Microsoft® Content Management Server 2001

Site Administrator's Guide

Microsoft®

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Using This Guide

What this guide is about

Welcome to Microsoft® Content Management Server 2001.

This guide provides comprehensive information and procedures to help a site administrator set up a Content Management Server 2001 site, including assigning publishing rights to users, managing internal and external access to the site, importing objects and templates, setting up page archival, using the Server Configuration Application to configure the site, and information about the Microsoft® Content Management Server 2001 Site Stager.

This guide also includes information about setting up a Microsoft® Content Management Server 2001 Content Connector for Commerce Server 2000 site, including creating and deploying a customized Content Connector site, creating and mapping product channels, folders, and pages, and authenticating Content Connector users.

Who should use this guide

This guide is for system administrators and members of the Content Management Server 2001 administrator rights group.

How to use this guide

This guide covers the following topics and tasks, with an indication of where to find the information.

To do this...	Go to this chapter
Understand the Content Management Server 2001 workflow, the roles, the states of pages, and the components of a Content Management Server 2001 system.	Chapter 1, "The MSCMS 2001 Publishing Process"
Create a container hierarchy for Content Management Server 2001. Create containers to organize and store pages, postings, and resources. Create virtual directories on the MSCMS 2001 server. Create channels and template galleries.	Chapter 2, "Setting up Publishing: Creating Containers for Users"

To do this...	Go to this chapter
Work with Content Management Server 2001 user roles—defining the roles, setting up rights and rights groups, assigning rights to users, assigning template ownership, and using the different types of URLs. Add LDAP users and groups to Content Management Server 2001 rights groups. Configure browsing rights with administrators.	Chapter 3, "Setting up Publishing: Assigning Publishing Rights"
Notify users of their entry points for the Content Management Server 2001 site. Manage external access (guest user). Index your Web site. End locks on objects.	Chapter 4, "Managing Access"
Change Content Management Server 2001 configuration settings without re-installing.	Chapter 5, "Using the Server Configuration Application"
Maintain earlier versions of published pages, postings, templates, and resources. Preview and compare revisions using detailed revision histories. Find revisions by date and time.	Chapter 6, "Using the Versioning Feature"
Export and import object packages using the Microsoft® Content Management Server 2001 Site Deployment Manager.	Chapter 7, "Using the MSCMS 2001 Site Deployment Manager"
Make an HTML or ASP copy of Web site available for multiple platforms. Stage run-time Help.	Chapter 8, "MSCMS 2001 Site Stager"
Create a Windows 2000 domain user account to be used as the Stage As User. Set up a Destination User. Create, edit, or delete a profile.	Chapter 9, "Creating Staging Profiles"
Stage a site either automatically or manually.	Chapter 10, "Staging a Site"

To do this...	Go to this chapter
Define Content Connector user roles. Outline responsibilities for developing, deploying, and managing Content Connector sites.	Chapter 11, "Content Connector Roles and Responsibilities"
Customize the Content Connector Method Systems sample site. Package and deploy a Content Connector customized site.	Chapter 12, "Customizing and Deploying Content Conector"
Set up user authentication for guests and pre-registered users in Content Connector sites.	Chapter 13, "Managing Content Connector User Authentication"
Create product channels, folders, and pages for Content Connector.	Chapter 14, "Creating and Mapping Content Connector Containers"
Determine the context and resolution of error messages with the MSCMS 2001 server, Site Builder, and communications.	Chapter 15, "Error Messages"

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 Web Author environment, the Method Systems sample site is simply representative—everything is configurable, including toolbars. There have been considerable changes to the "look and feel" of the user interface so that the example quotes may not completely resemble what you see on screen.

However, for Microsoft Content Management Server 2001 Content Connector for Commerce Server 2000, the sample Method Systems site is included and should be unpacked (see Chapter 7 "Installing Content Connector" in the *MSCMS 2001 Setup Guide*. We suggest you familiarize yourself with the sample data before customizing your Content Connector site.

Conventions used in this guide

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

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

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

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

Tip
Tips provide helpful suggestions for using Content Management Server 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 Server 2000 and unpacking a site, and installing the MSCMS 2001 Site Stager.

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

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

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

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

Chapter 1

The MSCMS 2001 Publishing Process

Overview

This chapter provides an introduction to Microsoft® Content Management Server 2001 (MSCMS 2001) publishing, and the administrator's role in the publishing process.

Terms and concepts

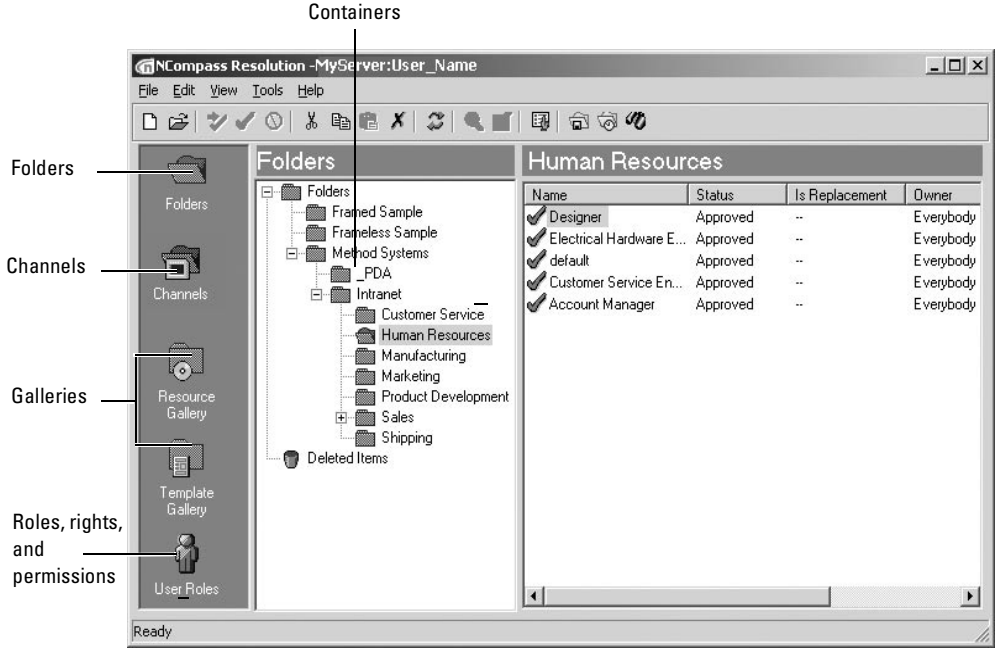
Users

Any valid user account on the network, on a domain or organizational unit known by Microsoft Content Management Server 2001, is a potential user. MSCMS 2001 uses Windows 2000, Site Server Lightweight Directory Access Protocol (LDAP), and Active Directory services accounts.

Users are automatically authenticated when they use MSCMS 2001.

Containers

A container is a virtual storage area used to organize and store pages, postings, resources, templates, and rights groups in the MSCMS 2001 Site Builder and Web Author.



Sample containers in the MSCMS 2001 Site Builder

You'll want to create, name, and sort containers of your own to suit your organization's needs. Only an MSCMS 2001 administrator can create new containers.

Templates

Page templates

Page templates provide the means for authors to create a Web page without coding any HTML. A page template generates an HTML form in a Web browser, where authors can add content. The areas on the page where authors add content are called placeholders.

Text formatting and media properties that are allowed in a placeholder are set by the placeholder's properties. Template designers can set the properties for the placeholder in the Template Design window, a tool that is launched from the Site Builder. The type of content the placeholder accepts, as set by the template designer, is shown on each placeholder's formatting toolbar in the Web Author.

Navigation templates

Navigation templates provide an MSCMS 2001 site's navigation interface 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 such as "Home" and "Help" are generally provided by navigation templates.

Postings

To publish an MSCMS 2001 page, it must be posted to a channel. A posting contains a publishing schedule that includes start and expiry dates, and which channel to publish it on. When a subscriber navigates to a posting, MSCMS 2001 dynamically generates the page associated with the posting.

Folders

Pages are saved and stored in folders. Although folders do not appear in the Web Author, every channel must have a folder associated with it from the Site Builder. Usually one or more editors are assigned to each folder. Pages stored there must be approved by one of those editors (or by an administrator) before the pages can continue through the publishing process. MSCMS 2001 auto-approves pages submitted to folders that do not have an editor. (MSCMS 2001 always auto-approves pages for editors when working in folders they have editing rights in.)

Channels

Channels are used to store, organize, and manage access to content. Channels organize postings into a hierarchy. Content posted to a channel can only be published after an MSCMS 2001 moderator has approved it. Administrators are responsible for creating channels using the Site Builder.

Roles

There are seven MSCMS 2001 roles: subscriber, author, editor, moderator, resource manager, template designer, and administrator. Part of the administrator's job is to assign users to one or more roles, and select which containers the users have permissions in. The privileges associated with each role are explained in detail in Chapter 2, "Setting up Publishing: Creating Containers for Users."

Rights

A users' rights (what they can do) are determined by their role within MSCMS 2001. For example, you can choose to assign a user the role as moderator, and give that user permission to a particular channel only. You assign rights to users by assigning them to rights groups, and granting permission to one or more containers for each rights group. Users can belong to more than one group.

Rights Groups

Role	Rights	Container
Subscriber	• browse to MSCMS 2001 pages published to channels where they have rights	No access to Site Builder
Author	• create and modify pages, submit them for approval, and post them to channels • use page templates • use resources	Folder, Template Gallery, Channel, Resource Gallery
Editor	• approve or decline pages • delete pages • modify postings • create pages, and submit postings to channels • use page templates • use resources	Folder, Template Gallery, Channel, Resource Gallery
Moderator	• modify posting schedules • approve or decline postings	Channel

Role	Rights	Container
Resource Manager	• add, remove, and replace content in a resource gallery	 Resource Gallery
Template Designer	• design page and navigation templates • use resources	 Template Gallery  Resource Gallery
Administrator	• assign user roles and rights • create hierarchies • assign rights in all containers • maintain an archive of content revisions and purge obsolete revisions • find and view revisions by date	 Folder  Template Gallery  Channel  Resource Gallery  User Roles

When creating a rights group, the administrator selects one of the predefined roles, then creates a rights group for that role. Each role can have its own set of rights groups, and the rights groups can be assigned permission to one or more containers. Therefore, a user's rights depend on the rights group they belong to, and the containers in which the rights group has been assigned permissions.

For example, Mark is a member of a rights group named "Sales Editors," which has been created for the editors role. Mark can work as an editor in any container the Sales Editors rights group has been assigned permissions to.

You can set it up so that a user belongs to more than one rights group. They can have editor rights in one folder and authoring rights in three others, while another user has editing rights in all folders.

Understanding the MSCMS 2001 workflow

MSCMS 2001 is a tool that allows a group of people to collaborate in the Web site publishing process. Your organization can:

- create pages without HTML experience
- control when pages are made available for viewing, and who can view them.

The tasks involved in publishing and maintaining content are divided among roles. To understand how you'll use MSCMS 2001 to play your part, you first have to understand the publishing process, and your role—or roles—in it.

Understanding the publishing workflow

MSCMS 2001 gives you and the people you work with control over publishing and content management for your intranet, extranet, and Internet Web sites.

Authoring

The publishing process begins when an author, who can be any content creator in your organization, uses the Web Author to create a page. Using the Web Author, anyone anywhere in your organization with access to a Web browser can create and distribute pages.

The author can set a publishing schedule (a "posting") that determines when the content can be viewed.

Postings

A posting contains a publishing schedule that includes start and expiry dates, and which "channels" to publish it on. When a subscriber navigates to a posting in a channel, MSCMS 2001 dynamically generates the page associated with the posting.

Channels

Channels are used to store, organize, and manage access to content. Channels organize postings into a hierarchy.



Sample MSCMS 2001 Web Author

When the author considers the content ready for publication on the Web site, it is submitted for content approval by an editor.

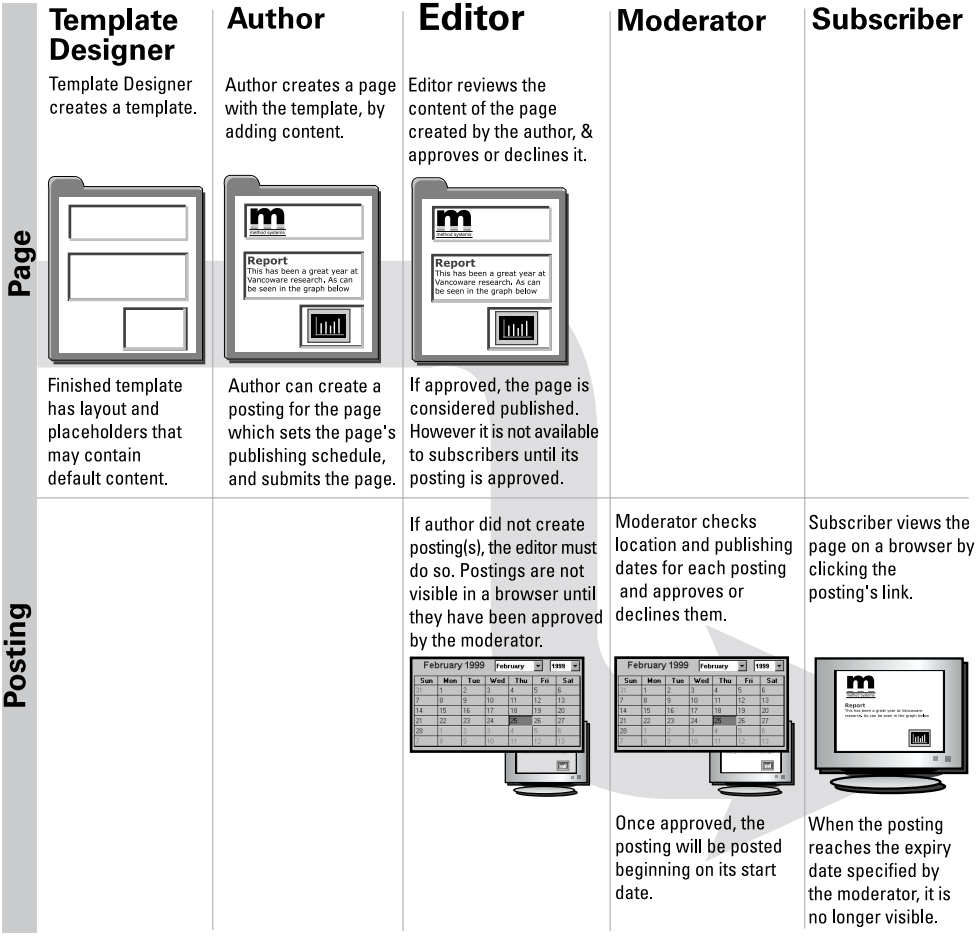
Approving

Once an editor approves the page, a moderator for the channel the page is posted to reviews and approves the posting before publication. Moderators ensure their channels contain relevant content.

Or, the administrator can arrange for pages to be auto-approved. This is covered in Chapter 3, "Setting up Publishing: Assigning Publishing Rights."

Publishing

After a posting is approved, the page's content is published on the site according to the scheduled start and expiry dates of its postings. After a page's content is published to a channel, subscribers to that channel can read the page. When a posting reaches the end of its schedule, publication of the page stops on that channel.



Understanding the administrator's tasks

The administrator role overlaps all other roles, but administrators are solely responsible for setting up publishing. This involves assigning roles, creating containers for people to work in, and arranging who can access which containers. Administrators automatically have subscription rights to all channels.

Maintaining the publishing environment

The publishing process is maintained by users who help organize the site, and help authors create pages. Users responsible for these tasks do the following:

- design the "look and feel" of the templates that authors use to create Web pages (template designers)
- provide resources, such as images and videos, for use by authors in both the Site Builder and Web Author environments (resource managers)
- program the site's navigation links, and create custom Web-based authoring programs (template designers).

The above tasks are divided among roles, which are detailed in Chapter 2, "Setting up Publishing: Creating Containers for Users."

Administrator tools

Site Builder

The Site Builder is where you'll set up publishing, by creating folders, channels, and rights groups and perform *some* maintenance tasks such as purging obsolete object revisions.

Web Author

The functionality of the Web Author provides several of the authoring functions currently in the Site Builder. With the improved functionality and user interface:

- authors and editors can create and edit content-related pages and publish those pages to multiple channels
- authors and editors can create versions and compare revisions (of pages, postings, resources, and templates)
- administrators can find revisions by date.

- resource managers can:
  - add a new resource to a resource gallery
  - replace current resource with a new one of the same MIME type
  - delete a resource from a resource gallery
  - edit the Name, Description, and Display Name properties.

Server Configuration Application

The Server Configuration Application (SCA) is used to reconfigure an MSCMS 2001 server. The SCA presents a series of screens in which you enter configuration changes. See Chapter 5, "Using the Server Configuration Application" for information on adjusting background cleanup settings, selecting domains, viewing license information, and other site management tasks.

MSCMS 2001 Site Deployment Manager

The MSCMS 2001 Site Deployment Manager is an add-on product to do incremental updates to your MSCMS 2001 system, using an export and import transfer method. The Site Deployment Manager allows you to separate your development and production environments.

MSCMS 2001 Site Stager

MSCMS 2001 Site Stager converts dynamically generated MSCMS 2001 content to static HTML files for deployment on any Web server. Chapters 8 to 10 of this guide provide instructions on using Site Stager.

Keyboard shortcuts

Site Builder must be active to do most of the following keyboard shortcuts. The shortcuts listed document MSCMS 2001 specific actions and not only document standard Windows behavior.

Note
To enlarge the Microsoft Content Management Server window to fill the screen, press **ALT** + **SPACEBAR** + **X**. To restore the window to its previous size and location, press **ALT** + **SPACEBAR** + **R**.

Press	To
CTRL+A	Select all contents in the list view of the main window
CTRL+F	Open the Find dialog box from the Microsoft Content Management Server main, Find, Production Manager, or Approval Assistant windows.
CTRL+G	Go To in the Find, Production Manager, and Approval Assistant windows
CTRL+O	Open selected page or template from the main window or Template Design Window
F2	Rename selected item in the list frame of the main window
F5	Refresh the list frame in the main window
CTRL+TAB	Move to the next region of the main window
CTRL+DEL	Purge an object to which you have rights instead of deleting it.

Chapter 2

Setting up Publishing: Creating Containers for Users

Overview

Administrators set up and organize the virtual workspace where Microsoft Content Management Server 2001 (MSCMS 2001) users author and publish pages and grant access for the MSCMS 2001 Web Author. Administrators also assign publishing roles to users and create rights groups—this process establishes *who* can do *what* in *which* containers.

Understanding the primary tasks

Setting up publishing involves three primary tasks:

- creating containers for users to work in. You create:
  - channels: to store and organize postings
  - folders: where authors and editors create and edit pages
  - template galleries: where template designers create and store page and navigation templates
  - resource galleries: where resources (images, video, text) are created and stored.
- assigning publishing rights to users. This involves:
  - creating rights groups for each role
  - assigning users to one or more rights groups
  - assigning permissions to containers for each rights group.
- assigning ownership of templates to template designers.

Tips on creating containers

- create your channel hierarchy first to set the foundation for building your site. Channels determine the overall architecture and navigation for your site. Creating them first sets the foundation for building your site.
- create containers with a one-to-one correspondence. For example: if you create a channel named “Sales” you should create a folder named “Sales.” Assign the Sales channel as the default channel for the Sales folder. Content authors for the Sales folder then know to which channel they should submit the postings. For the Web Author, you must create a folder to correspond to each channel.

Creating containers

About containers

A container is a directory used by MSCMS 2001 to organize and store pages, postings, and resources. There are four types of containers: folders, channels, resource galleries, and template galleries.

Container type	Used to store
Folder	Pages
Channel	Postings
Resource gallery	Resources
Template gallery	Templates

One of your first tasks is to create, name, and organize containers of your own to suit your organization's needs.

Conventions for naming and using channels

- MSCMS 2001 does not allow channel names that use the following characters:
  `# & % + / |`
- give each channel a unique name
- never name a channel NR. NR is the name reserved for the root virtual directory for MSCMS 2001
- never start a channel name with a backward slash (\)
- spaces in channel names are permitted (they are converted to the plus sign (+) in the Web browser)
- postings: MSCMS 2001 adds a .htm to the posting name in the URL. For example, the following URL is generated for the posting "February":

  Marketing/Newsletters/February.htm
- Advise authors and editors not to add ".htm" to a page's name, because a posting of the page is given a .htm file name extension.

URL Encoding or hierarchy-based URLs

A hierarchy-based Uniform Resource Locator (URL) is an address for an item stored in an MSCMS 2001 hierarchy. For example, the URL for a posting might look like this:

```
http://www.example.com/Marketing/Newsletter/CurrentIssue.htm
```

By default, MSCMS 2001 uses hierarchy-based URLs. You can switch to unique ID-based URLs using the Server Configuration Application. Refer to Chapter 5 in this guide for more information.

Items and container names are stored as Unicode (UTF-8 encoded). Do not use characters that are outside the 0 to 9, A to z range because they are automatically encoded on generated pages. You do not have to worry about the encoding, provided you are merely following links from one MSCMS 2001 page to another. However, if you are directly typing in the URL in your Web browser's Address box, you must manually replace the invalid character with its URL-encoded equivalent.

For example, to view a page named "News" that you know is in the "Sales, Marketing and Promotions" channel, because the channel's name includes a comma and spaces, type the following URL in your browser's Address box:

```
http://yourserver/Sales%2C+Marketing+and+Promotions/News
```

Note that the .htm file name extension is optional for requested postings.

Creating virtual directories on your MSCMS 2001 server

If you plan to create virtual directories that map to your Web site's channel hierarchy, avoid using names that are identical to your MSCMS 2001 site's root-channel name, and its immediate sub-channels. Internet Information Server (IIS) gives MSCMS 2001 the first chance to find a match for the URL in the MSCMS 2001 database. If a URL match is found in the database, MSCMS 2001 retrieves the page. The similarly-named file in the virtual directory is not retrieved.

Summary of creating channels procedure

Following is a summary of the five key steps to creating a channel. Step-by-step instructions follow in the next sections.

1 Naming the channel, giving it a description, and assigning its publishing priority:
   - name the channel to make it easily identifiable to content creators in the Web Browser and Site Builder environments, and to subscribers browsing your site
   - the description provides more detailed information about the channel's intended use that appears in a ToolTip in the Site Builder
   - the priority of the channel can be set to "Important" so the channel and its postings are returned when a subscriber clicks the What's New button on your Web site, if the navigation template programmer has allowed this functionality.

2 Enabling the channel for the Web Author makes the channel available for authoring.

3 Assigning the channel a navigation template and cover page determines how the channel displays on your site. It can determine how the channel sorts its postings.

4 Setting the channel's start and expiry dates determine when it is available on your Web site.

5 Assigning rights groups to the channel determines who can work in the channel and who can view postings published there.

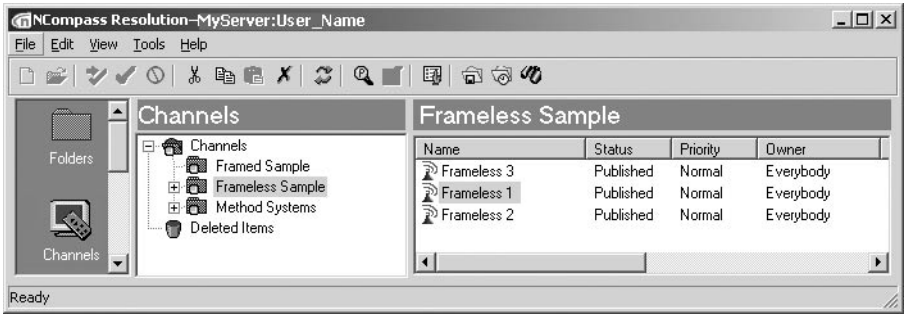
Creating the MSCMS 2001 documents channel

The documentation suite is stored in a folder on the Microsoft Content Management Server 2001 Installation CD. To make these PDFs available for download by your site's users, we recommend creating a channel named "MSCMS 2001 Documents," and assigning all subscribers (except perhaps Guest Subscribers) to that channel. Then add the PDFs to a resource gallery and create a page containing the PDFs.

To create the MSCMS 2001 Documents channel, follow the instructions in the next sections. You need to assign subscriber rights groups to the channel only and not other rights groups.

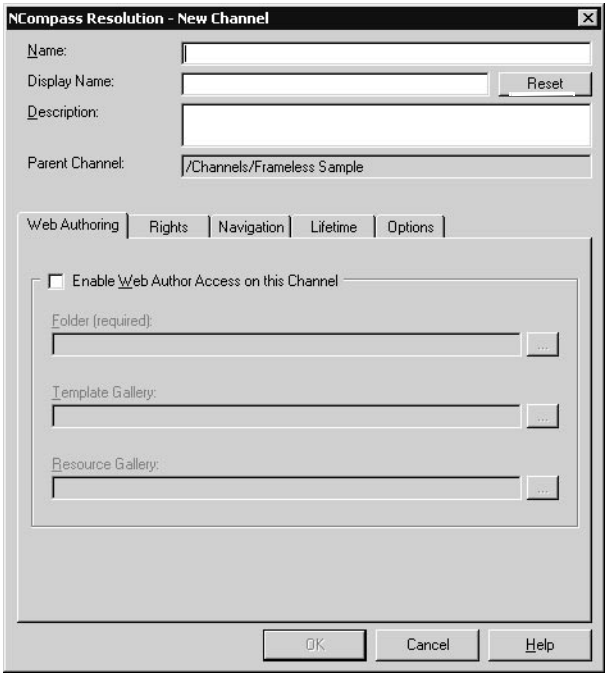
Creating channels, step 1: naming, describing, and assigning priority

1 Open the Site Builder, and click the Channels icon to display the channels hierarchy.



MSCMS 2001 Site Builder, with channels hierarchy expanded

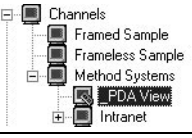
2 Right-click the channel the new channel is to be created in, and select **New Channel**. The New Channel dialog box opens.



The New Channel dialog box

3 (Be sure to have read "Conventions for naming and using channels" in this chapter before proceeding.) Name the new channel to make it easy to identify. For example, if it's a channel where content related to inside sales will be published, name it Inside Sales. Channels must have names less than 100 characters in length.

Example of a parent channel:



_____ "Method Systems" is the parent channel for _PDA View.

4 Enter a description of up to 256 characters that makes the channel's use easily identifiable to Site Builder users and subscribers. This description should briefly describe what type of content the channel is for, and indicate which rights groups have rights in the channel.

Note

MSCMS 2001 supports the use of the DisplayName property for postings, channels, and resources to display text for navigation links. See Chapter 9, "Customizing Your MSCMS 2001 Web Author" of the *MSCMS 2001 Site Programmer's Guide.*

Creating channels, step 2: enabling the channel for the Web Author

These steps are required to make the channel available on the Web Author.

1 On the Web Authoring tab, select "Enable Web Author Access on this Channel."

2 In the Folder box, browse to select a folder. Pages using the Web Author are generated in this folder. If a suitable folder does not exist, you need to create one later, then return here to assign the folder. See "Creating Folders" later in this chapter. To allow authoring on this channel, a folder must be associated it.

3 In the Template Gallery box, browse to select the template gallery that stores Web Author templates. (Note this is only the default gallery that is displayed first or is in some way flagged in the list of accessible galleries. This applies also to selecting from resource galleries.) The template gallery you choose will be available to authors when they create pages for the Web Author.

Creating channels, step 3: assigning the navigation template and cover page

Navigation template programmers frequently need to change and re-assign navigation templates to channels. You may want to assign navigation template programmers to the administrator role so they can assign navigation templates to channels themselves.

The main function of navigation templates is to generate links to MSCMS 2001 pages, postings, and resources on your site. Navigation templates are also used to create Web Authors. Refer to the *MSCMS 2001 Site Programmer's Guide* for more information on navigation templates.

The cover page for a channel is the page that appears when a subscriber clicks the channel name in their Web browser. You can assign a different cover page as required.

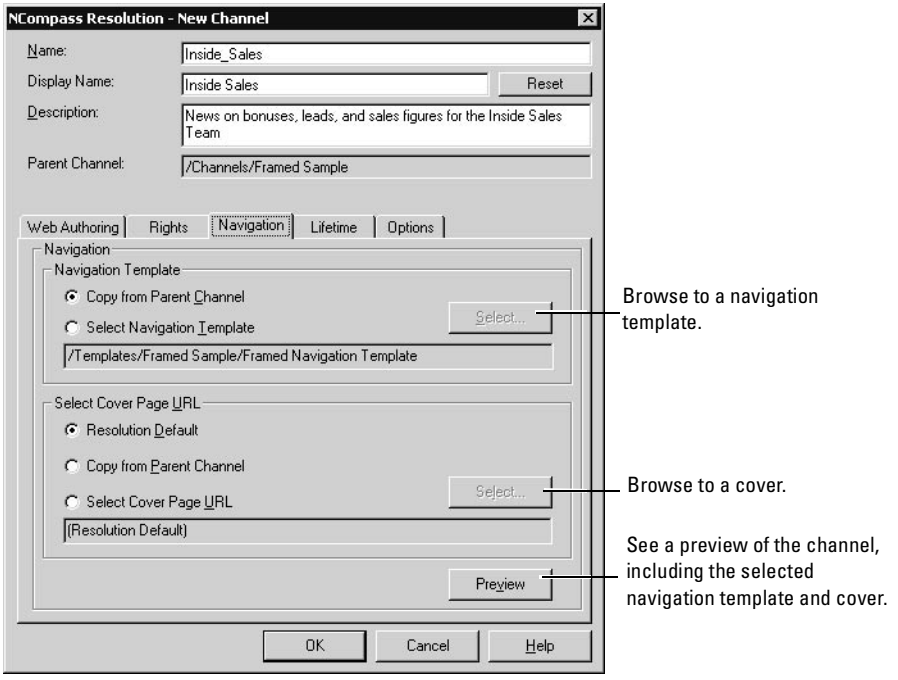
Framed sites: When assigning a channel as a cover page for a framed channel, make sure subscribers have access to the channel you assign as a cover page. Otherwise, they will see the MSCMS 2001 default cover page, located in the `NR/Shared/cover.asp` virtual directory.

Framed navigation in the samples sites designates the first posting in framed channels as the channel cover page.

The order of postings in a channel is usually controlled by navigation scripting. Refer to the *MSCMS 2001 Site Programmer's Guide* for information on how to change the navigation scripting's sort order. In the absence of scripting to control navigation, the order of postings is controlled by the sorting you set on the Sorting tab of the channel Properties dialog box.

Frameless sites: For a frameless channel, create a posting in the channel that describes the channel, and have the navigation scripting for that channel use that posting as the channel's cover page.

1 On the Navigation tab, select "Copy from Parent Channel" to assign the same navigation template as the channel's parent channel.



The New Channel dialog box, with the Navigation tab selected

2 To designate the channel as important, click the **Options** tab and select the "Important Channel" option. When subscribers do a "What's Important" search, this channel is returned. The channel's icon in the Site Builder changes to signify it is an important channel.

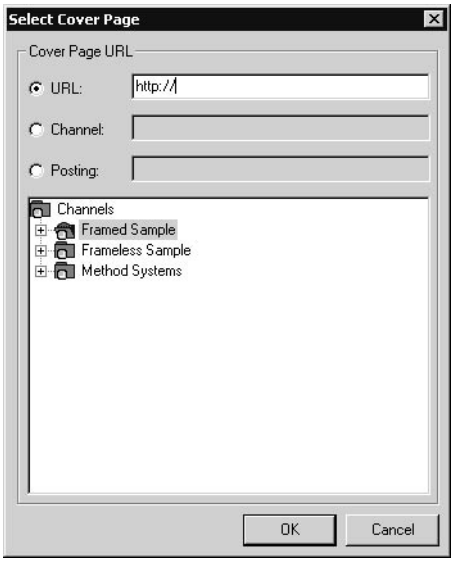
Or:

Select "Select Navigation Template," and click **Select** to browse to a navigation template. The Select Template dialog box opens.

3 In the Navigation Template box, select a navigation template. A thumbnail preview of the navigation template appears to the right. Click **OK**.

4 Select an option in the Cover Page URL area:

- Default: a generic cover page appears for the channel (`NR/shared/cover.asp`)
- Copy from Parent Channel: the channel uses the same cover page as its parent.
- Select Cover Page URL: choose this option, and click **Select** to browse to a cover page. The Select Cover Page dialog box opens.



Select Cover Page dialog box

Enter a URL, or select a channel or posting to use as a cover page. Click **OK**.

5 Click **Preview** to see the selected navigation cover page in a Web browser.

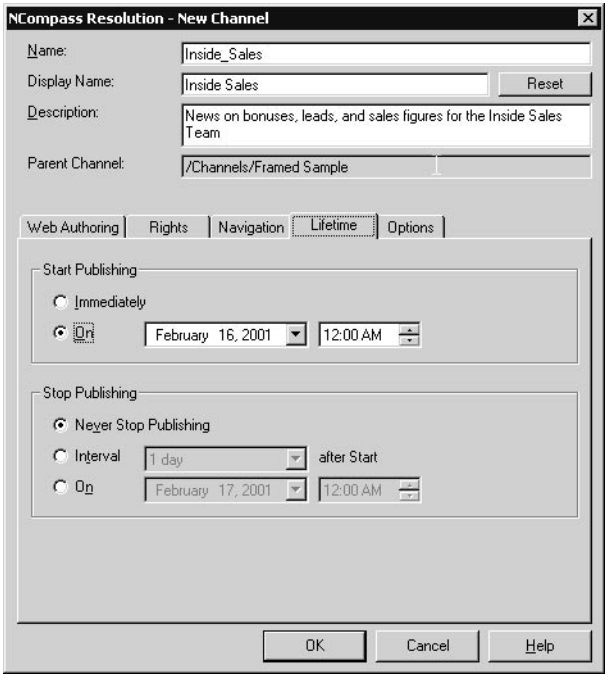
Note

Do not enter a URL for a channel which, in turn, uses this channel as its cover page. For example: if Channel "A" uses Channel "B" as its cover page, and Channel "B" uses Channel "A" as its cover page, an infinite loop is created.

Creating channels, step 4: setting the channel's start and expiry dates

Note
The Start and Expiry dates of a channel may override the Start and Expiry dates of a posting. Any postings submitted to the channel will not be visible until the channel's Start Publishing date, even if the posting's publishing date is set to immediate.

1 On the Lifetime tab, select an option from the Start Publishing area. The options set the date the channel becomes available for publishing.



The New Channel dialog box, with the Lifetime tab selected

2 To publish the channel on a specific date, select the "On" option, and click the drop-down list. The calendar opens where you can click the required date.

