Programming Interface (API) with which other applications can interact. The API consists of the functions, messages, data structures, data types, and statements that programmers can use in creating applications that run under Windows 2000.

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.

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.

framed site

A Web site that uses HTML frames throughout to display its hierarchies of channels and postings.

frameless site

A Web site that displays its hierarchies of channels and postings without using frames.

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.

I

internal resource

A resource that exists only within the context of a specific page, as opposed to a resource that is stored in the Resource Gallery and is available to all pages.

L

label

A timestamp applied to Content Management Server 2001 objects (templates, pages, and resources) that identifies that object at a specific time in the past (a revision).

M

Microsoft® Content Management Server 2001 system

A Microsoft Content Management Server 2001 (MSCMS 2001) system is the MSCMS 2001 server, all the MSCMS 2001 Site Builders and Web Authors that connect to the server, and the database. Content Management Server 2001 can also include multiple MSCMS 2001 servers doing different functions, such as development, staging, or production.

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.

multilingual support (MLS)

Multilingual support provides the ability to display textual data in a language other than the standard Western European languages.

N

native flags

Native flags allow customers to define specific properties of objects (such as postings, channels) within Content Management Server 2001. These flags include the ability to hide pages at run-time, control Web Robot access, hide page content, and display multilingual navigation links.

navigation template

Navigation templates are Active Server Pages (ASP) files created in MSCMS 2001 template galleries and assigned to channels. The template determines the interface displayed when the channels are displayed in a Web browser. Only template designers and administrators can create and edit navigation templates.

(See also *cover page, page template.*)

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.

profile, staging

(See *staging profile.*)

proto-template

A proto-template is a page template opened in an HTML editor in conjunction with the template Design Palette. When the template is saved in the editor, the Design Palette saves the template to the template gallery the HTML editor was launched from.

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.

Site Deployment Manager

The Site Deployment Manager is an add-on product that allows objects such as resources, template, and galleries to be exported and imported from one MSCMS 2001 system to another. The most common application of site deployment is to move data from a development server to a production server. Site deployment can be done by a site administrator only.

Site Stager, MSCMS 2001

A Content Management Server 2001 application that takes HTML or ASP "snapshots" of part or all of your Web site, thereby allowing you to host this content from another directory or server. MSCMS 2001 Site Stager allows you to reduce browser traffic on your MSCMS 2001 site, and to host your site on non-Windows 2000 platforms.

staged site

The MSCMS 2001 Site Stager allows you to create a static HTML site that can be ported to various platforms. A staged site consists of HTML "snapshots" taken of the channels and postings or views of pages of the Content Management Server 2001 site to be staged. The contents of the staged site can be hosted on a Web server for users who want to browse published content on your site.

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.

T

template

Content Management Server 2001 uses two types of templates, page templates and navigation templates. 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, for example text or images, to the placeholders. When creating a page, an author can add more views to it by applying different templates to it. In this way, an author can quickly create different versions of the page to suit different audiences.

Templates have no life-cycle and can be considered to be in either a checked-in (Saved) or checked-out (Approved) state.

Only template designers and administrators can create or make changes to MSCMS 2001 templates. Most references to templates in Content Management Server 2001 documents are to page templates.

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

Template Design Palette

The template Design Palette opens when an Edit Template HTML or New Template command is selected. The Design Palette manages the joint session between Content Management Server 2001 and the configured HTML editor. The Design Palette provides access to items in the

Resource Gallery as well as placeholders that can be dragged and dropped into proto-templates. When the HTML editor saves the template, the Design Palette detects the save action, and imports the new version of the template back into the database.

Template Design window

A template designer opens templates in the Template Design window, where placeholder properties can be configured, default content can be added, and hyperlinks can be inserted.

Template Gallery

A container used to control and manage access to templates.

template status

You can check the status of a template by looking at the status column next to its name in the Content Management Server 2001 window's list frame. The status indicates the availability of the template for use.

(See also *status*.)

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

Validate Template

Template validation is done automatically when you submit a saved template with an approved version. Or, you can manually validate a template by right-clicking the name of the Saved template. Validation determines if any of the changes to the template will change how placeholder content is displayed.

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.

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