Microsoft®
Content
Management
Server 2001

Microsoft® Content Management Server 2001 Tutorial

Table of Contents

Module 1 **Getting Started**

About the tutorial 2

Overview of topics 4

Module 2 **Setting up**

Software requirements 8

Module 3 **Introduction**

Overview 12

About MSCMS 2001 server 13

Module 4 **Working With the Web Author**

Overview of workflow and roles 17

Introducing the Web Author 19

Terminology used in this tutorial 20

Creating a page with the Web Author 21

Connected pages (multiple postings) 29

Creating content connected pages with the Web Author 30

Approving a page with the Web Author 33

Publishing a page with the Web Author 35

Viewing revision histories 36

Working with custom properties in the Web Author 42

Copy and Move pages 47

Resource Manager 50

Enhanced link administration in the Web Author 52

Module 5 **Site Builder and Administration**

Site Builder structure 58

Site Builder galleries 60

Site Builder folders 63

Reports 64

Module 6 **Setting up Publishing: Creating Containers for Users**

Understanding the primary tasks 68
Creating containers 70
Creating the MSCMS 2001 documents channel 73
Deleting a channel 83
Creating folders 84
Deleting a folder 90
Creating Resource Galleries 91
Creating Template Galleries 96

Module 7 **User Roles and Rights in the Site Builder**

User role functions 104
User role rights 107
Assigning publishing rights to users 109

Module 8 **Creating Templates in the Site Builder**

Navigation Templates 119
Creating a template 122
Template Design Palette 125
Placeholders in templates 129

Module 9 **Tutorial Wrap-up**

Tutorial review 133
Building your site 134

Module 1

Getting Started

About the tutorial

This tutorial is for use with Microsoft® Content Management Server 2001. The various components are referred to in the tutorial as:

Component name	Short name
Microsoft® Content Management Server 2001	MSCMS 2001 or MSCMS 2001 server
Microsoft® Content Management Server 2001 Site Builder	Site Builder
Microsoft® Content Management Server 2001 Web Author	Web Author

This tutorial will guide you through steps to familiarize you with Content Management Server through the installation and setup, authoring, administering, publishing of the sample site and creating templates.

To achieve the desired results, please be aware that the tasks are best done in the order in which they appear in the tutorial.

Objectives

- To gain an understanding of Content Management Server and its components.
- To learn about the process of publishing with Content Management Server.
- To create, enhance, and administer pages on your Web site.

Who should use this tutorial

The Microsoft Content Management Server 2001 tutorial is intended for use by system administrators and technical personnel who need to understand and evaluate the functionality of Microsoft Content Management Server 2001.

We suggest you print a copy of this MSCMS Tutorial PDF file in order to work through the tutorial.

After you complete the MSCMS 2001 Tutorial, you will have an understanding of:

- page template creation
- page creation
- channel creation
- site administration
- publishing.

The Content Management Server functionality is also used by Microsoft® Content Management Server 2001 Content Connector for Commerce Server 2000. We suggest you complete this tutorial before proceeding with the MSCMS 2001 Content Connector Tutorial.

The data

The sample data used in this tutorial is that of a fictitious company called Method Systems.

The sample web site is at http:// < servername > /Method + Systems/default.htm.

Overview of topics

It is recommended that you work through this tutorial in the order in which it is presented. At a later time you can refer back to any module. The tutorial covers the following topics:

Setting up

You will learn about the different user types, and what you need to set them up.

Web Author

This module starts with an introduction to the Web Author and how it is used. You will learn the terminology essential in using MSCMS 2001 server, about workflow, and what is involved in publishing a page from the Web Author.

You will go through the publishing process by creating a page and a content connected page. You will then approve and publish those pages. You will also learn about revision histories and work with custom properties.

You will learn more about different capabilities of the MSCMS 2001 server, such as how to copy and move pages, manage resources, and manage links in the Site Builder. You will also learn about template switching and why that is an indispensable capability in running a Web site.

Site Builder

This module gives an introduction to the Site Builder, its architecture and features. There is a discussion on how a product page is constructed. You will log onto the Web site as different types of users and will see what is visible to these different users.

Setting up publishing: creating containers for users

This module contains an explanation of the primary tasks that you must carry out in order to set up an environment in which publishing can take place conveniently and in an organized manner.

You will practice creating and deleting channels and folders, and creating resource and template galleries.

User roles and rights in the Site Builder

This module will give you the big picture in what user roles and rights entail. You will also practice assigning rights to different users from the Site Builder.

Creating templates in the Site Builder

This module looks at the difference between navigation and page templates. You will learn what is involved in creating a simple page template with placeholders, and what role the template design palette plays in your MSCMS 2001 Web site.

Help available

- Product Documentation: located in User Documentation on the CD
- On-line help: http://www.microsoft.com/cmserver

Module 2

Setting up

Software requirements

Full instructions for installing, unpacking and setting up your Content Management Server site, are contained in the *MSCMS 2001 Setup Guide.* After the system is installed, the user setup should be done by the site administrator. Full instructions on user setup are contained in the *MSCMS 2001 Site Administrator's Guide.*

Before you begin this tutorial, check that the following components have been installed:

- Content Management Server
- Content Management Server sample site
- Site Builder. You will need to have the Site Builder installed somewhere on the network.

The above components are contained in the MSCMS 2001 CD.

You will also need:

- An HTML editor. In order to create templates in the tutorial, you will need to have an HTML editor such as MS Frontpage.

Requirements for using the MSCMS Tutorial

Before beginning the MSCMS Tutorial, ensure that the following are installed and functioning properly (See *Microsoft Content Management Server 2001 Setup Guide*):

1. Microsoft Content Management Server 2001 and MSCMS Site Builder are installed.
2. A Microsoft SQL Server database has been created and configured.
3. The MSCMS Sample Site data has been loaded into the database. If the MSCMS Sample Site data is not installed, run the Install Shield Wizard to install the Sample Site data.



Note

You must have a clean MSCMS Sample Site in order to properly use the MSCMS Tutorial. If you are using the MSCMS Tutorial for a second or subsequent time, you must restore the initial Sample Site database prior to beginning the tutorial. You should remove the previous MSCMS Sample Site data and then create a new SQL database and reload the MSCMS Sample Site data.

4. In order to use the MSCMS Tutorial, you must have Administrator privileges to access the Content Management Server 2001 and the MSCMS Site Builder. As an administrator, you will be able to do the initial user and roles setup needed to complete the MSCMS tutorial. More information and practice on user roles is found in the tutorial.

Active Directory Service users:

Content Management Server users must exist as Active Directory Service (ADS) users before they are added to Content Management Server through the Site Builder.

You will need to create the following users in ADS:

- *administrator*
- *author1*
- *editor1*
- *moderator1*
- *guest.*

If you do not have Active Directory administrator rights to create these users, you can designate five existing ADS users to these roles.

You will need to set up the Method Systems sample site with the following user groups and their rights in the Site Builder:

- MSCMS2001 Guest
- MSCMS2001 Authors
- MSCMS2001 Editors
- MSCMS2001 Moderator
- MSCMS2001 Administrator.

You will add the ADS users you just created to these groups. For learning purposes, it is recommended that you set *all* user passwords to **password.**

Content Management Server Users

In the Server Configuration Application (SCA), enable guest access:

1. Run the SCA, which is in Programs > Microsoft Content Management Server
2. Click the **Security** tag, then the **Configure** button.
3. Set "Allow Guests on Site" to **Yes**. In "Guest Login Account," select the Guest you created in ADS.
4. Click **OK**, then close the SCA.

In the Site Builder

1. Open the Site Builder, which is in Programs > Microsoft Content Management Server
2. Click on **User Roles**, then **Administrator** in the "User roles" pane.
3. Add *Moderator* to this group.

4. Click on **Subscribers** in the "User roles" pane.
5. Add the Guest user to the MSCMS 2001 Guest group you created, which grants access to the default parts of the site. This grants rights to all public areas in the MSCMS 2001 site.

   Users who do not provide any credentials to the site will automatically be logged on as this Guest user.
6. Add *author1, editor1,* and *moderator1* to their appropriate MSCMS 2001 groups.

Here is a summary of the user roles and the rights groups to which they should belong:

User Roles	Rights Groups	AD user to assign
Subscribers	MSCMS2001 Guest	Guest
Authors	MSCMS2001 Authors	Author1
Editors	MSCMS2001 Editors	Editor1
Moderators	MSCMS2001 Moderators	Moderator1
Administrators	MSCMS2001 Administrator	Administrator

In the Web Author

1. Open Internet Explorer and type in the sample site URL:

   http:// < your server name > /Method + Systems/default.htm
2. Click **LOGIN**.
3. In the **LOGIN** area, log on as each one of the above users.

For further information on setting up users, refer to the *MSCMS 2001 Site Administrator's Guide*.

Module 3

Introduction

Overview

Overview This section gives you a general overview of Content Management Server 2001.

Objectives

- To familiarize you with MSCMS 2001 terminology.
- To provide an entry point to the tutorial and ensure that you feel confident about MSCMS 2001 fundamentals before moving forward.
- To provide you with an understanding of the functionality and uses of MSCMS 2001 server.

Objectives

By the end of this tutorial, you will be able to:

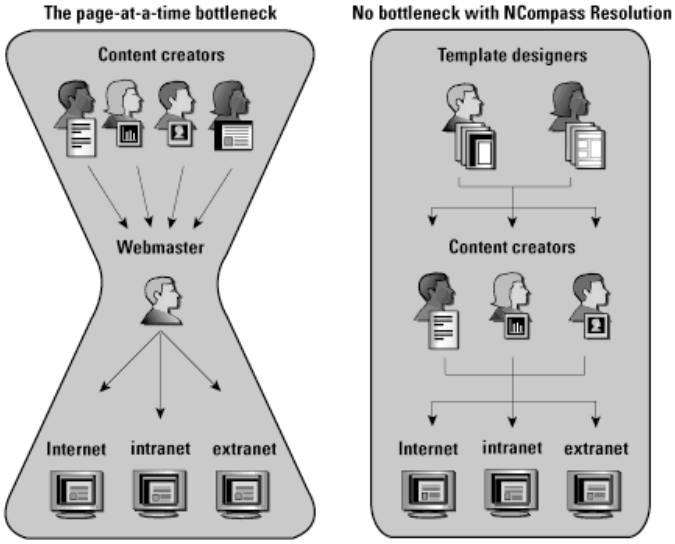
- understand the concepts and terminology associated with the MSCMS 2001 server publishing process
- use the Web Author to publish Web content
- be familiar with the Site Builder, user groups, and assigning rights
- be familiar with creating pages and templates
- separate the content from the design of a Web site.