3 In the Stop Publishing area, select an option:

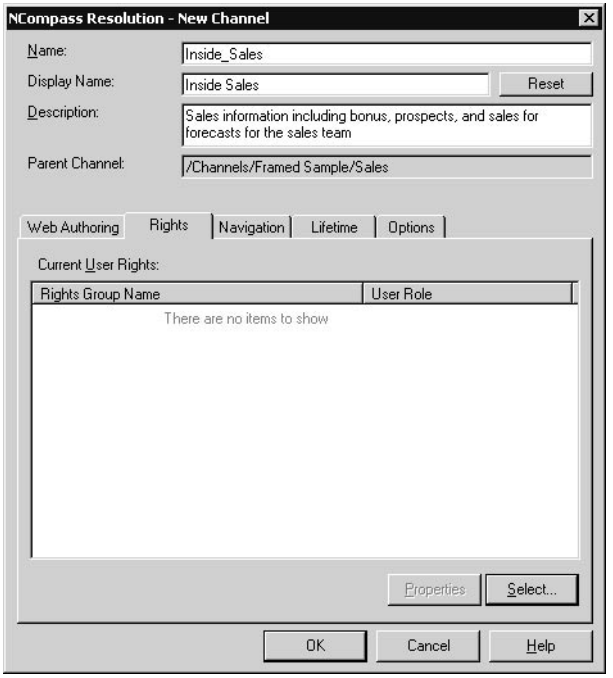
- Never Stop Publishing: the channel is available for publishing until this option is changed, or the channel is deleted.
- Interval: select this option and select a time period (day, week, month) for when the channel expires.
- On: select a specific date in the future when the channel expires.

Creating channels, step 5: assigning rights groups to the channel

If you have not created rights groups to assign for the channel, click **OK** to close the New Channel dialog box, and move to the next section for instructions on creating other containers. After you have finished creating containers, you can create rights groups and assign them to the containers.

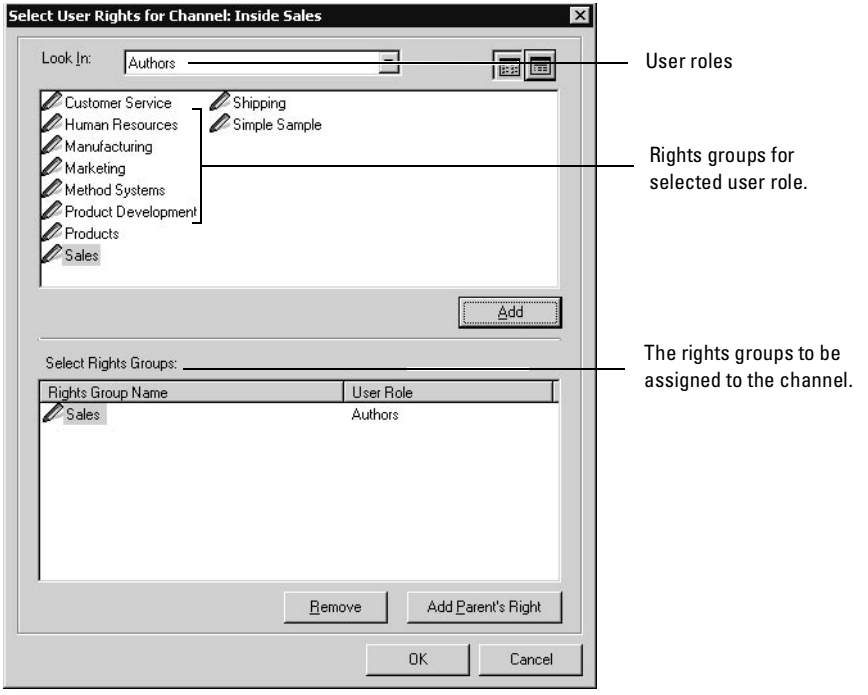
Assigning rights groups to the channel allows the rights group members to work there. In order to browse your Web site, users must also be assigned subscriptions rights to channels.

1 Select the Rights tab on the New Channel dialog box.



The New Channel dialog box, with the Rights tab selected

2 On the Rights tab, click **Select**. The Select User Rights dialog box opens.



Select User Rights dialog box

3 Select a user role from the Look In box. You can assign authors, editors, moderators and subscribers to the channel. Assign subscribers to the channel first so users can view postings in the channel on your site.

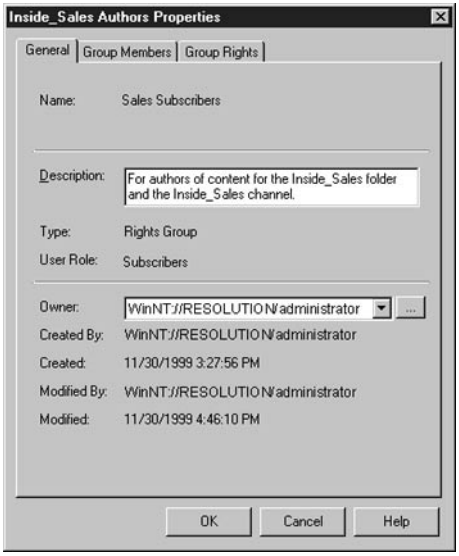
Or:

To assign the channel the same rights groups as its parent channel, click **Add Parent's Rights**. The parent channel's rights groups appear in the Selected Rights Groups box. Skip to step 5.

4 Select rights groups from the Look In box, and click **Add**. The rights groups appear in the Selected Rights Groups box.

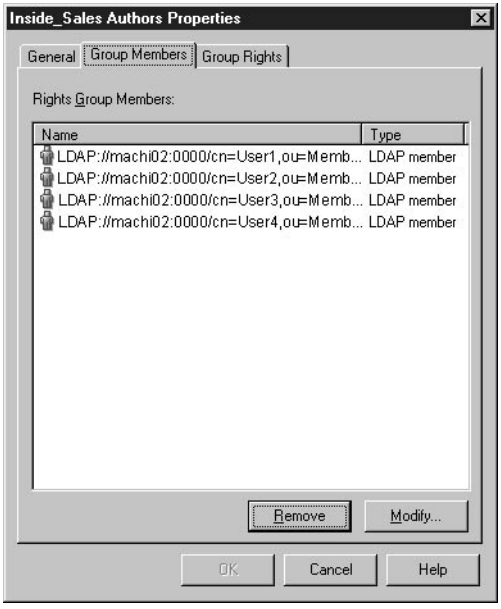
5 Click **OK** to close the Select User Rights Groups dialog box.

6 In the Current User Rights area, select a Rights Group, and click **Properties**. The Rights Group Properties dialog box opens.



Rights Group Properties dialog box

7 Select the Group Members tab. The users assigned to the rights group are shown.



Group Members tab on the Rights Group Properties dialog box

8 Repeat steps 1 to 5 to assign rights groups for authors, editors, and moderators to the channel.

9 Close the Group Rights Properties dialog box. To modify members of the rights group, see "Assigning publishing rights to users" in Chapter 3, "Setting up Publishing: Assigning Publishing Rights."

10 When finished assigning the rights, lifetime, navigation, and Web Author properties to the new channel, click **OK** on the New Channel Properties dialog box. The dialog box closes, and the new channel appears in the Site Builder's channel hierarchy. The channel will be available for use, effective from its start date.

If the channel has been Web Author-enabled and rights groups have been assigned to the channel, when you click the OK button, a dialog box appears offering to automatically assign the channel's rights group members to corresponding folders and galleries.

Changing the root channel's name

In the following example, the channel named "Channels" is the root channel name:

```
Channels
Human Resources
Marketing
Press Releases
Sales
```

You can change the name of the root channel, although it's a good idea to retain "Channel" as part of the name, to help users distinguish channels from folders in the Site Builder.

The channel's URL does not contain the root channel's name when a user views a channel in a Web browser. However, a navigation template programmer can set the root channel's name to appear in its cover page.

You can change the root channel's name the same way file names are changed in any Windows environment:

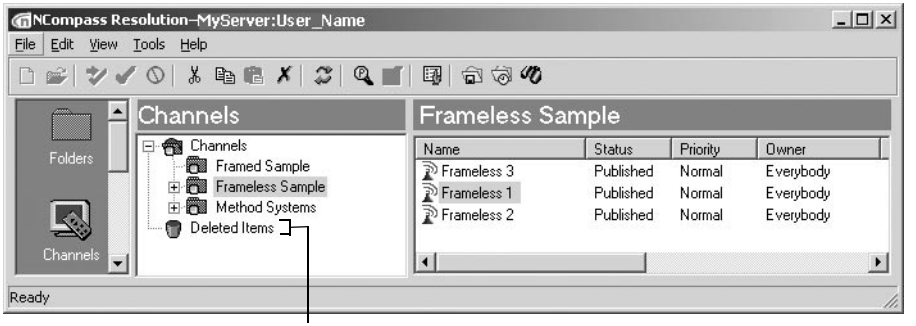
1 Click the root channel's name ("Channels"). + -

2 Click the name again. The name field for "Channels" is highlighted.

3 Change the name.

Deleting a channel

Only administrators can delete channels. When a channel is deleted, it is moved to the Deleted Items container.



To delete a channel, select it and press delete or move it into the Deleted Items container. The Deleted Items container is like the Recycle Bin on your Windows desktop. Items moved to the Deleted Items container are no longer in the MSCMS 2001 hierarchy, but remain in the MSCMS 2001 database. To remove an item from the database, and therefore delete the item permanently, it must be removed from the Deleted Items container (Purging a channel).

Undeleting a channel

To make the channel available for use again, move it from the Deleted Items container back into the channel hierarchy.

Purging a channel

Purging a channel removes it permanently from the system. Channels can be purged from the Deleted Items container only. To purge all deleted channels, right-click the Deleted Items container, and select **Purge All Deleted Items.** To purge one deleted item, select it in the Deleted Items container, and delete it.

Note
There is a default limit of 200 on the number of items that can be purged in one operation.

Creating folders

Channels that have been enabled for the Web Author require a corresponding folder. You must create one folder for each Web Author-enabled channel, then reset the channel's properties, to associate the folder with the channel. See "Creating channels, step 2: enabling the channel for the Web Author" earlier in this chapter.

Once a folder is created, it is available for authors and editors to use in the Site Builder.

Do not store more than 500 pages in a folder. Overloading a folder with pages will cause noticeable delays in the Site Builder.

Folders and the Web Author

Folders in the Site Builder are inextricably connected to postings in the Web Author. When an author creates a new posting in the Web Author and submits it for approval, the page for that posting is stored in a folder on the Site Builder.

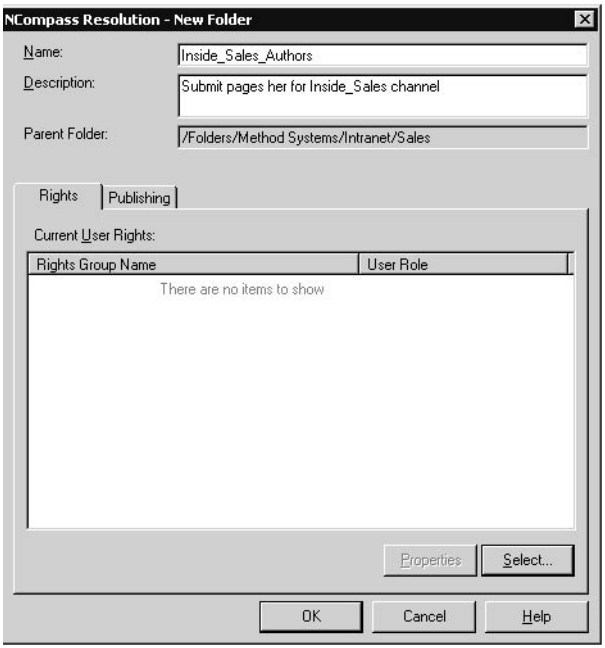
Do not delete pages in folders, unless you are sure of the following:

- the folder has not been assigned to a channel used for authoring in the Web Author
- you want to delete the postings that correspond to those pages.

Creating folders, step 1: naming and describing the folder, and setting its posting channel

1 Open the Site Builder, and display the folders hierarchy by clicking the Folders icon.

2 Right-click the folder (in Folders area you want to create the new folder in) and select **New > Folder**. The New Folder dialog box opens.



New Folder dialog box

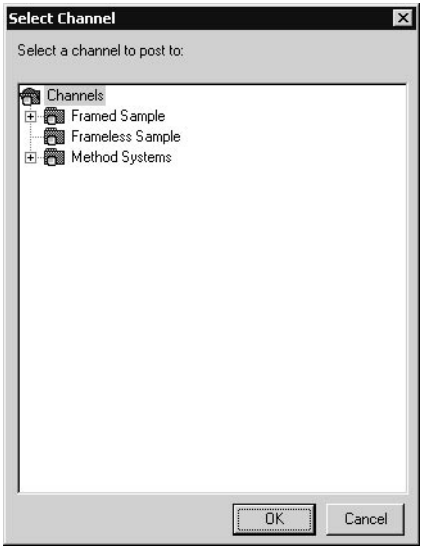
3 Name the new folder to make it easy to identify. For example, if it's where pages related to inside sales will be submitted, name it "Inside Sales."

4 Enter a description in the description box to make the folder's use easily identifiable to authors. This description should briefly describe what kind of content the folder is for, and indicate which rights groups have rights in the folder. It can be up to 256 characters.

Note
Default posting channels apply to authoring within the Site Builder only. Read this section only if your organization does not use the Web Author.

When authors use the Posting dialog box to create and submit a posting of a page, it suggests using this channel. (The words "default channel" appear beside the channel's name in the Posting dialog box.) This makes the author's job easier, and encourages posting to the appropriate channel. Authors can also select a different channel in which they have rights.

5 On the Publishing tab, click **Browse** to choose a default posting channel for the folder. The Select Channel dialog box opens.



Select Channel dialog box

6 Select a channel to use as the folder's default channel, and click **OK**. The Select Channel dialog box closes.

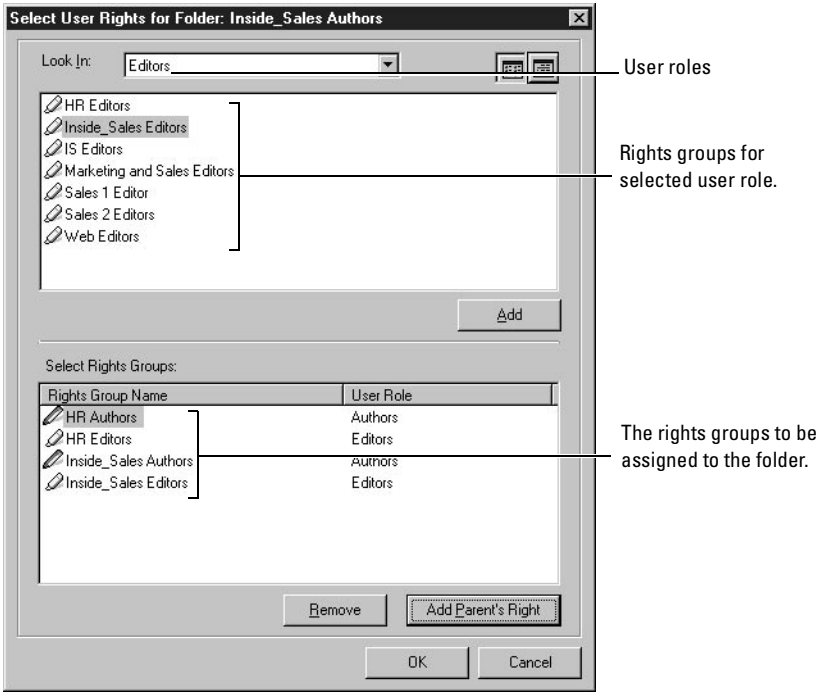
Creating folders, step 2: assigning rights groups to the folder

If there are no rights groups to assign for the folder, click **OK** to close the New Folder dialog box and move to the next section for instructions on creating other containers. After you have finished creating containers, you can create rights groups and assign them to the containers.

Assigning rights groups to the folder allows the rights group members to work on items stored in the folder.

1 Select the Rights tab to assign rights groups members to the folder.

2 Click **Select** on the New Folder dialog box. The Select User Rights for Folder dialog box opens.



Select User Rights for Folder dialog box

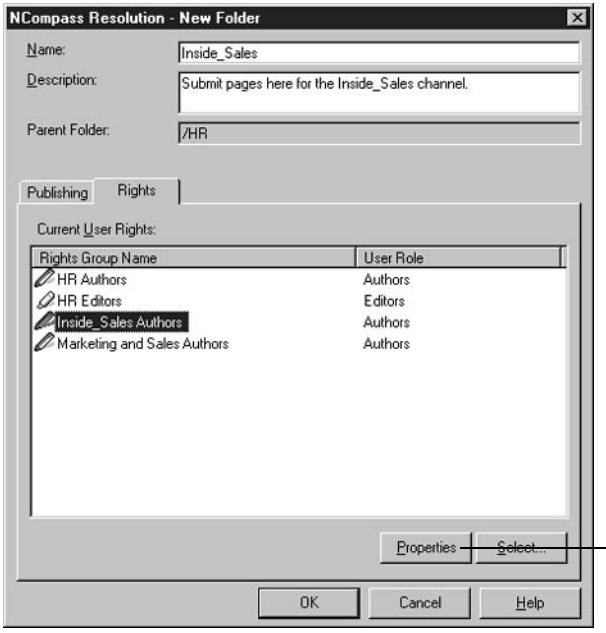
3 Select a user role from the Look In box. You can assign authors and editors to the folder.

Or:

To assign the folder the same rights groups as its parent folder, click **Add Parent's Rights**. The parent folder's rights groups appear in the Selected Rights Groups box. Skip to step 4.

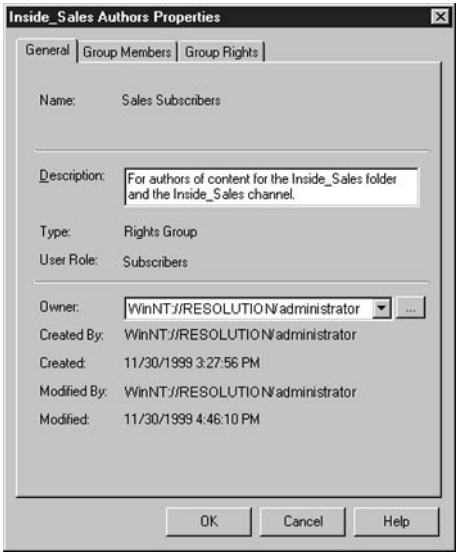
4 Select rights groups from the Look In box, and click **Add**. The rights groups appear in the Selected Rights Groups box.

5 To assign rights groups from the Selected Rights Groups box to the folder, click **OK**.



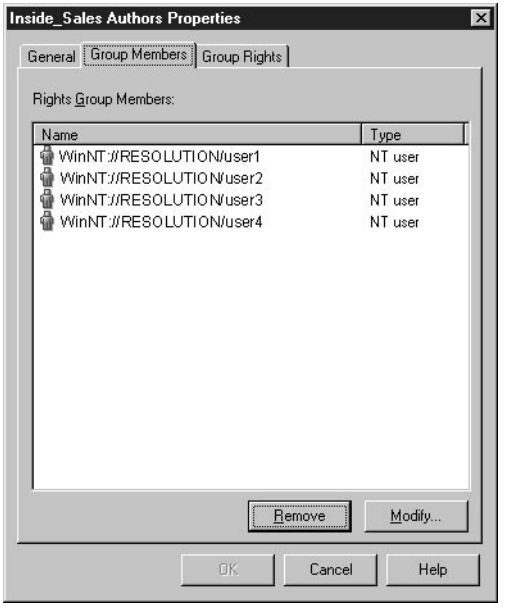
Click to view the members of a Rights Group.

6 In the Current User Rights area, select a Rights Group, and click **Properties**. The Rights Group Properties dialog box opens.



Rights Group Properties dialog box

7 Select the Group Members tab. The users assigned to the rights group are shown.



Group Members tab on the Rights Group Properties dialog box

8 Close the Group Rights Properties dialog box.

9 Repeat steps 1 to 5 to assign rights groups for editors to the folder.

10 When finished assigning the rights and publishing properties to the new folder, click **OK** on the New Folder Properties dialog box. The dialog box closes, and the new folder appears in the Site Builder's folder hierarchy. The folder is available for use by authors and editors immediately.

Deleting a folder

When a folder is deleted, it is moved to the Deleted Items container. To delete a folder, select it and press the delete key or move it into the Deleted Items container. The Deleted Items container is like the Recycle Bin on your Windows desktop. Items moved to the Deleted Items container are no longer in the hierarchy, but remain in the MSCMS 2001 database. To remove an item from the database, and delete the item permanently, it must be deleted within the Deleted Items container (Undeleting a folder).

Note
Be careful when deleting folders that are assigned to channels. If the folder contains published pages, once the folder is deleted, the postings associated with those pages will no longer be available for viewing in a browser.

Undeleting a folder

To make the folder available for use again, move it from the Deleted Items container back to the folder hierarchy.

Purging a folder

When you purge a folder, it is removed permanently from the system. Folders can be purged from the Deleted Items container only. If you haven't done so already, move the folder to the Deleted Items container. To purge all deleted folders, right-click the Deleted Items container, and select **Purge All Deleted Items**. To delete one, select it in the Deleted Items container, and delete it.

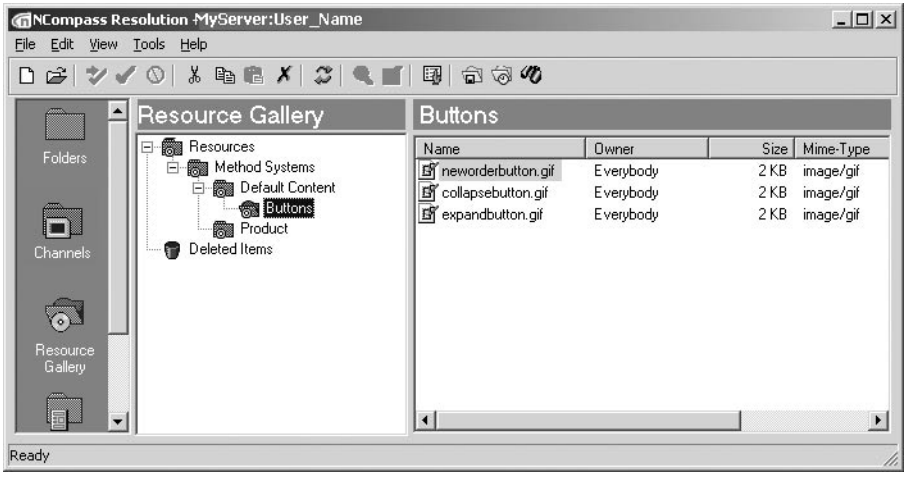
There is a default limit of 200 on the number of items that can be purged in one operation. This limit can be increased or decreased.

Creating Resource Galleries

Resource galleries hold the images, sound files and videos that authors use when adding content to a page. Template designers use resources from the resource galleries to create templates.

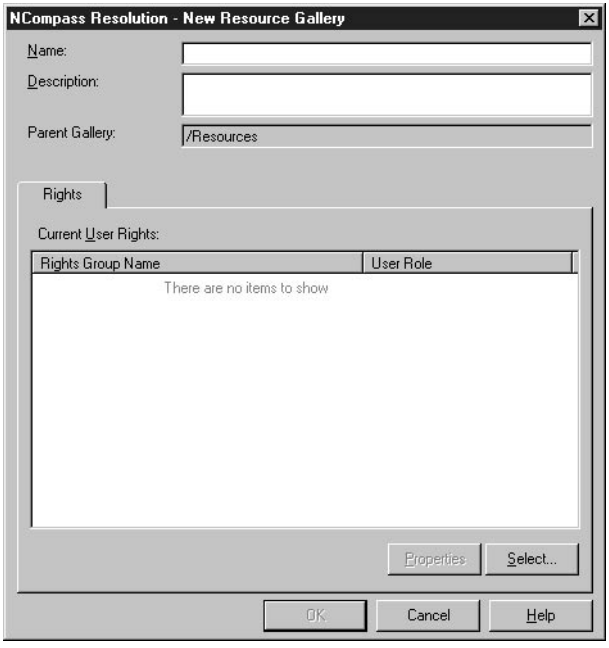
Creating Resource Galleries, step 1: naming and describing the resource gallery

1 Open Site Builder, and display the Resource Gallery hierarchy by clicking the Resource Gallery icon.



MSCMS 2001 Site Builder, with Resource Gallery hierarchy expanded

2 Right-click the resource gallery you want to create the new gallery in and select **New > Gallery**. The New Resource Gallery dialog box opens.



New Resource Gallery dialog box

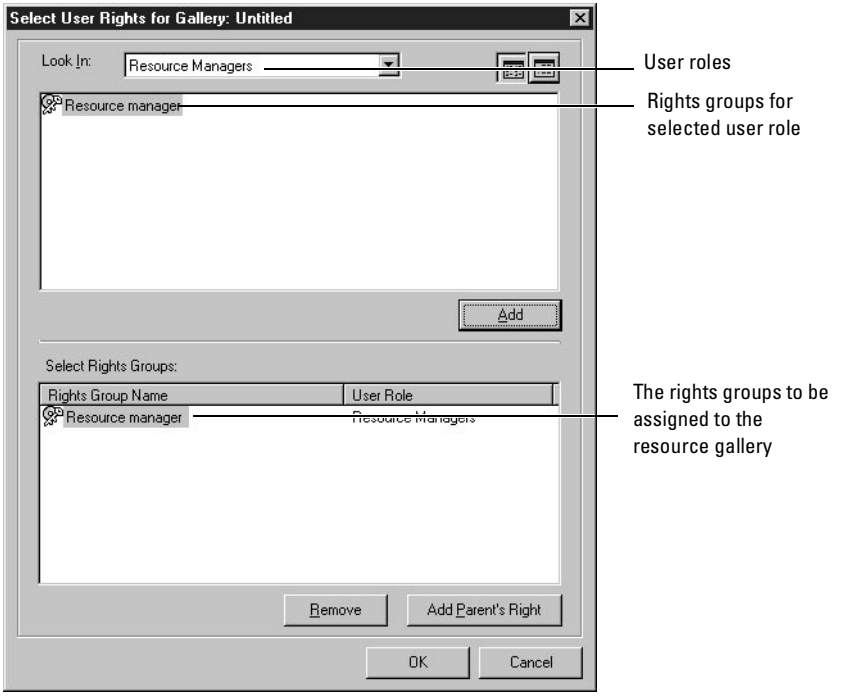
3 Name the new resource gallery to make it easy to identify. For example, if it contains resources intended for a specific purpose, such as default content, name it Default Content.

4 Enter a description of up to 256 characters in the description box to make the resource gallery's use easily identifiable to content creators. This description should briefly say what type of content the resource gallery is for, and indicate which rights groups have rights to it.

Creating Resource Galleries, step 2: assigning rights groups to the new resource gallery

If there are no rights groups to assign for the resource gallery, click **OK** to close the New Resource Gallery dialog box, and move to the next section for instructions on creating other containers. After you have finished creating containers, you can create rights groups and assign them to the containers. Assigning rights groups to the resource gallery allows the rights group members to work there.

1 Click **Select** on the New Resource Gallery dialog box. The Select User Rights Groups for Resource Gallery opens.



Select User Rights for Gallery dialog box

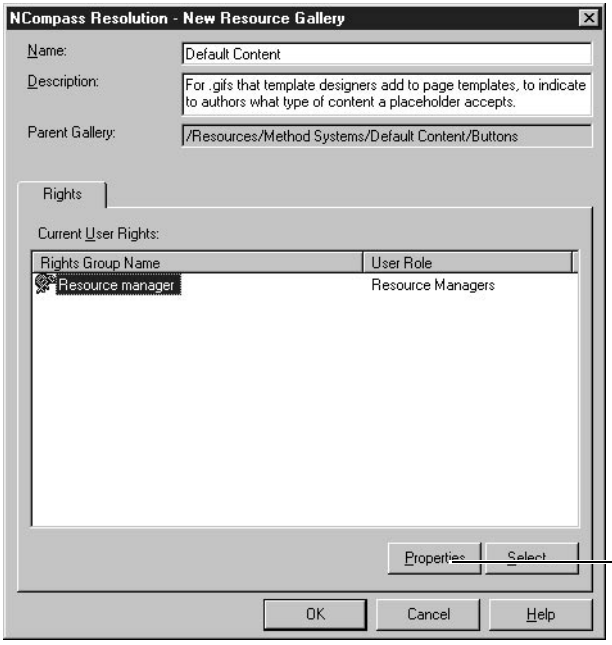
2 Select a user role from the Look In box. You can assign resource managers, authors, editors, and template designers to the resource gallery.

Or:

To assign the resource gallery the same rights groups as its parent folder, click **Add Parent's Rights**. The parent resource gallery's rights groups appear in the Selected Rights Groups box. Skip to step 4.

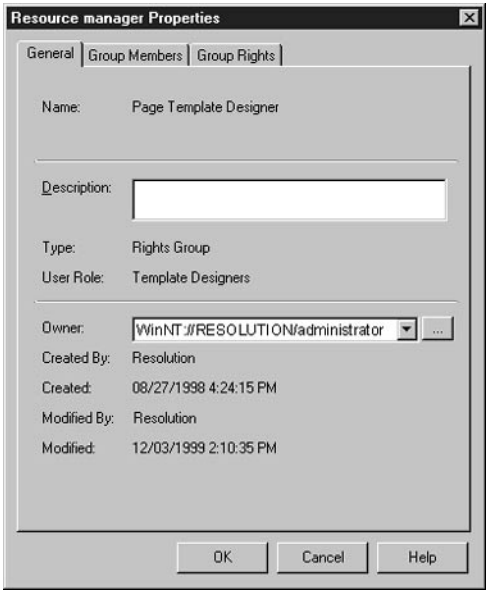
3 Select rights groups from the Look In box, and click **Add**. The rights groups appear in the Selected Rights Groups box.

4 To assign rights groups from the Selected Rights Groups box to the folder, click **OK**.

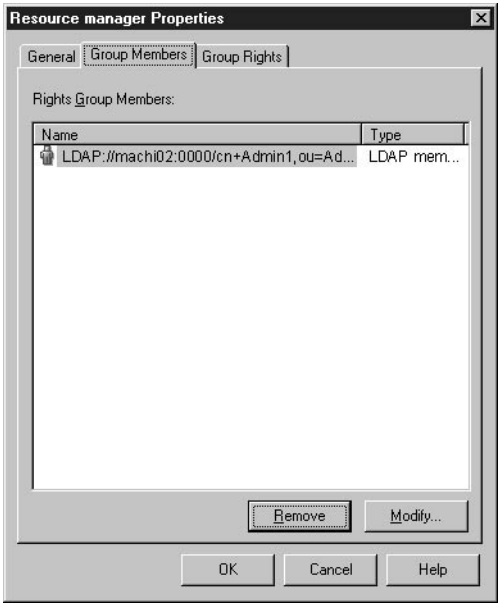


Click to view the members of a Rights Group.

5 In the Current User Rights area, select a Rights Group, and click **Properties**. The Rights Group Properties dialog box opens.



6 Select the Group Members tab. The users assigned to the rights group are shown.



Group Members tab on the Rights Group Properties dialog box

7 Close the Group Rights Properties dialog box. To modify members of the rights group, see "Assigning publishing rights to users" in Chapter 3, "Setting Up Publishing: Assigning Publishing Rights."

8 Repeat steps 1 to 3 to assign rights groups for other roles to the resource gallery.

9 When finished assigning the rights and publishing properties to the new resource gallery, click **OK** on the New Resource Gallery Properties dialog box. The dialog box closes, and the new gallery appears in the Site Builder's Resource Gallery hierarchy. The new gallery is available for use immediately.

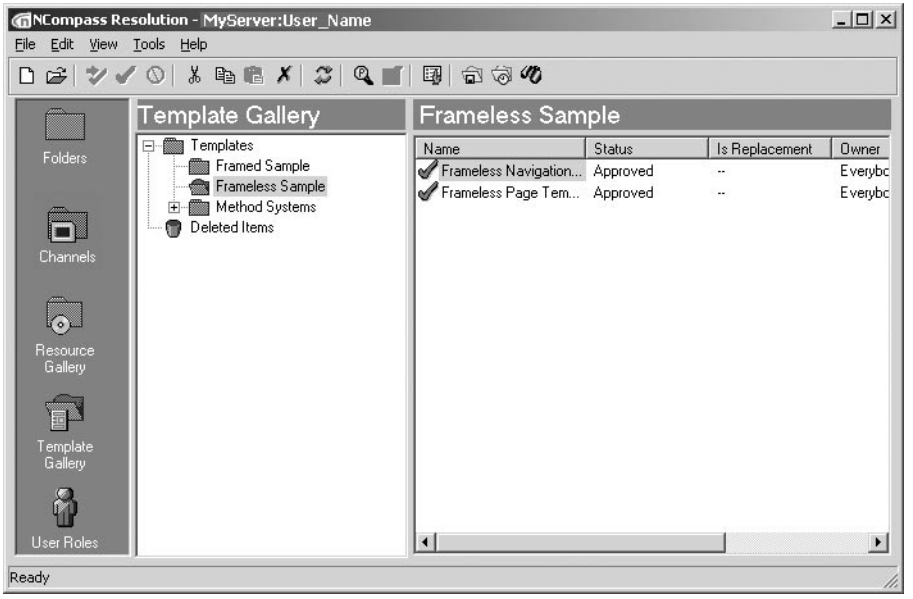
Creating Template Galleries

Template galleries store page and navigation templates. Page template designers create and save page templates to template galleries, where they are made available for authors to create pages. Navigation template programmers create navigation templates, which contain ASP scripts and server-side include files that control the navigational elements of channels.

Store page and navigation templates in separate galleries. Name the galleries so that users know which ones contain page templates and which ones contain navigation templates.

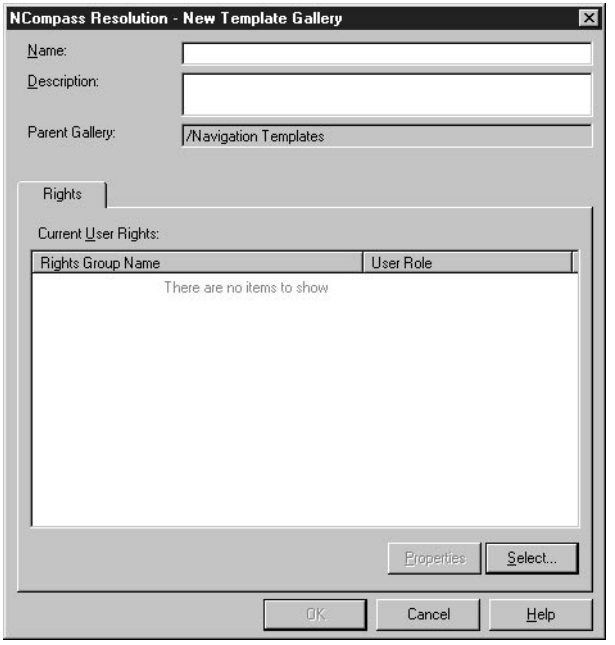
Creating Template Galleries, step 1: naming and describing the template gallery

1 Open the Site Builder and display the Template Gallery hierarchy by clicking the Template Gallery icon.



MSCMS 2001 Site Builder, with Template Gallery hierarchy expanded

2 Right-click a template gallery, and select **New > Gallery**. The New Template Gallery dialog box opens.



New Template Gallery dialog box

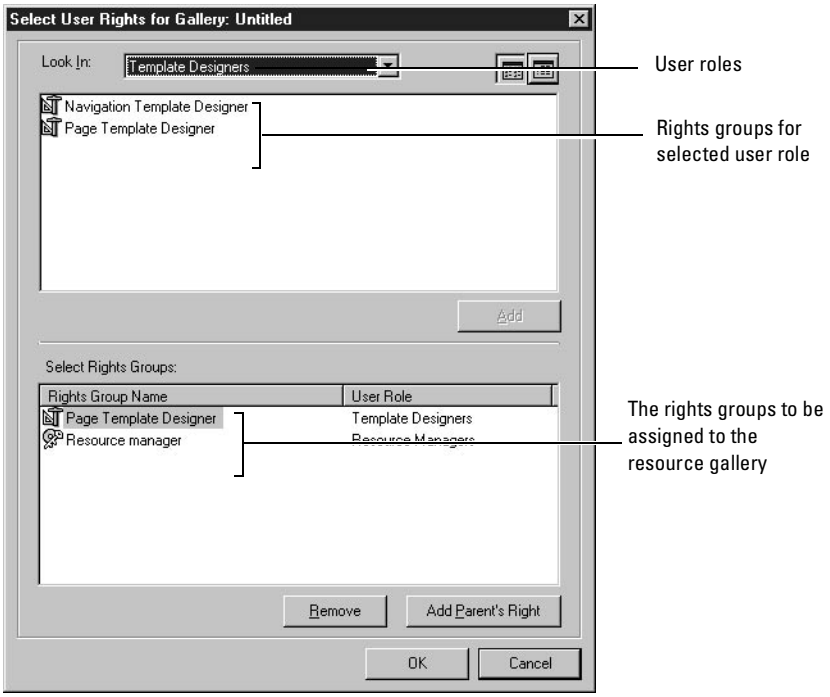
3 Name the new template gallery to make it easy to identify. For example, if it is to contain navigation templates, name it so that authors will not confuse it with a gallery that contains page templates.

4 Enter a description in the description box to make the template gallery's use easily identifiable to users. This description should briefly say what type of content the template gallery is for, and indicate which rights groups have rights to it. The description can be up to 256 characters.

Creating Template Galleries, step 2: assigning rights groups to the new template gallery

If there are no rights groups to assign for the template gallery, click **OK** to close the New Template Gallery dialog box and move to the next section for instructions on creating rights groups. Assigning rights groups to the template gallery allows the rights group members to work there.

1 Click **Select** on the New Template Gallery dialog box. The Select User Rights Groups for Template Gallery opens.



Select User Rights for Gallery dialog box

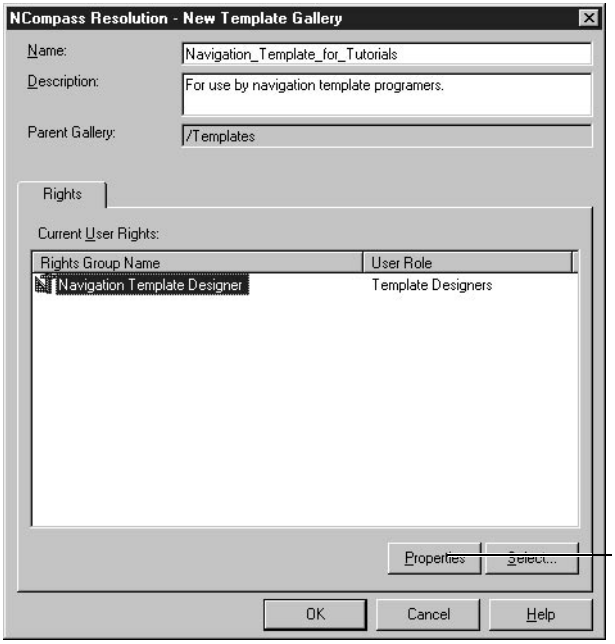
2 Select a user role from the Look In drop-down list. You can assign authors, editors, and template designers to the template gallery.

Or:

To assign the template gallery the same rights groups as its parent folder, click **Add Parent's Rights**. The parent template gallery's rights groups appear in the Selected Rights Groups box. Skip to step 4.

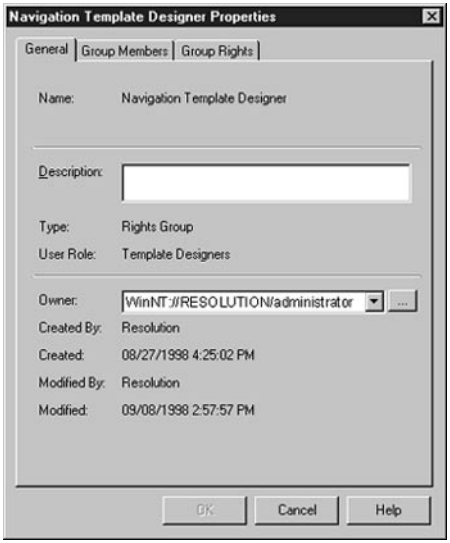
3 Select rights groups from the Look In box, and click **Add**. The rights groups appear in the Selected Rights Groups box.

4 To assign rights groups from the Selected Rights Groups box to the template gallery, click **OK**.



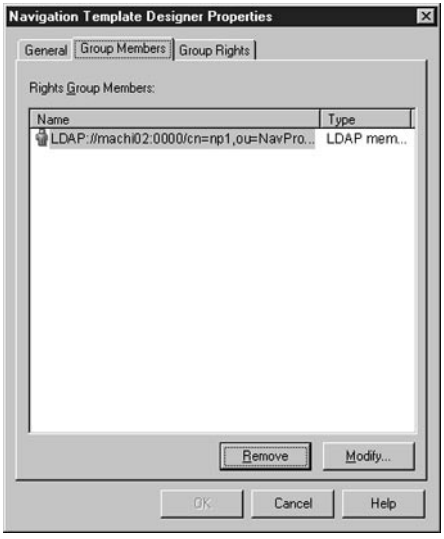
Click to view the members of a Rights Group.

5 In the Current User Rights area, select a Rights Group, and click **Properties**. The Rights Group Properties dialog box opens.



Rights Group Properties dialog box

6 Select the Group Members tab. The users assigned to the rights group are shown.



Group Members tab on the Rights Group Properties dialog box

7 Close the Group Rights Properties dialog box.

8 Repeat steps 1 to 3 to assign rights groups for other roles to the template gallery.

9 When finished assigning the rights and publishing properties to the new template gallery, click **OK** on the New Template Gallery Properties dialog box. The dialog box closes, and the new gallery appears in the Site Builder's Template Gallery hierarchy. The new gallery is available for use immediately.

Chapter 3

Setting up Publishing: Assigning Publishing Rights

Understanding user roles

Every Microsoft Content Management Server 2001 (MSCMS) user, from subscribers who browse your site to read postings, to administrators who set up the site, is assigned a role. All users can be assigned to more than one role. There are five keys to understanding user roles:

1 Roles are tied to channels, folders, or galleries.

   Example: Dave is an author in the Sales folder, Mary is an editor in the Sales folder, and Ann is a moderator in the Sales channel.

2 Roles are not system-wide.

   Example: Dave is an author in the Sales folder, and he is also an author in the Company News folder, but he is not an author in any other folders.

3 A user can have more than one role.

   Example: Ann is an author in the Sales folder; in the Marketing folder, Ann is an editor.

4 Some roles overlap others.

   For instance, you may be both an author and an editor in one folder.

5 You see only the parts of MSCMS 2001 you need for your roles.

   Example: if a user has been assigned to the moderator role only, they'll see only the channels hierarchy in the MSCMS 2001 Site Builder.

Subscribers

Subscribers are users inside and outside your organization who have been given access to channels, in order to view pages published on your site. Inside users are given access through their membership to one or more subscriber groups. Outside users can log in to your site as guests. They browse channels to which guest subscribers group members have been given access.

Subscribers do not have access to the MSCMS 2001 authoring environment unless they are also an author, editor, resource manager, template designer, or administrator. You can assign any Windows 2000 or LDAP account to the subscriber role, provided the account resides on a domain that is in a trust relationship with the machine hosting the server. Subscribers can use their browsers to view pages published on the channels they're subscribed to.

A subscriber can be a user who has been assigned to the subscriber role only, and therefore does not have rights to participate in content publishing. However, content creators (authors, editors, moderators, resource managers, and template designers) must be given subscriber rights to the containers they will work in. This allows content creators to use their browsers to view content they have created on the Web site.

Authors

Authors create pages and submit them for approval by an editor. Some users are authors in more than one folder.

Authors also usually post their pages to a channel, though this may be left for others—such as an editor—to do. A posting contains the following information:

- the page to be published
- which channel to publish it on
- the date the posting is available to subscribers
- the date the posting expires.

Editors

The editor role overlaps the author role. As well as doing everything authors do, editors approve pages for publication. Editors can be assigned to more than one folder.

Editors ensure that pages are accurate and decline inaccurate or otherwise inappropriate pages. They can ask the author to revise such a page, or revise it themselves before approving it.

Editors are assigned to Site Builder folders. Although folders do not appear on your site, editors can do their work in the Web Author exclusively. The Web Author has a search tool that allows editors to search for pages waiting for approval.

Moderators

Moderators approve or decline postings to their channels. This ensures that the schedule and content are appropriate and relevant for each posting on a channel. Moderators can reject inappropriate postings, and can ask for the schedule, the page, or both to be revised. Alternatively, they can revise a posting's schedule before approving it. However, they cannot revise the page content itself. Moderators can also change the order of postings.

Resource managers

Resource managers are mainly responsible for ‘stocking’ resource galleries with resources. Resources are any file type that can be added to a page or template, including:

- Microsoft Word documents
- PDF files
- ZIP files
- image files
- MP3s.

Only users with resource manager rights can delete or create resources.

Template designers

There are two types of templates: page templates and navigation templates.

- Page templates are used to create pages. Every MSCMS 2001 page uses a page template.
- Navigation templates allow subscribers to navigate the channels of an MSCMS 2001 site in order to view postings.

Users who create page templates are page template designers, and users who create navigation templates are navigation template programmers. Both act under the role as template designers.

Administrators

The administrator role is special in the MSCMS 2001 system. Administrators can do any task any other role can do, however, administrators are solely responsible for setting up MSCMS 2001 hierarchies (folder, channel, gallery) and rights groups. Administrators automatically have subscription rights to all channels.



Note
To view users on a domain, the administrator's account must have "Access computer from network" rights on that domain's Primary Domain Controller (PDC). If these rights have been removed, administrators cannot assign rights or add users to rights groups. If "Access computer from network" rights have been removed, ask your network administrator to reassign them.

Setting up rights and rights groups

Setting up rights consists of:

- creating rights groups
- adding role members to the rights groups
- assigning containers for members of the rights groups to work in.

These tasks are explained in the following sections.

Note
Domain trust relationship issues may cause the Site Builder to be unable to display the list of users from your domain. The administrator's machine account should be on the same domain as the MSCMS 2001 server.

Understanding rights and rights groups

Rights allow users to act in (or on) a given container. To have rights in a container, a user must be a member of an MSCMS 2001 rights group, which is a group of one or more users. Each role has its own set of rights groups.

A user's rights depend on the rights groups they have been assigned to. For example, to make a person the moderator of a channel named Sales, you would:

- create a moderator rights group
- add the user to the moderator rights group
- give the rights group access to the Sales channel.

Administrator rights group membership

Administrators have all rights in and to all containers. Therefore, you don't assign containers to the administrator rights group, and cannot remove them from it. There is only one administrator rights group, which is created when MSCMS 2001 is installed. You can create one or more rights groups for each role except the administrator's role.

Keep the number of members in the administrator rights group to a reasonable minimum. This helps centralize administrative control of the whole system, and prevents confusion caused by giving too many users powerful rights.

Subscriber rights group membership

Generally, you want members of any subscriber rights group to have access to the channels that have been assigned to the Guest Users rights group. If a subscriber rights group has access to only a few channels, it may save time to assign those channels to the Guest User rights group.

Note that if a user has author or editor rights to a channel, they have subscription rights to the channel automatically.

Assigning rights to template designers

Page template designers often must have template galleries created for specific purposes. However, only MSCMS 2001 administrators have rights to create containers. Therefore, some users whose primary function is to create and edit page templates may need to belong to the administrators rights group so they can create their own containers.

For example, if MSCMS 2001's "switching" templates are used, a page template designer needs to create and store switching templates in a gallery designated exclusively for switching templates. Authors should not have access to galleries that contain the "alternate" templates.

Navigation template programmers assign navigation templates to channels. You may want to assign navigation template programmers to the administrators rights group so they can assign navigation templates to channels themselves. Users can view navigation template properties only if they have rights to those template galleries.

Synchronizing MSCMS 2001 user names with Windows domain user names

Removing users

If an MSCMS 2001 user has been removed from the Windows 2000 domain (shown as NT domain on dialog box), the user's name remains on the MSCMS 2001 database.

Best Practices

Creating Windows 2000 or LDAP groups for MSCMS 2001 rights groups

For future work, you can save time by creating Windows 2000 or LDAP groups for each rights group you create. You can add a Windows 2000 or LDAP group to a rights group, rather than adding members individually. This way, you can add or remove users from the Windows 2000 or LDAP groups, allowing the rights groups to update automatically.

Authoring using content-related pages in the Web Author

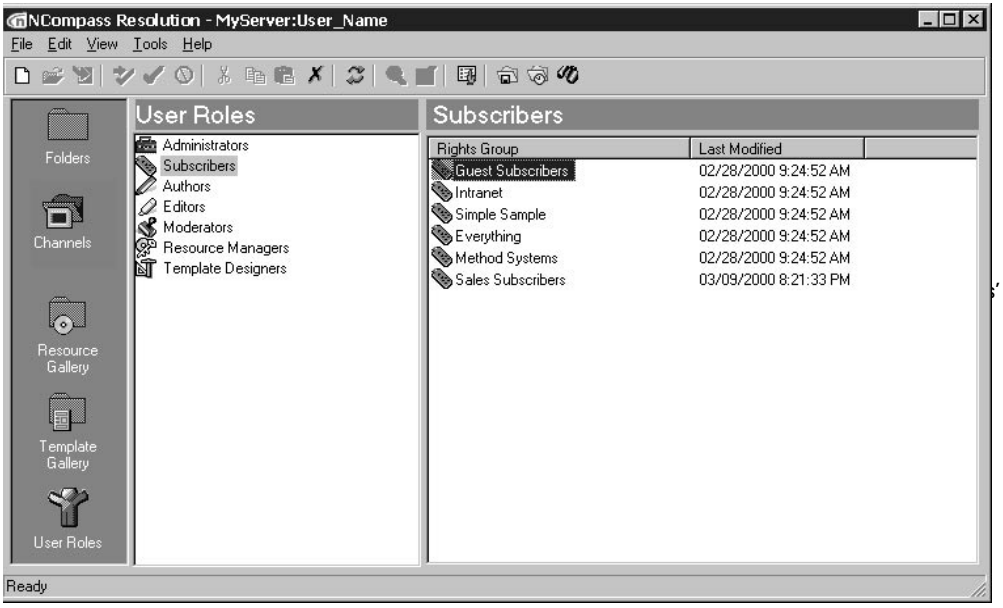
Pages that are cross-posted to multiple channels but share underlying content are said to be "connected." Authors and editors can do the following tasks using the Web Author:

- create and publish connected pages
- edit connected pages
- copy, move, and delete connected pages.

Assigning publishing rights to users

Assigning publishing rights, step 1: creating a rights group

1 Display the list of user roles by selecting the User Roles icon.



Subscribers' role and subscribers' rights groups

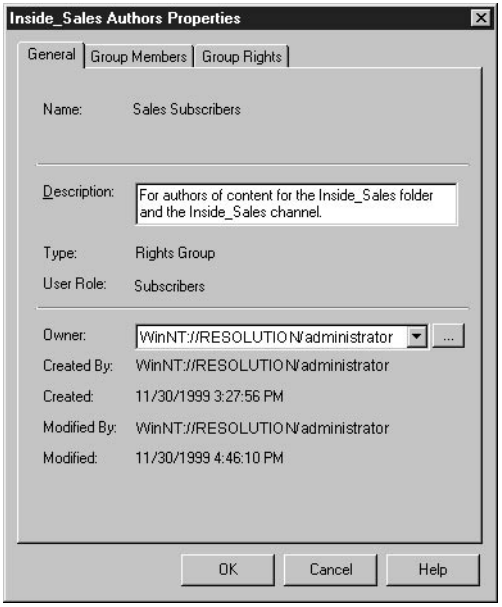
2 Click a user role. A list of existing rights groups for that role is displayed on the right.

3 Right-click an existing rights group, or anywhere within that list, and select **New Group**. A new rights group is added to the list.

4 Name the rights group to make it easy to identify. For example, if it's a rights group for authors who'll create content related to inside sales, name it "Inside Sales Authors." (MSCMS 2001 disallows duplicate names of rights groups.)

Enter a description

5 Double-click the rights group. The Properties dialog box opens.



Rights Group Properties dialog box

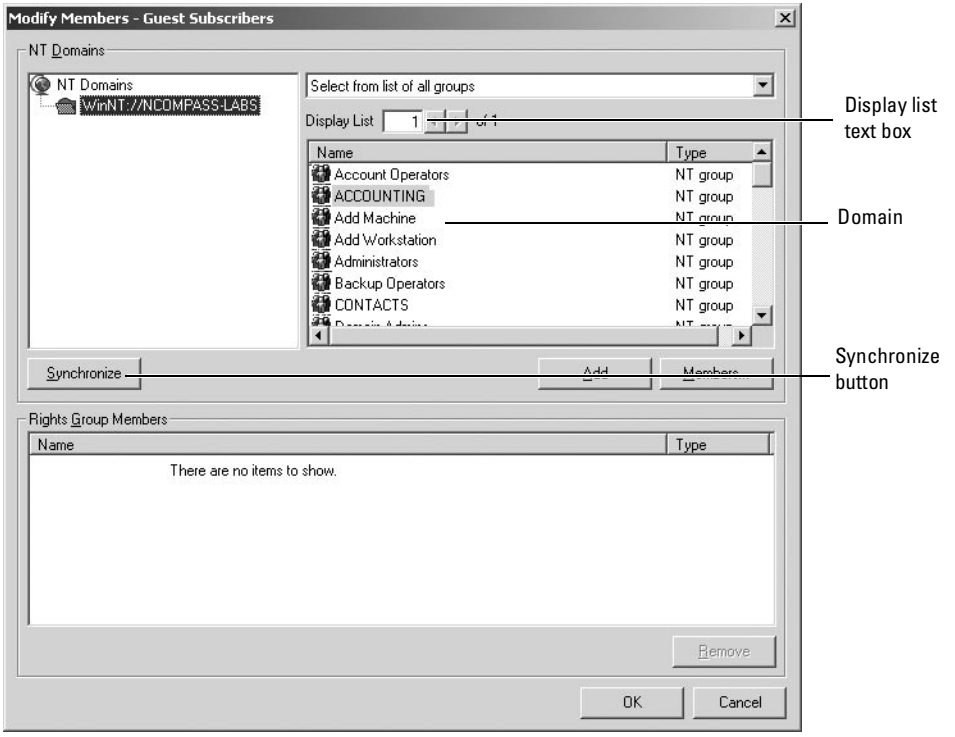
6 On the General tab of the dialog box, enter a description of up to 256 characters. This description should indicate which containers the rights group has rights to.

Assigning publishing rights, step 2: adding members to a rights group

Once a rights group is created, the next step is to add members.

1 Click the Group Members tab in the Properties dialog box. The tab displays a list of existing Windows domain groups or LDAP Organizational Units (for Site Server or Active Directory), if any have been assigned to the MSCMS 2001 rights group.

2 Click the **Modify** button. The Modify Members dialog box opens.



Modify Members dialog box

3 Click **Synchronize**, if new users have been recently created. The Modify Members dialog box updates to show all Windows NT domains and LDAP server contents. Note there is a text box, Display List, that shows the number of pages. The number of pages equals the number of total users/groups in the domain divided by 1000. So, if a domain contained 40,001 users groups, the text box would show 41 pages.

4 Select a domain name in the Modify Members dialog box. The domain members field lists the domain groups if using Windows 2000, and the Organizational Units if using Site Server, or the Organization Units and containers if using Active Directory.

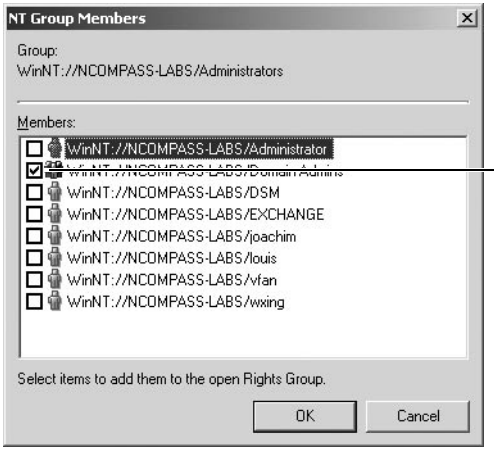
! Caution

Generally, you want members of any subscriber rights group to have access to the channels that have been assigned to the Guest Users rights group. If a subscriber rights group has access to only a few channels, it may save time to assign those channels to the Guest User rights group.

5 Click "Select from list of all groups and users" from the drop-down list.

6 To add a group and all its members to the rights group, select the group and click **Add**. The group moves to the Rights Groups Members area.

7 To hand-pick members of a group, select a group and click **Members**. The Group Members dialog box opens either for LDAP or Windows 2000 (shown as NT Group Members on dialog box).



Group Members dialog box

8 In the Group Members dialog box, click the check box beside a user's name to add users to the rights group. When finished, click **OK**.

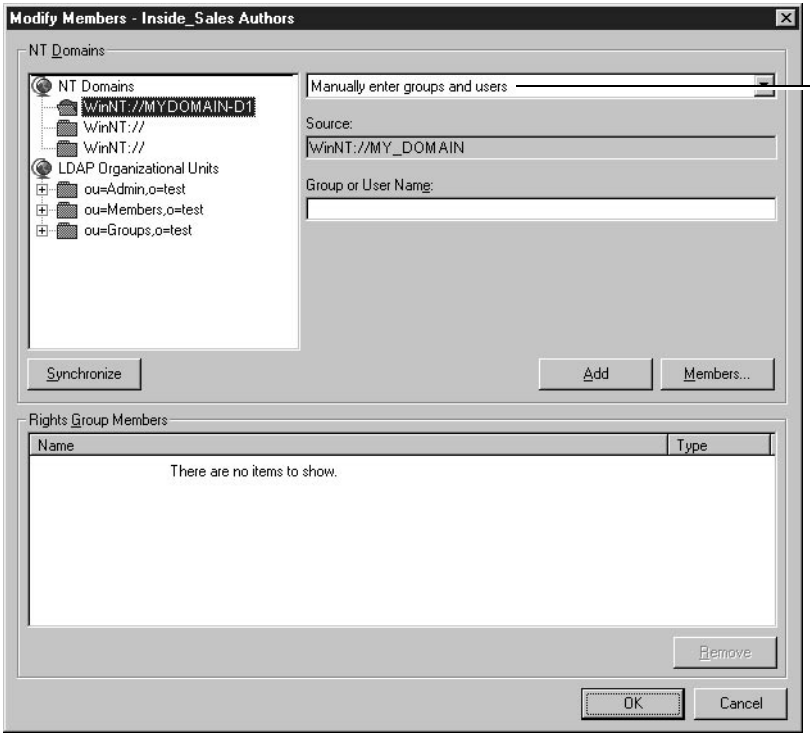
9 To select individual members from the list, double-click (or select them and click **Add**) to add them to the Rights Groups Members box.

10 Click **OK** on the Modify Members dialog box. The dialog box closes, and the selected user names appears in the Rights Groups Members area on the Group Members tab.

Note

To force an immediate refresh of your Site Builder, click **Synchronize**. Otherwise, your Site Builder will be updated to reflect the changes within approximately 15 to 20 minutes.

11 You can also select groups and users manually by clicking "Manually enter groups and users" from the drop-down list.



Manually enter groups and users option.

Assigning publishing rights, step 3: assigning containers to a rights group

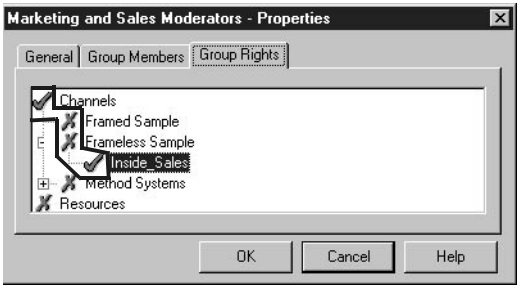
Once a rights group has been created and members have been added to it, the next step is to choose which containers those members will work in.

Subscription rights to a channel are automatically set when a channel is assigned to any rights group. This allows the rights group members to view content published to the channel in their browser.

Ensuring subscription continuity

Read this section before following the procedure to assign containers to a rights group.

Your site's navigation templates may have been set up to crawl the virtual directories and display channels in the same hierarchical order as your Site Builder. If this is the case, to view pages in a channel, a subscriber must have rights to the channel directly above it in the channel hierarchy. This is called subscription continuity.

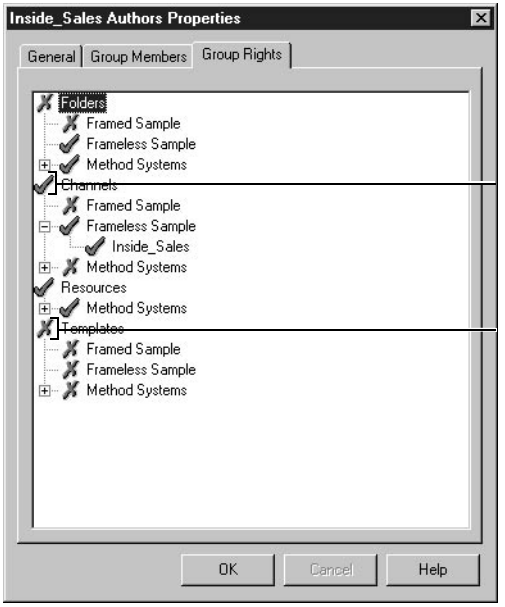


Subscriber Rights Group dialog box showing broken continuity

In the rights configuration shown above, Inside_Sales subscribers won't be able to view the Frameless channel even though it's assigned to the rights group. The continuity chain between the root channel ("Channels") and Inside_Sales is broken because the Inside_Sales' parent channel, Frameless Sample, isn't assigned to the group. However, if hierarchy-based URLs are used and Inside_Sales subscribers know the full path name, they can view pages published there.

Continuity is not required for any containers (including channels) for any rights groups other than subscribers, except where viewing rights are not allowed (see the section on pruning containers for viewing rights in Chapter 5, "Using the Server Configuration Application" in the *MSCMS 2001 Setup Guide)*.

1 Click the Group Rights tab in the rights group's Properties dialog box. The tab displays a list of hierarchies for the containers that can be assigned to the rights group.



Group Rights tab on the Rights Group Properties dialog box

2 You can assign containers to rights groups in two ways:

- To assign one container to a rights group, click the name of a container you want to assign to the Rights Group. The "X" beside the container name changes to a check mark.
- To assign a container and all of its subcontainers ("children"), right-click the container and select **Propagate Rights to Children**. Each cross beside the container and all its children changes to a check mark.

To learn about a container, hold your pointer over its name to display its description.

Tip

To get more information about a particular container to help decide if you should assign it to a rights group, right-click and select **Properties**, then click the Rights tab. The tab displays a list of rights groups already assigned to the container. (With folders, the Default Posting Channel information on the General tab should also be helpful.)

3 Assign at least one appropriate container from each container category displayed on the Group Rights tab, then click **OK**.

Note
Once a channel has been assigned to a user, the user is automatically subscribed to that channel. If users do not wish to see (in their browser) content published to channels they've been automatically subscribed to, they can unsubscribe themselves from channels.

Deleting user accounts

When a user login ID is deleted from the network, it still appears in any rights groups it was previously added to. If an MSCMS 2001 user leaves your organization, remove the user from the rights groups they had been assigned to.

Assigning ownership of templates

The templates shipped with MSCMS 2001 are assigned to "Everybody." You must reassign ownership of these templates to template designers, in order to distribute responsibility for editing and maintaining them.

Template ownership can be limited to one person, or granted to all users who have rights in the gallery where the template is stored. Until ownership is explicitly changed, the template designer who created the template owns it.

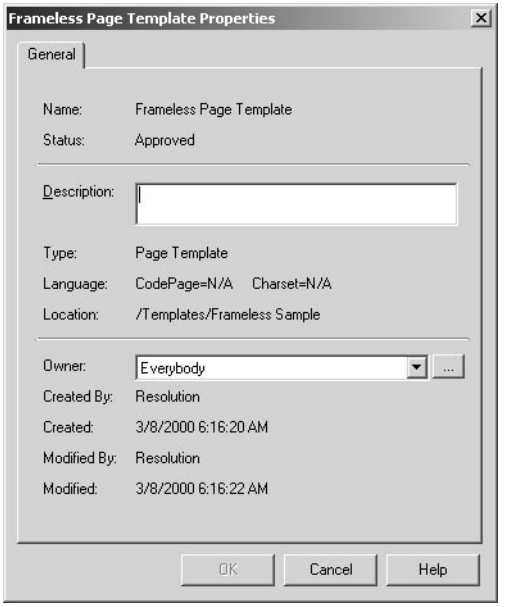
Changing the owner of a template

1 Display the hierarchy of templates by selecting the Template Gallery icon in the Site Builder.

2 Expand the template gallery hierarchy as necessary.

3 Select a gallery containing a template whose ownership you want to change.

4 Right-click the template and select **Properties**. The Template Properties dialog box opens.



Template Properties dialog box

5 Click the **Browse (...)** button. The Select Owner dialog box opens.



Select Owner dialog box

6 Select a domain from the Domain Name drop-down list. The domain user groups and names appear in the Domain Members box.

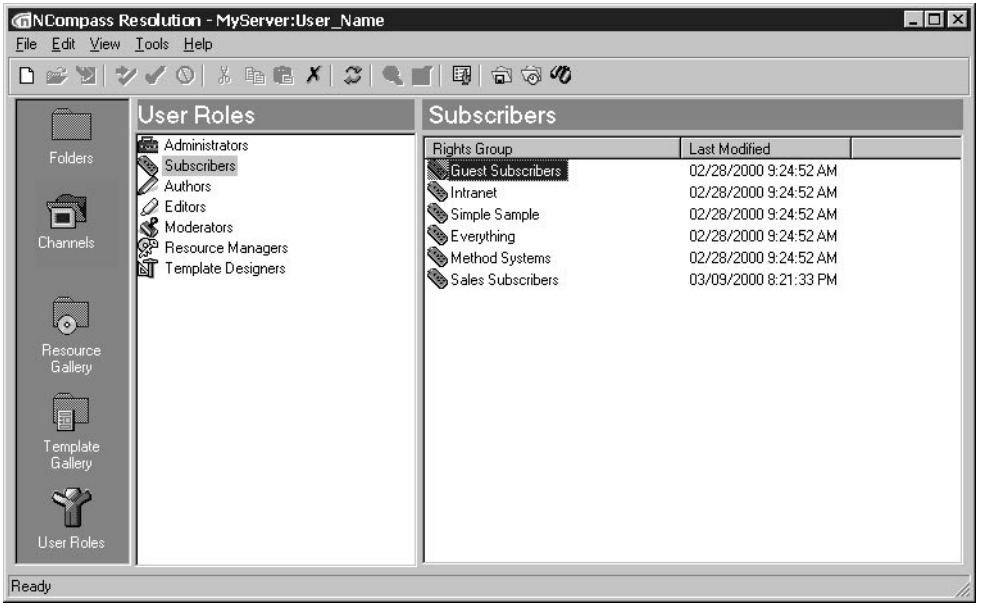
7 Select the name of a template designer who has rights in the gallery the template is stored in and click **OK**.

Adding LDAP users and groups

Note
In the context of this section, the term LDAP refers to both Site Server and Active Directory.

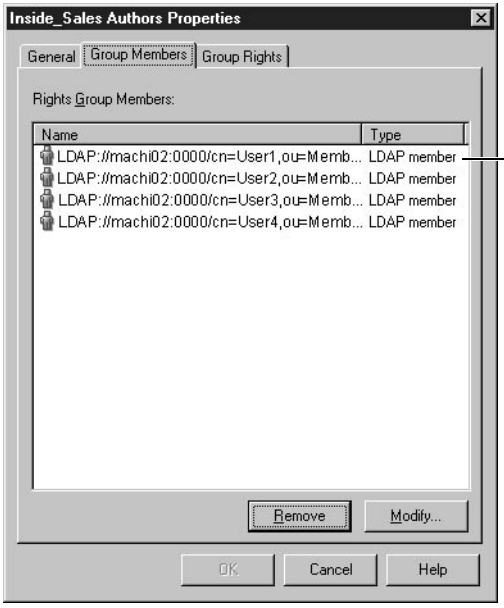
To add LDAP users and groups to an existing rights group:

1 Open the Site Builder.
2 Select the User Roles icon. Click one of the roles, for example, the **Subscribers** user role.



MSCMS 2001 Site Builder, with a subscriber group selected

3 From the list, select the user group you want to add members to. Double-click the group. The user group's Properties dialog box opens.
4 Select the Group Members tab.



Windows 2000 and LDAP subscribers can both appear in the group members list. Note that if the site is protected by Site Server, you will not be able to browse the site as an NT user, and vice versa.

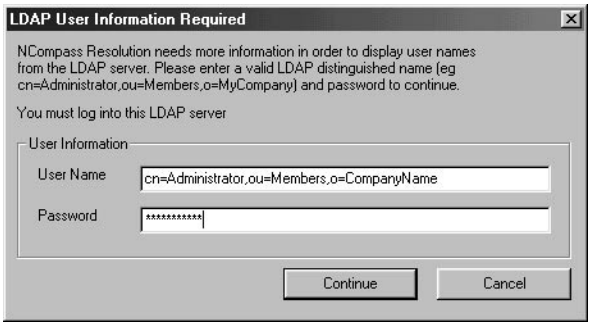
Rights Groups Properties dialog box, with Group Members tab selected

5 Click the **Modify** button—the Modify Members dialog box opens.

6 Click **Synchronize**, if new users have been recently created. The Modify Members dialog box will update to show all LDAP server contents.

7 Select a Domain Name in the Modify Members dialog box. The Domain Members field lists the domain members, including individuals and groups.

If you select an Site Server Membership Server group and anonymous access to the LDAP server is not allowed, and you are not already logged in to the LDAP server, you receive a login prompt.



MSCMS 2001 Site Builder's LDAP User Information Required dialog

Enter your full LDAP Server login name, for example

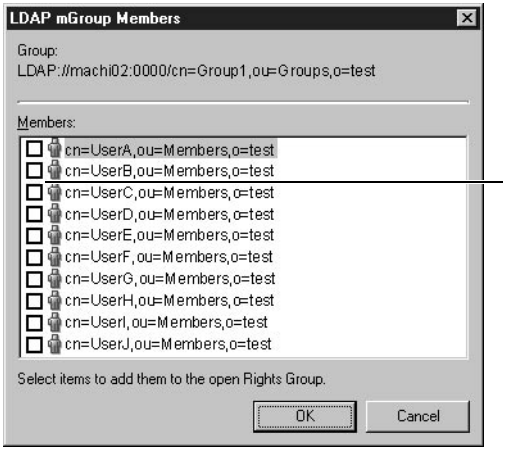
`cn=Administrator,ou=Members,o=CompanyName`

and the LDAP password. Click **Continue**.