About MSCMS 2001 server

Problems with traditional publishing models:

- consistency in design is difficult to enforce
- content authors are disconnected from the Web publishing process
- updating content and maintaining the site is often cumbersome and time-intensive
- difficulty in managing broken links
- people at various stages of the process need to understand HTML, so there is a heavy dependence on Webmasters throughout the cycle.

The traditional Web publishing model versus the MSCMS 2001 Web publishing model



The benefits of MSCMS 2001 server:

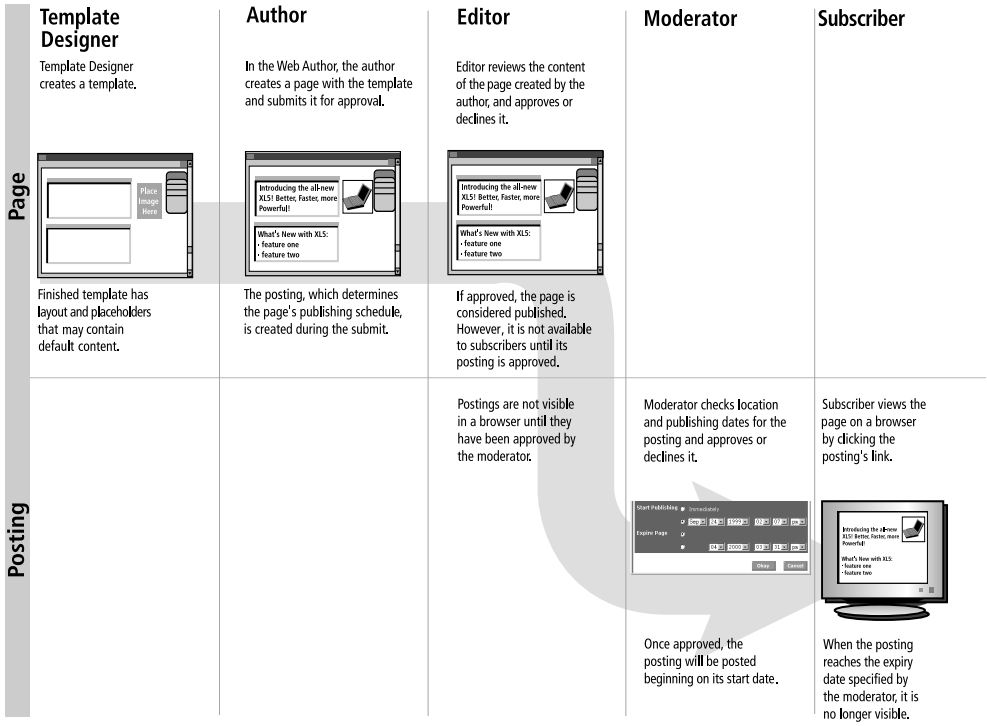
- satisfies evolving e-business needs
- empowers employees to quickly create and publish content
- delivers the right information to the right people at the right time—every time
- maintains design consistency and site usability
- reduces time to market and lower the cost of ownership
- ability to contribute content with only a Web browser.

Web content management incorporates:

- the design, authoring, review, approval, conversion, storage, testing, and deployment of all Web site content

- the effective administration of the information, resources, and technologies of a Web presence
- the process by which content can be maintained, monitored, upgraded, and eventually retired and archived
- separation of content from design in order to facilitate better site development and management.

The MSCMS 2001 server Publishing Process



Module 4

Working With the Web Author

Working with the Web Author

Overview

This section contains sample scenarios detailing various aspects of the Web Author.

Objectives

By the end of this section, you will be able to:

- demonstrate the various roles in the MSCMS 2001 server workflow
- demonstrate the placeholder functionality
- understand the power of MSCMS 2001 server in re-purposing content.

Overview of workflow and roles

Workflow in the MSCMS 2001 server is composed of an author, editor and moderator and the security already on your system.

Introduction to roles and rights

- All MSCMS 2001 users are assigned roles.
- One user can have more than one role.
- Roles help determine the function of each user in the MSCMS 2001 publishing process.

Browse through the site. Your access to the site at this point is that of a guest subscriber.

We will talk about the out-of-the-box workflow of author, editor, and moderator, and associate each role with a specific job description within a "real life" HR department. For example, the author could be the HR Consultant, the editor could be the HR Manager's Office Administrator, and the moderator could be the HR Manager.

You will need to logout and log back on as a different user. Although there are a number of ways to authenticate users; in this case we have decided to use a **LOGIN/LOGOUT** toggle button on the page. The workflow can be customized in MSCMS 2001.

Roles and rights

User roles include:

- Subscriber - browses the live site
- Author - creates and edits page content, and suggests page properties
- Editor - authors page content, approves or declines changes to page content and its location on the site
- Moderator - approves the page properties and the location of the page on the site
- Resource Manager - creates, replaces, or deletes resources in the Resource Galleries
- Administrator - manages the full application, including folders, channels, template and resource galleries and user rights groups. Possesses all roles, assigns user rights, creates and edits container structures.

When you log on as an author, the button **Switch to Edit Mode** is available. The "Hello author" area indicates the user's current role.

A number of interfaces can be made available to users when they log on. For example: Two fields on the user default Web page—one for the user ID and the other for the password. You could also have a "hidden" URL that links to the login page.

All Web pages served in MSCMS 2001 are based on templates. The template gallery is a container for templates. The administrator determines the number of template galleries and templates available to a particular user. These templates should also be named appropriately, based on their functionality or purpose. You can preview the available templates when selecting the one you need. The templates include areas called Placeholders, which is where you put dynamic content.

Introducing the Web Author

The Web Author makes publishing a Web page easier and quicker using a browser. This guide steps users through some typical tasks in creating and publishing a Web page.

Site administrators and template designers define and configure your site to be representative of your company's goals and needs. Because you can do extensive configuring with MSCMS 2001, we are presenting only basic tasks in order to provide an overview of the concepts and practice of developing a Web page using the Web Author.

What is the sample Web site?

We will use example screens from the sample Web site of a fictitious company called Method Systems to show the basic tasks in working with a page, including creating, previewing, saving, editing, approving, declining, and publishing pages.

Statuses of pages

Content Management Server provides the status of a page as you progress through the stages of Web publishing, as shown in the following table.

Status	State of page
New	When an author is authoring content, but before the page has been saved for the first time.
Saved	After it has been saved, but before being submitted for approval.
Waiting for Editor/Moderator Approval	After being submitted for approval, but before being approved by an editor or a moderator.
Approved	After being approved by editor and a moderator. In the approved state, the page has not yet reached its start time.
Published	After being approved by both an editor and a moderator. Note that this is the only state in which the Web page can be seen by subscribers to the site.
Editor/Moderator Declined	Declined by an editor or moderator and before being modified and resubmitted.
Expired	Approved by an editor and moderator, but where the current time is greater than the expiry time of the page.

Terminology used in this tutorial

Pages

When an author uses the Web Author to create a page and submit it for approval, the result is a new page. A page includes a publishing schedule with start and expiry dates, and its appropriate channel.

Channels

The channel hierarchy is used to store, organize, and manage access to content. Channels are similar to the directory structure of traditional file-based Web sites.

Roles

MSCMS 2001 distributes publishing responsibility across several users, wherein every user is given one or more roles. Users act within their role to either create content or manage the Web site and each role is responsible for a predetermined part of the page as it moves along the MSCMS 2001 publishing process.

Placeholders

Placeholders are predefined areas where you add content to a page. They may contain instructional text or images to show authors the type of content a placeholder accepts, or to suggest an appropriate use for the placeholder. The type of content within a placeholder is defined by placeholder properties. The template designer controls the placeholder properties.

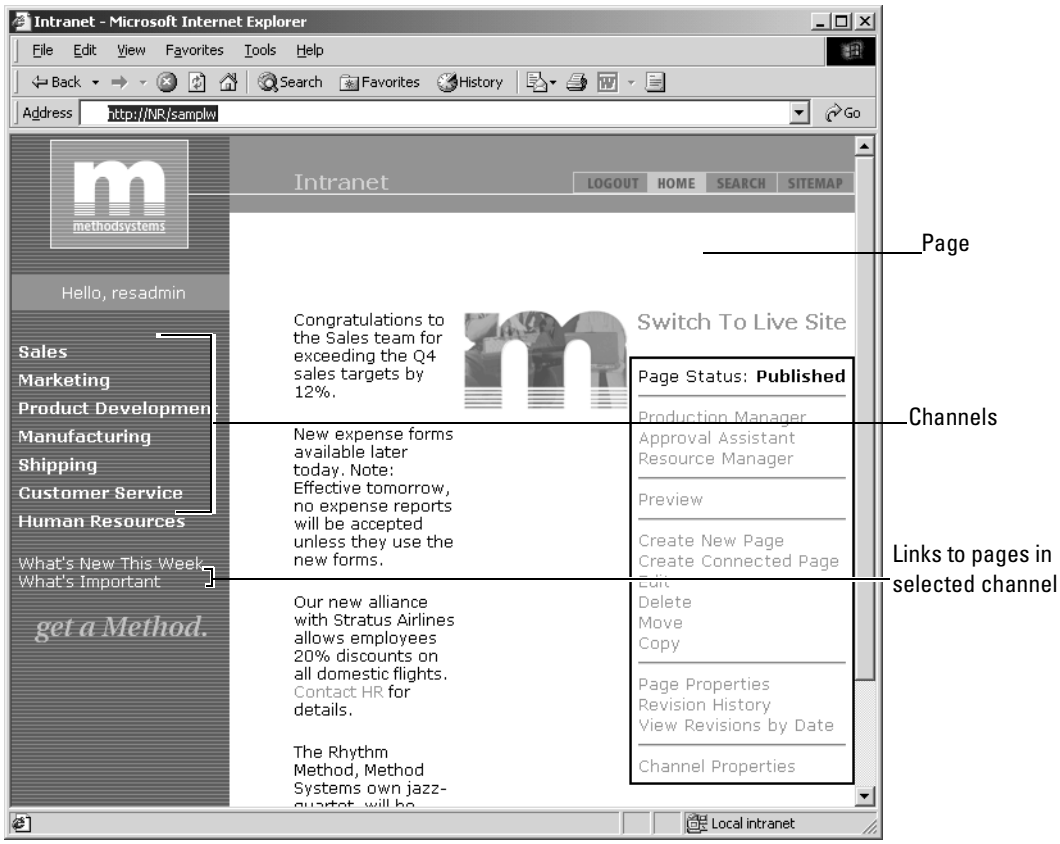
Creating a page with the Web Author

We will go through a simple publishing cycle in the Web Author to understand the publishing process from the perspective of authors, editors, and moderators.