Note

You can use the name and password of any LDAP user with sufficient rights to view the list of groups and users on the Membership Server.Administrators need an LDAP user name and password (in addition to their NT directory service user name and password) to create and maintain subscriber groups.

8 Select a domain member and click **Members**. The Group Members dialog box opens.



Group Members dialog box

9 In the Group Members dialog box, click the check box beside a user's name to add users to the rights group. When finished, click **OK**.

10 Click **OK** on the Modify Members dialog box. The dialog box closes, and the selected user names appears in the Rights Groups Members area on the Group Members tab.

About AD nested groups and log on conventions in MSCMS 2001

- We offer limited support for Active Directory nested groups on domains running in native mode. You can log on to MSCMS 2001 as members of a subgroup if its parent group is granted rights to MSCMS 2001, but you cannot expand the nested group.
- Distinguished names are displayed only if they cannot be converted from domain names to canonical format due to network problems. Otherwise, domains (and only domains) are displayed in canonical format (`Microsoft.com`).

  So, for example, if you selected `Microsoft.com` as your domain and `Microsoft.com/Users` as your container in the Server Configuration Application (SCA), you would see `Microsoft.com` in the domain list when logging in.

Users can specify their logins as follows:

Domain selected	User name format	Example
Windows NT 4.0 format	user's login	`WinNT://Microsoft/jsmith`
Active Directory domain - distinguished name format	relative distinguished name	Depends on how the user was created in Active Directory. The format can be user's login if first name and last name are not specified, or it can be first name, middle name, and last name.
Active Directory domain - canonical format	You can also log in directly using the UPN format (jsmith @domain.com) and bypass selecting a domain.	`jsmith@Microsoft.com`

Changing the navigation framework

Much of the look and functionality of the Web interface is controlled by navigation templates and system resource files. Therefore, your Web interface can be customized by following the guidelines, instructions, and examples in the *MSCMS 2001 Site Programmer's Guide*.

About navigation templates

Navigation templates allow subscribers to navigate the channels of a site in order to see postings. MSCMS 2001 offers a selection of ready-to-use navigation templates. Your navigation programmers can edit those, or create new ones to suit your purposes. For more information, see the *MSCMS 2001 Site Programmer's Guide*.

The software ships with a default navigation template assigned to the root channel. When you create a channel hierarchy below the root channel, each subchannel automatically inherits the navigation template of its "parent" container. If the navigation template is changed for a channel, you can choose whether or not that change is cascaded to the children.

Using hierarchy-based URLs or unique ID-based URLs

What are hierarchy-based URLs?

A hierarchy-based URL is an address for an item stored in an MSCMS 2001 hierarchy. For example, the URL for an MSCMS 2001 page might look like this:

```
http://www.example.com/Marketing/Newsletter/CurrentIssue.htm
```

"CurrentIssue" is the name of a posting (Content Management Server 2001 adds a .htm extension to the URL for postings). It does not show the root channel name in the URL. The hierarchy for the URL is as follows:

```
Channels
Marketing
Newsletter
CurrentIssue
```

Hierarchy-based URLs and non-English languages

In hierarchy-based URLs, MSCMS 2001 uses the name of the channel in the language they appear in on your site. Provided that the names of channels and postings use characters within the A to Z ASCII character set, hierarchy-based URLs are more compatible with Internet search engines.

Certain non-Roman characters may not map correctly to ASCII and, therefore, may not work properly on the Internet. For instance, non-standard characters in a URL are replaced by URL-encoded characters. This changes the names of channels as they appear in the Address field of a Web browser. For example, Infoseek cannot index pages where the URL contains the symbols ()@?#$%^&*. For Internet use, we recommend using Roman character-based names for pages and channels.

For information on setting up your MSCMS 2001 site for use by Internet search engines, see the section "Setting up for indexing by a Web search engine" in Chapter 4, "Managing Access."

Unique ID-based URLs

What are unique iD-based URLs?

A unique ID-based URL uses randomly generated numbers and letters to uniquely identify a channel or posting. The following is an example of a unique ID-based URL for a posting of an MSCMS 2001 page:

```
http://sample/NR/Intranet/Intranethome.asp?Mode=STORYRUNTIME&NodeGuid={E4D19123-
9DD3-11D1-B44E-006097071264}
```

Disabling or enabling hierarchy-based URLs

The option to choose between using hierarchy-based URLs or unique ID-based URLs is available from the Server Configuration Application. Refer to Chapter 5, "Using the Server Configuration Application" in the *MSCMS 2001 Setup Guide* for complete information about disabling or enabling hierarchy-based URLs using this tool.

Refreshing the Site Builder

Content Management Server 2001 stores and retrieves items in the cache whenever the Site Builder is used. When many users work at one time, the cached version of containers, pages, and postings can become unsynchronized with the current ones stored in the database. Refreshing the Site Builder ensures you are working with the latest version of containers, pages, and postings.

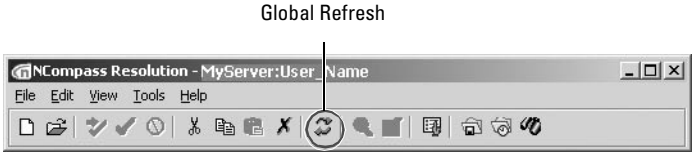
You can refresh the Site Builder with the Refresh or Global Refresh tools.

Refresh

The Refresh tool refreshes single items, such as a folder or channel. Right-click the page or channel and select **Refresh** from the pop-up menu.

Global Refresh

The Global Refresh tool refreshes all containers in the Site Builder. Click the **Global Refresh** icon on the Site Builder toolbar.



Miscellaneous tips

Consecutively publishing pages

Publishing pages consecutively means you can create a new version of a page to replace the original on a given date. Note that the pages must be in the same channel. Pages can be published consecutively by:

- naming the page identically to the original
- setting the original page's expiry date to the date you want the posting for the new page to replace it
- setting the start date of the posting for the new page to the date you want it to replace the original.

  If both postings share the same publishing dates, both appear in the run-time channel hierarchy and have the same name. So, to replace a posting it is not enough to set a second posting with the same name to start; you must also expire the first.

The approval process in one version of a page or posting is independent of that of any other version. Each version can be modified or approved at any time.

Consecutively publishing channels

You can create a version of a channel to replace the original on a given date by:

- naming the new channel identically to the original
- setting the original channel's expiry date to the date on which you want the new channel to replace it
- setting the new channel's start date to the date you want it to replace the original.
  If the original channel and new channel share the same publishing dates, both appear in the run-time channel hierarchy and have same name. So, to replace a channel, it is not enough to set a second channel with the same name to start; you must also expire the first.

Published channels inside an expired channel, or inside a channel with a start date in the future, do not display in the browser channel hierarchy. However, they appear in results from "What's Important."

Linking to an MSCMS 2001 channel or posting from an external source

Because your system could be using either unique ID-based or hierarchy-based URLs, the safest method of addressing the link is to navigate to the posting or channel in your browser, and copy the URL from your browser's address box. You may need to periodically update the link, because the URL is subject to changes made to its channel's hierarchy.

Bypassing the approval process

You can have authors publish pages directly, without editor or moderator approval, in any channel of your choice.

1 Do not assign an editor to a channel's corresponding folder. MSCMS 2001 auto-approves pages submitted there.

2 Do not assign a moderator to the channel. Postings submitted there are auto-approved.

You can use the auto-approval system to have content approved by an editor only, or by a moderator only, to suit your needs.

Chapter 4

Managing Access

Overview

Users in Microsoft Content Management Server 2001 (MSCMS 2001) are imported from the network and updated approximately every ten to fifteen minutes. Any valid login ID on the network is a potential MSCMS 2001 user. You may want to create a new Windows 2000 domain reserved for users.

Managing internal access

Ensuring subscriber access

After you have set up channels and subscriber rights groups, it is important to let subscribers know their entry points for the site, and to coordinate with navigation template programmers to create those entry points, if necessary.

If you plan to give subscribers different entry points according to their identities or design-time roles, be sure to send an e-mail message, or otherwise notify them of their own specific entry point. This can also be done through specific links at a single-entry point.

Managing external access

Setting up guest access for non-staged sites

Before installing MSCMS 2001, you need to create a Windows 2000 account called "GuestUser" (or any name you prefer). The *MSCMS 2001 Setup Guide* steps you through this process. During the installation procedure, you can provide guest access whereby site visitors from outside your Windows 2000 domain can view parts of your site as a Guest.

To manage guest access, set up a "Guest" subscriber rights group, add the "GuestUser" account to the rights group, and give the group rights over those channels guests can view.

Generally, you want members of any subscriber rights group to have access to the channels that have been assigned to the Guest Users rights group. If a subscriber rights group has access to a few channels only, it may save time to assign those channels to the Guest User rights group.

Setting up visitor access

When creating an LDAP or Windows 2000 MSCMS 2001 Guest account, consider setting up user accounts for special types of visitors, with names such as Partner, Customer, Press, Contractor, or Investor, that reflect their relationship to your site. You must also set up subscriber rights groups for these visitors, and add the users to them. Distribute the user names and passwords for each visitor type to the appropriate people.

You can use these password-protected accounts to target sensitive information to certain site visitors, or to give customers or contractors access to pages from which they can download files.

Restricting external access

As an MSCMS 2001 administrator, take care to restrict external visitor access to certain parts of your site. If, for instance, the generic Guest account is allowed access to subscription pages, one guest could change subscription rights for all subsequent guests. The `subscription.asp` script, in the Shared directory, prevents Guest accounts from accessing the subscriptions pages; however, the main purpose of this .asp file is for changing subscriptions.

About Web search access (for dynamic sites)

MSCMS 2001 allows Internet search engines to index URLs that are accessible to guests. MSCMS 2001 permits Web indexing access to only those URLs that are accessible to guests.

You can also implement your own search feature by installing a search engine directly on the site. In this case, you can allow searches for authenticated access also.

Requirements for Web indexing

If you plan to have your site indexed by an Internet search engine, or use a Web crawler to allow users to do full-text searches on your site, this section explains the general requirements.

About Web indexing software

Web crawlers are used by most major Internet search services, as well as the site indexing applications that can be purchased for use on your own Internet or intranet site.

Most Web crawlers work similarly, taking the top-level pages submitted, and following all the links it finds. The collected information is stored, while the links are used to guide the crawler's search patterns. When potential customers look for your products or services through Internet search sites, the results of their queries are generated from the pages found by the Web crawler.

For a working demonstration of how searching capabilities can enhance an MSCMS 2001 Web site, visit `www.microsoft.com/cmserver`.

Redirection

MSCMS 2001 uses redirects that your Web crawler may or may not recognize. You will need to add the necessary HTML coding to templates to ensure that redirects are handled correctly by the Web crawler. Refer to the *MSCMS 2001 Site Programmer's Guide* for more information.

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 Publishing Application Programming Interface (API) `Autosession` object can be used within the page template:

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

Setting up for indexing by a Web search engine

Setting up user access to Internet search engine results

MSCMS 2001 must have Default Guest Access allowed in order for public Internet search engines (Web crawlers) to index your site. If the Web crawler is pointed at the root page of a site that doesn't allow guest access, then the Web crawler will not be authenticated and will not index any pages. The Default Guest Access option can be provided using the MSCMS 2001 Server Configuration Application.

Indexing your site for full text searching

You can provide a search link from your MSCMS 2001 site to Web indexing software. This will allow users to search for postings, or text contained in the pages associated with postings. MSCMS 2001 ships with Active Server Pages (ASP) scripts for Site Server that allow all searches to be authenticated by the user's rights. For example, a search for postings will return only the postings contained in channels the user has rights in. Full text searching also offers users two options for filtering results from a search. Full text search can:

- search for postings in channels the user has rights in
- search for postings in channels the user is subscribed to.

Indexing your site is a regular task. Depending on the Web indexing software you use, it may be possible to automate daily indexing. Whether indexing is automated or done manually, it's best to do the indexing outside of working hours, or any time when fewer people are using MSCMS 2001. Indexing every channel on your site will tax your server.

Setting the User Agent String

A Web crawler's User Agent String contains a keyword that identifies the Web crawler when making http GET requests. For example, when an Internet Explorer 5 browser does a search, it sends a string that indicates the request came from Internet Explorer 5.

If you are using a Web crawler to do authenticated (that is, using username and password rather than as guest) full-text searches on your site, you must add a keyword "MSCMS 2001" to its User Agent String, so that MSCMS 2001 can authenticate the Web crawler.

Creating a user account for authenticated Web indexing

Windows 2000 membership authentication

To index your site for full text searching, create an MSCMS 2001 user account for use by the Web indexing software. If all channels and their contents are to be crawled, create an administrator account for this purpose. This saves time, as administrators have access to all channels automatically and don't require subscriptions to channels. The Web indexing software will crawl your site using the administrator account you have set up. Security is maintained, as subscribers can search only within channels where they have rights.

Configuring the MSCMS 2001 User Account

Configure the Web indexing software to use the MSCMS 2001 user account and the domain the user account resides on. For example: `MY_DOMAIN\USER_NAME`.

Site Server and Active Directory membership authentication

If you are using Site Server's Membership Server or Active Directory for membership authentication, your Web indexing software uses an LDAP account to index your site. You can assign an administrator role to the LDAP user account. Giving the LDAP account administrator rights ensures the LDAP account has access to all channels on your site.

Configuring Internet Information Server for Web indexing

To allow full text searching, IIS must be configured for Basic Authentication.

1. Open the Microsoft Management Console for IIS.
2. Right-click the Web server that is hosting your MSCMS 2001 site and select **Properties** from the pop-up menu. The Web server's Properties dialog box opens.
3. Select the Directory Security tab.
4. In the Anonymous Access and Authentication Control area, click the **Edit** button. The Authentication Methods dialog box opens.
5. Select the **Basic Authentication** option, and click **OK**.

Configuring IIS for Web indexing on Site Server

If using Site Server, to allow full text searching, IIS must be configured as follows:

1. Open the Microsoft Management Console for IIS.
2. Right-click the Web server that is hosting your site, and select **Properties** from the pop-up menu. The Web server's Properties dialog box opens.
3. Select the Membership Authentication tab.
4. Select the **Basic Authentication** option, and click **OK**.

Precautions when indexing your site for full text searching

Take precautions to ensure no users other than MSCMS 2001 administrators have access to the machine where the Web indexing software has been installed. Because the Web indexing software uses administrator rights to crawl your site, it creates links to all postings on your site. Some Web indexing software packages display a sample paragraph from each page the postings point to. We recommend installing the Web indexing software on the same machine hosting your MSCMS 2001 server, and restricting access to it.

Note
Be sure to save copies of your original files, in case you need to restore their original functionality.

Linking the search page to your MSCMS 2001 Web site

After the site index for full text searching has been generated, you need to provide a way for a user to search the index. The following file can be used as an example of how to use Site Server search:

```
\Server\Methods Systems Sample\Support Files\Includes\Search\Search.inc.
```

Web crawler information

This document contains general Web crawler information:

```
http://info.Webcrawler.com/mak/projects/robots/robots.html
```

This reference contains recommendations for helping search engines index a Web site:

```
http://www.w3.org/TR/REC-html40/appendix/notes.html#recs
```

Using the Kill Lock command

While a user is working on an MSCMS 2001 object such as a page, that object is locked to prevent two users from working on the same object at one time. (Other users can work with a locked object in read-only mode.)

If a client machine was turned off while one or more objects were use, the object(s) may remain locked after rebooting. Use the Kill Lock command from the Tools menu in the Site Builder to end the lock.

If users consistently report being unable to work with an object they have rights to, kill the lock on it after making sure no user is currently working with it.

! Caution
Ensure that no one is using the page at the time Kill Lock is used. Killing the lock on a page currently in use can result in loss of data.

Chapter 5

Using the Server Configuration Application

Overview

This chapter provides an overview only of the MSCMS 2001 Server Configuration Application (SCA). For more detailed procedural information, including the initial installation or upgrading of multiple servers, refer to the *MSCMS 2001 Setup Guide*.

What is the Server Configuration Application?

The SCA is used to view and if necessary, change, the configuration values for the MSCMS 2001 server and the database it references. It can be used by individuals with administrator rights on the server machine who are responsible for the configuration and general maintenance of a single server or multiple connected servers (as in a server cluster or farm).

Scalability and configuration settings

MSCMS 2001 is scalable. Multiple servers can be pointing to the same database. While some configuration settings are stored in the registry, those that apply to the entire "farm" are stored in the database. Therefore, administrators can use the functionality provided by scalability to automatically update changes to database properties on all servers pointing to that database.

To provide multiple server support without degrading performance for a single server configuration, configuration properties are now separated into Web entry-point properties, local and global.

- entry-point properties affect one entry point of a server
- local properties affect all the entry-points to the local server
- global properties affect all the servers that point to a particular database.

Global defaults are stored in the database and affect all servers that point to that database, unless individually overridden with a local setting.

Working with the SCA

You can do the following tasks with the SCA:

- select the URL type. Refer to Chapter 2, "Setting up Publishing: Creating Containers for Users" in this guide for information about URL types.
- prune containers to establish viewing rights
- change the background cleanup settings
- change the location and size of the disk cache
- change the size of the memory cache
- set multiple Web entry points
- select or remove Windows NT domains
- change user authentication (Windows 2000, LDAP—Site Server or Active Directory)
- change the MSCMS 2001 System Account
- change cookie settings
- turn guest access on or off
- view the product ID information entered during installation.

What tasks cannot be handled by the SCA?

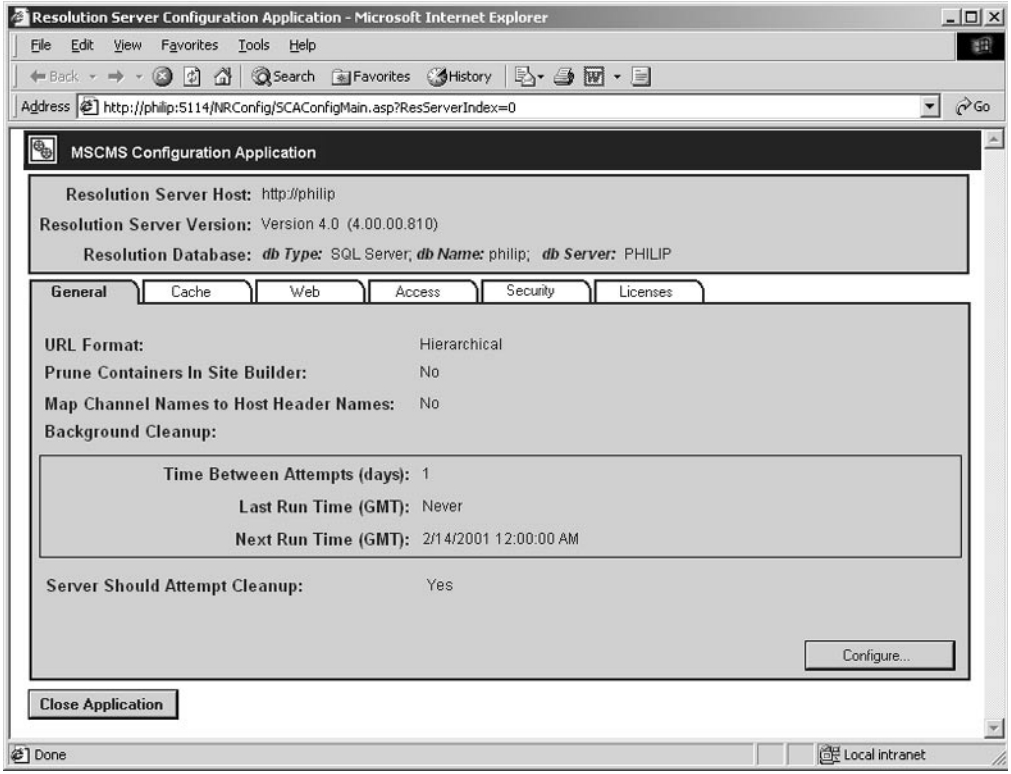
The following tasks cannot be done using the SCA:

- changing to a different SQL server
- changing to a different SQL database

These tasks are handled using the Database Configuration Application (DCA), also documented in the *MSCMS 2001 Setup Guide*.

Launching the SCA

After you complete a database install, the DCA automatically allows you to continue with the SCA. You can also load the SCA by typing the following URL from any machine that has network access to the server: `http://<machine>/NRConfig` where `<machine>` is the machine or domain name that corresponds to the SCA Web site. Or, from Windows, select **Start > Programs > Microsoft Content Management Server > Server Configuration Application**. The following screen appears from which you make tab selections.



The General tab, on the Server Configuration Application

If the SCA is installed on a Web site that uses a port other than 80, include the port number in the URL. For example, a port of 5114 would be: `http://<machine>:5114/NRConfig`.

Note

Internally, the MSCMS 2001 server stores dates and times in Greenwich mean time (GMT). However, the start dates and times you specify are always local.

Chapter 6

Using the Versioning Feature

Versioning pages, postings, templates, and resources

In the Web Author, revisions are based on postings. Changes 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

Revision histories display the following 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
  - type of revision
  - name of who approved the revision.
- For both approved and unapproved revisions. there is an option to preview and compare to another revision

Enabling the versioning feature

The versioning feature is always enabled. There is no user-defined numeric maximum for the length of the revision history because revision histories are versioned instead by date and time.

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 MSCMS 2001 Site Deployment Manager" in this guide.

Viewing revision histories

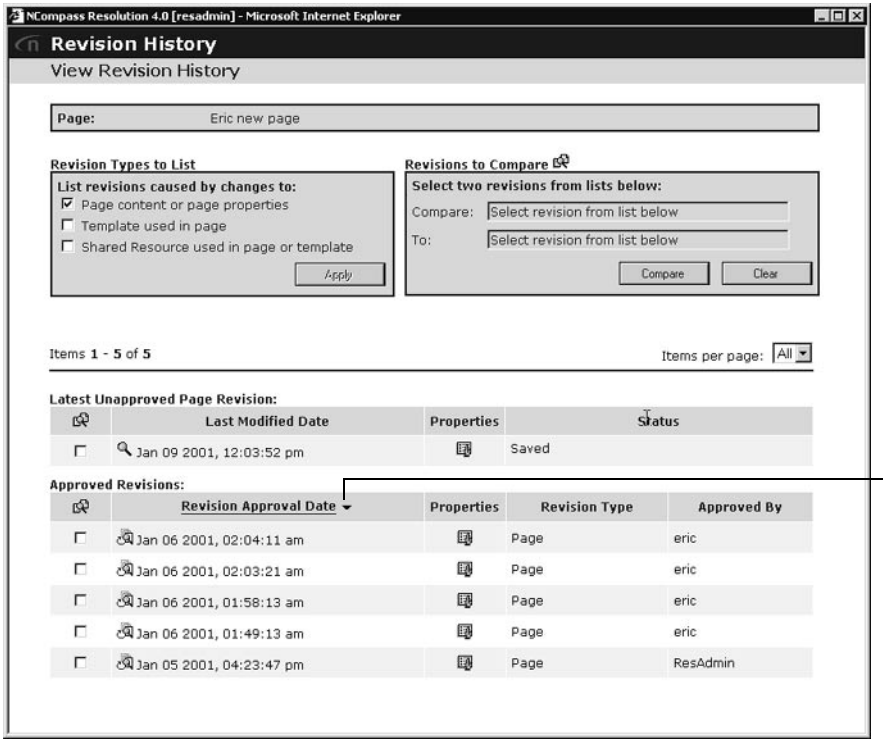
You can display revision histories from within *both* the Site Builder and Web Author environments. To view a revision of a page in the Web Author or posting in the Site Builder, you must have subscriber rights to that posting and authoring rights to at least one page in the site. To display a revision history in the Web Author:

1 With the object in edit mode, select **Revision History** from the console. The Revision History window appears.

2 Select the type of revision to be displayed from the Display Options dialog box.

3 Click **Apply.**

4 Select the preview link corresponding to the revision to be viewed. It opens in a new window.



Displaying a list of unapproved and approved revisions using the Web Author

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 a posting is always created before it 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.



Note

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.

Versioning and connected pages and postings

The revision histories of connected pages appear similar except the one created more recently may have fewer revisions in its history, and their template revisions differ if they use different templates.

In the Web Author, it is possible to create a connected posting. A connected posting displays separate revisions for all approvals of its associated page that occur *after* the creation of the connected posting. A connected posting does not create a revision marking its first approval unless its associated page happens to also be waiting for editor approval and both approvals occur at the same time.

Comparing revisions

Changes to a template or resource cannot be directly compared. They must be viewed in the context of an associated page. You can compare any two revisions and are not limited to the most recent version. To compare revisions using the Web Author:

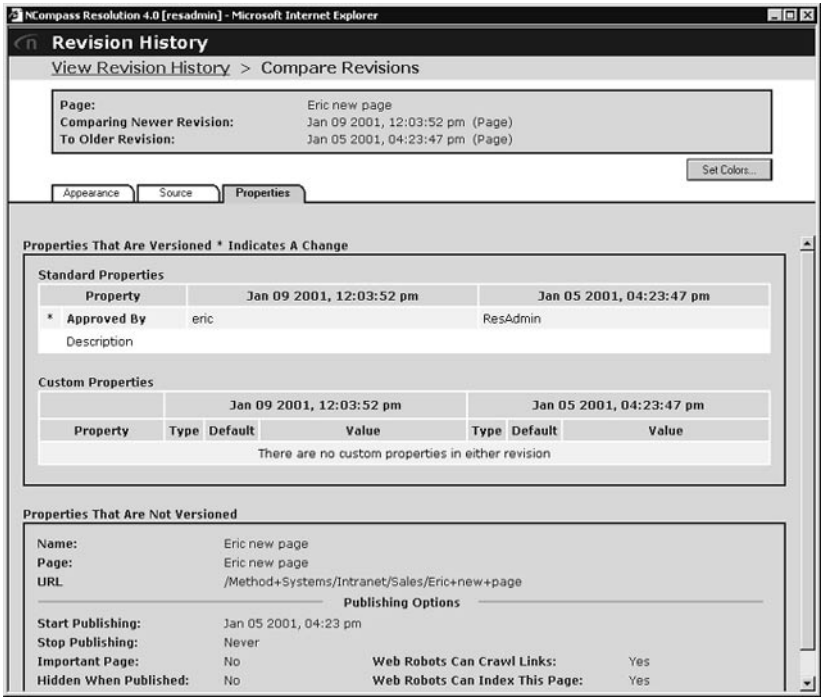
1 Select the type of revision you want to display from the Revision Types to List options.

2 Click **Apply**.

3 Select any two revisions from the list of revisions displayed.

4 Click **Compare** from the Revisions to Compare dialog box.

5 Click the appropriate tab to compare the appearance, source code, or properties of the two revisions selected.



Comparing revision properties using the Web Author

About revision tracking

Changes are shown in a different color or with strike throughs. The “Source” option compares the HTML code. The “Property” option compares text-based properties. Only the name of the person approving the revisions and custom properties of the revisions can be compared.

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. Note that on screen deletions appear in blue and insertions in green.

Viewing revisions by date

The View Revision by Date option can be accessed from within either the Site Builder or Web Author. To select a date and time for viewing revisions, you must have authoring rights to at least one page in your site and subscriber rights to the selected posting. You can see those revisions for which you have at least subscriber rights.

With the View Revisions by Date option, you can preview a page (in the Web Author) or a posting (in the Site Builder) 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. The preview option uses historical templates and resources, and hyperlinks to other pages are preserved. Therefore, you have limited site-wide navigation capability in historical mode.

Important note

When previewing revisions by date, they may not appear exactly as they did at that time. 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.

Accessing View Revisions by Date

From within the Web Author do the following:

1 With the object revision in edit mode, select **View Revisions by Date** from the console.
2 Select a date and time for the site preview from the drop-down lists.
3 Click **Apply.** The page revision that was approved at that time is displayed.

Purging revisions by time stamp

From within the Site Builder (and only the Site Builder) administrators now can permanently delete all object revisions that are older than a specific time. MSCMS 2001 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 window appears.
2 Using the calendar's drop-down lists, select the month, date, and time corresponding to the revisions to be purged.
3 Click **Purge**. A confirmation message appears.
4 Click **Yes.** All revisions older than the date you specified are now purged.

Notes

- Revisions can be purged by time stamp only.
- The default value for the date is the current date.
- It is not possible to purge revisions in only one part of the site.

Best Practices

- The number of revisions on your system is limited only by the size of your database. There is no option to automatically purge revisions or disable creation of revisions. While the overhead for a revision is not large, be mindful of repeatedly replacing large resources as they become historical revisions and remain in your database taking up space until purged.
- Treat the purging of revisions as a database maintenance task that must be done regularly to recover space or remove sensitive material.
- Back up your database before purging because this operation cannot be undone. All revisions older than the specified date are permanently removed.
- Do not purge revisions from your site at times of high use because users can be locked out of the system during the procedure.

Chapter 7

Using the MSCMS 2001 Site Deployment Manager

Overview

Microsoft Content Management Server 2001 (MSCMS 2001) Site Deployment Manager allows you to do incremental updates to your MSCMS 2001 systems, using an export and import transfer method. Using the Site Deployment Manager, you can selectively update your system, allowing for separate development and production environments.

Note
Be aware that if you are trying to deploy a read-only site, the login will fail. Check Chapter 5, "Using the Server Configuration Application" in the *MSCMS 2001 Setup Guide* for information about setting up another Web site or pointing to an existing Web site with authoring rights to the same server the read-only site resides on.

Operating requirements

Background processing

There should always be at least one gigabyte of storage space for the MSCMS 2001 server and database. Users are advised not to do an import when background processing is active or your import will fail. However, if an import is active when the background processing starts, the background processing waits until the import is complete before it starts. You can adjust the frequency at which MSCMS 2001 does background cleanups, using the Server Configuration Application, documented in the *MSCMS 2001 Setup Guide*.

Source system

The system from which you export objects is the source system.

Object package

When you export objects, they are exported to a .rop file. Even when exporting one object only, it is exported to an object package.

Destination system

The system to which you transfer objects is the destination system.

MSCMS 2001 objects that can be transferred

You can transfer the following MSCMS 2001 objects:

- folders and pages
- channels and postings
- resource galleries and resources
- template galleries and templates
- rights groups and rights groups members.

Note
Application Center, one of the .NET Enterprise Servers, provides content deployment and management facilities for sites built on Microsoft Windows® 2000 and Microsoft Internet Information Services (IIS) 5.0. It can be used to synchronize files not stored in the MSCMS 2001 repository across servers and server clusters. For more information, check out www.microsoft.com/applicationcenter/default.asp.

MSCMS 2001 objects that cannot be transferred

Server-side includes and other files stored on the server (and not managed by MSCMS 2001 inside the database) cannot be exported or imported. They must be manually copied and moved.

Who can use Site Deployment Manager?

Only MSCMS 2001 administrators can use Site Deployment Manager.

Basic steps to transfer content

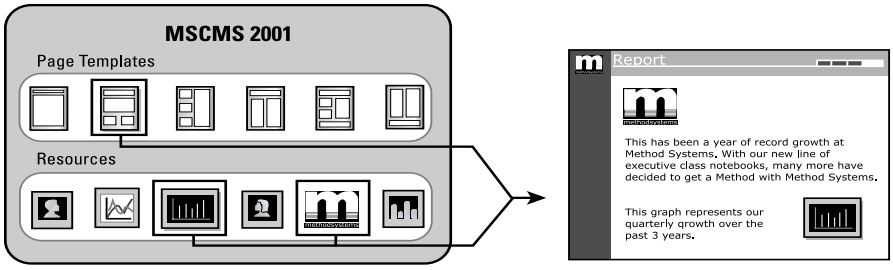
1 On the source system, export one or more objects to an object package (contained in a .rop file).

2 On the destination system, import the object package to complete the process. Only objects in an object package can be imported.

How Site Deployment Manager handles dependent objects

What are dependent objects?

An MSCMS 2001 page, for example, has dependent objects: the template it was created from and the resources (images, text, video) serving as its content. When an object is exported, its dependent objects are exported with it. Objects cannot be exported without their dependent objects.



When a page is exported, its dependent objects (page template and Resource Gallery objects) are also automatically exported.

Note that only dependent objects in the MSCMS 2001 database are exported, not files on the file system, such as server-side includes that could be referenced from a template. For example, a cover page of a channel created from a posting is exportable. However, a cover page created from an HTML file stored on the server cannot be exported. Files stored on the file system of the server must be manually moved to the destination system server.

Potential dependent objects for each type of object:

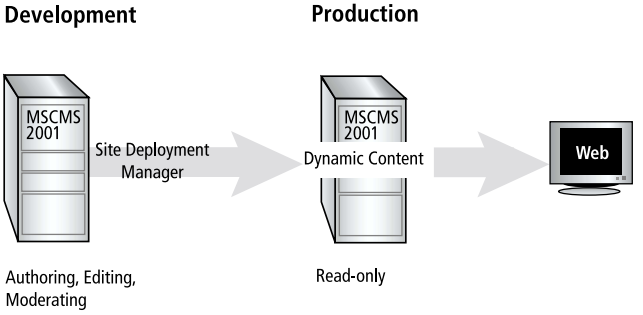
Object	Dependent objects (automatically exported with object)
Page	Page templates and resources
Posting	Page, page templates, and resources
Folder	None
Channel	Navigation template and resources, postings for cover page
Page template and navigation templates	Resources

Object	Dependent objects (automatically exported with object)
Resource gallery and resources	None
User rights groups and users	None

How you might use Site Deployment Manager

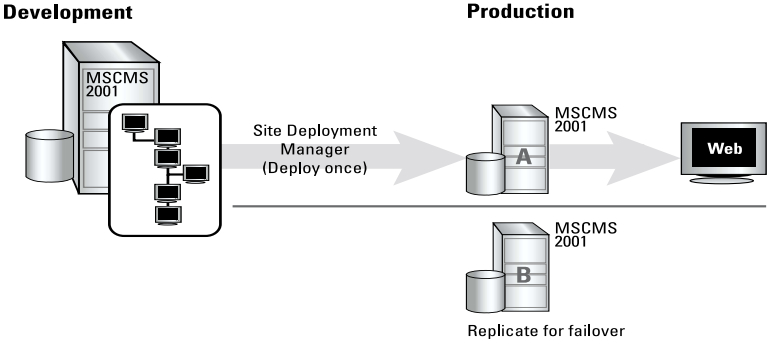
Following are examples of network configurations and how Site Deployment Manager is used in each one.

Transferring content from development server to read-only production server



In deploying a site, start by creating all the containers for your site on the development server where authoring, editing, and moderating activity can be done. See "Separating the development environment from production" in the Best Practices section of this chapter.

Transferring content from a development server to two production servers



This is essentially a failover or replication scenario wherein content is developed then distributed to a production server A. Production server B is a mirror image of A. Use the database replication utilities of your choice once the deployment from the development server to production server A is done.

Best Practices

Copying an entire site

Site Deployment Manager is for making incremental updates to a destination server for small sets of objects. To copy an entire site, use a database replication utility.

Deploying in a server farm

When the Site Deployment Manager is used in a server farm, it has to connect to individual servers in the cluster.

Optimal time to use Site Deployment Manager

Use Site Deployment Manager when it causes the least amount of inconvenience to the users on your site. Moving parts of your site may take time, and Site Deployment Manager locks out modifications to the destination system (the server you are transferring objects to) during this period. This prevents users from making modifications to objects in the destination server; however they still have read access to the destination server. If multiple interconnected servers are supported in the server configuration, the lock will be in effect across all servers.

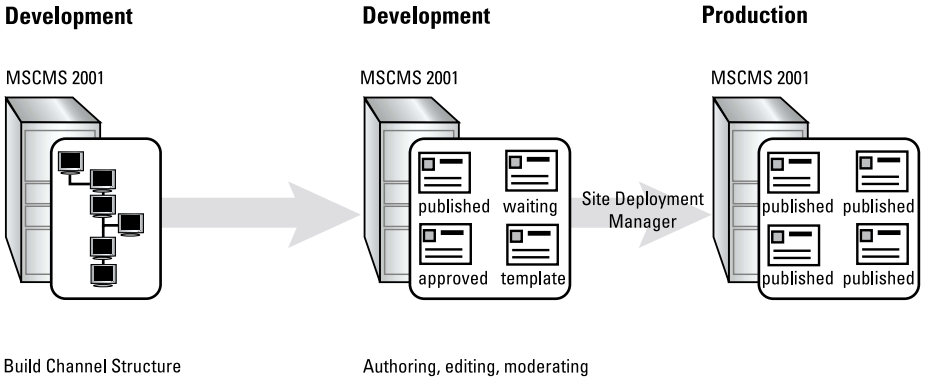
Another reason to move objects at periods of low activity is to prevent users from losing work, since objects open for editing at the time of import may be replaced by the import.

Separating development environment from production

If your site operates over more than one server, we recommend separating your development work from production work. Additionally, you could include a second level of development server for quality assurance, as shown in the following diagram as B (otherwise the tasks shown in the diagram on B are done on the development server A).

- Create site and information structure on the development server, as represented in the diagram by A.
- Using Site Deployment Manager, move the site architecture to another development server B.
- Isolate all content development work (authoring, editing, template creation, and moderating) to the development server B.
- Any changes to the site structure designed on server A can be applied to server B to synchronize its site structure while leaving the content in place.
- Do not allow any content development work on the production server. Use the Site Deployment Manager to move content from the development server B to production server C.

This should ensure tight control over the navigation, hierarchy, and content of your site. It also saves time rewriting navigation templates, which rely heavily on the site's channel structure to perform their functions.



The channel structure of the site is built on the development server (A) and authoring, editing, and moderating are isolated to the development server (B). Use Site Deployment Manager to move the channel structure to the development server used for content management tasks (B), and incrementally move content to the production server (C). This synchronizes the two main environments (development and production), and uses the channel structure as the foundation to build content.

Exporting security information

To not have any information about users and domains from the source imported to the destination (perhaps they don't share any common domains), do not export rights groups members (users).

Double-checking all objects for export

Make sure that all objects to be exported have been approved before doing the export operation. Only the approved versions of objects are exported.

Exporting and importing frequently updated content

A good practice is to create channels dedicated to content that is frequently updated. For example, if your company issues press releases regularly, you might want to create a channel to hold postings of press releases to be exported. This saves time when transferring timely content.

Deploying versioned content

A posting's revision history can reflect changes to its dependents. 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.

Setting up an export/import for a later date

Using Export profiles

Export profiles are a convenient way to set up an export for use at a later date, or save a selected group of objects and options. However, a saved export profile might not contain the most current information when used for an export. To determine whether the export profile accurately lists the objects to be exported, run an Export Preview. The Export Preview identifies which objects have been deleted since the Export profile was created, and which links might be broken once objects in the ROP are imported.

Using Import Preview

Import Preview reports provide a more accurate snapshot when no publishing activity occurs on the destination system between the time the Import Preview is run and the actual import is started. If users have modified objects, the Import Preview may not be completely accurate. Use this report to verify that no unexpected replacements will occur as a result of the import.

Planning an import

IMPORTANT: Be sure to back up the destination database before doing any importing.

Using the reports

Save the Export Preview and Export Report every time you export objects. These reports provide a record of your selections and options, which you may need to review when you are configuring options for your import. Also, these reports provide a record of the state of all objects that were exported, and objects that could not be exported, some of which (user names, rights groups, dependent objects) do not appear in the Export dialog box.

Also, keep copies of the Import Preview and Import Reports and add them to your records. The next time you import objects, you can refer to the reports from the last import to help you choose the right settings to ensure the import policy is kept consistent with previous deployments.

Importing dependent objects

Dependent objects can replace objects on the destination system when imported. For example, if you import a page, the dependent objects of the page (all templates and resources associated with the page) are also imported. If the templates and resources in the object package already exist on the destination system, they are replaced with the ones being imported. This affects all objects on the destination system that use those templates and resources.

Setting ownership of objects

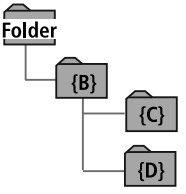
Be careful when setting ownership for objects you are importing. To ensure that users can act on objects imported, set the owner of an object to a user who has rights on the domain for the destination system, or set the ownership to Everybody. Or, remember to set ownership on imported objects individually after import.

Changing the name of an object

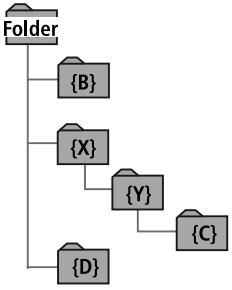
Changing the name of an object to the name of another object doesn't make the two objects the same. This is because objects are not identified by name in the MSCMS 2001 system but by a globally-unique identifier (GUID). For example, object "A" is created on the source server and object "A" is created on the destination server. The source object "A" will not replace the destination object "A" even though they share the same name. The imported object is created as new.

Changing the destination system hierarchy

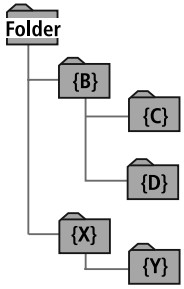
If you select the "Change container hierarchy on destination to match the package hierarchy" option, it may reorganize containers on your destination system.



Object Package



Destination system, before import



Destination system, after import

Preserving the destination system object hierarchy

If the "Change container hierarchy on destination to match the package hierarchy" option is not selected, the destination system will maintain its object hierarchy before import.

When you are doing an import, if you select the "Delete all existing container contents when replacing a container" option, container contents are deleted before they are imported and their sub-items are added. The exception is templates that are used by pages.

Using Site Deployment Manager to export objects

About exporting objects

Following are some key definitions and concepts regarding the export objects process:

- Objects are exported to an "object package" that is composed of the objects selected for export.
- Site Deployment Manager exports only the approved version of pages, postings, and templates.
- Revisions cannot be exported.
- If an object has a link to another object, you must export both objects for the link to work on the destination system. Links will also work if the linked object is already on the destination system. Broken links do not appear in published pages, but they appear when the page is opened for editing in the Site Builder. Also, export and import reports indicate which objects contain broken links.

Dependent objects

- The dependent objects of a user-selected object are automatically exported, including its parent container hierarchy up to the root container.
- The dependent objects exported from the Deleted Items container on the source system are imported to a "default" container on the destination system if the object doesn't already exist on the destination system. The dependent objects stay in Deleted Items if they already exist there. Using the Import options, you can specify a container to function as the "default" container, where objects are stored in such cases. Also stored in the default container are exported objects whose parent wasn't exported and whose parent doesn't exist on the destination system.

Postings for pages that use multiple views

Site Deployment Manager exports the page associated with a posting. Note that if the author created multiple views of that page, Site Deployment Manager exports the page templates used for each view.

Viewing dependent objects

After selecting objects for export you can view their dependent objects that will be exported, by running an Export Preview. It shows a list of all objects selected for export, including their dependent objects.

Rights groups and rights groups members

MSCMS 2001 rights groups can be exported with or without the rights group members. If the destination system uses a common domain and users as the source system, you can export both the rights groups and rights groups members that have been assigned to the containers being exported. If the domains are different, we recommend you do not export members, because the user information is meaningless on the destination system.

Reporting options when exporting

There are four types of reporting information you have access to when exporting objects as described in the following table.

Report title	How to run
Dependency Report lists the pages or templates that rely on a resource. Includes information such as status, name, location, owner.	Select a page or template and either run the report from the Report menu, or right-click and select Dependency Report.
Resource Report for a template lists the resources and placeholders used. For a page, the templates, resources, and placeholders it uses are listed.	Select a page or template and either run the report from the Report menu, or right-click and select Resource Report.
Export Preview lists the objects selected for export.	See "Exporting, step 3: generating an Export Preview," in this chapter.
Export Report lists the objects that were successfully exported to the object package.	See "Exporting, step 5: activating the export and saving the Export Report."

Running the Export operation

Open the Export dialog box in either of these two ways:

- Right-click an object in the Site Builder window in list or tree view, and select **Export to Package**. You can also right-click multiselected objects. The Export dialog box opens, displaying the selected objects.
- In the Site Builder window, click **File > Package > Export**.

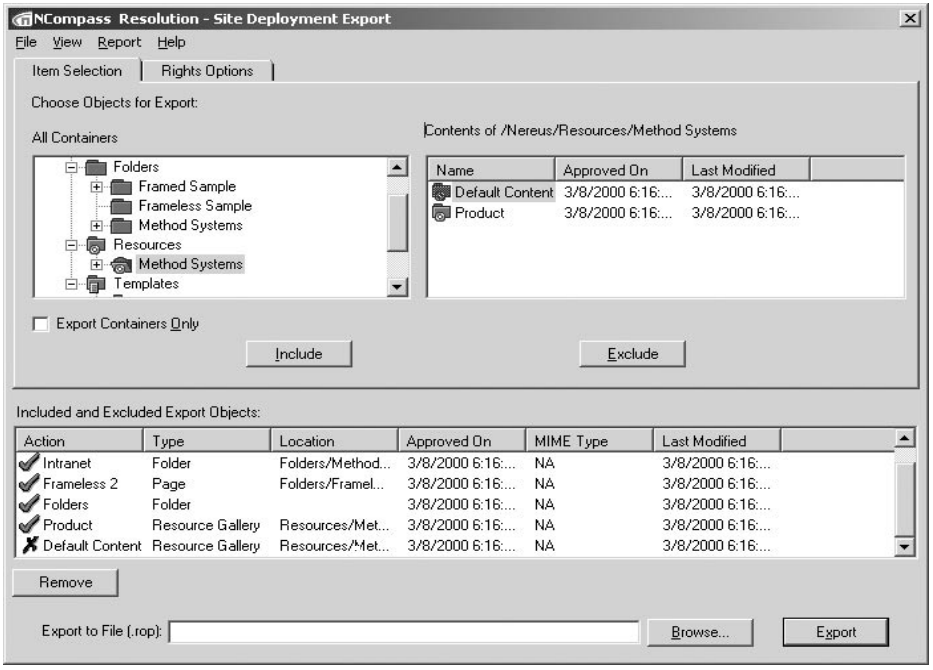
Icons for containers and objects in the Export dialog box

Containers		Objects	
Server		Posting	
Channel		Page	
Folder		Template	
Template gallery		Resource	MIME type icon, dynamically generated
Resource gallery			

Exporting, step 1: selecting one or more objects for export

1 Open the Export dialog box as described in the previous section.

2 If you are exporting containers without their contents—exporting object hierarchy or site structure only—select the Export Containers Only option on the Item Selection tab.



Export dialog box

3 Select containers in the Choose Objects for Export area, if you did not select them from the Site Builder window. Selected containers and their objects appear in the contents box to the right.

4 Select objects and click **Include**. The selected objects are moved to the Included and Excluded Export Objects area. Only approved versions of MSCMS 2001 postings, pages, and templates are exported; if a re-edited version of an approved page or template is selected, it won't be exported.

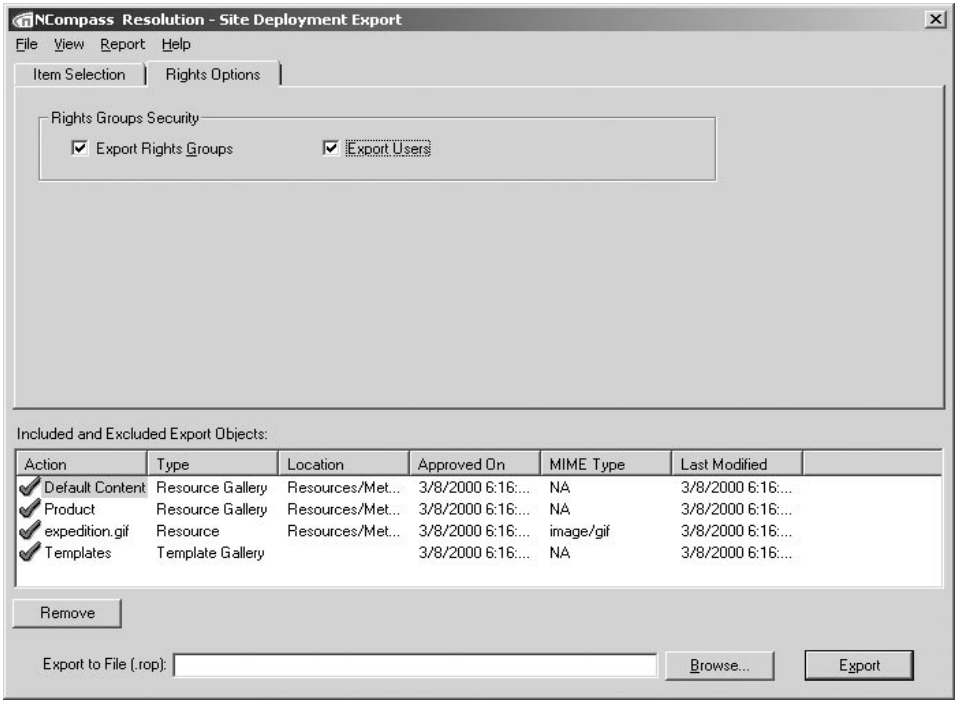
5 If there are objects that you do not want exported (particularly children of a container that was selected for export), select them and click **Exclude**. Any container in the Included and Excluded Export Objects area will have all its contents exported, unless you select the child objects for exclusion. The parent containers for selected objects are not automatically exported.

You can always select Exclude, but the actual exclusion done during the export operation depends on these conditions—you can exclude sub-items of selected container objects, but

you cannot exclude objects that are dependent objects of objects being exported. These objects are exported regardless of the include/exclude setting.

Exporting, step 2: setting the Rights Options for export

1 Click the Rights Options tab in the Export dialog box.



The Rights Options tab on the Export dialog box

2 Select Export Rights Groups, in the Rights Groups Security area, to export the rights groups that have been assigned to containers being exported.

3 Select Export Users to export the user names for members of the rights groups being exported. Note that the exported users must exist on the domain of the destination system in order for them to have access to the imported objects.

Note

To preserve security and not export user information, or when source and destination don't share domains, don't check the Export Users box.

Exporting, step 3: generating an Export Preview

Use the Export Preview to review and save a list of the objects selected for export, including sub-items and dependent objects. User-selected objects are in bold and dependent objects are in normal text.

Run the Export Preview from the Export dialog box, after you have moved selected objects to the Included and Excluded Export Objects area.

1 To run an Export Preview, select Export Preview from the Report menu in the Export dialog box. The report contains the following areas of information.

Report heading	Comments
Report Information	Includes information about the package file, such as generated date and time, report generator (user), client machine, version, the source system's URL, and the server version.
Selected Export Parameters	Parameters such as security settings.
Selected Containers and Items	Items selected by a user are shown in bold. Dependent objects of selected objects are not in bold. Includes the following: Channels and Postings, Folder and Pages, Template Galleries and Templates, and Resource Galleries and Resources.
User Rights Groups	User rights groups and user, including the path name for the rights groups in the report for easier identification.
Selected Export objects not currently available for Export	Items selected but not available.
Select objects containing broken MSCMS 2001 links	Links that could potentially be broken on import.

2 Click **File > Save As** and **File > Print**. Saved Export Preview reports are HTML documents.

Exporting, step 4: saving the export selections to an Export Profile

If you think you'll export the same objects and options again, or if you want to export your selections later, save the settings to an Export Profile.

1. Select **File > Save Export Profile As** from the File menu on the Export dialog box. The Save Export Profile As dialog box opens.
2. Select a directory, and enter a name for the profile. A saved MSCMS 2001 Export Profile has a .rep extension.

Saved Export Profiles can be opened from the File menu on the Export dialog box.

If you plan to use the Export Profile later, see "Setting up Exports/Imports for a later date" in the Best Practices section of this chapter.

Exporting, step 5: activating the export and saving the Export Report

Once you have moved the objects to the Included and Excluded Export Objects area, and have saved and printed an Export Preview (recommended), you can export the objects to an object package.

1. If you are using an Export Profile, open it from the File menu on the Export dialog box. The Export Profile opens.
2. Enter a valid path and file name in the Export to File field, or click **Browse** to specify a file.

   Click **Export**. The export begins, with a progress indicator displayed. You can cancel the export operation at any time, however the cancel may not occur immediately but a short time later.
3. The Export confirmation dialog box indicates successful creation of the Object Package. An error message is displayed if the export wasn't successful.

   From this dialog box you can launch the generation of the Export Report which lists the objects that were successfully exported to the object package. If you generated and saved a Preview Export, you can compare it to the Export Report to note any discrepancies (for example, someone has deleted an object that you planned to export).
4. Click **Show Report** on the Export confirmation dialog box. The Export Report opens, displaying information similar to the Preview Export report.
5. Click **File > Save As**. Saved Export reports are HTML documents.



Note

When exporting a file to a machine with very low disk space, an Object Package (.rop) file with a size of zero is created. Free up some disk space and try the export again.

Using Site Deployment Manager to import objects

Before you start

- Back up the destination server before importing by backing up the database.
- We recommend you read the Best Practices section at the beginning of this chapter to help ensure a successful import.

About importing objects

Synchronization

Site Deployment Manager objects are always synchronized—objects on a destination system are always replaced when re-imported from an object package.

Links

If an object contains links to another object, both must be in the object package in order for the link to work on the destination system. If the linked object is already on the destination system, the link will also work. Note that broken links will be inactive at run time.

Importing dependent objects

An object's dependent objects could replace objects on the destination system when imported. This, in turn, can affect other objects on the destination server that use those same dependent objects. See the Best Practices section, "Importing Dependent Objects" in this chapter for more details.

Rights groups and members

You can import rights groups with or without their members.

Make sure the members of imported rights groups exist on the domain of the destination system. Users on the destination system will be unable to access the imported containers and objects, if the destination system cannot authenticate the imported user names.

System-wide lock

Imports should be done in periods of no or low activity because the Site Deployment Manager places a lock on the destination system during import. This means that the users on the site won't be able to do tasks involving modification of objects, such as modifying or submitting pages. If multiple interconnected servers are supported in the server configuration, the lock will be in effect across all servers.

Edited objects

Objects on the destination system that were edited before import might get replaced by their published version. It is not recommended to import to a destination system when editing occurs.

Changing the destination system container hierarchy

Regarding the destination system container hierarchy, even after existing objects get moved around, their linkages or relationships to other objects remain intact (for example, page to template, posting to page, or page to resource).

Import Mode

Site Deployment Manager allows only one import mode to "add and replace" objects on the destination system. Objects from the object package that do not exist on the destination system are added while objects from the object package that already exist on the destination system are replaced.



Note

If you import a template that is in use by pages and postings on the destination system, those pages and postings switch to the newly-imported template. Be sure the template is compatible, otherwise your site may not function properly.

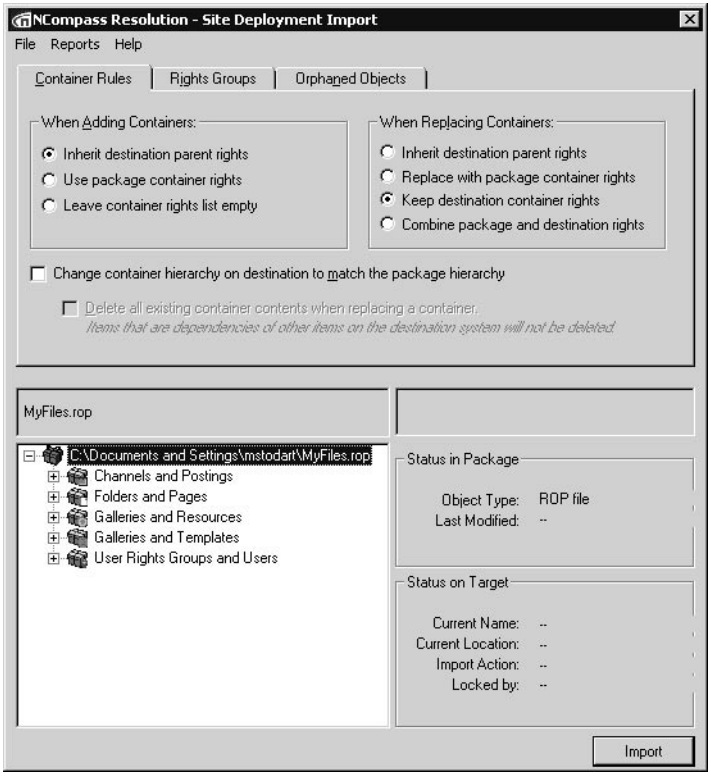
Running the Import operation

Importing, step 1: setting options

1 Open the Site Builder window on the destination server and select **File > Package > Import**. The Site Deployment Import dialog box opens. Select the Container Rules tab.

Name of the object package from which objects will be imported.

Contents of object package. Select objects to view their import status.



The Container Rules tab on the Import dialog box

2 Select an option from the "When Adding Containers" area.

- "Inherit destination parent rights" means that imported containers inherit the privileges assigned to the parent container on the destination system. Use this option when security configuration is managed from the destination system.
- "Use package container rights" imports the containers in the object package and the users assigned to them. Security settings from the source system are mirrored.
- "Leave container rights list empty" imports the containers in the object package with no user rights group assigned to them. Use this option if you want containers to be created with no access rights.

3 Select an option from the "When Replacing Containers" area.
   - "Inherit destination parent rights" means that replaced containers inherit the users assigned to the parent container on the destination system.
   - "Replace with package container rights" imports the containers in the object package and replaces the users assigned to them on the destination system with the users assigned to the containers in the object package. Mirrors security setting from source system.
   - "Keep destination container rights" replaces the containers while leaving their existing security setting.
   - "Combine package and destination rights" imports the containers in the object package with their assigned users and adds them to the existing list of users assigned to the container on the destination system.
4 When replacing containers, if you select the "Change container hierarchy on destination to match the package hierarchy," the imported objects have the same hierarchy they did on the source system. See "Changing the destination system hierarchy" in the Best Practices section at the beginning of this chapter for examples of how this option re-organizes containers on the destination system.
5 If you select the "Delete all existing container contents when replacing a container" option, container contents are deleted before they are imported and their sub-items are added. The exception is templates that are used by pages.



Note
You can select this option only if the "Change container hierarchy on destination to match the package hierarchy" option is selected.

This ensures that the contents of the imported container mirrors the source system (additional or obsolete objects are removed).

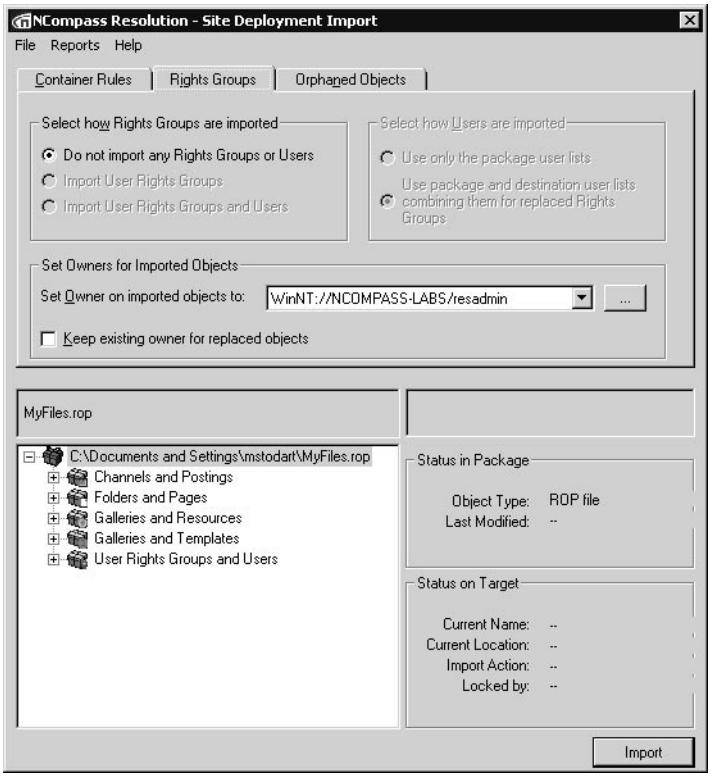
Importing, step 2: setting options on the Rights Groups tab

The options on the Rights Groups tab apply only if rights groups and users were exported to the object package.



Tip
Check the Export Report (if one was printed after export) to see which rights groups and users were exported to the object package.

1 In the "Select how Rights Groups are imported" area you can specify whether security information for rights groups and users on the source system is to be imported.



Rights Groups tab, on the Import dialog box

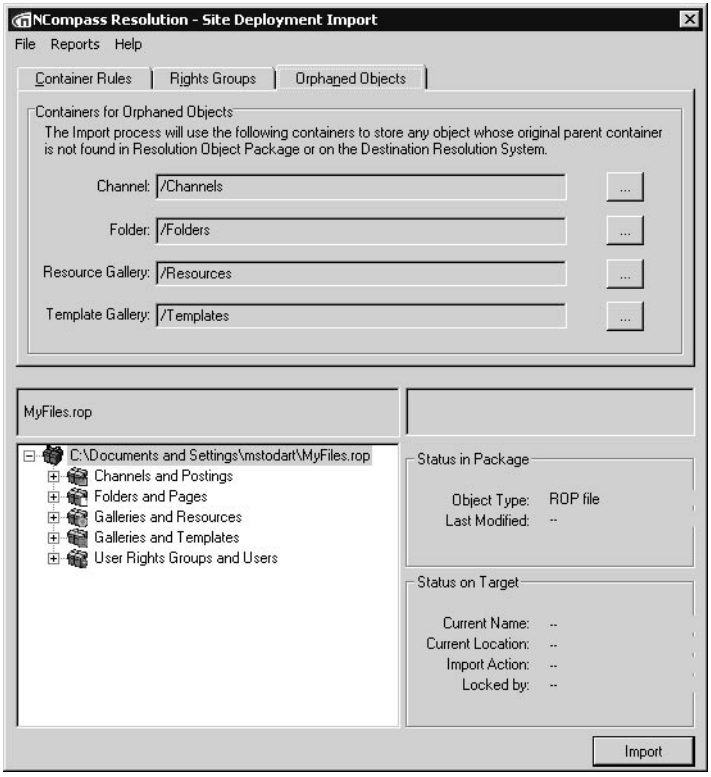
2 If you select the "Import User Rights Groups and Users" option, you can select an option in the "Select how Users are imported" area.

- "Use only the package user lists" adds the users in the object package who belong to the rights group and, if the user rights group is already on the destination system and being replaced, the members list is overwritten.
- "Use package and destination user lists combining them for replaced Rights Groups" adds the users in the ROP file. If the user rights group already exists, its members list is merged with users imported from the ROP file.

3 Specify ownership in "Set Owner for Imported Objects" or click **Browse** to set the ownership to a user from the destination system. If you set ownership to Everybody, all users with rights on the destination system can act on the object.

Importing, step 3: setting options on the Orphaned Objects tab

1 Select the Orphaned Objects tab on the Import dialog box.



Orphaned Objects tab, on the Import dialog box

2 Click **Browse** (...) to configure the default containers for orphaned objects.

Importing, step 5: generating an Import Preview

Use the Import Preview to review a list of the objects selected for import, including the import modes and options selected for them. Note that it may take time to generate this report, depending on the number of objects in the package.

No changes are made to the destination system.

Import issues

1 From the Import dialog box, select Import Preview from the Report menu. A progress indicator displays and then the Import Preview opens. The report contains the following sections:

Report heading	Comments
Report Information	Includes information about package file, date and time generated, generated by, client machine and version, server URL, and server version.
Import Parameters	Includes parameters such as user rights groups, destination containers for orphaned objects, import mode, and container rules.
Object Placement from Source to Destination System	Itemized by container type and indicates Source and Destination. There is also an indication of whether the object being imported is relocated (container or object is imported to a location that is not identical to the object package), same (location is identical to object package), or new container or object is imported to a new location that will be added to the destination location.
Destination Objects that will be Deleted on Import	Includes information about duplicate objects listed under the Destination Objects that will be deleted on Import.
Destination Objects that may Contain Broken Links after Import	

2 Click **File > Save As** and **File > Print** to print the Import Preview which is an HTML document.

Importing, step 6: saving the settings to an Import Profile

You can save the settings to an Import Profile if the same objects and options might be imported again, or to import the object package later.

1 Click **File > Save Import Profile As** on the Import dialog box. The "Import Profile As" dialog box opens.

2 Select a directory, and enter a name for the Profile. Saved Import Profiles have a .rip file extension.

You can open Saved Import Profiles from the File menu on the Import dialog box.

If you plan to use the Import Profile for export later, see "Setting up Exports/Imports for a later date" in the Best Practices section at the beginning of this chapter.

If you have previously set options for an import package, and saved them to an Import Profile, click **File > Open Import Profile** from the Import dialog box. The settings in the Import dialog box are set according to the options that were saved to the Import Profile.

Importing, step 7: activating the import

⃠ Warning
Once you start the import operation, it cannot be stopped. Stopping the import could leave the site in an unknown state.

Once you've set the import options, and have saved and printed a Preview Import (recommended), you can import objects from the object package. An import operation can take considerable time, depending on its scope. Operate the import during periods of low usage, or ensure no user other than yourself is logged in to the MSCMS 2001 destination system.

If you are importing from an Import Profile, open the Import Profile from the File menu of the Import dialog box. Click **Import** to start the import operation.

A successful import is indicated by an Import confirmation dialog box. An error message is displayed if the import wasn't successful—the Import Report will contain more information.

Importing, step 8: viewing and saving the Import Report

The Import Report lists the transactions that occurred during import, such as locked objects that were unlocked, deleted objects, or objects that contain potential broken links. Note that for deleted objects, the path that is reported is the path before they were deleted.

The import confirmation dialog box, which appears after the import is complete, offers the option to view the Import Report. Click **Show Report** on the dialog box to display the Import Report.

Importing templates: setting up server and system files

After importing navigation templates and frameless page templates, all system files referenced by the imported templates must be added to the destination system. These files can include:

- files external to the MSCMS 2001 database that are referenced by a URL
- files included using ASP scripting
- all component files of a frameset
- external JavaScript files
- external Cascading Style Sheet (CSS) files.

Note
If you have modified the destination server and system files, back them up before copying over them.

Note
Application Center, one of the .NET Enterprise Servers, provides content deployment and management facilities for sites built on Microsoft Windows® 2000 and Microsoft Internet Information Services (IIS) 5.0. It can be used to synchronize files not stored in the MSCMS 2001 repository across servers and server clusters. For more information, check out `www.microsoft.com/applicationcenter/default.asp`.

If imported templates use Microsoft® Internet Information Server (IIS) virtual directories to reference MSCMS 2001 system files, these virtual directories must also be duplicated on the destination system.

Using sample scripts

We have included sample scripts for site deployment operations in a folder on the MSCMS 2001 Installation CD. With these samples, you have scripting access to the Site Deployment Manager to allow automated deployment, such as scheduling a deployment operation at a specific time (for example, midnight) and for a specific occurrence (once a week).

The sample scripts can be used for doing basic tasks with the Site Deployment Manager, including load a profile, export and import, check for errors, and generate the resultant report (Export Report or Import Report, depending on the operation performed).

Currently, you will be setting all your preferences and objects selections for export or import using the Site Deployment user interface. These settings are saved as export and import profiles and are loaded by the script. The following sections explain how to schedule an import with the Site Deployment Manager, and how to use the sample scripts.

Scheduling an import

1 Copy the sample script folder for import on the installation CD to your local file system.

2 Locate Task Scheduler by selecting Scheduled Tasks in the My Computer folder in Windows Explorer. Click **Scheduled Tasks**, then **Add Scheduled Task**. The Scheduled Task Wizard appears.

   For Windows 2000, select **Scheduled Tasks** from the Control Panel (**Start > Settings > Control Panel**), then click **Add Scheduled Tasks** to activate the Scheduled Task wizard.

3 Click **Next** on the wizard.

4 Use the Browse button to locate the import sample script file you saved in step 1.

5 Configure the remainder of the options according to your requirements.

6 On the **User Information** tab, enter the MSCMS 2001 user login name and password (person who is authorized to access the Site Deployment Manager—only administrators have this privilege).

7 Click **Finish**.

When the sample import script is executed, the following occurs:

- The Object Package (ROP) is imported to your target MSCMS 2001 system.
- The Import Report is displayed.
- The Import Report is saved to the file you specified.

Using the sample scripts

Following are the basic steps to customize and reuse the sample script which carries out an import with the Site Deployment Manager.

1 Open the import script file for editing in your preferred editor.

2 Locate the section marked "User Configurable Constants" which is the area you will be working with—ignore the rest. Provide the machine address where the target server resides. Enter the IP or host name to the right of the constant for the server name constant.

3 Next, you need to customize the filename of the import profile you'll be using. An import profile is created with the Site Deployment Manager user interface. Refer to previous sections in this chapter for information about creating profiles. Enter the path of your import profile as indicated in the script.

4 Normally, the Object Package (ROP) file to be imported is specified in the import profile, in which case there is no need to set it in the script. However, if you need to create and reuse a set of pre-configured import options without repeatedly modifying the profile to specify a different ROP file through the Site Builder window, you can have the script reference the import profile and specify a different ROP file in the script every time you use it. To do this, set the ROP path value to the appropriate constant.

5 Set the flag on whether the Import Report needs to be saved.

6 If the Import Report is to be saved, specify the path and base filename from which a unique filename will be generated for each import operation.

7 Set the flag to toggle an Import Preview to be generated before the import starts.

You are now ready to execute the sample script, either Site Deployment Export or Site Deployment Import, on the install CD.

Chapter 8

MSCMS 2001 Site Stager

About Site Stager

One of the advantages of Microsoft Content Management Server 2001 is its ability to publish dynamically-generated Web site content. However, there may be times when a static HTML or Active Server Pages (ASP) version of the same content would be useful. Microsoft Content Management Server 2001 (MSCMS 2001) Site Stager is an application that converts MSCMS 2001 content, navigation, and links to static HTML or ASP for deployment on any Web server.

How can I use Site Stager?

You can use MSCMS 2001 Site Stager to make an HTML or ASP copy of your Web site available for multiple platforms.

Because you can select the parts of an MSCMS 2001 site you want processed, you can set up more than one version of the Web site to meet the specific information needs of various audiences, and automatically update these sites at regular intervals.

You can also use Site Stager to maintain separate publishing and browsing environments which frees resources for publishing and content management activity. Separating publishing and browsing also has security advantages because of reduced traffic on the Web server.

Granting access to remote staging machines

We recommend that access to the NR/System/Staging IIS virtual directory be restricted so only authorized machines can access it. This directory is globally accessible by default and poses a significant security risk. To grant access to remote staging machines, follow this procedure.