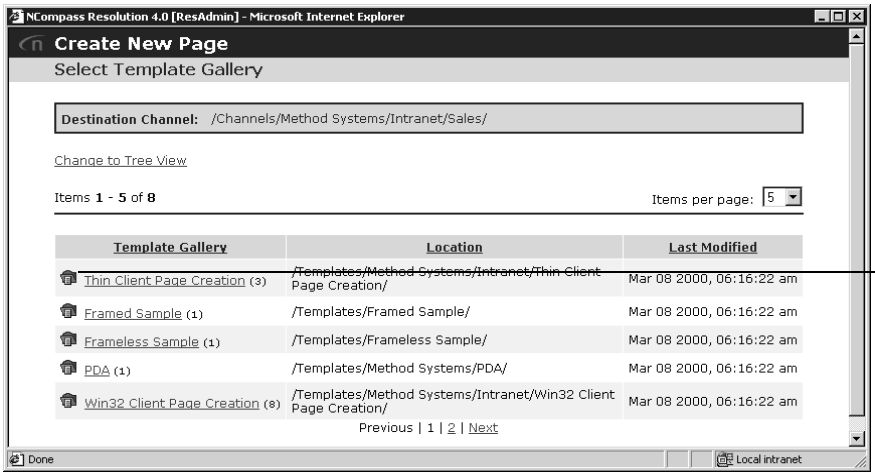
To create a page, follow this procedure:

1. Launch Internet Explorer and enter the URL of the Method Systems Intranet Web site.
2. Log on as Author1. If you have any questions about this, check with your site administrator.
3. Click **Switch to Edit Site.**

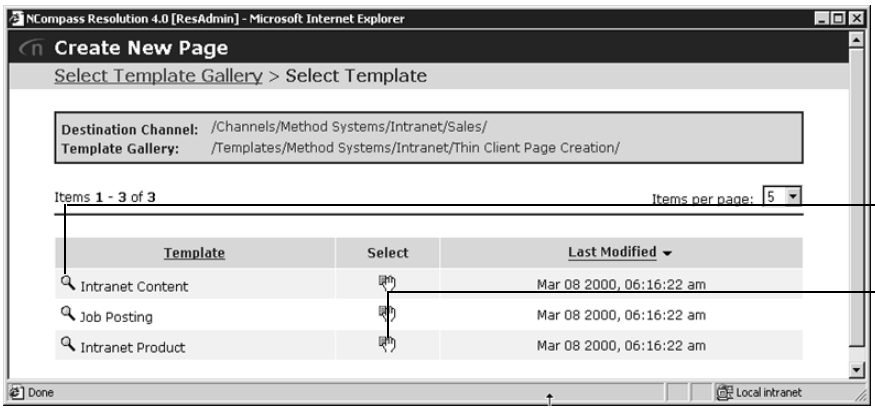
   In the following screen shot, the site has been switched to edit mode. This is an example of a console belonging to an administrator. What an author's console displays would depend on what rights are assigned to that particular author.



4. Click **Create New Page**. The Select Template Gallery page opens, presenting you with several gallery selections. The number of templates in each gallery is noted in parentheses.



5. Select **General Use,** which opens to display templates you can work with.
6. Select the **Intranet Product** template as shown in the following sample screen. Note you can also preview the template by clicking the preview icon which looks like a magnifying glass.

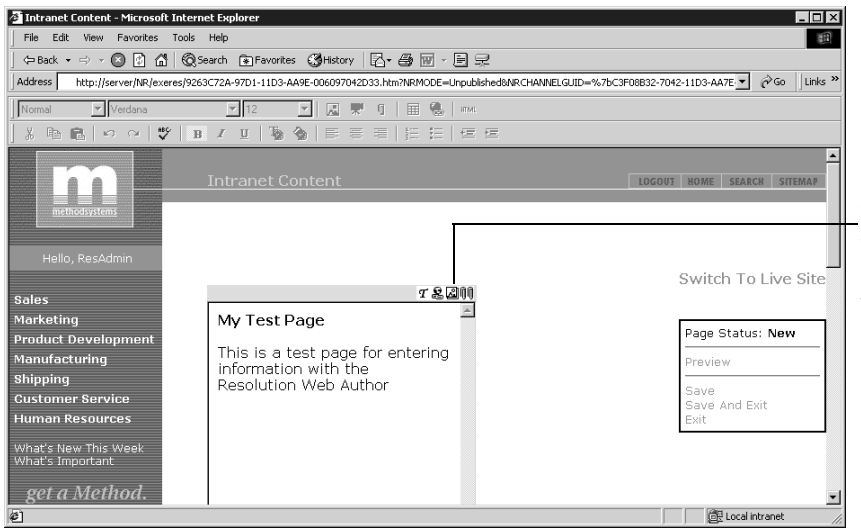


The main browser window loads the selected template. The page template has boxes called placeholders where you can add content such as text and graphics.

Note

In the template gallery, it is possible for "Tree View" to display nothing because the user does not have access to the full path of galleries. To avoid this, make sure you switch to "List View."

7. Add content to the placeholder in the template. You can experiment with changing the style of your text or the font. When you click **Insert Image**, picture galleries are displayed from which you can make a selection.



Note

The Rich Text Formatting options such as selecting font styles, bullets, and indentations are available with Internet Explorer 5.0 and 5.5 only. This is due to support for the Document Object Model for DHTML in these browsers.

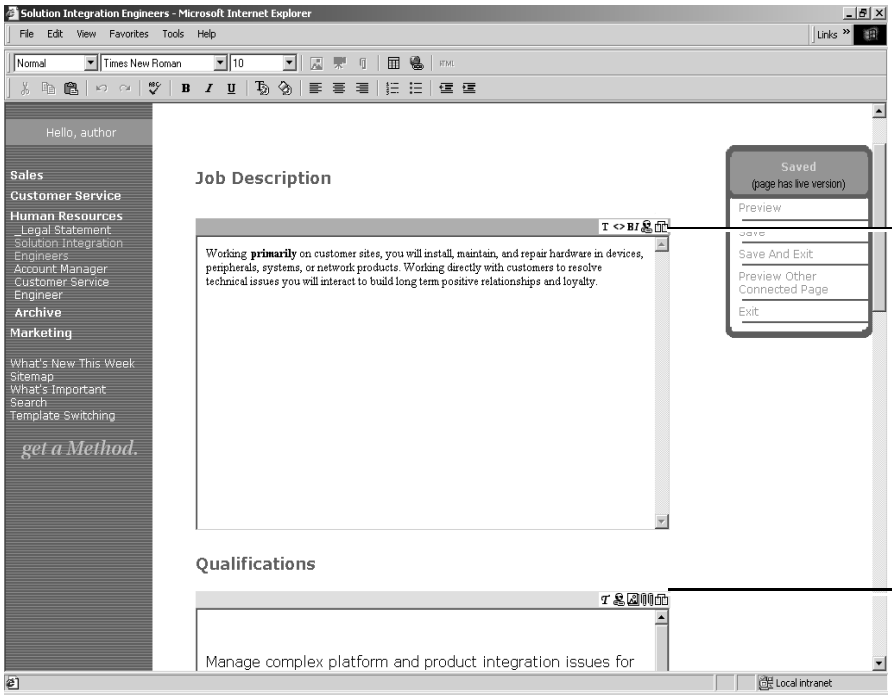
Practice with some Web Author features

Inserting an image from the Web Author

You can do these steps while editing your placeholders.

1. Click inside a placeholder that allows images.

   You can tell what a placeholder allows by which icons are present in the upper right-hand corner of a placeholder.

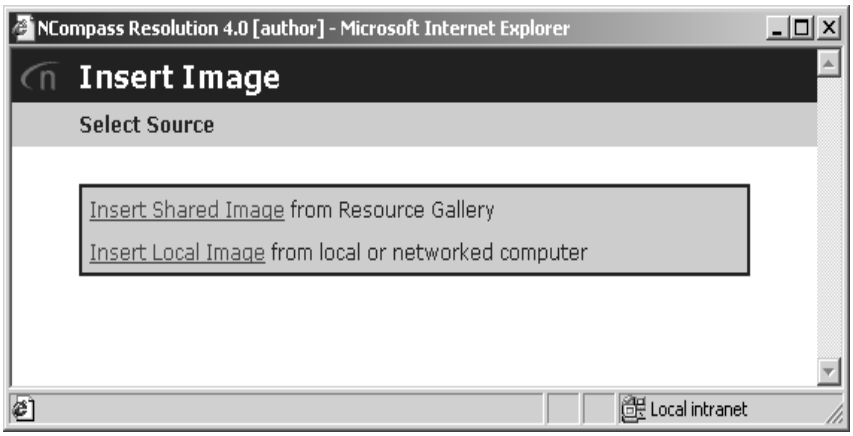


This placeholder allows plain text, HTML styles, bold and italic text, hyperlinks, and has shared placeholder

This placeholder allows full formatting, hyperlinks, multiple attachments, and has shared placeholder capabilities

Within placeholders such as the above, different formats may be permitted.

2. Click the **Insert Image** icon. The Insert Image window opens.



The Insert Image window

3. Click **Insert Shared Image** from Resource Gallery.

4. Click the resource gallery of your choice.
5. Click the Select icon beside the name of the image you choose.
6. Enter a URL or any alternate text you want in the dialog box that follows.
7. Click **Insert.**

   The image is now in the placeholder.
8. Delete the image you just inserted.

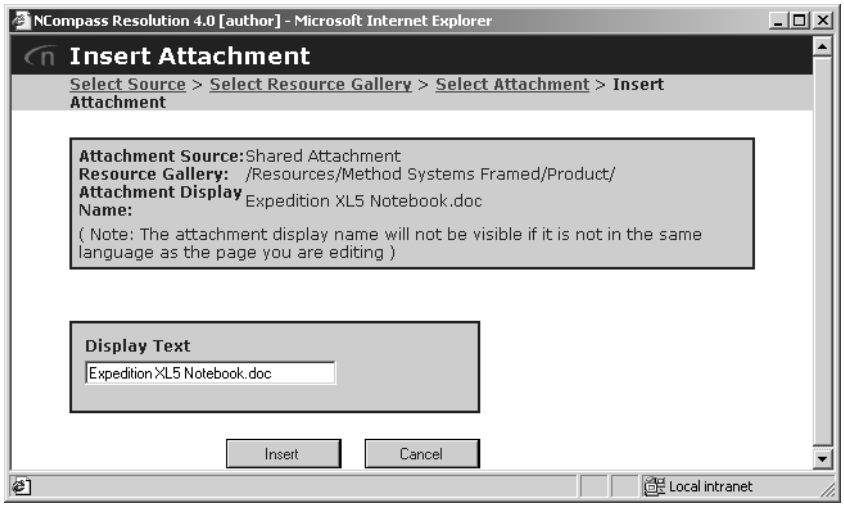
Why is alternate text important?