1 Open the IIS Manager and select the Web site's NR/System/Staging directory.
2 Right-click the Staging folder and select **Properties**.
3 Click the Directory Security tab.
4 Click **Edit** in the "IP address and domain name restrictions frame."
5 Click **Add** and select any machines that will be running Site Stager.

How does Site Stager work?

On activation of a Site Stager profile, Site Stager navigates an MSCMS 2001 Web site, converting dynamic MSCMS 2001 pages into static HTML files. The HTML files, along with linked elements such as graphics, are organized in a directory structure that mirrors the MSCMS 2001 site's channel hierarchy.

Profiles

Site Stager profiles determine the time at which staging is to occur, the frequency of staging, and which channels to stage.

Important considerations for site programmers

If your MSCMS 2001 system will be staged sometime in the future, you need to consider the following when developing and using the system.

Most of the following points must be read by your site's navigation programmers and page template designers before staging occurs for the first time.

1 You must apply the `ResolveURL()` method to all references (URLs) external to the MSCMS 2001 system, in order for Site Stager to stage all content properly. (The `ResolveURL()` method is part of the MSCMS 2001 Publishing Application Program Interface (API). For further information about the API, see the *MSCMS 2001 Site Programmer's Guide*.)

   The `ResolveURL()` method will be automatically applied to any URLs generated by the Publishing API, but any URLs that are manually coded and need to be staged (with the exception of the URL used as an HTML form's "action" attribute) must be explicitly tagged with `ResolveURL()`. Note that if a referenced HTML file contains a link to a resource that needs to be staged, the HTML file must be converted to ASP, and then `ResolveURL()` applied to the link.

2 If you are using the template switching feature of MSCMS 2001, you must do browser detection using client-side scripting rather than server-side scripting.

3 To stage the target of an external link posting (a redirect), the creator of a redirect template must insert ResolveURL in the redirect as follows (being especially careful with the placement of quotation marks). Note that the target URL can be hard-coded into the redirect tag as shown below, or the template can be programmed to insert the URL based on author input.

```
<meta http-equiv="refresh" content="0;
url=<%=AutoSession.ResolveURL("http://www.someco.com")%>">
```

4 Any references (URLs) outside the firewall the MSCMS 2001 system resides behind must be fully qualified, and the URLs must be accessible from the server serving the staged site. (For more information, see Chapter 3, "Setting up Publishing: Assigning Publishing Rights.")

5 ASP scripts should be written to use references (URLs) provided by the Publishing API "as is." For example, scripts should not be used to manipulate the URLs returned by the Publishing API.

6 The output HTML pages generated by server-side scripts are staged, rather than the scripts themselves. For samples of staging scripts, refer to Chapter 10, "Developing for MSCMS 2001 Site Stager" in the *MSCMS 2001 Site Programmer's Guide*.

7 To successfully stage the product of a script that contains an MSCMS 2001 mode check, "`Or Autosession.IsModeStaging`" must be added to the mode check. For example,

```
If Autosession.IsModePublished Then
```

becomes

```
If Autosession.IsModePublished Or Autosession.IsModeStaging Then
```

(For further information, see the *MSCMS 2001 Site Programmer's Guide*.)

8 To prevent staging of dynamic resources such as Subscription, query (for example, What's New), and login pages (none of which will function in the context of a staged site), surround references to them with the following check:

```
<%If Not Autosession.IsModeStaging Then%>
  code for dynamic resource
<%End If%>
```

(For further information, see the *MSCMS 2001 Site Programmer's Guide*.)

9 To stage ActiveX objects or Java Applets referenced in MSCMS 2001 templates and server system files, the objects or classes must be packaged in CAB or JAR files respectively. In the case of server system files, `ResolveURL()` must be applied to the references, unless the files are stored in an MSCMS 2001 resource gallery.

For JAR files stored in a Resource Gallery to function properly within MSCMS 2001 and to be re-usable, the file name must be the same as the name of its initial class. (For specific examples of using ResolveURL() with such references, see the *MSCMS 2001 Site Programmer's Guide*.)

10 To stage forms, the URL of the form's action parameter must be fully qualified, and `ResolveURL()` from the Autosession object must not be applied to that URL. (For further information, see the *MSCMS 2001 Site Programmer's Guide*.)

11 For successful staging, navigation templates must not contain any code that creates an Autosession using `CreateObject()`. Rely on the Authenticate.inc file to supply an Autosession object to work with. (For further information, see the *MSCMS 2001 Site Programmer's Guide*.)

12 If you use `Response.Redirect` to redirect browsers, the URL to which you are redirecting should not be a relative URL. Rather, it should use a full path, such as `/files/recent/headline.html`. **Redirecting to relative URLs will lock the Site Stager in an infinite loop.**

13 If redirecting to URLs returned by MSCMS 2001 properties, such as Posting.URL, you must manually modify the URL before redirecting to it. This is necessary because in the Staging Autosession mode, MSCMS 2001 wraps staging tags (`<NCOMPASSSTAGINGSERVER>...</NCOMPASSSTAGINGSERVER>`) around all URLs it generates. The files included with the server include a VBScript function to strip off staging tags. The `StripOffStagingTags` function in the `Server\IIS_NR\shared\TemplateSwitching.inc` file can be used to make generated URLs compatible with redirects. The following example shows how this is done. See Chapter 10 of the *MSCMS 2001 Site Programmer's Guide* for a code sample.

14 For links in template HTML to targets external to your MSCMS 2001 system, where those targets themselves contain one or more links, `ResolveURL()` must not be applied to the links in the template HTML. (If it is, Site Stager stages the targets of those links but without highly specialized coding or scripting, so any links in the staged targets themselves won't work. Not applying `ResolveURL()` to such links in template HTML allows browsers to follow the links to a "live" version of the target for any such link, complete with functioning links.)

Staging run-time Help

The run-time Help file (Subscribe.htm) that ships with MSCMS 2001 works with a non-staged MSCMS 2001 Web site. When a site is staged, this Help file does not serve any function, because it has been designed for a non-staged site and refers to subscribing to channels.

Subscribe.htm is on the server in the `httpread/Help/` directory. The staged Web site Help file should be stored in this directory as well.

To prevent staging or displaying an non-applicable Help file, you can create a staged Web site Help file, then implement a simple `If` statement in the files that contain links to the Help files:

```
<%If AutoSession.IsModeStaging Then%>
    ’ code for staged version of Help file
<%Else%>
   ‘ code for standard run-time Help file
<%End If%>
```

If the mode is not staging, the URL for the production Help file is returned; if the mode is staging, the URL for the staged Help file is returned with `ResolveURL()` applied to it.

Structure of the destination directory

Several new directories are created automatically in the destination directory to help Site Stager accomplish its job. Do not delete or change any files in this directory.

Logs directory

The logs directory keeps logs that track the file downloads and directory creation and is used internally by Site Stager. Do not change any files in this directory.

Temp directory

The temp directory is where all files are downloaded to before moving to their final destination.

<resources> directory

In the profile Properties dialog box, if you chose to “Store Resources Separately” from the pages, this directory will hold those resources. For the site to be exposed properly, a virtual path must be created that points to this directory, must be a subdirectory of the destination directory. The virtual path and the name of the resource directory are by default '/resources' and 'resources' respectively and are configured with the Staging Profile property dialog (displayed when editing a Staging Profile).

<channels> directory

This directory stores the staged HTML content. It also stores resources, if the option to "Store Resources Separately" was not chosen.

Location of the Site Stager log files

The default location is a subdirectory named "Site Stager Logs" within the MSCMS 2001 folder. The log files can be opened with a text editor for viewing.

You can set the location of Site Stager log files.

Log file names

A log file is created every time the Site Stager activates a profile either automatically or manually. Errors occurring during the session are recorded in the log file. The name of each log file is based on the details of the profile's session, including the profile's name and the time at which it was activated:

```
profile name_year_month_day_hours_minutes_seconds_{GUID}.log
```

Chapter 9

Creating Staging Profiles

Creating a profile's "Stage As User"

A "Stage As User" is a dedicated NT domain user account with Microsoft Content Management Server 2001 (MSCMS 2001) subscription rights. A profile will stage only the channels and content that their Stage As User has subscription rights to. Therefore, you use the rights of a Stage As User to determine what content from your MSCMS 2001 site will be created on the static site. By using separate profiles with separate Stage As Users, you can create different versions of a site.

Stage As User accounts must be dedicated (that is, not in use by an MSCMS 2001 subscriber). Otherwise, subscription choices made by the subscriber will affect what gets staged.

To set up a Stage As User, create a new NT domain user. Name the NT account so it can be readily identified with the staging profile. Create an MSCMS 2001 subscriber rights group exclusively for that user, and assign the channels you want staged to the rights group.

Creating the Destination User

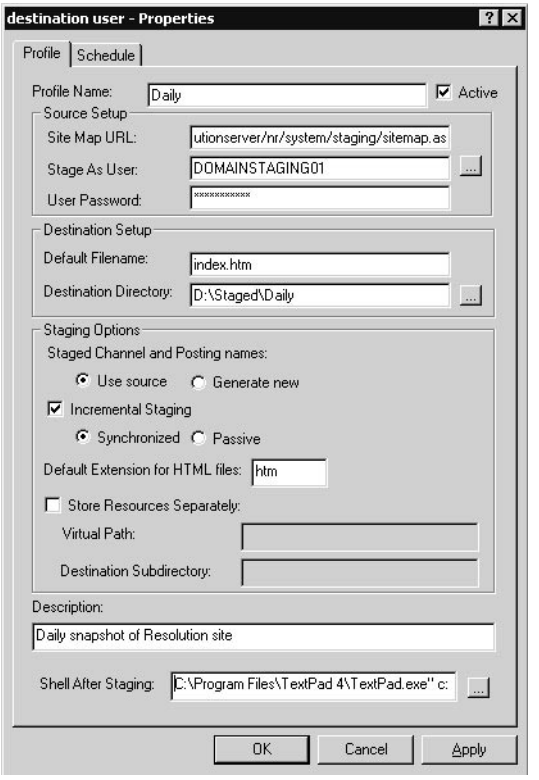
You must create the Destination User account before installing the Site Stager. Site Stager uses the Windows NT User Manager rights to create directories and files as it stages a site. The Destination User does not need to be a member of an MSCMS 2001 User Group.

Site Stager requires that the Destination User have "Log On As Batch Job" rights, and write privileges in all directories where the generated HTML files are stored. These rights and privileges can be explicitly granted to the Destination User account or inherited from an NT group to which the Destination User belongs. The Destination User must also have local administrator rights.

If the account you enter does not already have "Log On As Batch Job" and "Log on locally" rights, the Site Stager installation program grants them. Administrator rights must be manually granted using the Windows NT User Manager (or Users and Passwords in Windows 2000). If the destination user account is modified, ensure the new Destination User is given these rights on the Site Stager computer. We recommend creating Destination User accounts specifically for Site Stager use only.

Creating a profile

1 Open the Site Stager Administration window. Click **Add**. The Properties dialog box opens.



Profile tab of the staging profile Properties dialog box

2 Enter a name in the Profile Name box. If possible, base the name on the Stage As User name.

Source Setup:

3 Configure the "Active" check box. If the Active check box is checked, Site Stager runs this profile automatically according to the schedule set for it. If you clear the check box, the profile must be started manually.

4 The URL that was entered when the Site Stager was installed (`http://<your server name>/NR/System/Staging/sitemap.asp`), or whatever has been entered since, appears as the Site Map URL. If the server name for the site to be staged is ever changed, you'll need to edit the site map URL accordingly.

5 Type in or browse for a user name to use as the Stage As User. Site Stager runs the profile using the subscription rights of this user. Type the password for the Stage As User in the User Password box.

Destination Setup:

6 In the Default Filename box, type the file name (usually index.htm or default.htm) used as the default, top-level page for the staged version of the MSCMS 2001 site.

7 Type in or browse for a Destination Directory. The staged site will be written to this directory. The Destination User must have "Log On As Batch Job" rights, and write privileges in all directories where the generated HTML files are stored. Staging will not occur unless this field contains a valid directory.



Note

We recommend each profile have a different Destination Directory. If two profiles must share the same Destination Directory, ensure there is enough time to move the staging results before the next staging occurs. Also, confirm that the destination drive will have enough unused space to accommodate the generated Web sites.

During staging to the destination directory, if the file or directory already exists, then its security attributes are left untouched. Otherwise the file or directory is given the security attributes of the directory that contains it.



Note

Universal Naming Convention (UNC) names (\\server\shared\path)are supported. Using UNC names means that a user can schedule a stage on a computer, log out, and still have the stage work successfully.

Staging Options:

8 For names to mirror the channel names, select the "Use source" option. For a new name, select the "Generate new" option to automatically have Site Stager create names for directories and files.

- Generated folder names include the prefix "ch" followed by a number, for example, "ch1"
- Posting names include the prefix "p" followed by a number, for example "p1.htm"

Spaces, punctuation, and other characters (for example, the non-alphanumeric characters \/:*?" < > |) that would generate either invalid URLs or invalid file or folder names are automatically removed. Spaces are converted to a " + ".

You may need to use automatically generated names if the character set used for the channel names (Japanese Shift-JIS, for example) creates non-standard URLs. Before using channel names as URLs, confirm that your operating system, server software, and Web browsers support non-standard URLs.

9 Enter required information in the Incremental Staging and Store Resources areas.

- Select "Incremental Staging" to overwrite and update only those files whose contents have changed since last staging, thereby preserving the last-modified dates of those files whose contents haven't changed.

Note
Selecting this option doesn't result in a faster staging process.

The two types of incremental staging are synchronized and passive.

- With Synchronized (default) staging, previously staged items whose corresponding objects on the server have been deleted since the last staging will be deleted as well (applies to files and directories).
- With Passive staging, no items will be deleted. Files will only be overwritten if it has been determined that the content has changed since last staging. This method preserves modification dates on files whose content hasn't changed.

- Enter a suffix in "Default Extension for HTML files." Instead of all HTML files being staged with the extension "htm", you can specify in the text box, the suffix to be used instead of "htm". All staged HTML files in the next staging of this profile will have the suffix specified. Do not specify any blanks or the "." in the text box.
- Select "Store Resources Separately" to have htm and html files generated from a .asp, or files generated by a .cfm, stored in one directory hierarchy (channels) and have other file stored in a separate resources directory. Specify a subdirectory that resides under the destination directory and a Web Server virtual mapping that maps to this physical directory.
  - Virtual path: Site Stager uses this path to write URLs to the staged resources properly. This path must be absolute, for example, "/dir1/dir2/respath" and must be mapped to the destination subdirectory value (through the Internet Services Manager). The default value is "/resources".

- Destination subdirectory: All resources are stored in this directory. This value must be a relative path, for example, “dir1/dir2/residir” and a subdirectory of the destination directory. There is no organization of the resources into subdirectories. The default value is “resources.”

Description:

10 Enter a short description identifying the profile. This description is visible in the Site Stager Administration window.

11 In the “Shell After Staging” text box, enter the path of the program to be run after staging is complete. For example, if you enter: `"C:\Program Files\TextPad 4\TextPad.exe" c:\test1.txt`, it opens the text file `"c:\test1.txt"` after staging has successfully completed. If staging has not successfully completed, the program will not be executed.

Tip

- Be sure to enter all arguments if they exist and separate them by a space. For example: `c:\dir1\dir2\foo.exe arg1 arg2`.
- If the path to the executable contains spaces, you must surround the path with double quotes. For example: `"c:\program files\ncompass\foo.exe" arg1 arg2`.

12 Using the Microsoft Task Scheduler, click the Schedule Tab to set up a schedule. (To use MS Task Scheduler Help, select a field and press **F1**.)

Note

If the Task Scheduler service is not started or was not installed, an error message appears when you click **OK** to close the profile’s Properties dialog box. Ensure the Task Scheduler service is installed and configured to start automatically, using the Services control panel applet. If the Task Scheduler is not running, Site Stager won’t stage and no error is reported to the Site Stager log file.

If active, a valid profile stages automatically according to any schedule set for it.

Editing or deleting a profile

To edit a profile, select the profile name in the Site Stager Administration window, click **Properties**, and edit the profile. After making the changes, click **OK** to save them and close the profile Properties dialog box.

To delete a profile, select the profile and click **Remove**.

Chapter 10

Staging a Site

Staging a site automatically

Site Stager runs automatically for any active profile with a valid schedule.

! Caution
If the Task Scheduler service is not started or was not installed, Site Stager will not stage and no error will be reported to the Site Stager log file. Make sure the Task Scheduler service is installed and configured to start automatically, using the Services control panel applet.

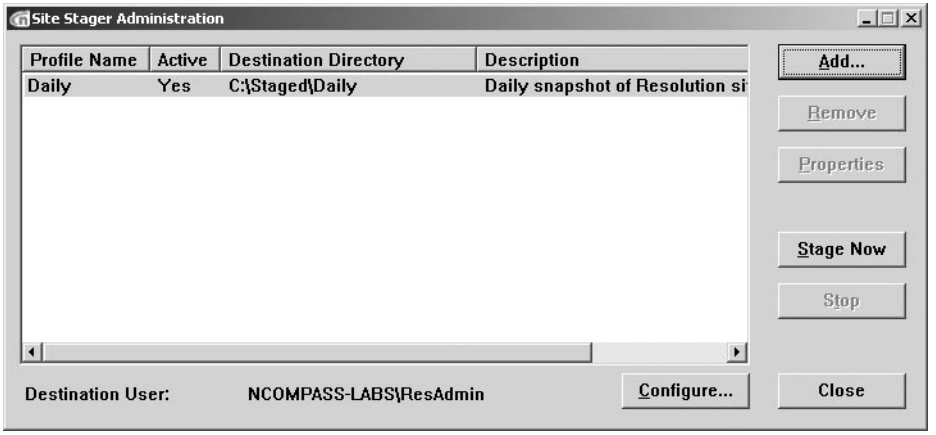
Note
There is a Site Stager limitation whereby you cannot stage a site as an LDAP user.

Staging a site manually

Check the *MSCMS 2001 Setup Guide* for complete Site Stager install instructions.

The server must be running when the Site Stager is started. Never stage more than one profile simultaneously to the same destination directory.

1 You can initiate the staging of a profile at any time by selecting it in the Site Stager Administration window and clicking the **Stage Now** button. As well, you can click the **Stop** button if you want to stop the staging, make corrections to pages or templates, and then start over.



Example of a Site Stager Administration window

2 Click **Configure**. The profile Properties dialog box opens. Refer to the previous chapter on creating a staging profile for an example of the dialog box and how to complete it.

3 Click **OK** to begin staging the site. The text in the Active column next to the Profile Name changes to "Yes (Currently Staging)" while the Site Stager is working.

Note that the status listed in the Site Stager Administration window will not refresh if the profile Properties dialog box is opened during staging.

Closing the Site Stager Administration window while a profile is staging does not stop the staging from occurring. Staging continues as a background task until it is complete.

If the Site Stager cannot connect to the server or has other difficulties staging the site, the errors are written to a log file. See Chapter 8, "MSCMS 2001 Site Stager" for more information about the Site Stager log files and error messages.

Site Stager stops after all accessible channels and postings have been converted to static HTML or ASP files.

Chapter 11

Content Connector Roles and Responsibilities

Content Connector roles and responsibilities

Commerce Server 2000 identifies three user roles within an organization that use Commerce Server to develop, deploy, and manage Web sites. These user roles are identified as:

- System administrators
- Site developers (referred to as site programmers in the Microsoft Content Management Server 2001 documentation)
- Business managers.

In addition to the responsibilities for each role that are outlined in the Commerce Server 2000 documentation, MSCMS 2001 Content Connector adds the following responsibilities.

Role	Responsibility	Tools and user interfaces
Site administrator	• Installs Content Connector • Customizes and deploys Method Systems sample site • Creates MSCMS 2001 user groups • Creates MSCMS 2001 channels • Creates MSCMS 2001 resource gallery	• Commerce Server Manager • MSCMS 2001 Site Builder
Site developer (site programmer)	• MSCMS 2001 templates (in consultation with the business manager)	• MSCMS 2001 Site Builder • Method Systems sample site
Business manager	• Creates page profiles • Creates personalized content objects • Manages rich content created for Web site	• Commerce Server Business Desk • MSCMS 2001 Web Author

Responsibilities for customizing the sample site

Customizing the Method Systems site could involve several changes to the site data on the Business Desk and to the Content Management Server 2001 components that make up a Content Connector site. The table below outlines components that might be changed and who is responsible for changing them.

Component	Responsible for change	Use this to make change	For more information...
Site term	Business manager	Business Desk, User category	Commerce Server 2000 documentation
Extending user profile definition	Business manager with assistance from the site administrator	Business Desk, User category	Commerce Server 2000 documentation
Campaigns	Business manager in consultation with the site programmer	Business Desk, Campaigns category	Commerce Server 2000 documentation
Catalogs	Business manager	Business Desk, Catalogs category	Commerce Server 2000 documentation
Extending the MSCMS page profile definition	Business manager with assistance from the site administrator	Business Desk, Profile Designer module	*MSCMS 2001 Content Connector Business Desk User's Guide*
Personalized content objects	Business manager in consultation with the site programmer	Business Desk, Personalized Content Object module	*MSCMS 2001 Content Connector Business Desk User's Guide*
Profile SQL schemas	Site administrator in consultation with business manager	SQL Enterprise Manager	• Commerce Server 2000 documentation • *MSCMS* 2001 *Setup Guide*
MSCMS 2001 user groups	Site administrator in consultation with business manager and site programmer	MSCMS 2001 Site Builder	*MSCMS 2001 Site Administrator's Guide*

Component	Responsible for change	Use this to make change	For more information...
MSCMS 2001 resources	Site administrator in consultation with business manager and site programmer	MSCMS 2001 Site Builder	*MSCMS 2001* Site Administrator's Guide
MSCMS 2001 channels	Site administrator in consultation with business manager and site programmer	MSCMS 2001 Site Builder	*MSCMS 2001 Site Administrator's Guide*
MSCMS 2001 templates	Site programmer in consultation with business manager	• MSCMS 2001 Site Builder • Method Systems sample solution site application files	• *MSCMS 2001 Page Template Designer's Guide* • Method Systems sample site (which presents a Content Connector scenario)
Site navigation and structure	Site programmer in consultation with business manager	• MSCMS 2001 Site Builder • Method Systems sample solution site application files	• *MSCMS 2001 Page Template Designer's Guide* • Method Systems sample site (which presents a Content Connector scenario)
Rich product pages	Content creators	• MSCMS 2001 Web Author • Business Desk, Page Profile module if they have rights	• *MSCMS 2001 Content Connector Business Desk User 's Guide* • *MSCMS 2001 Site Programmer's Guide*
Other MSCMS 2001 site content (for example, pages and resources)	Content creators	• MSCMS 2001 Site Builder • Method Systems sample solution site application files	• *MSCMS 2001 Content Connector Business Desk User's Guide* • *MSCMS 2001 MSCMS 2001 Site Programmer's Guide*

Chapter 12

Customizing and Deploying Content Connector

Overview

Developing and deploying a customized site

This section of the *MSCMS 2001 Site Administrator's Guide* details how you customize and deploy a site for Microsoft Content Management Server (MSCMS) 2001 Content Connector for Commerce Server 2000.

The following steps summarize the tasks required to customize the Method Systems sample site that ships with Microsoft Content Management Server 2001 Content Connector. For each step, the relevant chapter and guide is given.

1 Confirm that you meet the hardware and software requirements Chapter 7, "Installing Content Connector" in the *MSMCS 2001 Setup Guide)*.

1 Run the InstallShield for Content Connector (Chapter 7, "Installing Content Connector" in the *MSMCS 2001 Setup Guide)*.

2 Create a custom site (this chapter).

3 Package your site (this chapter).

Before continuing with this section, you should also review Commerce Server 2000 Help, particularly the sections "Deploying Your Site: Using Site Packager" and "Administering Commerce Server: Running the Profiles Resource."



Tip

The Method Systems sample site can be customized and deployed to another machine. You and the Commerce Server 2000 business manager should familiarize yourself with the Method Systems sample site before creating a customized site.

MSCMS 2001 Content Connector must be installed before developing and deploying your site.

Creating a customized site

Delete the Method Systems sample site before you begin customizing it. See the section "Uninstalling Content Connector" in Chapter 7, "Installing Content Connector" in the *MSCMS 2001 Setup Guide* for information on deleting a Content Connector site.

From the **Microsoft Content Management Server\Server\Content Connector\CS2000\SitePackage**, double-click **MethodSystems.pup**.

Step	Dialog box title	Action
1	Unpack	Select **Custom Unpack**. Click **Next**.
2	Unpack Method	Select **Create a new site**. Click **Next**.
3	Site Name	Type a new name for the site, for example, **MyCustomSite**. Click **Next**.
4	Select Resources	Select the resources and data to unpack.
5	Global Resource Pointers	Map global resource pointers to global resources.
6	Database Connection Strings	Configure the connection strings for the resources you are unpacking. A SQL dialog box opens. Enter the SQL username and password for this database connection. Click **OK.**
7	Select Applications	Select the applications to unpack.

Step	Dialog box title	Action
8	Select IIS Web Sites and Virtual Directories	Select an IIS Web site and virtual directory for each application. 1 Select the Method Systems Application in the left window. 2 In the IIS virtual directory field, type your new name, for example, **MyCustomSiteApplication**. 3 Select the MethodSystems biz desk Application in the left window. 4 In the IIS virtual directory field, type your new name, for example, **MyCustomSitebizdesk**.
9	Unpacking	The site begins unpacking. This takes a few minutes.
10	Data Warehouse	Accept the defaults. Click **OK**. Unpacking proceeds; this takes a few minutes.
11	Profiling System	Accept the defaults. Click **Next**.
12	Profiling System	Accept the defaults. Click **OK** (this takes a few minutes).
13	Unpacking is Complete!	Click **Finish**.

Customizing your site

In order to customize the Method Systems site, the site administrator, the business manager, and the site programmer will likely make a number of changes to the site data and the other components that make up an MSCMS 2001 Content Connector site. See Chapter 11 “Content Connector Roles and Responsibilities” in this guide for a table that outlines what components and site data might change and who is responsible for changing them.

The following table addresses the components that the site administrator is responsible for when customizing a site.

Site administrator customization responsibilities:

Component or site data	Responsible for change	Use this tool to make change	For more information...
Profile SQL schemas	Site administrator in consultation with business manager	SQL Enterprise Manager	Commerce Server 2000 documentation, SQL Server documentation, and this guide.
MSCMS 2001 user groups	Site administrator in consultation with business manager and site programmer.	MSCMS 2001 Site Builder	Chapter 3, "Setting Up Publishing: Assigning Publishing Rights" this guide.
MSCMS 2001 resources and channels	Site administrator in consultation with business manager and site programmer.	MSCMS 2001 Site Builder	Chapter 2, "Setting Up Publishing: Creating Containers for Users" this guide.

Extending profile schemas

Profile schemas change whenever the business manager changes or adds properties to a page profile. The Method Systems site includes five extra columns in the SQL table, but for customization, you will probably need to add columns in order to accommodate new data members. Review "Running the Profile Resource" in the Commerce Server 2000 Help for more information about profiles, data members, and extending profile schemas.



Note

Extensions to the Content Management Server 2001 content profile schema can only be done by adding columns to the single existing Content Management Server 2001 profile table. All properties of the page profile definition must be mapped to the data members of the data object for this profile table.

Before you package your site

All the files for your customized site are packaged into a .pup file and then unpacked on the computer you specify. To customize your site you will probably have to update some files, including the SQL server schema profiles and your import and export profiles. Many of these files you need to update are in the Site Name Package directory.

Updating SQL Server

If changes were made during the development of your customized site, for example you modified the SQL schema for the MSCMS page profile or other profiles, you must do the following before packaging your new site.

If changes were made to...	Do this
SQL schema for the MSCMS Page Profile definition (for example, you added new data members to the MSCMS PageProfile data object)	Use the SQL Enterprise Manager to generate an updated version of the MSCMSPageProfile.SQL file. 1 From **Commerce Server Manager>Microsoft SQL Servers>SQL Server Group><YourServerName> Databases><YourSiteDatabase>Tables** select **MSCMSProfile**. 2 Right-click **MSCMSProfile**. 3 Select **All Tasks>Generate SQL Script**. For more information on generating SQL scripts, see the SQL Server documentation.
SQL schema for the user profile or other profiles described in the ProfileSchema.SQL file	Use the SQL Enterprise Manager to generate an updated version of this schema script from the current schema defined in SQL Server. (See Commerce Server 2000 Help for more information on updating the SQL schema for user or other profiles.) If you make a change to these SQL schemas you may want to change the hard-coded sample profile data. To do this, open the PopulateProfileData.sql file and change the necessary data.

Global.asa file

Commerce Server site applications have a global.asa file that controls the logic for starting the application and loading the caches. When the site application is unpacked, the global.asa file in the application directory under <AppName>\Unpack|Copy-to-wwwroot\ directory is copied to the wwwroot so that the global.asa will run there.

If changes are made to the global.asa file at the wwwroot level, then this file must be copied back the <AppName>\Unpack|Copy-to-wwwroot\ before the site is packaged again. Doing this ensures that the next time the site is unpacked, the new file is copied to the wwwroot on the new target machine.

Site resources

MSCMS 2001 Content Connector adds two site resources in addition to those site resources already supplied by Commerce Server 2000. They are the Content Connector custom resource and the Content Data custom resource.

- The Content Connector custom resource is used to pack all personalized content objects and page profile data in your site.
- The Content Data custom resource uses a custom package object to export and import Content Management Server 2001 data when packaging and unpacking a site. The default export and import profiles does not explicitly name users from your system—this is because some users may not be present on the target machine. You can include or exclude users by setting the Data resource export and import profiles.

Setting import or export profiles

The < SiteName > folder includes two pairs of import and export profiles. The two pairs of profiles are:

- ExportWithoutAnyUsers.REP and ImportWithoutAnyUsers.RIP (this is the default)
- ExportIncludingUsers.REP and ImportIncludingUsers.RIP.

Set the desired export and import profiles before you proceed with packaging your site. For example, if you want to pack your site to another machine and include the user rights group members, give the Data Export Profile property and Data Import Profile property the values of ExportIncludingUsers.REP and ImportIncludingUsers.RIP respectively.

The export and import profiles are used to transfer MSCMS 2001 objects. By default, the export profiles for the Method Systems sample site exports a single root object of each of the following types:

- Resource gallery
- Template gallery

- Channel
- Folder.

In the sample site each root object is named CS2000, but you can rename it. All of the objects beneath these root objects are exported when the site is packaged.

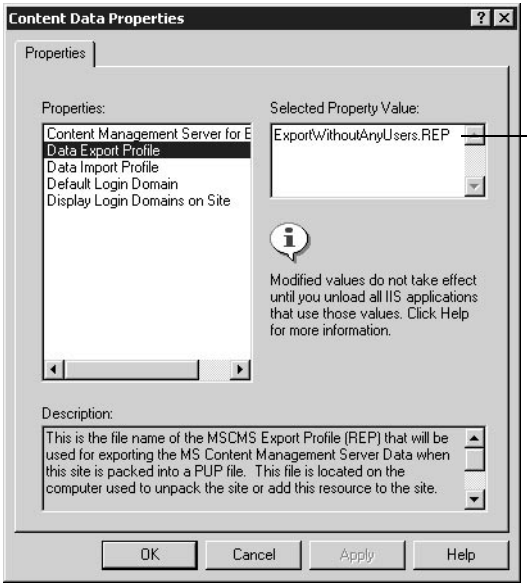
The Site Resources folder contains one pair of import and export profiles. To set your data export and import profiles do the following:

1 Open **Commerce Server Manager > Commerce Sites > < YourSiteName > Site Resources > Content Data.**

2 Right-click **Content Data**. Click **Properties**. The Content Data Properties dialog box opens.

3 In the Properties area select Data Export Profile.

4 In the Selected Property Value area the default is set to **ExportWithoutAnyUsers.REP**. Leave the default or change it to include users by typing: **ExportIncludingUsers.REP**.



To include users when exporting, select this property value and type ExportIncludingUsers.REP. Repeat the procedure for the Data Import Profile.

5 Click **OK**.

6 Repeat the procedure for the Data Import Profile.

Tip

Content Connector includes only two pairs of deployment profiles (REP and RIP files). Using MSCMS 2001 Site Deployment Manager you can have more extensive control over your deployment by editing or creating new deployment profiles. See Chapter 7, "Using the Site Deployment Manager" for more information.

Packaging a Content Connector site

To create the site package, from **Microsoft Content Management Server\Server\Content Connector\CS2000\SitePackage\ < MyCustomSiteName >** double-click **PackThisSite.vbs**.

Running the PackThisSite.vbs file copies the PreMethodSystems.vbs file to the output directory. The .vbs file is automatically renamed with your new customized site name Pre < MyCustomSite > .vbs. In addition, PackThisSite.vbs uses the MSCMSPageProfile.SQL to pack the MSCMS page profile data.

The Commerce Server Site Packager opens.

Step	Dialog box title	Action
1	Packaging	Packaging proceeds automatically; this takes a few minutes.
2	Profiling System	1 In the Schema Definition Scripts field, click **Browse**. From the **<MyCustomSiteName>** directory, select the **ProfileSchema.SQL** file. 2 In the Data population scripts field, click **Browse**. From the **<MyCustomSiteName>** directory, select the **PopulateProfileData.SQL** file.
3	Packaging	Packaging proceeds; this takes a few minutes.
4	Packaging is Complete!	Click **Finish**.

See the Commerce Server documentation for additional information on packaging a site.

Deploying your customized site

Before proceeding with the Commerce Server steps for unpacking a site, you must do the following steps:

1. From the PackageOutput directory, copy the **Pre < YourCustomSiteName > .vbs** and **< MyCustomSiteName > .pup** files to the target machine.
2. Double-click the .pup file to launch the **Site Packager PUP.exe** to unpack **< MyCustomSiteName >** .
3. You are now ready to unpack your customized site. See the section "Unpacking the sample site" in Chapter 7, "Installing Content Connector" in the *MSCMS 2001 Setup Guide* or Commerce Server 2000 Help for information on unpacking your customized site.

Chapter 13

Managing Content Connector User Authentication

Creating Content Connector MSCMS 2001 user groups

Overview

You can set up various users to access different parts of your site. In the Method Systems sample site, the following users have been set up:

- Guests: These users have no Content Management Server 2001 users rights. They include:
  - non-registered guest users
  - registered guest users.
- Privileged users: These users have Content Management Server 2001 rights. They include:
  - Partners (OEM, Education, and Government users)
  - Content creators (authors and editors)
  - Administrators.

Content Connector guests

Guests do not have any Content Management Server 2001 rights. They can only browse the pages you make accessible to any site visitor.

Setting up guest user access

For guests to see your site, you must give them access using the Server Configuration Application and Site Builder. See the section "Enabling guest user access options" in Chapter 5, "Using the Server Configuration Application" of the *MSCMS 2001 Setup Guide,* and Chapter 3, "Setting up Publishing: Assigning Publishing Rights" in this guide.

Non-registered guest users

Every non-registered guest user is given a basic automatic guest user profile, but for them to participate in personalization they must register.