Alternate text, or the words “alt text” can appear momentarily when your pointer hovers over an image in a browser. It is usually a short description of the image. This makes your site more accessible to users who have Web browsers set to text only. Instead of showing a missing image, the user sees just a description of the image.

If there is nothing in a placeholder that accepts images, it is good practice to put at least a space in the alt text prompt for text only users.

Insert an attachment

1. Click inside a placeholder that allows attachments.
2. Click the **Insert Attachment** icon.
3. Click **Insert Shared Attachment** from Resource Gallery.
4. Click the resource gallery of your choice.
5. Click the **Select** icon beside the name of the image you choose.
6. Type in the text you would like to display on the page with the attachment.



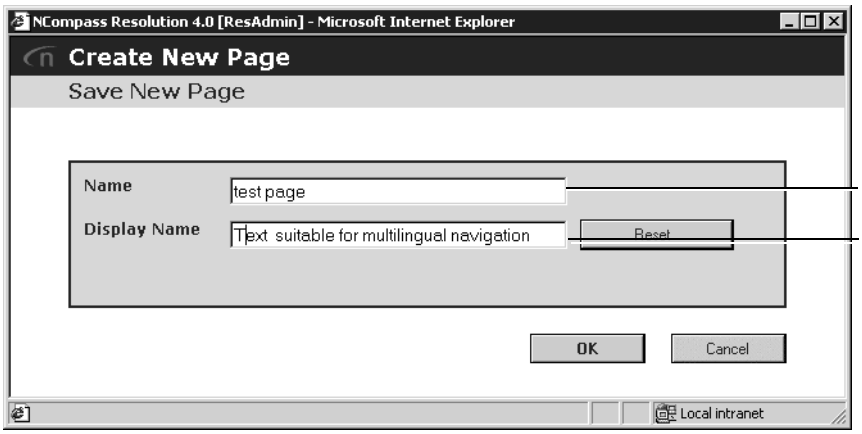
7. Click **Insert.**

   The attachment is now in the placeholder.

8. Delete the attachment you just inserted.

9. When you've finished, click **Save** from the authoring console. The **Save New Page** browser window opens for your page. Type a name and display name of your choice. When editing a page, you have three options to choose from if you have not saved your changes:

   - clicking **Save** from the authoring console saves your changes and keeps you in authoring mode
   - clicking **Save and Exit** saves your changes and takes you out of authoring mode
   - clicking **Exit** takes you out of authoring mode, but does not save any unsaved changes.

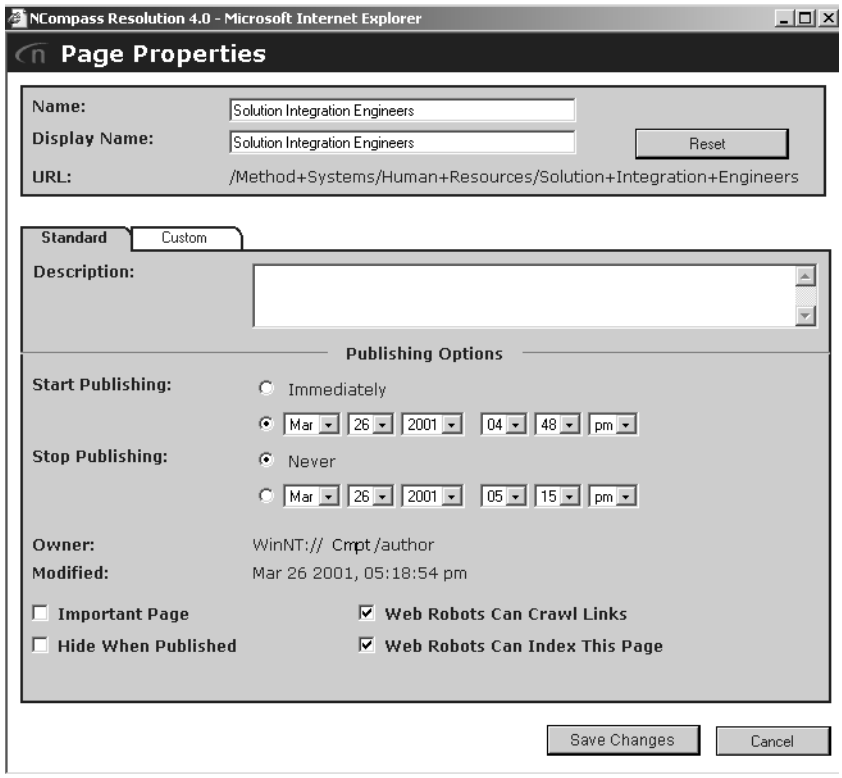


The Save New Page dialog box

Note

Display Name defaults to Name if no value is entered. Clicking the **Reset** button sets the Display Name value to Name.

10. To set other properties for your page such as Start Publishing, Stop Publishing, Important Page, and Web Robot information, click **Page Properties** on the authoring console. The Page Properties browser window opens for your test page. Click **Save Changes** when finished.



If you check …	It indicates…
Important Page flag	the priority of the page.
Hide When Published flag	the channel or posting is hidden from the navigation in published mode. Your ability to access the given channel or posting is not restricted in the Web Author. The hidden flag should not be used to prevent users from viewing a channel or posting.
Web Robots Can Crawl Links flag	Web robots should follow links to other postings or channels. Disabled for frameless channels.
Web Robots Can Index This Page flag	Web robots should index content in a given posting or channel.

Note
See "Working with Custom Properties in the Web Author" later in this module for an explanation of the Custom tab.

11. Click **Submit**. The posting status changes to Waiting for Editor Approval. If there isn't an editor or moderator assigned to the channel, the posting is approved automatically.
12. Click **LOGOUT**.

Connected pages (multiple postings)

In MSCMS 2001 authors can create multiple content-related Web pages using different template views. This allows users to share content across associated pages in instances where template families are used to target content to different audiences. This is the equivalent of the current desktop multi-view functionality. The connected pages user interface allows users to identify the associated Web page views and to display their contents. Any changes made to a Web page view are replicated across all shared placeholders in the associated Web page views.

To create connected pages as an author, you must have access to two or more channels and one or more templates.

The idea is as follows: You navigate the site and select a posting. By selecting **Create Connected Page** and choosing the same template that the original posting was created with, you create another posting of the view.

However, if you choose a different template from the original posting, or any different view in the same page, you will create a new view and one associated posting in the original page.

Press releases are a good example of a section of a site that may use connected pages. In a regular site, a press release page is normally removed from the current site and moved to an archive area. Using the multiple posting feature of MSCMS 2001, you can create new press releases based on the original one, but place it in different channels that may or may not use the same time stamp.

Page views

A Page view is an HTML page that is dynamically assembled and delivered when a subscriber selects a posting.

Page view refers to the number of templates with which a page is created. If there are two templates, then this page has two views. If there are three templates, then the page has three views, and so on. Each view can have its own look, feel, and functionality. Each view has its own posting(s).

One purpose of multiple views is to share content among different sites on the same MSCMS 2001 server. Content can be in shared placeholders that belong to different templates. Shared placeholders also share the same name.

Thus, if placeholders have the same name in several different templates, the content of one placeholder is automatically migrated/transported to the other placeholders with the same name. Therefore, when the content of one placeholder is updated, all postings based on that placeholder will be updated at the same time.

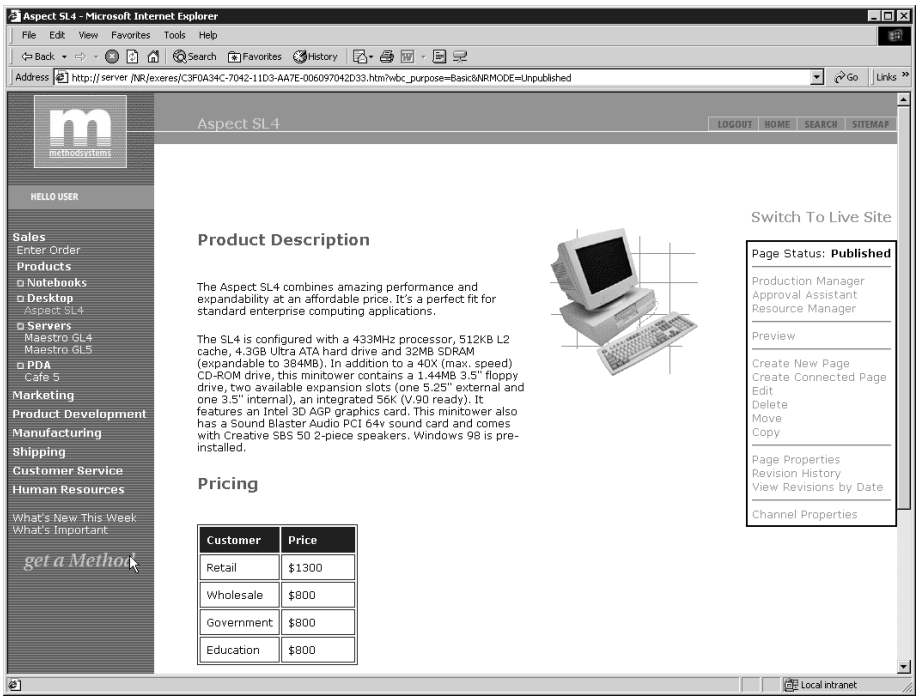
Creating content connected pages with the Web Author

With the Content Management Server 2001 Web Author, you can cross-post to multiple channels so that the underlying content is shared. Authors and editors can do the following tasks quickly using the Web Author:

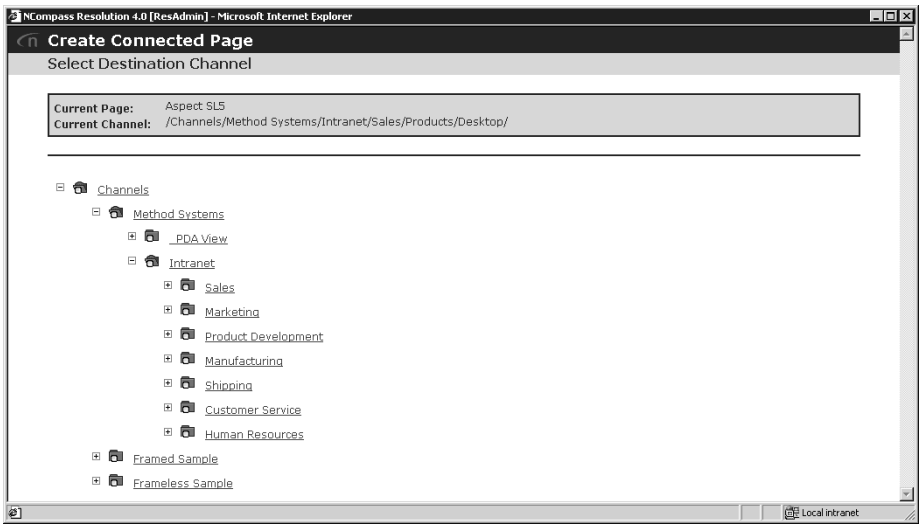
- create and publish connected pages
- edit and update connected pages
- copy, move, and delete connected pages.

To create a page, follow this procedure:

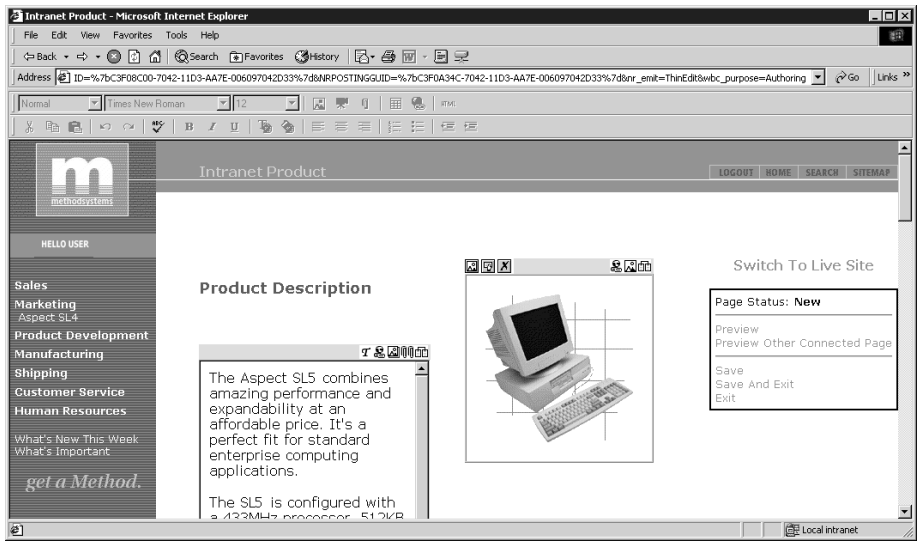
1. Launch Internet Explorer and enter the URL of the Method Systems Web site.
2. Log on as Author1. If you have any questions about this, check with your site administrator.
3. Click **Switch to Edit Site**.
4. Select the page with the content to be posted to another channel. In the following sample screen, the product description of the Aspect SL5 desktop computer is in the Product subchannel of the Method Systems Sales channel.



5. Click **Create Connected Page.**
6. Specify the destination channel for the shared content. In this instance, we want to share the product description of the Aspect SL5 between the Sales and Marketing channels.
7. Expand the tree until the Marketing channel is visible by following the structure **Channels > Method Systems > Intranet > Marketing**.
8. Click the Marketing channel as shown in the following sample screen.



9. A window prompting you to select a template gallery displays the templates available to you. Click the **General Use** gallery, which opens to display templates you can work with.
10. Select the **Intranet Product** template as shown in the following sample screen. The original Aspect SL5 product description from the Sales subchannel is displayed using the template from the Marketing channel.



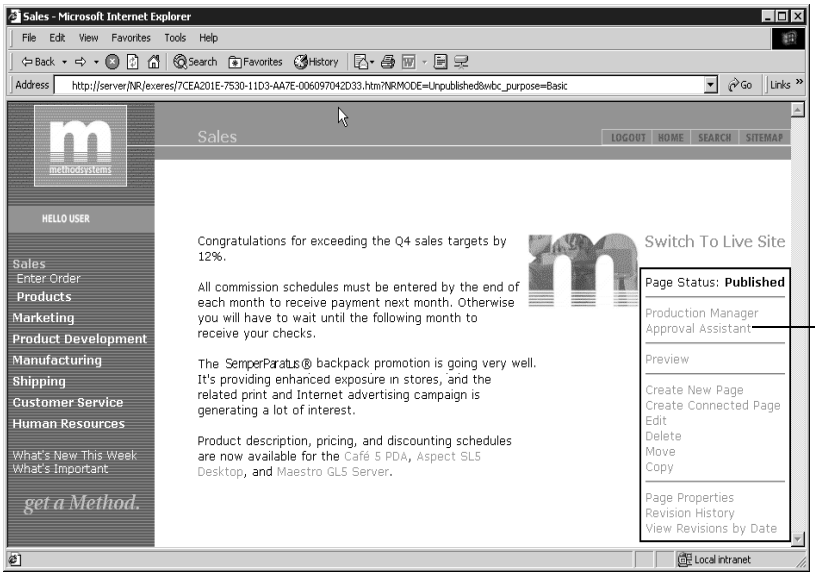
Note
In order for the related content to be displayed, content-connected pages must share the same template placeholder names.

11. Click **Preview** to display the new page in live mode or **Preview Other Connected Pages** to display a list of content-related pages that are cross-posted to different channels.
12. Click **Save** from the authoring console. The **Save New Page** browser window opens for your content-connected page. Type in a display name of your choice. When editing a page, you have three options to choose from if you have not saved your changes:
    - clicking **Save** from the authoring console saves your changes and keeps you in authoring mode
    - clicking **Save and Exit** saves your changes and takes you out of authoring mode
    - clicking **Exit** takes you out of authoring mode, but does not save any unsaved changes. It displays a confirmation message.
13. Click **Submit**. The posting status changes to Waiting for Editor Approval. If there isn't an editor or moderator assigned to the channel, the posting is approved automatically.
14. Click **LOGOUT**.

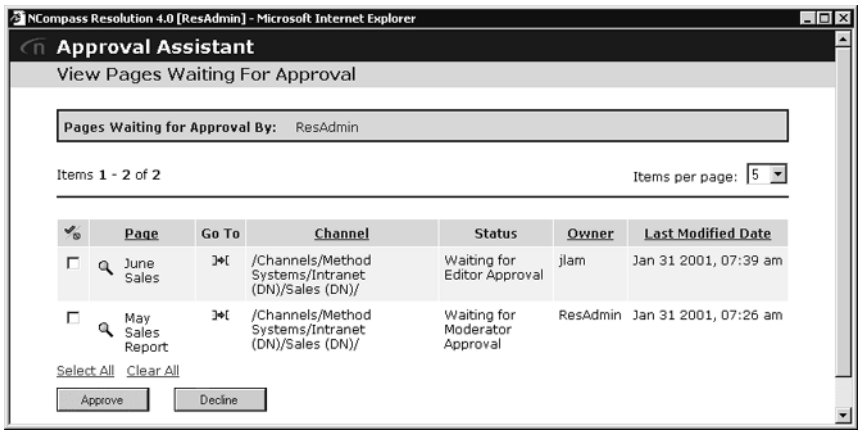
Approving a page with the Web Author

After logging on as Editor1, click **Switch To Edit Site** and proceed as follows.

1. Click **Approval Assistant**.



2. The Pages Waiting for Approval opens, which shows pages submitted to channels where you as the editor have rights. Click the **Preview** icon to display the page in a separate browser window. If you are satisfied, close the preview browser window and return to the page approval window.



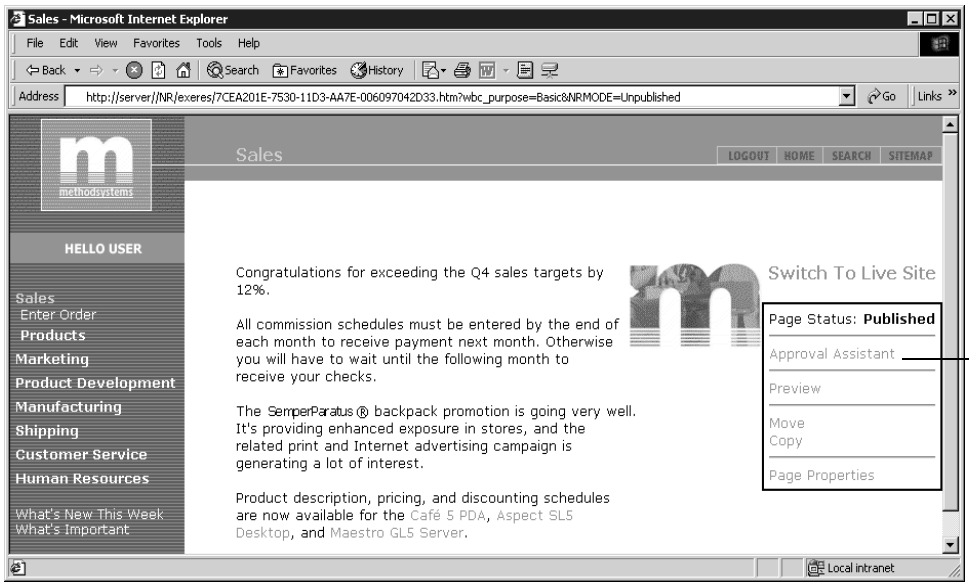
3. Check the box next to your page.
4. Click **Approve**. The page disappears from the list.

5. Close the Approval Assistant, navigate to your page. The status of the page shows Waiting for Approval.
6. Click **LOGOUT**.

Publishing a page with the Web Author

As a moderator, your responsibility is to make pages go “live” on the Web site. You do not have editing rights on pages, but you can change the scheduling information. After logging on as Moderator1, click **Switch to Edit Site** mode and proceed as follows.

1. Click **Approval Assistant** and go to the page requiring approval.



2. Click on the page name and verify the properties by opening the Page Properties browser window. You can make changes to the Start and Expiry dates at this point.
3. Click **Approve**. Once a page is approved, the status changes to Approved and it is available to subscribers as of its publishing date. Or, you can click **Decline** to decline the page.

Note
If a moderator also has authoring rights, all postings (pages) they author and submit to their channel are automatically approved.