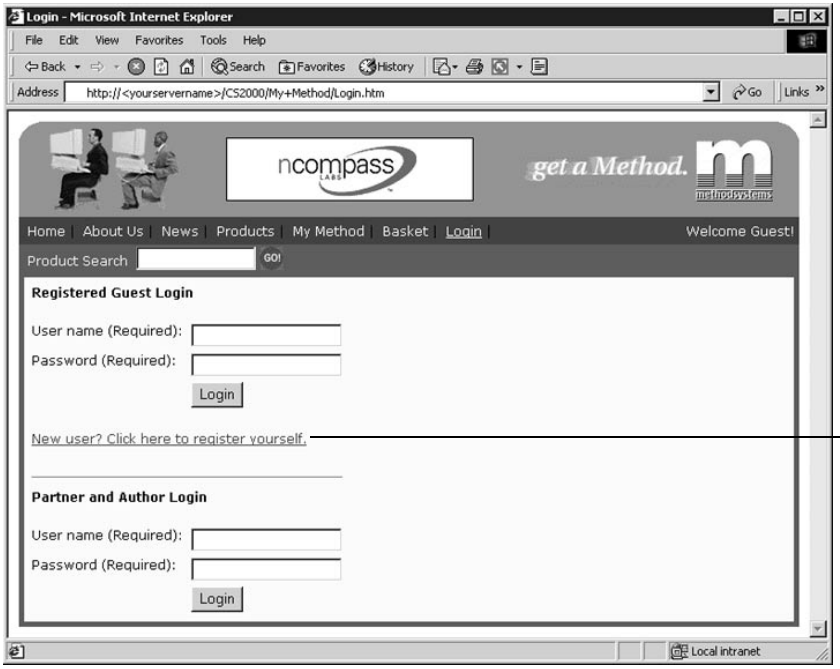
You can choose to set up your site so new users must register immediately.

Registered guest users

Registered users are users who have created a Commerce Server 2000 profile. In the Method Systems site these users can create a profile by clicking the login portion of a site and registering.

1 From the header, click **Login**. The registration page opens.

2 New users must click the link, **New user? Click here to register yourself.**

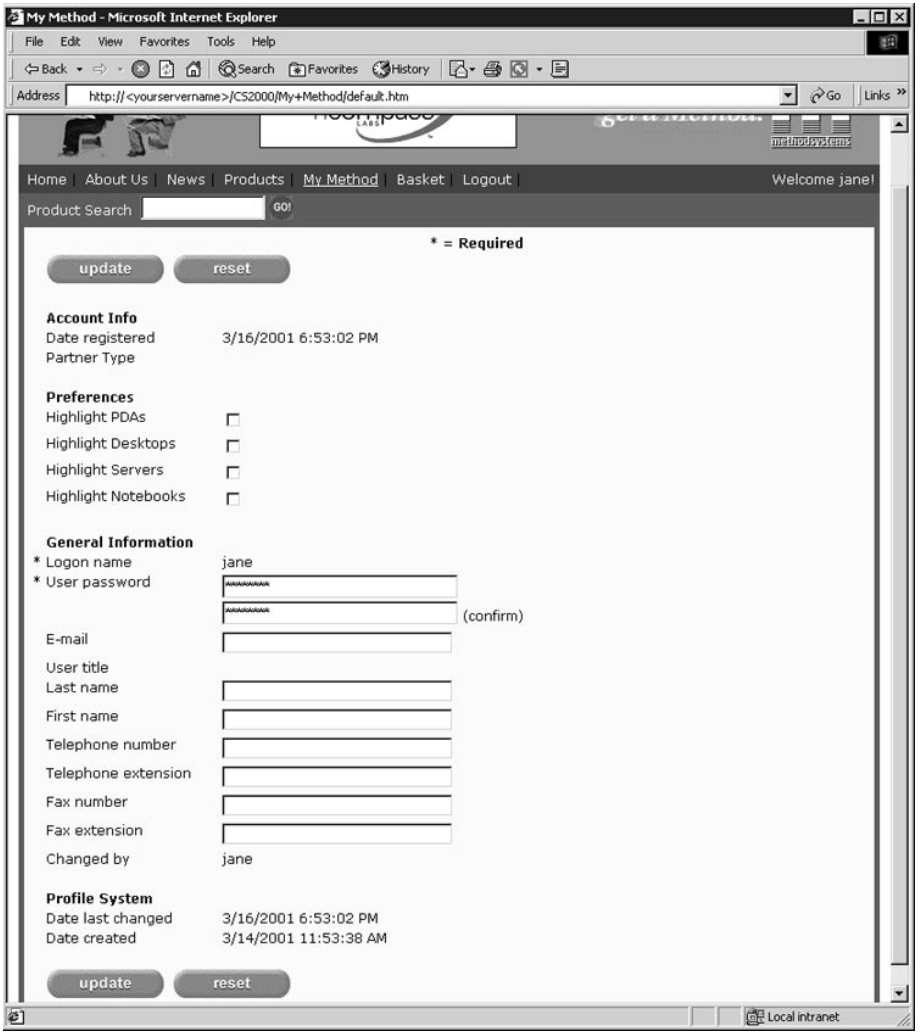


A new user clicks the New User? link. A registered guest users fills out the appropriate fields.

Method Systems registration page

3 From the registration page, the user provides a user name and password and then clicks **Submit**. The My Method page opens.

4 The new registered user can participate in site personalization by filling out a user profile.



Creating guest users in the Business Desk

The Business Manager can also create these users in the Business Desk using the Users module.

1 From Users, click the **Users** module.
2 Click **New User** from the toolbar. The New User window opens.
3 Fill out the appropriate fields and click **Save and Back**.

Content Connector privileged users

Privileged users have a Content Management Server 2001 identity. On the Method Systems site, registered users are:

- Partners (OEM, Education, and Government users)
- Content contributors (authors, editors).
- Administrators.

In the Method Systems solution site, partner users have privileged access to some news channels and placeholders within product pages. There are three kinds of partners in the solution site (OEM, Government, and Education). When a partner user logs on they are shown content that is specifically for them. This could include content that no other user sees.

Setting up privileged users in Content Management Server 2001

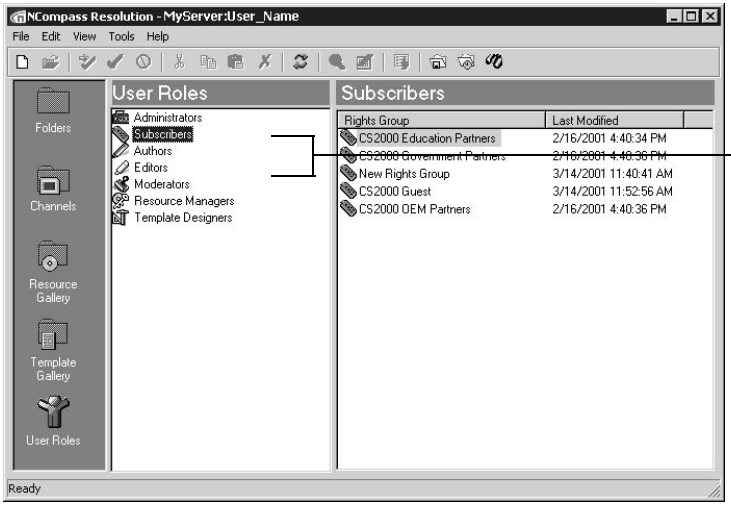
The following procedures describe how to set up partners, authors, editors, and administrators in Content Management Server 2001.

1 Create an active directory or Windows 2000 domain user.
2 Open Site Builder. (You must log on as the Administrator.)
3 From the navigation bar, click **User Roles**.

4 In the User Roles pane select **Subscribers**. Add the partner user to the appropriate MSCMS 2001 subscriber group (in the Method Systems site you would add this user to CS2000 OEM Partners, CS2000 Education Partners, or CS2000 Government Partners. See table below.)

Follow steps one to three for authors, editors, and administrators. See Chapter 3, "Setting up Publishing: Assigning Publishing Rights" for more information on adding users to a rights group.

User roles	Rights group
Subscribers	CS2000 OEM Partners CS2000 Education Partners CS2000 Government Partners
Authors	CS2000 Authors
Editors	CS2000 Editors
Administrators	CS2000 Administrator



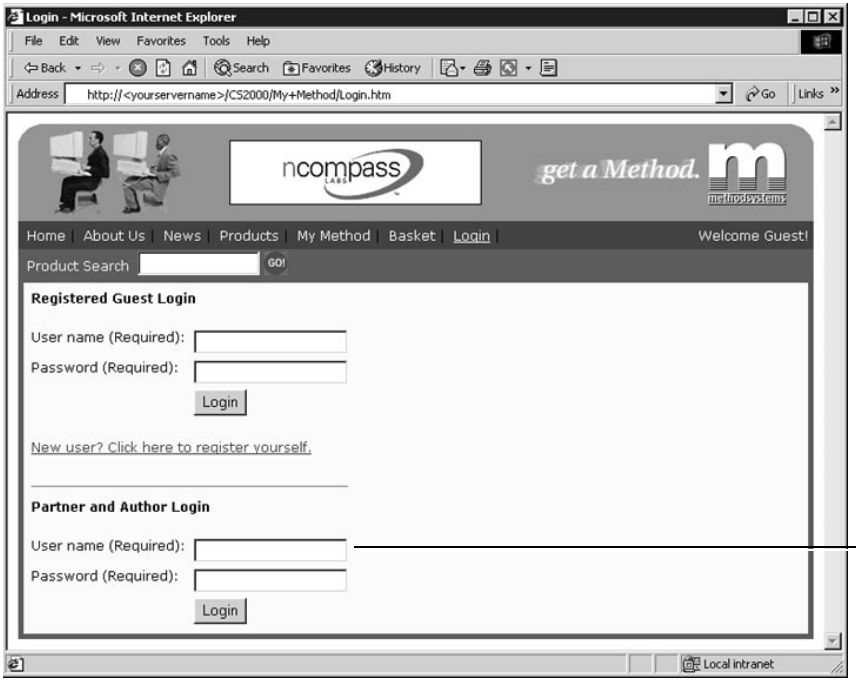
If you're setting up partner users, select Subscribers. If you're setting up authors, editors, or administrators, select the corresponding user role.

Logging on to a Content Connector site as a privileged user

When you log onto the Method Systems site as a partner or author, you are logged on to both Content Management Server 2001 and Commerce Server 2000.

1 Open your browser and type in the URL for Method Systems `http://<your server>/MethodSystems`.

2 From the header, click **Login**. The registration page opens.



Method Systems login window

3 In the Partner and Author section, fill out your user name and password (and domain, if the selection list is displayed) using your Windows 2000 or Active Directory user name and password. You are now logged on to Commerce Server Manager 2001 and Commerce Server 2000. To avoid accidently conflicting with other users, the characters **MSCMS_** are automatically attached to your generated profile name. No users with MSCMS_ can log on using the Registered Guest login.

A password is auto-generated as "********" (eight asterisks) for the generated Commerce Server profile, but users will never need to type that.

Setting the partner type in the Business Desk

When a partner user logs on to the site for the first time, a Commerce Server profile is automatically created, but the business manager must set their partner type.



Note

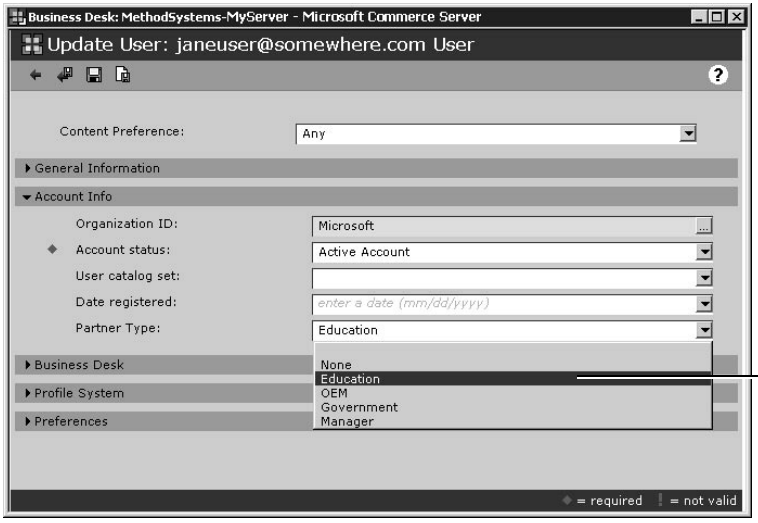
Before you can set the partner type for a privileged user, they must have logged on the site at least once. You can do this for them immediately after creating the user in Active Directory or Windows NT and setting them up in Content Management Server 2001.

Setting up privileged users in the Business Desk

1 From the Business Desk find a user profile.

2 Select **Open User** from the toolbar. The Update User window opens.

3 From the Account Info section, select the Partner Type from the drop-down list. Set the Partner Type as appropriate to your user. Set partners according to who they are and what you want them to see, for example, in the Method Systems site, they would be set as Education, OEM, or Government users. For content contributors and administrators, they would be set as Managers so they can see personalized content intended for all partner types.

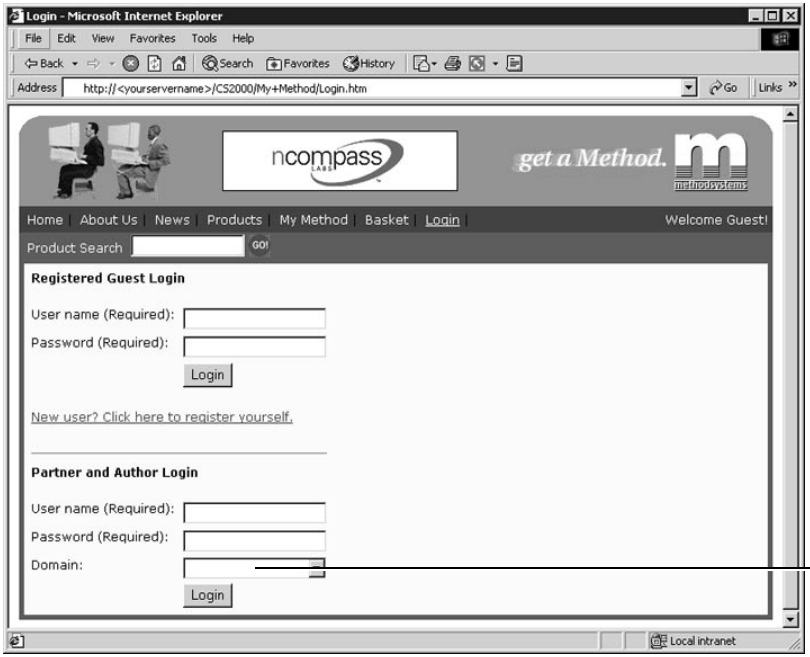


In the Method Systems Site a registered partner user set to Education, OEM, or Government receives content specific to them. A manager sees all the content.

User profile window

Setting the partner and author login domain in the solution site

You have the option of making a domain selection drop-down list box appear or not on the partner login portion of your site. This is set by a Boolean flag in the Content Management Server 2001 Data Resource in Commerce Server Manager.



You can choose to have the domain visible or not on the login page of your site.

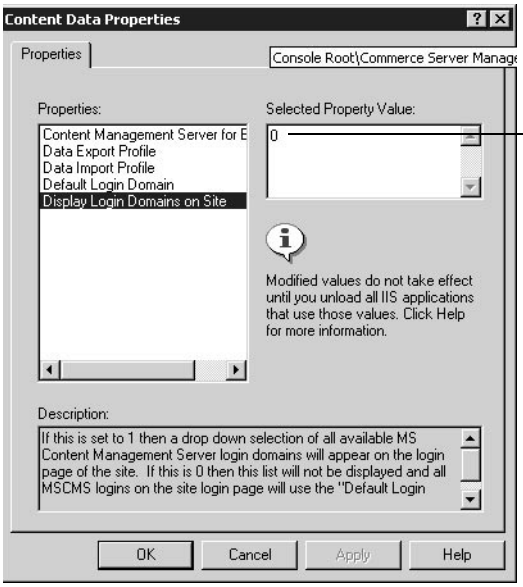
To set the default domain to be automatically used:

1 Open the Commerce Server Manager. Expand **Commerce Server Manager > Commerce Sites > MethodSystems > Site Resources > Content Data**.

2 Right-click Content Data. Click **Properties**. The Content Data Properties dialog box opens.

3 Select **Display Login Domains on Site**. Notice the Selected Property Value is set at 1. This means a drop-down list of all available MSCMS 2001 login domains appears on the login part of the site.

4 Change the value to 0. This means the user will not be able to select a domain when logging on the site. The domain will default to whatever is listed in the Default Login Domain property in the Content Data Properties window. At install this is set to the first authorized domain in the MSCMS 2001 list, but any authorized domain can be used.



This value determines whether or not the authorized domains are displayed when a partner or author logs on.

5 Once you make this change, you must make the root level application reload. This may require an **iisreset**.

Chapter 14

Creating and Mapping Content Connector Containers

Overview

Importing a catalog

After you create a customized Content Connector site you will likely import your own catalog to the Commerce Server Business Desk. (For information on importing a catalog see the Commerce Server 2000 Online Help.)

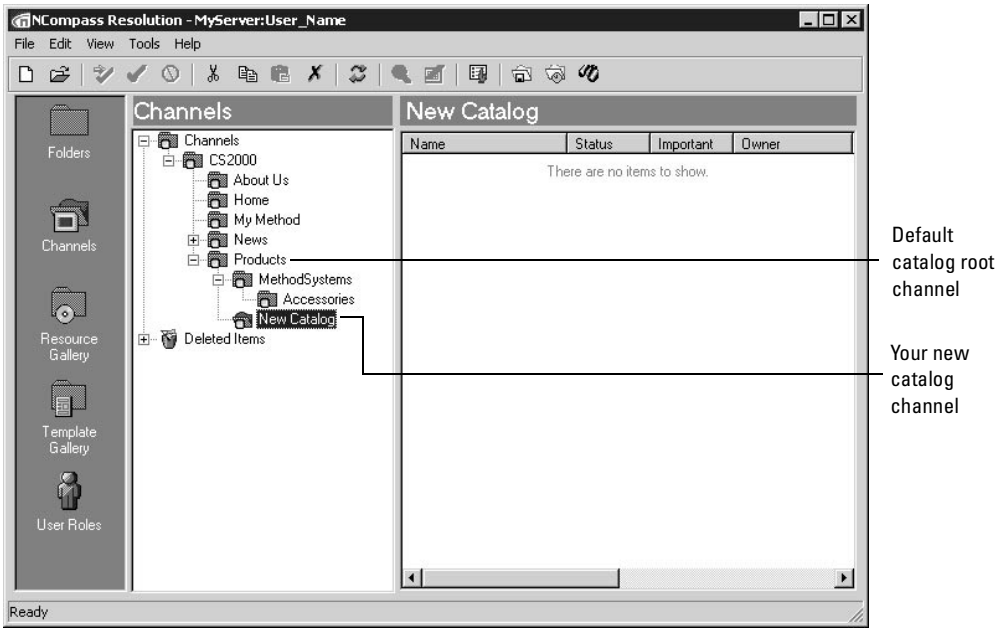
When a catalog is imported, all products are visible in the Web site as simple products. As a result, there are some management options to consider including the creation of channels, folders, and pages that are specific to that site. These containers store rich product pages, simple product pages, and specify paths to the appropriate templates.

This chapter outlines the steps for:

- Creating new catalog channels and folders
- Overriding Content Connector defaults
- Changing the system defaults.

Creating a new catalog channel and folder

When you import a new catalog, the Products channel is the default catalog root channel. All product pages automatically get created there. However, by creating a channel with the same name as your catalog under the default catalog root channel you can have the new product pages created there. (For information on creating new channels and folders, see the sections "Creating the documents channel" and "Creating folders" in Chapter 2, "Setting up Publishing: Creating Containers for Users.")



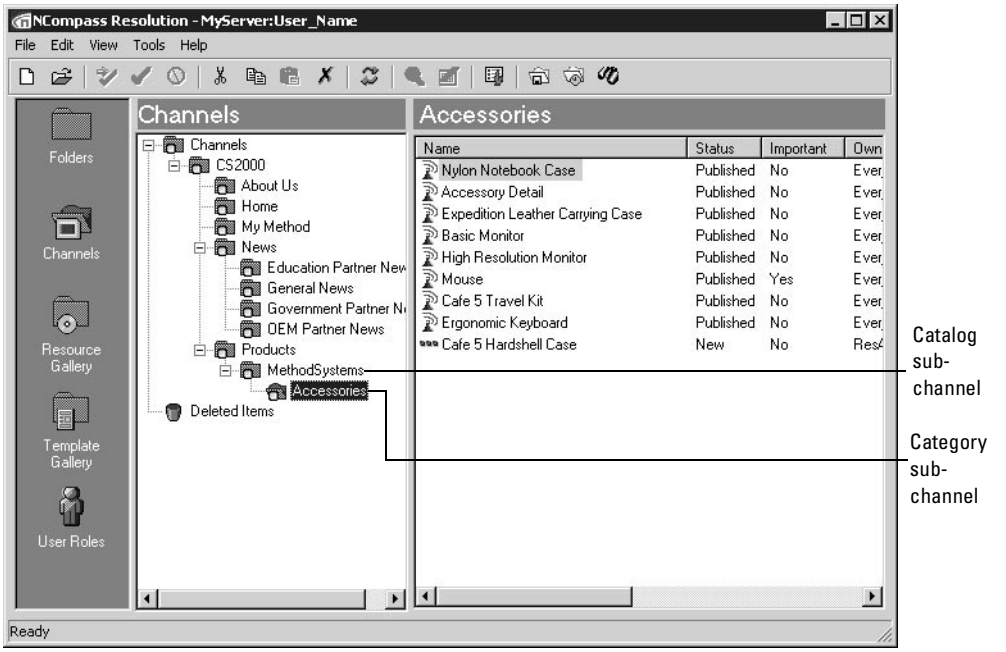
When you import a catalog some Content Connector properties such as the RichProductChannel, RichProductTemplate, and SimpleProductPosting mapping properties are automatically added to the catalog's various categories. These can be used for overriding defaults if you want product creation behavior to be different in different categories. One reason to do this might be performance, since large numbers of Content Management Server 2001 pages in a single channel can affect performance.

Overriding Content Connector default mappings

Overriding the catalog root channel default mapping

Once you import a new catalog you may want to create new channels and folders that correspond to categories in your catalog.

Method Systems uses the Products channel as its catalog root channel. Its sub-channel is MethodSystems which also has a category sub-channel called Accessories. The Accessory category overrides the Product channel default by placing all accessory products in the CS2000/Products/MethodSystems/Accessories channel.



Method Systems channel structure

To create channels and folders for catalog categories follow the procedures outlined in the sections “Creating the documents channel” and “Creating folders” in Chapter 2, “Setting up Publishing: Creating Containers for Users.”

To have your pages appear in the category channels instead of the catalog root channel (like the Accessory category in Method Systems), you must change the mapping in the Business Desk.

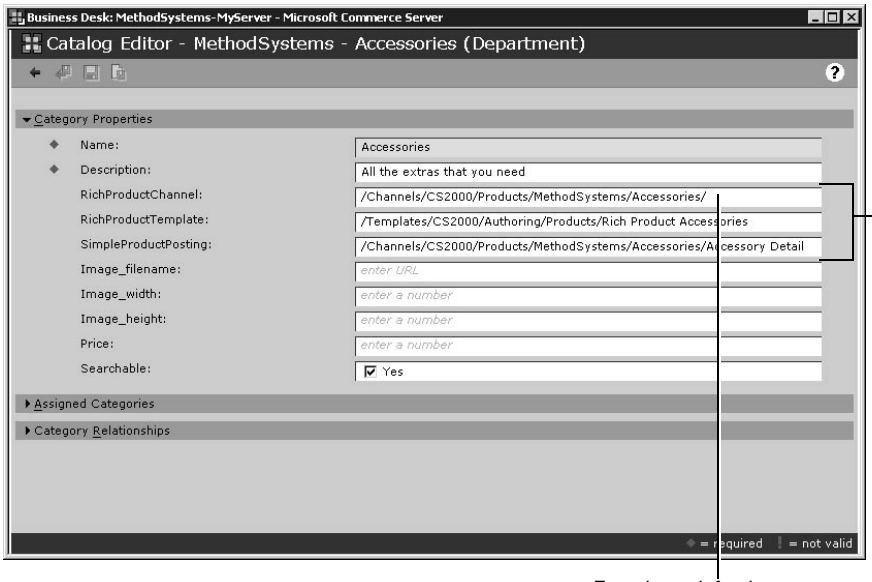
1 Open the Business Desk.

2 From Catalogs, select the **Catalog Editor** module.

3 Click the catalog you want to open. From the toolbar select **Open Catalog**. The Catalog opens.

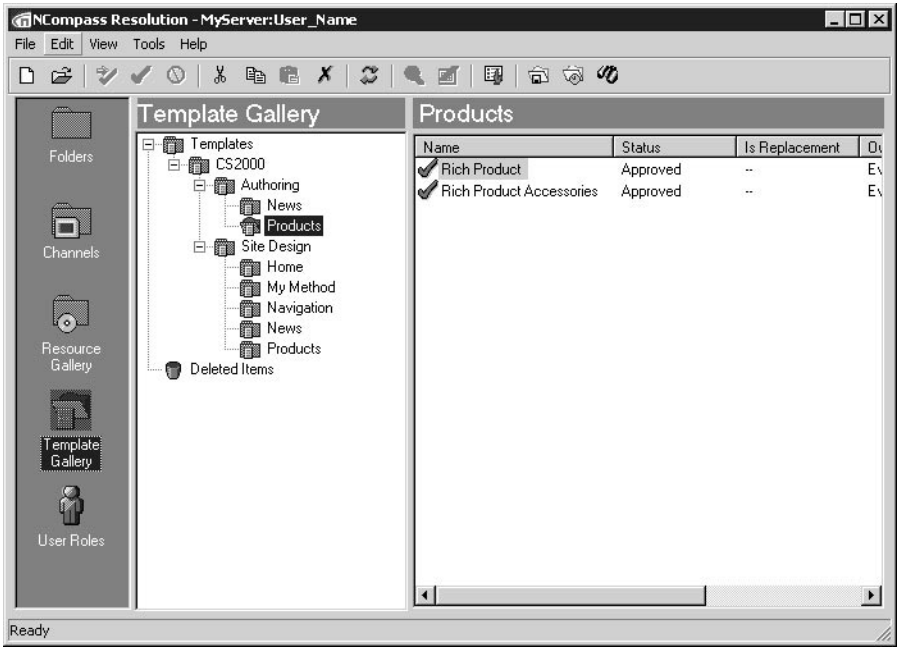
4 Expand Categories and select the category to assign a channel path to. Click **Edit**. The Catalog Editor window opens.

5 Type the RichProductChannel path.



Overriding the rich product template

The Method Systems template gallery pictured below has two Product folders. The Authoring/Products folder contains the rich product templates and the Site Design/Products folders contains the simple product templates.



The default site behavior is to use either Rich Product or Rich Product Accessories as the rich product template for new pages. In the Method Systems site, the accessories category overrides this behavior by only using the Rich Product Accessories template for new product pages in that particular category.

For your customized site, you can create a new template or copy the existing Method Systems rich product template and make modifications to it. For information on creating or modifying templates see Chapter 2, "Creating a Template" and Chapter 8, "Editing a Template" in the *MSCMS 2001 Page Template Designer's Guide*. Also see Chapter 14, "Accessing the Content Connector Product Catalog" in the *MSCMS 2001 Site Programmer's Guide*. Only after the template is approved, can you override the mapping for a category. This is done in the Business Desk.

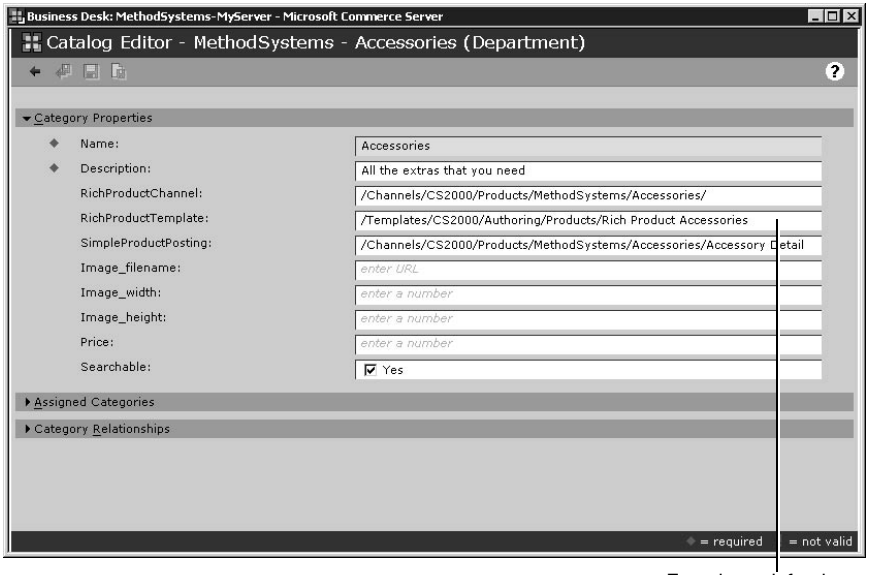
1 Open the Business Desk.

2 From Catalogs, select the **Catalog Editor** module.

3 Click the catalog to open. From the toolbar select **Open Catalog**. The Catalog opens.

4 Expand Categories and select the category to assign a channel path to. Click **Edit**. The Catalog Editor window opens.

5 Type the RichProductTemplate path.



Type the path for the RichProductTemplate.

Overriding simple product postings

In the sample site, all simple products use the default simple product posting except accessory products which use the Accessory Detail posting. To override simple product postings for a category do the following.

Step 1: creating a simple product template

Create a new template or copy the existing Method Systems simple product template and make modifications to it. For information on creating or modifying templates see Chapter 2, "Creating a Template" and Chapter 8, "Editing a Template" in the *MSCMS 2001 Page Template Designer's Guide*. Also see Chapter 14, "Accessing the Content Connector Product Catalog" in the *MSCMS 2001 Site Programmer's Guide.* Approve the template once you're finished.

Step 2: creating a simple page

1 Open the MSCMS 2001 Site Builder and click the **Folders** icon to display the folders hierarchy.

2 Select the folder where you want to create the simple product page.

3 From the File menu select **New > Page**. The Select Template window opens.

4 Select the template for the simple product page. Click **OK**. The New Page window opens.

5 Create your page. When you are finished, from the toolbar, click **Save**. The Save As window opens.

6 Name your page. Click **Save**.

7 Close the New Page window. The page you created appears in the list frame (the right pane of the MSCMS 2001 Site Builder window).

Step 3: creating a simple posting

1 Right-click the page you created and click **New Posting**. The New Posting window opens.

2 From the Select Channel pull-down list click **Browse**. The Select Channel window opens.

3 Select a channel for your posting. It should correspond to the folder hierarchy. Click **OK**.

4 Click **OK** in the New Posting window.

5 Right-click the page you created and click **Approve**.

Step 4: mapping simple product categories

For the categories in your site to use your new simple posting, change those categories individually.

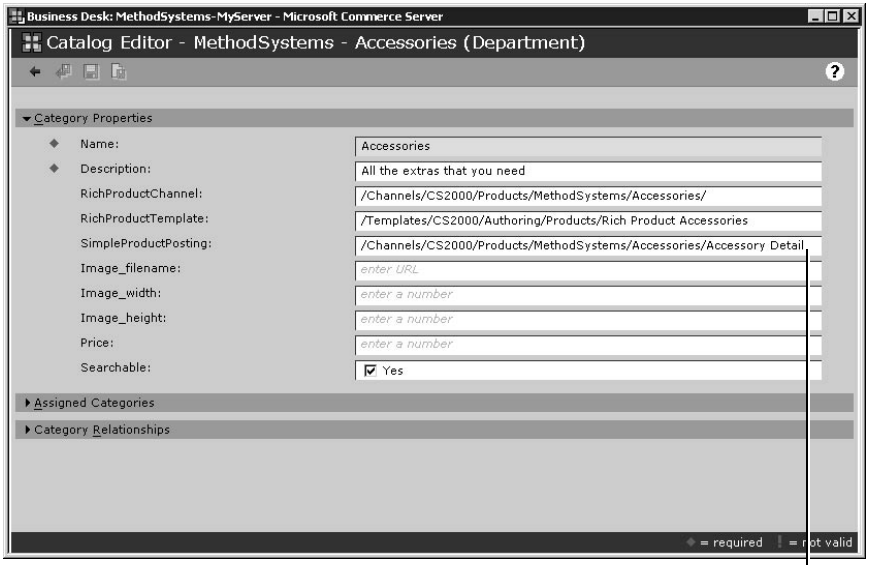
1 Open the Commerce Server 2000 Business Desk.

2 From Catalogs select the **Catalog Editor** module.

3 Click the catalog to edit and from the toolbar click **Open Catalog**. The Catalog window opens.

4 Expand Categories and select the category to assign a posting path to. Click **Edit**. The Catalog Editor window opens.

5 Type the SimpleProductPosting path.



Type the path for the SimpleProductPosting.

Changing the system defaults

Changing the default root catalog channel

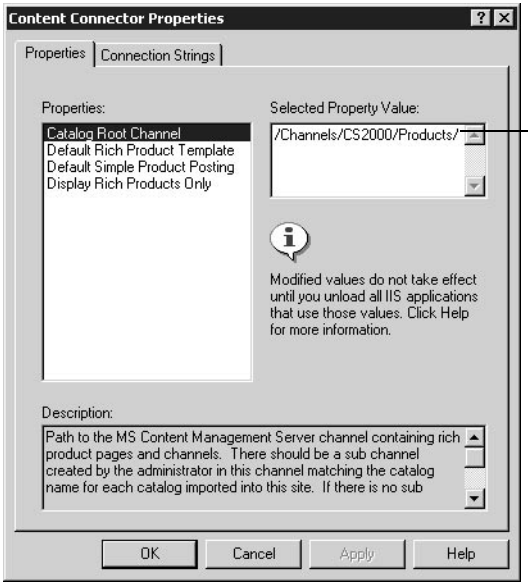
To create a new channel structure you may want to change the root catalog channel path in the Commerce Server 2000 Manager. Setting the default paths in the Commerce Server Manager affects the entire site.

1 Click **Start > Programs > Microsoft Commerce Server 2000 > Commerce Server Manager**.

2 Open the path **Console Root\Commerce Server Manager\Commerce Sites\ < Site Name > \Site Resources\Content Connector**.

3 Right-click Content Connector and select Properties. The Content Connector Properties dialog box opens.

4 In the Selected Property Value field, specify the new path for the Catalog Root Channel.



Specify the Content Management Server path to correspond to the channel you created in the Site Builder.

Changing the default rich product template

Once you've created or modified a rich product template and approved it, you have the option to use it for all new rich product pages. To do this you can change the system defaults for the rich product template in the Commerce Server 2000 Manager.

1 Click **Start > Programs > Microsoft Commerce Server 2000 > Commerce Server Manager**.

2 Open the path **Console Root\Commerce Server Manager\Commerce Sites\ < Site Name > \Site Resources\Content Connector**.

3 Right-click Content Connector and select Properties. The Content Connector Properties dialog box opens.

In the Selected Property Value field, specify the new path for the Default Rich Product Template. You have the option to map either the gallery or a single template. Mapping a gallery provides additional template choices.