4. Click **LOGOUT**. At this point you can click **Switch to Live Site** to go back and see your page.

Viewing revision histories

In the Web Author, revisions are based on postings. Changes to the posting itself are not kept as versions, but changes to a posting's page, template, or resource gallery items can be viewed as revisions of a posting that uses them. 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 you have the option to preview it and compare it to another revision.

Now that you have created, approved, and published a page, you will revise it. You need to do this in order to see the differences in the tasks related to revision history that are still to come.

Log on as an administrator to bypass the workflow from this point on.

Making revisions to a posting

1. Make sure you have the page you just published in view. Click **Switch to Edit Site** if you are not already in that mode.

   Alter your page superficially, such as making a word bold, or adding a hyperlink.

2. Click **Edit** in your console.
3. Pick a placeholder that indicates full formatting is allowed. Select a word and click the Bold button in your toolbar.

   The word you just selected is now bold.

4. Pick a placeholder that allows hyperlinks. Select a word and click the Edit Hyperlink button.

   The Edit Hyperlink dialog box appears, prompting you for a URL.

5. In addition to the "http://" that is already there, type in: www.microsoft.com
6. Click **OK**.

   The word you just selected is now a hyperlink.

7. Click **Save and Exit**.
8. Publish the page by clicking **Approve**. You are now ready to view your revision history.

To display a revision history in the Web Author:

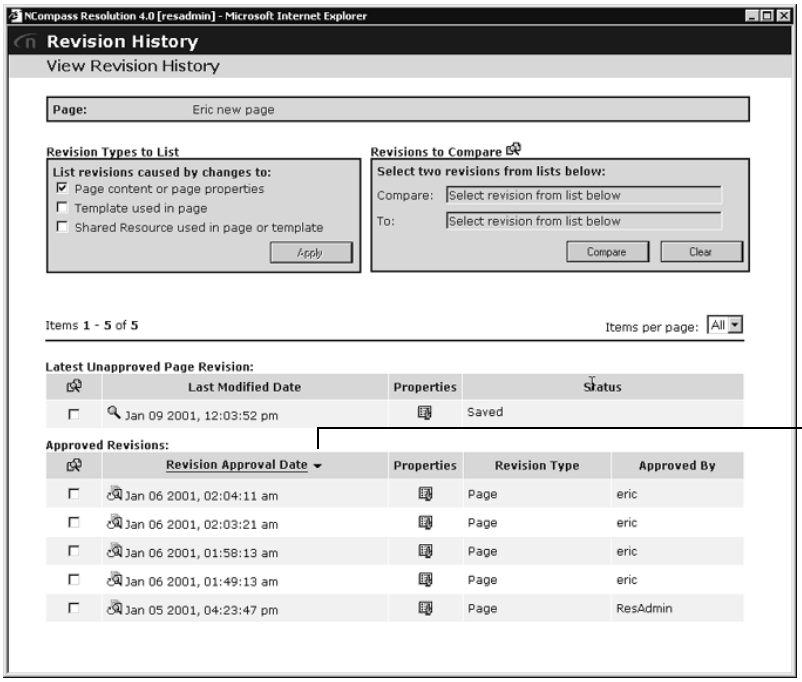
1. Launch Internet Explorer and enter the URL of the Method Systems Web site.
2. Log on according to how your rights have been set up. If you have any questions about this, check with your site administrator.

Note

To view a revision of a page in the Web Author, you must have authoring rights to at least one page in the site.

3. Click **Switch to Edit Site**.
4. Click **Revision History** from the console.

   The Revision History window appears.
5. Select the type of revision to be displayed from the Revision Types to List dialog box.
6. Click **Apply.**
7. Select the preview link corresponding to the revision to be viewed. It opens in a new window. See the next page for a sample revision history.



The Web Author Revision History page displays a list of unapproved and approved revisions

MSCMS 2001 provides the ability to invoke red-line revision tracking and comparison within a page. This is similar to the track changes feature in Microsoft Word. Users can select the revision formatting attributes for changed text. This feature allows editors or authors to preview changes done in a particular editing session by comparing the page being edited with the approved version of the page.

MSCMS 2001 archives all approved postings. At installation time, the installer sets the number of page versions to be archived in the "Configure Page Archiving" pane. The default value is 5. Before setting the number, (you can change it) determine how many versions will be necessary.

To determine the number of versions, consider the following:

- Each time a page is approved by an editor, a copy of the original becomes a version of that page. For example, an existing page has a "Published" status and an author edits the page by changing some content. As soon as an editor approves the changes, the system archives the original page in terms of content, design, etc. and then replaces the original with the new content.
- At this point, you have one version of the page archived. If the author or the editor realizes that some content is not exactly what they want and re-edits the page, the newly edited content is then re-approved and a second archive version is made. Archiving is activated each time the editor presses the approve button.
- Only an administrator can review versions or archives of a page unless other people have also been given rights to the revision history.

When you select a version, you see the version of the page as it was at the time it was date-stamped.

To re-instate a version of the site, it is only necessary to preview the desired version and copy and paste the content into the appropriate placeholders of a page.

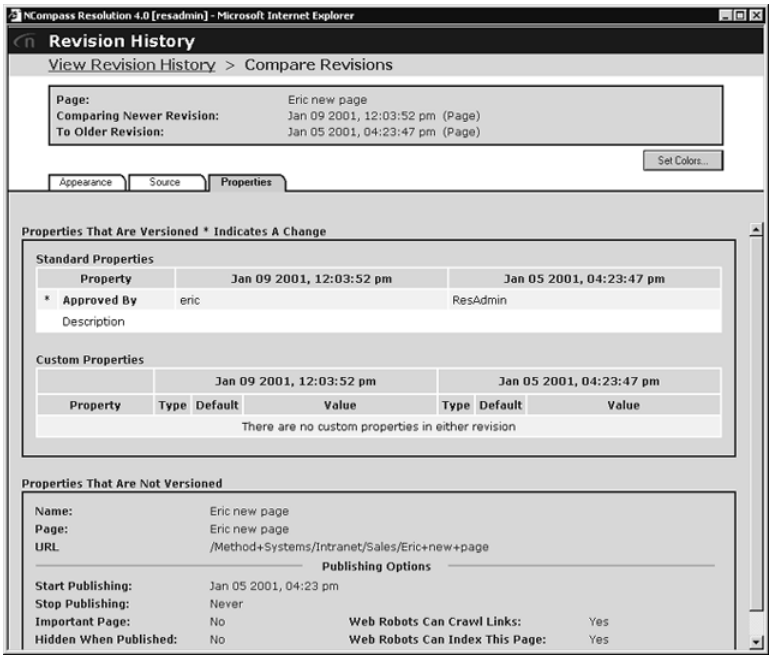
You can use the Site Builder or Web Author command **View Revisions by Date** to select the revision date and time of a page you want to view.

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:

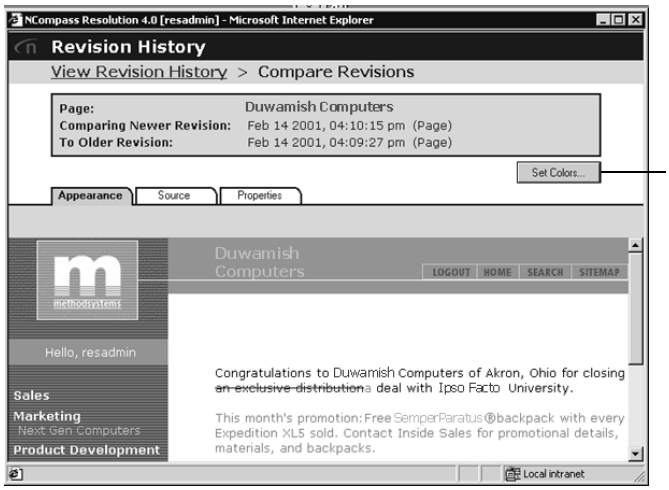
1. Select the type of revision you want to display from the Revision Types to List options, found in the top-left pane of the Revision History window. You can choose:
   - Page content or page properties
   - Template used in page
   - Shared Resource used in page or template
2. Click **Apply**.
3. Select 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. Changes are shown in a different color or with strikethroughs. The "Source" option compares the HTML code and the "Property" option compares text-based properties. Only the name of the person approving the revisions, the description, and custom properties of the revisions can be compared.



Comparing revision properties using the Web Author

6. Click the Appearance tab and compare two revisions of a posting in the Method Systems Marketing channel called “Duwamish Computers.” The revision tracking resembles the following:



Note that on the screen, deletions appear in blue and insertions appear in green. These are the default settings. Modify them using the Set Colors button.

Revision tracking on the Duwamish Computers posting in the Method Systems Marketing channel

Viewing revisions by date

With the View Revisions by Date option, you can preview a page in the Web Author that appeared in the past.

To view revisions by date in the Web Author:

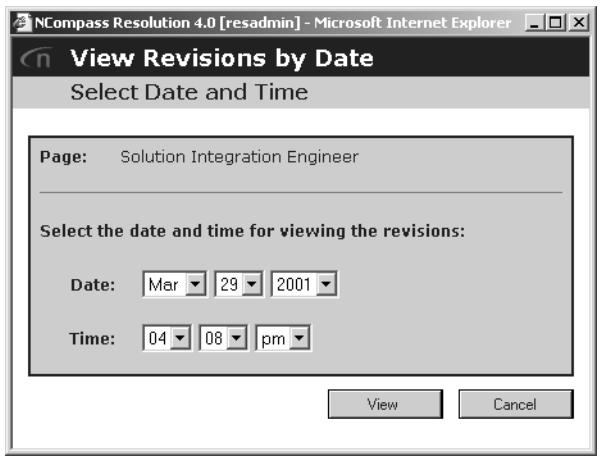
1. Launch Internet Explorer and enter the URL of the Method Systems Web site.
2. Log on according to how your rights have been set up. If you have any questions about this, check with your site administrator.

   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.
3. Click **Switch to Edit Site**.
4. Click **View Revisions by Date** from the console.
5. Select a date and time for the site preview from the drop-down lists.
6. Click **Apply.** The page revision that was approved at that time is displayed.

The revision history of a template or resource cannot be viewed directly, but must be viewed as part of a posting revision history. 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.



Working with custom properties in the Web Author

Custom properties are user-defined properties associated with channels and pages.

With custom properties you can:

- create summary pages of postings and channel content
- create cross-references between pages and channels
- categorize pages and channels based on content
- search all pages and channels.