Change default simple product posting

Once you've created or modified a simple product template and approved it, you can use it for all simple products on the site. To do this, change the system defaults for the simple product posting in the Commerce Server 2000 Manager.

1 Click **Start > Programs > Microsoft Commerce Server 2000 > Commerce Server Manager**.

2 Open the path **Console Root\Commerce Server Manager\Commerce Sites\ < Site Name > \Site Resources\Content Connector**.

3 Right-click Content Connector and select Properties. The Content Connector Properties dialog box opens.

4 In the Selected Property Value field, specify the new path for the Default Simple Product Posting.

Chapter 15

Error Messages

This chapter contains a listing of Microsoft Content Management Server 2001 and MSCMS 2001 Site Stager error messages, categorized by the domain that generates them.

Most Content Management Server 2001 error messages contain details to help you determine the source of the error. Click the **Details** button on the error message for this information.

Site Builder error messages

The following messages can appear when working in the Site Builder.

`Could not create a connection of Microsoft Content Management Server.`

`Could not open download start-up script server (URL is http://<servername>/NR/System/clientui/login.asp)`

`Could not get connection to Microsoft Content Management Server.`

`The attempt to connect to the server failed.`

Context: Unexpected error when the user is launching the Site Builder.

Action: 1. Check the network and server connections.

2. Check that the IIS W3SVC is running on ths server.

`Could not get connection to Microsoft Content Management Server Site Builder.`

`Failed to initialize the Microsoft Content Management Server Site Builder.`

Context: Unexpected error when the user is launching Site Builder.

Action: Close MSCMS 2001 Site Builder and start Content Management Server 2001 again.

`You do not have access rights to the Microsoft Content Management Server Site Builder.`

`Could not log into Microsoft Content Management Server. Either this user id has not been assigned any rights on the current server, or it is an Active Directory user id.`

Context: The user attempts to launch Content Management Server 2001, but the system detects that the user has no access rights to Content Management Server 2001.

The user may also be attempting an automatic login with an Active Directory user id that is not supported.

Action: Log on as a user who has access rights.

`Content Management Server AENavBar::Init() failed.`

`Content Management Server AENavBar.Init() called twice.`

Context: Unexpected error when the user launches the Site Builder.
Action: Close Site Builder and start Content Management Server 2001 again.

`Content Management Server NavBar.UnInit() called without Init() being called before.`

`Content Management Server AENavBar:UnInit() failed.`

Context: Unexpected error when the user is closing Site Builder.
Action: Close Content Management Server 2001 and restart it.

`The Page doesn't exist in the specified date and time.`

Context: Occurs when viewing revisions by date.
Action: Select a date and time that is more recent than the last revision purge, the first editor approval of the posting, and older than the current date.
Large differences between the client computer's clock and the database server's clock can make it difficult to select specific revision dates.

`You do not have sufficient rights to create Folder.`

`You do not have sufficient rights to create Channel.`

`You do not have sufficient rights to create page in this folder.`

`You do not have sufficient rights to create Gallery.`

Context: Attempt to create an item while logged in as a user without administrator's rights.
Action: Log on as an administrator, or ask your administrator to give you additional rights.

`The page has been opened in the Authoring window. Operation cannot be performed at this time.`

Context: Attempt to Submit/Approve/Decline/Rename/Delete a page, while the Authoring window is open, has caused conflict within the system.
Action: Close the Authoring window and try again.

`You do not have access right to edit the item.`

Context: A user attempts to edit a page, but the user doesn't have the rights necessary to make changes to the item. It is possible the user's rights changed after the user opened the Authoring window.
Action: Log on as an administrator, or ask your administrator to give you additional rights.

`Template has been opened in the Template Design window.`

Context: User attempts to rename a template, but the template has been opened in the Authoring window.

Action: Close the Template Design window and try again.

`Template has been opened by the Design Palette.`

Context: Open a template in the Template Design window, while the template is open in the Design Palette.
Open the Properties dialog box of a template, while the template is open in the Template Design Palette.
Attempt to rename or delete a template, while the template is open in the Template Design Palette.

Action: Close the Template Design Palette.

`Template has been opened in the Template Design window.`

Context: Open a template in the HTML editor (use the Edit Template command), while the template is open in the Template Design window.
Open the Properties dialog box of a template, while the template is open in the Template Design window.
Attempt to rename or delete a template, while the template has been opened in the Template Design window.

Action: Close the Template Design window.

`An unexpected error occurred during the new Group creation process.`

Context: An administrator attempts to create a new rights group, but the system could not perform the operation.

Action: Try again.

`Operation failed because lock cannot be obtained on the Root Control Gallery node.`

Context: An administrator attempts to create a Template Designer rights group. The newly-created rights group must have access rights to the root control gallery; however, the system failed to lock the gallery, as it should. The control gallery may have been locked by another user.

Action: Try again.

`You do not have sufficient rights to perform cut operation on this object.`

`You do not have sufficient rights to perform this paste operation.`

`An unexpected error occurred during the paste process.`

Context: User attempts to cut/copy/paste an object, but does not have access rights to perform operation.

Action: None.

`Failed to lock the item.`

Context: This is a general message issued when the system has failed to lock an item.

Action: Refresh the associated folder and try again.

Authoring window error messages

The following messages may appear when a user is working in the Authoring window.

`The number of objects selected exceeded the allowed maximum for this placeholder.`

Context(s): Insert more than one image or video into a placeholder whose properties are set to allow no more than one object to be inserted.

Action: Insert only one object, or ask the template's designer to change the placeholder's properties to allow for insertion of multiple items.

`Some of the selected elements were not inserted. Please check the placeholder's properties for allowed element types.`

Context(s): Insert an image or video into a placeholder that does not allow this type of content.

Action: Insert only the type of content allowed by the placeholder, or ask the template's designer to change the placeholder's properties to allow for the type of content you would like to insert.

`Formatting was removed from inserted section. Some elements may have been discarded.`

Context(s): Insert text that contains formatting, for example from MS Word, into a placeholder whose properties have been set to allow plain text only.

Action: Insert plain text, or ask the template's designer to change the placeholder's setting to allow for insertion of formatted text.

`Not enough storage is available to process this command.`

Context(s): Paste a block of text that exceeds 300 KB into a page's placeholder. Save the page.

Action: Content Management Server 2001 does not allow a placeholder to contain a text file that exceeds 300 KB. Divide and distribute large text files among two or more placeholders on a page.

`<folder name> could not be deleted because of the following conditions: the page <page name> is currently locked by user <user name>.`

Context(s): Save a page in the Authoring window, after another user has deleted the folder you are saving the page to.

Action: Ask author to save the page to a different folder.

`Failed to create <page/template> in the folder.`

Context(s: Click Save in the Save As dialog box.

Action: Select another folder. User may have recently lost rights in the selected folder.

`Item is locked by user <user name> on machine <machine name>.`

Context(s): - Delete an item.
- Approve/submit page
- Approve posting.
- Edit template.

Action: The item is locked by another user; try again later. If lock is erroneous, kill lock as administrator.

`This <page/template> is no longer locked. Changes made cannot be saved.`

Context(s): Save, or any command that performs a save operation (save as, submit, approve, decline, add/remove view).
Close the Authoring window
Submit a template in the Template Design window
Edit template HTML

Action: Close the Authoring window and open the page again. The administrator may have killed the lock on this item.

`To remove this View, you must first delete all postings for it, and empty the Channels hierarchy's Deleted Items.`
`If you still cannot remove the View, there are probably one or more postings for it that you don't have rights to see or delete. If necessary, contact the administrator.`

Context(s): Select the "Remove View" option in Authoring window.

Action: To remove a view from a page, there must be no postings created from that view, including those moved to the Deleted Items container. If this message appears again, after all associated postings have apparently been deleted, it is likely that postings associated with the view still exist—they are in containers the user does not have access to.

`Failed to remove View.`
`There are probably one or more postings for it that you don't have rights to see or delete. If necessary, contact the administrator.`

Context(s): Select the "Remove View" option in the Authoring window.

Action: If there are no postings on the page, the lock on the page may have been killed.

`Failed to remove View. Operation cancelled.`

Context(s): Select the "Remove View" option in the Authoring window.

Action: The request to remove the View failed because the page is no longer locked; possibly an administrator has killed the lock. Close the Authoring window and open the page again.

Properties dialog error messages

The following messages may appear in the context of a Properties dialog box, opened from either the Content Management Server 2001 or Authoring windows.

`Failed to create posting in this channel.`

Context: Click the Create Posting button.

Action: It is possible the user's rights on the selected channel have changed. To verify this, the user should close the Postings dialog box, return to the Site Builder and refresh the channels hierarchy. From the channels hierarchy, select the channel chosen to create a posting for, and click on it. If the channel icon is blue, it means the user should have posting rights there; if the channel is dimmed, the user doesn't have rights.

`Item is locked by user <user name> on machine <machine name>.`

Contexts:
- Click OK on a Properties dialog box.
- Delete an item.
- Set Sub-Channel Templates in channel Properties dialog box.
- Modify Group Rights in User Role Properties dialog box.
- Purge template.

Action: The item is locked by another user; try again later. If lock is erroneous, use the Kill Lock command.

`Failed to lock the item.`

Contexts:
- Delete an item.
- Purge template.
- Approve/Submit a posting.
- Approve posting.
- Edit template.
- Set sub-channel templates in channel properties.
- Modify user role properties.

Action: Refresh the MSCMS 2001 Site Builder.

`Insufficient rights to use the template, please select another template.`

Context: Click the OK button in the Select Template dialog box.

Action: Select another template and try again. It is possible that the user's rights on the selected template have changed. So alternatively, the user can exit the dialog box, refresh the Template Gallery hierarchy, and try again.

`Failed to lock the item <channel/posting name>.`

Context: In a Channel Properties dialog box, click the OK button after sorting the order of sub-channels and postings on the Postings tab of the dialog box.

Action: None. Since it is not locked by another user, the item's data may be corrupted. The order of the other channels and postings should be unaffected.

Item <channel/posting name> is locked by user <locking username> on machine <locking machine name>.

Invalid folder to move to.

The expiry policy will be set to do nothing.

Context: In a page's Properties dialog box, for the On Expiry Options on the General tab, user selects the Move To option, but the folder the user wants to move the page to does not exist.

Action: Select another target folder to move to on expiry.

Template has been opened by the Design Palette. Please try later.

Context: Attempt to edit or delete a template.

Action: Switch to the default HTML editor, and find the template that has been opened by the Template Design Palette. If it is not opened, it has probably been closed by the HTML editor. To edit this template, close the Template Design Palette, and try again.

Template has been opened in the Template Design window.

Please try later.

Context: Attempt to edit or delete a template.

Action: Find and close the Template Design window, which will have this template opened and try again.

The selected cover page has been moved to Deleted Items. Do you want to use default cover page.

The selected Cover page has been deleted on the server. The default cover page will be used.

This posting is not currently published. Do you want to use default cover page.

This Channel is not currently active. Do you want to use default cover page.

Context: A selected cover page is not valid anymore when the user opens the Channel Properties dialog.

Action: Select a new cover page or select the default one.

Failed to retrieve the Base template for new template creation.

Context: Import a template.

Action: Restart Content Management Server 2001 and try again.

`The expiry date of this page has passed. Do you still wish to submit the page?`

`The expiry date of this page has passed. Do you still wish to approve the page?`

Context Submit/Approve page.

Action: Clicking the Yes button will continue the Submit/Approve process of the page; however, when the page is approved, the page's status will change to "Expired" as opposed to "Published," since its expiry date has passed. Alternatively, the user can select "No" to cancel the operation, then make changes in the Expiry Date option for the page, and try again.

`Link: <linked file name> not found. Continue Parse?`

`Control: <control file name> not found. Continue Parse?`

`Resource: <resource file name> not found.`

`Continue Parse?`

Context: Import a template.

Action: Click the OK button to continue the parsing of the template being imported. Or click the No button to cancel the operation.

Template Design Palette error messages

The following messages may appear in the context of the template Design Palette (sometimes referred to as the HTML Editor Manager).

`Failed to create Content Management Server Parser Manager COM object.`

Context: The user's copy of the MSCMS 2001 Site Builder does not have the Content Management Server 2001 parser installed and/or registered. The Content Management Server 2001 parser is required to edit templates.

Action: Re-install the MSCMS 2001 Site Builder.

`Download of template file <insert filename here> from <insert URL here> failed. Check for the existence of this file on the server and try again.`

Context: The user wants to edit a particular template, but Content Management Server 2001 is unable to find the template file on the MSCMS 2001 server.

Action: Refresh the screen, then verify that another user has not deleted the template from the template gallery.

`Failed to create an instance of the file notification object.`

Context: Content Management Server 2001 cannot create an instance of a required component.

Action: Check that TEMP and TMP system variables are set to valid, existing directories. These can be found at **Start > Control Panel > System > Environment**. Also try re-installing the MSCMS 2001 Site Builder

`Failed to configure an HTML editor.`

Context: The user attempts to configure an HTML editor for use with Content Management Server 2001, but configuration fails.

Action: The client machine does not have the required control installed and registered for configuring an HTML editor. The missing OCX is HTMEDTUI.OCX. Re-install the MSCMS 2001 Site Builder.

`No HTML file specified to edit.`

Context: The user attempts to edit a template but Content Management Server 2001 cannot find the HTML file associated with the template.

Action: Ensure that a template is selected (highlighted) in the Site Builder and try again.

`Microsoft Content Management Server has not detected a save action from your HTML editor. If you have made any changes to the template <insert template name here>, these will not be saved unless you return to the editor and save the file. Close Design Palette anyway?`

Context: The user attempts to close the Design Palette window before saving changes made to the template.

Action: Clicking the Yes button: the Design Palette closes; the user can no longer save any changes to the template.
Clicking the No button: the Design Palette stays, allowing the user to continue editing the template, if the HTML editor is open.

MSCMS 2001 server error messages

The following messages may appear when a call is made to the MSCMS 2001 server. They are initiated by the server.

`SYSTEM ERROR: Server running low on memory.`
`Please record and report this error to the appropriate administrator.`

Context: This error can occur following any call to the server.

Action: Shut down unnecessary processes on the server. If the error persists, restart the (IIS) server. As a last resort, reboot.

`This item is not available for you to update. This is possibly due to the fact that an administrator has killed the lock on it in which case your changes will be lost... If not, this is probably a software error and should be reported to the appropriate administrator.`

Context: Saving changes to the server.

Action: Try to get exclusive access to the node and make your changes again. Advise your administrator that you don't want your locks killed.

```
User Error: That Microsoft Content Management Server item (node<number>) is
currently in use by another user (<name> on <computer>).
```

Context: A user attempts to modify an item, thereby requesting exclusive access to it.

Action: If the other user is not intentionally locking the item, or is not available, or is not using the specified computer, an administrator may need to manually kill the lock on the item.

```
SYSTEM ERROR:
The current transaction was deadlocked (more than once) and could not be
completed.
Please record and report this error to the appropriate administrator.
```

Context: Do an update on the server by saving changes to an item, approving/publishing a page, or obtaining exclusive access on an item.

Action: Try again, if possible. If the other user is not intentionally locking the item, or is not available, or is not using the specified computer, an administrator may need to manually kill the lock on the item.

```
SYSTEM ERROR:
The current transaction failed because updating the database failed as either
the database is full, or the transaction log is full.
Please record and report to the appropriate administrator.
```

Context: Do an update on the server, by saving changes to an item, approving/publishing a page, or obtaining exclusive access to an item.

Action: Allocate more database space to the server, or dump the transaction log (as appropriate).

```
INTERNAL ERROR:
<error specific message>
Please record and report this error to the appropriate administrator.
```

Context: Access the server.

Action: Restart the server.

Communication errors

The following error messages may appear when a call is made to the server. They are initiated from the client-side proxy, or the server-side stub.

```
Network IO exception.
```

Context: This error is seen when the user opens the administration tool; it usually indicates that the anonymous user has not been configured properly on the server.

Action: This may occur when either the network or server are not available. Check that both are connected properly and working.

`Could not continue server conversation.`

Context: The security manager on the server couldn't validate token received from client.

Action: Ensure that if security service has been shut down, the Web server was properly shut down as well. In IIS3, this means all services must be shut down; in IIS4, the IIS admin service must be shut down.

`Could not create object.`

Context: The stub has attempted and failed to create a required subcomponent. This error indicates that the code has issued a "class not registered" error from the operating system.

Action: Ensure that the security manager, grammar parser DLLs, and any other server-side components are correctly installed and registered.

`Insufficient access privileges to perform this action.`

Context: The system allowed the user access to an area where the user does not have rights to perform the requested action.

Action: This is an unexpected exception.

`Operation timed out.`

Context: The server's attempt to check in/out an item may return this error if updates to the database cannot be completed quickly enough. This can indicate that the proxy was not able to synchronize data with the stub object for whatever reason when attempting to perform an update.

`The following node has been removed from the database: {guid of node}`

Context: Another user has deleted the "node" being accessed by the current user.

Action: Try to refresh the Site Builder and try again.

`Node retrieval aborted due to timeout or network error.`

Context: Downloading an item from the server may report this error if another network exception or transaction fails and therefore interrupts this download, preventing it from completing successfully.

Site Stager error messages

Internal error messages

An entry already exists in the staging name mapper for this URL: <URL>

Could not convert to a usable name: <URL>

Could not find URL in Staging Map when it should have been added prior to staging - <URL>

Could not parse URL correctly in source: <referring URL>

Entry not added successfully to StagingNameMapper <URL>

Entry not found in StagingNameMapper: <URL>

Error staging a link: no new URL returned. Old URL: <URL>

Error while trying to get the children of an XML element.

Failed to find text off the TITLE subtag of the XML Element.

Failed to get HREF attribute off the XML Element.

Failed to get TITLE subtag of the XML Element.

URL not registered with name mapper: <URL>

Error while trying to get the children of an XML element.

Cannot stage the specified item. The URL for the staged item has not been set.

Could not create mail slot: <Filename>

Could not find URL in Staging Map when it should have been added prior to staging…

MSCMS 2001 Site Stager was unable to download the sitemap from MSCSMS 2001 server

Context: An internal error indicates each of the above error messages.

System errors

Problem encountered in creating the log directory. <Directory>

Context: There was an error in creating the log directory. This sub-directory should reside in the directory as all the Site Stager components.

Action: Create a directory called Site Stager Logs in the directory that contains the Site Stager components.

Error in formatting the name of the log file.

Context: There was a failure in the Site Stager's call to create the name of the log file from a system service.

Action: Check that other programs are working—this may be a system-wide problem.

`Problem encountered in creating the Staging Directory - <Staging Directory>`

Context: There was an error in creating the Destination Directory.

Action: Check that the Destination User has rights to create the Destination Directory; or try creating the directory manually as the Destination User. Check that there is enough disk space available on the Destination disk.

`Problem encountered in creating a test directory <Directory> in the Staging Directory. The Destination User may not have the proper access rights.`

Context: The Site Stager attempted to create a test directory in the Destination Directory to test the Destination User's access rights to the Destination Directory, but the process failed.

Action: Verify that the Destination User has Change (RWXD) access to the Destination Directory.

`Could not convert Java Proxy progid to clsid. Please recheck your Site Stager installation.`

Context: The Site Stager cannot translate the PROGID representing Content Management Server 2001 Java Proxy to the CLSID that represents this software component. This could be the result of the Content Management Server 2001 Java Proxy not being installed.

Action: If the MSCMS 2001 Site Builder is also installed, try running it to check that the Proxy is installed properly. Otherwise, try re-installing the Site Stager to install the proxy.

`Could not co-create Java Proxy component. Please recheck your Site Stager installation.`

Context: Site Stager cannot access the Content Management Server 2001 Java Proxy software component. Site Stager needs this component to log on the server designated for staging.

Action: Re-install Site Stager.

`Proxy Login process failed.`

Context: Site Stager tried to execute the Login command on the Proxy. No connection has been made to the server yet.

Action: There may be an error in the Proxy; if the MSCMS 2001 Site Builder is installed, try running it. If the MSCMS 2001 Site Builder will not run, try re-installing MSCMS 2001 Site Stager.

`Failed to connect to server, probably due to user authentication error. Please check the Stage As User name and password in the staging profile. Also check to make sure the Microsoft Content Management Server has this virtual path.`

Context: Site Stager is failing to access the server that is to be staged.

Action: Check that the Stage As User username and password are correct. Check that the server is operating and is properly connected to the machine that will host the staged site.

`Failed to get Login Cookie from Proxy.`

Context: Site Stager is failing to get the authentication token from the Java Proxy that it needs in order to make secure requests to the server.

Action: The Stage As User settings may be incorrect, or there might be an error in the Proxy; if the MSCMS 2001 Site Builder is installed, try running it. If the Site Builder will not run, then try re-installing Site Stager.

`Initialization of XML Parser with URL: <Sitemap URL> failed. Please make sure that IE4.01 is installed.`

Context: Site Stager is using the XML Parser in Internet Explorer 4.01 or above to parse the sitemap located at the given URL.

Action: Check that the Profile's Site Map URL is correct. Check that the structure of the generated sitemap is correct—it should be a properly formatted XML document. Check that IE4.01 is installed properly.

`Error opening input file: <Filename>`

Context: Site Stager is trying to open the downloaded file for processing links.

Action: Check that the file exists and is accessible for reading and writing by the Destination User.

`Error reading input file into memory: <Filename>`

Context: The Site Stager is trying to read the file for processing.

Action: Check that the file exists and is accessible for reading by the Destination User.

`Error closing the input file: <Filename>`

Context: The Site Stager is trying to close the file after reading from it.

Action: Check that the file exists and is accessible for reading by the Destination User.

`Error opening output file for writing: <Filename>`

Context: The Site Stager is trying to open the file for writing.

Action: Check that the file exists and is accessible for reading and writing by the Destination User.

`Error saving/closing output file: <Filename>`

Context: The Site Stager is trying to close the file after writing to it.

Action: Check that the file exists and is accessible for writing by the Destination User.

`Problem encountered while attempting to create a directory for the system to be staged <Directory>`

Context: Site Stager couldn't create a directory for the site to be staged.

Action: Make sure that the Destination User has **Change (RWXD)** access rights to the Destination Directory and all its subdirectories, if they were present before staging started.

`Could not determine server name from the Site Map URL <Sitemap URL>. Please check the Site Map URL setting in the staging profile.`

Context: The Site Stager could not determine the server name from the Site Map URL. It needs the server name in order to log on to the correct MSCMS 2001 server and download the Site Map.

Action: Make sure that the Site Map URL is correctly entered in the form: `http://<servername or IP address>/<path>/sitemap.asp`.

`No Stage As User is specified for this profile. Please check the Stage As User setting in the staging profile.`

Context: A profile that the Site Stager is trying to stage has no Stage As User specified.

Action: Re-edit the profile and add the missing information in the Stage As User field.

`No Site Map URL is specified for this profile. Please check the Site Map URL setting in the staging profile.`

Context: A profile that the Site Stager is trying to stage has no Site Map URL specified.

Action: Re-edit the profile and add the missing information.

`No Default Filename is specified for this profile. Please check the Default Filename setting in the staging profile.`

Context: A profile that the Site Stager is trying to stage has no Default Filename specified.

Action: Re-edit the profile and add the missing information.

`The Default Filename <Filename> specified contains illegal characters. Only letters, numbers and the period are permitted. Please check the Default Filename setting in the staging profile.`

Context: The Default Filename, specified in the profile that the Site Stager is trying to stage, cannot be used as the name of a file.

Action: Re-edit the profile and change the name of the Default Filename.

`Failed to get the root channel out of the sitemap. Perhaps the user does not have access to the root channel.`

Context: The Site Stager can't extract the root object out of the XML document. The Site Map document generated by the Site Map URL may be malformed or empty.

Action: This may occur because the Stage As User does not have access to the root channel of the MSCMS 2001 server that is to be staged. Check the Stage As User's access rights to channels on the MSCMS 2001 server.

`Broken link in location:<Referrer URL> - Could not download this URL:<URL> -> <Temp Filename> - <Internal Information> Link: <Destination URL on the Staged Site> Found on the page: <Staged Page Location>`

Context: The Site Stager couldn't download the page located at <URL>. <Destination URL...> is the Staged version of the <URL> once the link works and is staged successfully. <Staged Page Location> is the Staged Page where the broken URL was found.

Action: Check that a page exists at <URL>. Also if a script is used to generate the page, it may work during Published mode but fail during staging mode. This can be determined by doing a preview of the page using the MSCMS 2001 Site Builder and setting the "mode" query string parameter from "Unpublished" to "Staging."

`Error getting file info, looks like the disk is full: <Filename> (Downloaded from: <URL>)`

Context: The Site Stager may be unable to stage a file correctly because of low disk space and therefore can't get the attributes of the file (like file length).

Action: Check if the hard disk is low on disk space and free up space to accommodate the staged output.

`Error opening this file, looks like the disk is full: <Filename>(Downloaded from: <URL>)`

Context: The Site Stager may be unable to stage a file correctly because of low disk space and therefore can't open the file. Also the Site Stager may be unable to open the file for reading and writing because of insufficient access rights.

Action: Check if the hard disk is low on disk space and make sure that Site Stager can read and write to files in the Destination Directory.

`Error getting attributes of file: <Filename>.`

Context: Site Stager cannot get attributes of the file `<Filename>`. During the staging process, Site Stager creates temporary files which it compares to files (if they exist) in a previously staged site. This error could occur if files are deleted while the Staging Process is underway and Site Stager is unaware that the files are being deleted.

Action: Check to see if the file exists. Do not delete files in a previously staged site once staging is underway. Do not delete files in the Staging temp directory (<Dest. Directory>\temp) once staging is underway.

`Problem encountered in creating the resource directory <Directory Path>`

Context: The Site Stager failed to create the resource directory in the Destination Directory. The resource directory is a directory specified in the Staging Profile as holding resources if they are to be stored separately from the HTML content that is being staged.

Action: Check that the Site Stager Destination User has rights to create files and directories in the Destination Directory.

`Failed to create the download log: <Filename>`

Context: The Site Stager couldn't create a log file in the logs directory that's located in the Destination Directory.

Action: Check that the Site Stager Destination User has rights to create a file in the Destination Directory and that any logs files currently in the directory are not read-only or locked for use by another process.

`Problem encountered in creating the log directory - <Directory Path>`

Context: Site Stager couldn't create the Site Stager Logs directory which is usually in C:\Program Files\Microsoft Content Management Server directory, or wherever the Microsoft Content Management Server 2001 programs are installed.

Action: Check that the Destination User has sufficient rights to create a directory in Content Management Server 2001 folder and can create and write files in that directory.

`Error: Destination disk has less than <Number> Megabytes of storage free (<Number> MB free). Aborting staging.`

Context: Not enough space on the hard disk for Site Stager to do its job properly.

Action: Make room on the hard drive where the Destination Directory is located. Site Stager creates temporary files before overwriting any previously staged site so make enough room to accommodate both these temporary files and the previously staged site. Enough room to hold two versions of the staged site is sufficient.

`Failed to download sitemap for this URL:<URL> Error code = <Error Code>`

Context: Site Stager failed to download the SiteMap which it uses to get the URLs of all channels and postings to be staged.

Action: Verify that the SiteMap URL works by navigating to the following URL in Internet Explorer: `http://<server>/nr/system/access/manuallogin.asp?NEXTURL=<sitemap url>`

Glossary

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

A

Administrator, Content Management Server 2001

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

Administrator, Windows 2000

A Windows 2000 administrator is a user with administrative rights on the computer where the MSCMS 2001 server and database are installed. It is typically the responsibility of the Windows 2000 administrator to install and configure Content Management Server 2001, and set up user accounts. The Windows 2000 administrator will not necessarily be the same person functioning as a Content Management Server 2001 administrator.

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.

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*.)

authentication page

A Web page you might need to pass through in order to log on to a Microsoft® Content Management Server 2001 site with a Web browser. On the authentication page, you will need to select a valid 2000 domain and enter your user name and password, or an LDAP (Lightweight Directory Access Protocol) Organizational Unit (OU).

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*.)

B

business manager, Content Connector

The business manager is responsible for creating page profiles, personalized content objects, and for managing rich content created for Web sites.

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.

content expressions

Content expressions are used in Content Connector. They are a combination of properties, Boolean and relational operators, and values that determine if a page profile is selected or not. Content expressions are combined to make content groups.

(See also *content groups*.)

content groups

Content groups are used in Content Connector. They are objects that define and score by relevance a set of page profiles that share some common properties. Personalized content objects specify one content group to define the set of page profiles to be returned by the personalized content object pipeline. Content groups are created by combining content expressions and scoring them.

(See also *content expressions*.)

cover page

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

D

Database Configuration Application (DCA)

A Content Management Server 2001 utility with which you can select and populate a Microsoft® SQL Server database. In addition, the DCA is used to select the virtual Web site (for the MSCMS 2001 server and the Server Configuration Application), and to select a new MSCMS 2001 System Account and the Initial MSCMS 2001 Administrator for a new installation. After you have used the DCA for a new installation, further use will be to select a new database.

(See also *Server Configuration Application.*)

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.

destination directory, staging

The destination directory is the directory that receives the HTML or ASP "snapshots" of your Content Management Server 2001 site when it is staged with the MSCMS 2001 Site Stager.

destination server

The destination server is the MSCMS 2001 server that is importing the contents of an object package.

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.

Guest User, Content Management Server 2001

If permissions for guest access have been set, Content Management Server 2001 uses this account for anonymous site visitors. Guest users must be granted rights to channels and postings, just like any other MSCMS 2001 subscriber.

I

IIS – Internet Information Server

Microsoft's Web server software that runs on the Windows 2000 platform.

Initial Content Management Server 2001 Administrator

The "Administrator, Content Management Server 2001" created by the DCA when creating or upgrading a database. Initially, this is the only user who can log on to Content Management Server 2001 through the MSCMS 2001 Site Builder.

(See also *Administrator, Content Management Server 2001*.)

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.

K

kill lock

A "lock" prevents more than one user from modifying an object (such as a page or template) at the same time. Note that locks are not used with the MSCMS 2001 Web Author. The system will automatically place a lock on an object while a user modifies it. When a user, other than the one who has the lock, opens a locked item, the item will open in read-only mode. Using the Kill Lock function, an administrator can remove a lock placed on an object by the system.

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.

MSCMS 2001 page profile definition

The MSCMS 2001 page profile definition used in Content Connector specifies the set of properties and attributes in a page profile. The MSCSM 2001 page profile definition is managed

in the Profile Designer module in the Business Desk. This definition can be extended to include more properties.

(See also, *page profiles*.)

MSCMS 2001 window

The Content Management Server 2001 window contains the hierarchies of containers (folders, channels, and galleries) where authors, editors, moderators, resource managers, template designers, and administrators do their work. From this window, authors can open the Authoring window, and template designers can open the Template Design window.

(See also *Authoring window*, *Template Design window.*)

multilingual support (MLS)

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

N

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.

O

object

Content Management Server 2001 data objects are maintained in the MSCMS 2001 database and can be manipulated by users. An object can be a container such as a folder, channel, gallery, or user role, or an object such as a page, posting, template, or rights group.

object package

A file that contains objects exported from a Content Management Server 2001 system using the Site Deployment Manager. Object packages have the .ROP file extension and .ROP files can be imported to another MSCMS 2001 system.

(See also *Site Deployment Manager.*)

object property

The object property allows users to define customized pieces of data which can be added to Content Management Server 2001 objects. This allows the site generally to be much more extensible to allow greater scripting and searching capabilities.

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 groups

Page groups are used in Content Connector. Personalized content objects use page groups to target specific locations on a site. Page groups are defined in the Business Desk using the Reference Tables module.

(See *page positions, personalized content objects.*)

page positions

Page positions are used in Content Connector. They are identifiers defined in the Business Desk and used to provide additional context filtering when selecting content with personalized content objects.

page profile

Used in Content Connector, a page profile is a collection of properties describing a Content Management Server 2001 page. During personalization, page profiles are scored by content groups in order to determine what set of profiles belong to the group. There is one page profile definition for each site and it is defined in the Commerce Server Business Desk Profile Definition

module for that site. Profiles of individual pages can be created and managed from either the MSCMS 2001 Web Author or the Commerce Server Business Desk.

(See also *content expressions, MSCMS 2001 page profile definition*.)

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*.)

personalized content object (PCO)

Personalized content objects are used in Content Connector. They deliver collections of page profiles to Content Management Server 2001 pages. When a user requests a page that executes a personalized content object pipeline, information about the current user and the current context within the Web site are sent to the pipeline. Based on your targeting and filtering definitions, personalized content objects currently active in the Web site are evaluated to determine which ones are suitable for the current user in that particular context. The content from the personalized content objects is scored for relevance, blended, and returned to the page.

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*.)

rich product page

Used in Content Connector, a rich product page is a Content Management Server 2001 page linked to a specific product in a Microsoft® Commerce Server 2000 catalog. It stores its rich HTML and multimedia content in MSCMS 2001 and displays it on the site along with the product properties from Commerce Server 2000.

(See also *simple product page.*)

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

server, MSCMS 2001

The MSCMS 2001 server is a machine that hosts the Microsoft Content Management Server 2001 software. This server is connected to an MSCMS 2001 database and interacts with MSCMS 2001 Site Builder or Web Author software.

Server Configuration Application (SCA)

A Content Management Server 2001 utility used to configure individual or multiple (server farms) MSCMS 2001 servers. After a new installation, users can selectively configure, globally or specific to one server, activities such as changing the MSCMS 2001 system account, and adding and removing supported NT Domains, Active Directory, containers, and Site Server organizational units (OUs) as the network topology changes or grows.

simple product page

Used in Content Connector, a simple product page is a single MSCMS 2001 page for displaying product information for Commerce Server 2000 products. Products without a rich product page automatically use the designated simple product page. You have the option to make simple product pages visible on the live site or visible only in edit mode.

(See also, *rich product page.*)

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 programmer (developer), Content Connector

The site programmer is responsible for creating and editing Content Management Server 2001 templates and solution site files for Content Connector sites.

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.

Stage As User

The "Stage As User" is a Windows 2000 user account whose container rights determine which channels and postings are staged by the MSCMS 2001 Site Stager. The "Stage As User" isn't a real user. It is a dedicated Windows 2000 user account that an administrator must create for staging to occur. Creating the Stage As User involves creating a Windows 2000 user account, and adding its user name to Content Management Server 2001 subscriber or administrator rights group. When Site Stager stages a site, it stages the channels assigned to members of this rights group.

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.

staging schedule

The staging schedule, which can be set from the Profile Properties dialog box, determines when a particular staging profile is staged.

staging profile

A staging profile is a collection of all the information the MSCMS 2001 Site Stager needs to stage a site. A profile contains a name (to distinguish it from other profiles), the directory of the site to be staged, the channels to be staged, and a schedule that sets the staging frequency. You can have more than one staged site by creating a different profile for each one.

Site Stager, destination directory

The directory on the machine that receives the HTML "snapshots" of a Content Management Server 2001 site being staged.

Site Stager, Site Map URL

The MSCMS 2001 Site Stager Site Map URL points to a file (sitemap.asp) that generates a description of the Content Management Server 2001 system to be staged.

status

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

Subscriber

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

system administrator, Content Connector

The system administrator's job in Content Connector is to install Content Connector, customize and deploy the Method Systems sample site, and to create Content Management Server 2001 user groups, channels, and resource gallery.

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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