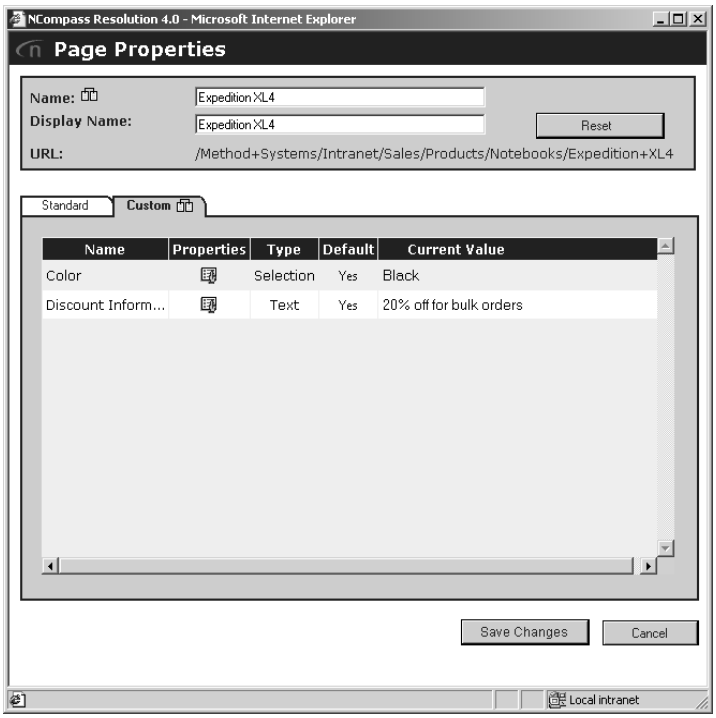
The Web Author supports viewing and editing of custom properties only.

Modifying custom properties for a posting

To modify existing custom properties for a page using the Web Author:

1. Launch Internet Explorer and enter the URL of the Method Systems Web site and go to the Intranet.
2. Log on according to how your rights have been set up. If you have any questions about this, check with your site administrator.
3. Click **Switch to Edit Site**.
4. You will be editing the custom properties of the Expedition XL4 page under **Sales > Products > Notebooks**. Click the page, then in the console, click **Page Properties.**

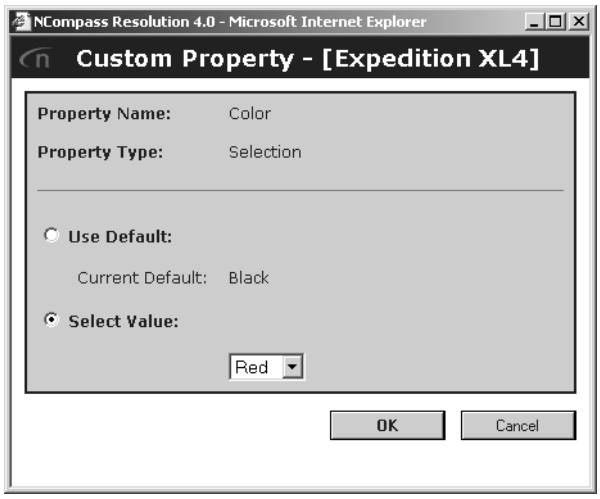
5. Click the **Custom** tab. In the example below, the custom properties for the Expedition XL4 page in the Sales channel are displayed.



The fields on the Custom tab are explained below.

Field	Description
Name	Main identifier for the custom property
Type	Can be Text type or Selection type. Text type is a single value up to 2000 characters. Selection type has a set of allowed values. There is no limit to the number of allowed values that can be added.
Default/Current value	Authors can change the current value for custom properties on pages: they can also reset values back to the default value.

6. Click the **Properties** icon corresponding to the property you want to modify. In this case, change the color property from black to red.



7. Choose the **Select Value** option instead of **Use Default**. Select the value Red from the drop-down list. Click **OK.**
8. Click **Save Changes** to save your work and return to authoring console.

   Notice the number of Related Jobs changes with different Page Properties. This is one of the advantages of using MSCMS 2001 to manage dynamic content.
9. Click **Submit.** If you have administrator rights, you can just click **Approve** to bypass the workflow.
10. Click **LOGOUT.**

Note
Use Default means the most recently approved default for the page template is used. If a new default is chosen later then this is reflected in the posting.

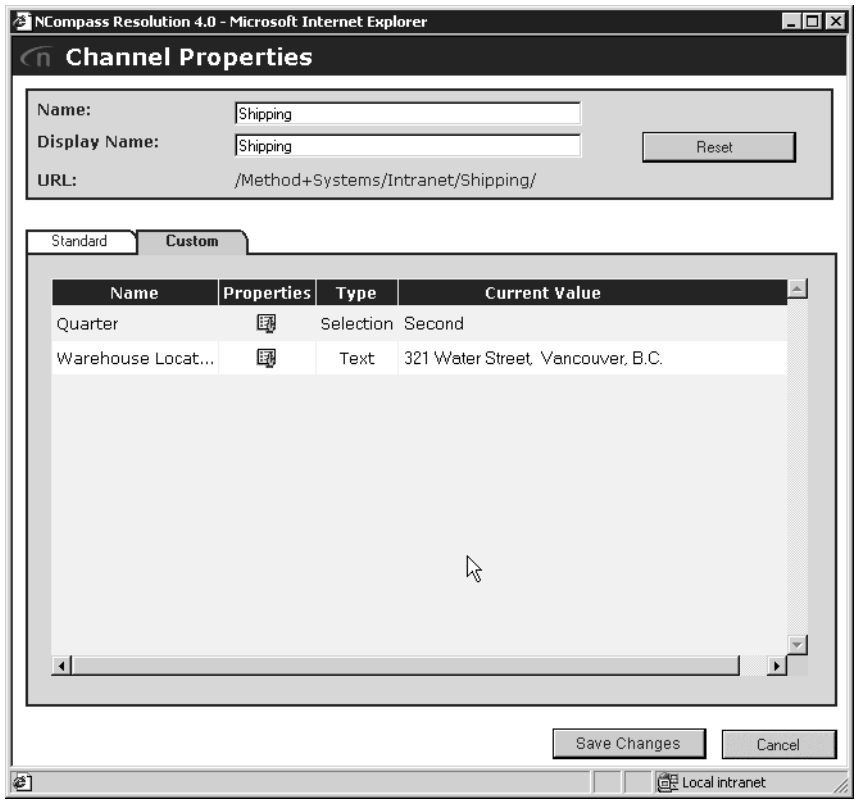
Note
Connected postings will share the current value for a given custom property.

Modifying custom properties for a channel

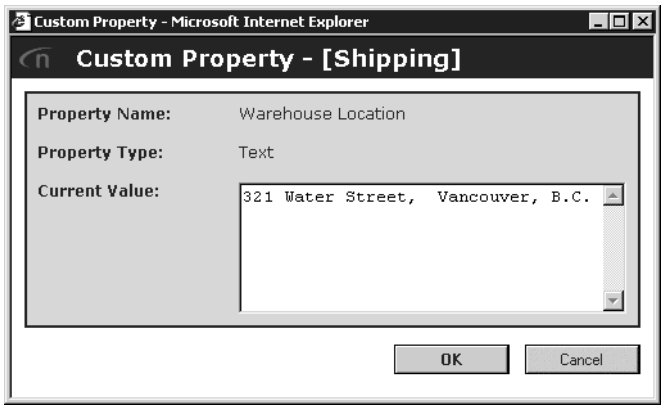
Note
To change the current value for a custom property on a channel, you must be assigned administrative rights.

To modify custom properties for a channel using the Web Author:

1. Launch Internet Explorer and enter the URL of the Method Systems Web site and go to the Intranet.
2. Log on according to how your rights have been set up. If you have any questions about this, check with your site administrator.
3. Click **Switch to Edit Site**.
4. Select the Shipping channel, where you will edit the custom properties.
5. In the console, click **Channel Properties.** Click the **Custom** tab. The custom properties for the Shipping channel are displayed.



6. Click the **Properties** icon corresponding to the property you want to modify. In this case, change the warehouse location. The following information is displayed.



7. Edit the information for the Current Value property.
8. Click **OK.**
9. Click **Save Changes** to save your work and return to the authoring console.
10. Click **Submit.** If you have administrator rights you can just click **Approve** and bypass the workflow.
11. Click **LOGOUT.**

Workflow summary

- There are three standard MSCMS 2001 roles (author, editor, and moderator). One user can have any one or a combination of these roles.
- All Web authors are able to use a browser-based, rich editing environment with in-context preview capability.
- This process does not require technical skills.
- By making one change, that change can be re-purposed to dynamically adjust multiple parts of the site.

Copy and Move pages

MSCMS 2001 allows users to copy and move Web pages anywhere within the channel hierarchy.

The **Copy** command creates a new page with all its views based on the same templates as the original page. The location of the page is based on the channel "Default" folder. **Copy** creates only one posting in the selected channel. That posting is created based on the same template as the original posting on which Copy was initiated.

Note
All other views in that page do not have any postings.

The **Move** command moves the Posting from the original channel to the selected channel. The user must have rights to both the original and the destination channel.

Log on with administrator rights.

Using the Copy command

In this example, you will copy the Expedition XL4 posting in the Notebooks channel to the Servers channel.

1. In the Web Author, select the Expedition XL4 posting.
2. In the console, click **Copy.**
3. Choose **Method Systems > Intranet > Sales > Products > Servers** as your destination channel.
4. Click **OK.**

   Remember the channel you selected. You will need to browse to it later. Notice that Expedition XL4 appears in the navigation of the Servers channel. A new posting was created in that channel. It is important to note that your browser session is still active at the original location.
5. Click the new posting.

   The page status is now "Saved." This happens automatically. Depending on your rights, you can either submit the page for approval, or in this case, approve it right away.

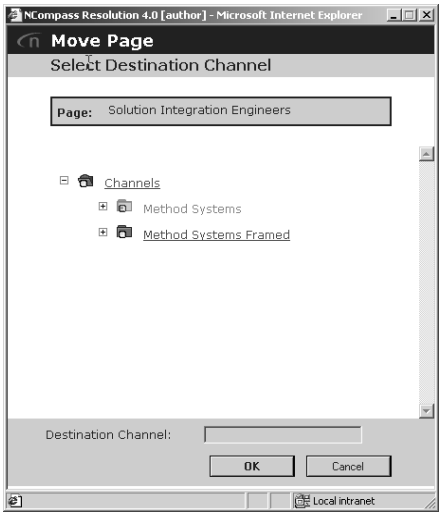


Copy the page to a selected channel

Using the Move command

In this example, you will move the Aspect SL4 posting in the Desktops channel to the Shipping channel.

1. In the Web Author, select the Aspect SL4 posting.
2. In the console, click **Move.**
3. Choose Shipping under Method Systems as your destination channel.



Move the page to a selected channel

4. Click **OK.**

   Your page has changed location. Your browser session is now active at the new location.

Note

If you are logged on with author rights and you are not the owner of the object, you will not see the move option in your console. An editor, however would see it.

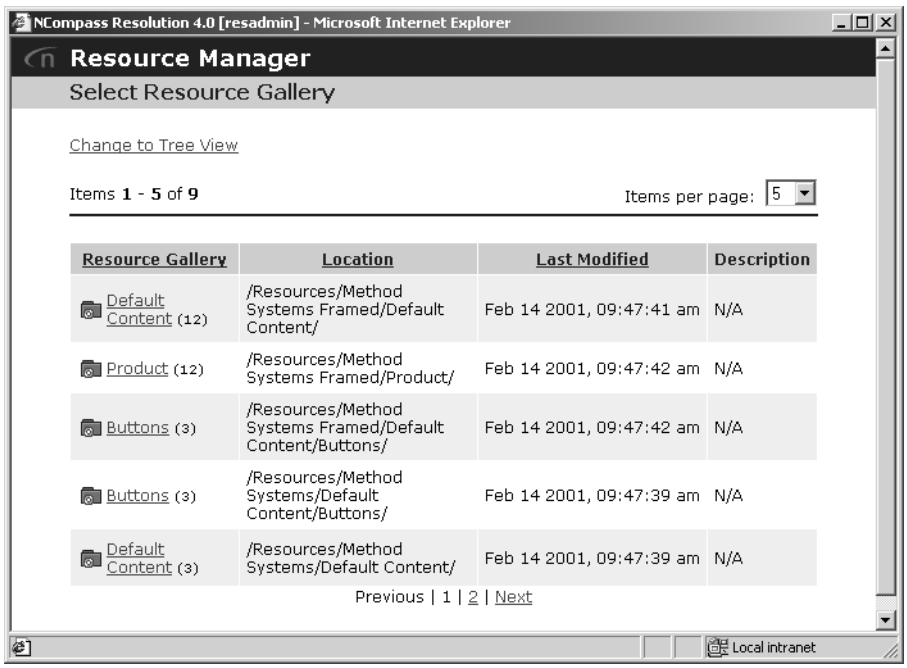
Resource Manager

MSCMS 2001 provides the ability to manage digital assets in the Resource Gallery through a Web browser interface. The new Resource Gallery management interface allows users to add, replace, and delete resources, as well as modify the properties of existing resources.

Resource management from the Web Author

1. Make sure you are logged on as an administrator in the Web Author.
2. Click **Switch to Edit Mode.**
3. Click **Resource Manager** in the console.

   A window appears displaying the different resource galleries.



Accessing the resource galleries from the Web Author

4. Click any of the resource galleries.

   A window displaying the items inside that gallery allows you to delete or add new resources.
5. Click the **Method Systems** gallery.
6. Click **Add New.**

   The Add Resource dialog box appears.

7. Browse to any image or text file on your local drive to add. Enter a display name and description for it at the appropriate prompts.
8. Click **OK**.

   Your resource is now added to the gallery.
9. Delete the resource by selecting the resource for deletion and clicking **Delete**.
10. Close the window.

Enhanced link administration in the Web Author

MSCMS 2001 administers your links when they are created within MSCMS 2001, and points to other objects such as resources, postings, or channels. This functionality is already included in MSCMS 2001.

For the following steps, you will need to use the channel on the site you worked in, and the posting you created earlier.

Creating links

1. Launch your Web Author and log on as an administrator. (This will bypass the workflow.)
2. Once you are logged on, browse to the Human Resources area and select the Customer Service Engineer posting.
3. Click **Switch to Edit Mode**.
4. Click **Edit.**
5. Select text in the second placeholder.
6. Click the **Edit Hyperlink** button.

   The "Insert Hyperlink" panel appears.
7. Select **Browse** and navigate to the Electrical Hardware Engineer posting in that channel.

   The visible channel structure is the structure that this specific user ID has rights to browse.
8. Select the Electrical Hardware Engineer posting.
9. Click **OK**.

   This link was created within MSCMS 2001 and points to an MSCMS 2001 object—a posting called "Electrical Hardware Engineer" in this case. From now on, the link will be administered by MSCMS 2001.
10. Click **Save and Exit.**
11. **Approve** this new change.
12. Test the link by clicking on it.

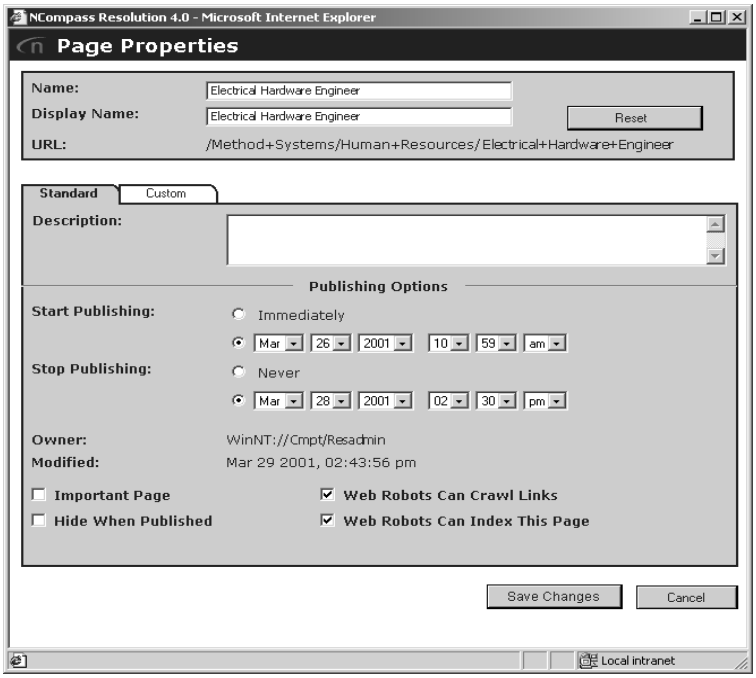
    The Electrical Hardware Engineer posting appears. On the Customer Service Engineer posting, you have created a link that points to Electrical Hardware Engineer in your channel.

Dealing with an expired page

This is when a page expires and there are links that point to it.

In the Web Author, you must be logged on as an administrator.

1. On the Electrical Hardware Engineer posting, click **Switch to Edit Mode**.
2. Click **Page Properties.**
3. Expire the page by selecting publishing dates that are an earlier date than today.



Change the start and stop publishing dates in the Page Properties window

4. Click **Save Changes.**
5. Click **Approve**.
6. Click **Switch to Live Site.**

   Electrical Hardware Engineer is now expired and no longer appears in the live site navigation.
7. Return to Customer Service Engineer where you created the link to Electrical Hardware Engineer.

   You now have a different page on your screen.
8. Locate the text in the second placeholder where the link was created. Move your mouse on top of the text.

There is no live link on the selected text. The link is no longer available because the page is now expired.

Re-activating an expired page

1. Using your Web Author, return to your working channel.

   Notice that Electrical Hardware Engineer is no longer available.

2. Click **Switch to Edit Mode.**

   Electrical Hardware Engineer is now available because you are in edit mode.

3. Select the posting.
4. Click **Page Properties.**
5. At "Stop Publishing" click **Never.**
6. Click **Save Changes.**
7. **Approve** the posting.
8. Click **Switch to Live Site.**

   The posting is now available.

You can create links that point to postings that are not live, but were already created. When these postings become live, all links that point to them become live as well.

Module 5

Site Builder and Administration

Site Builder and administration

Overview

This section explores the Site Builder and the administration that takes place within it.

Objectives

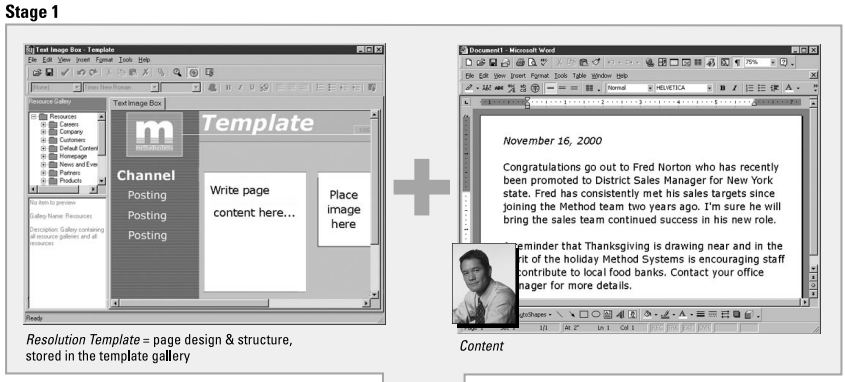
By the end of this section, you will:

- be acquainted with the Site Builder functions
- understand what a site administrator does
- understand the different user roles and rights settings.

If you are an administrator or a template designer, you will need to use the Site Builder. This application can be installed on the MSCMS 2001 server machine or on a Windows 98, NT Workstation, or Windows 2000 machine. The communication protocol of the Site Builder is by Hyper-Text Transfer Protocol (HTTP). This means that it is possible to do all tasks from a remote location as long as you have access to the MSCMS 2001 server. The following discussion will prepare you to use the Site Builder.

The MSCMS 2001 Web publishing structure

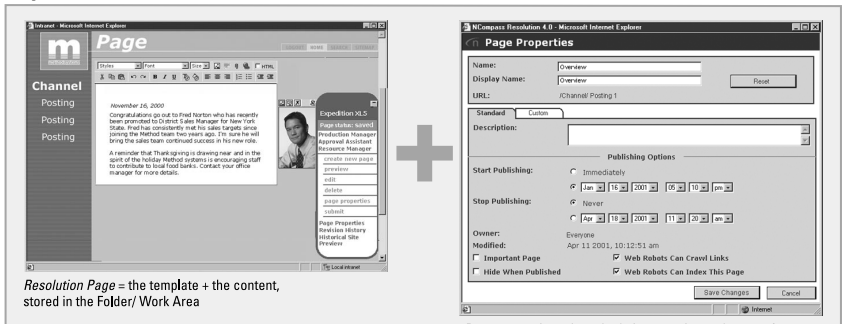
Stage 1



Resolution Template = page design & structure, stored in the template gallery

Content

Stage 2



Resolution Page = the template + the content, stored in the Folder/ Work Area

Page properties = the scheduling, location and name of the published page

Stage 3



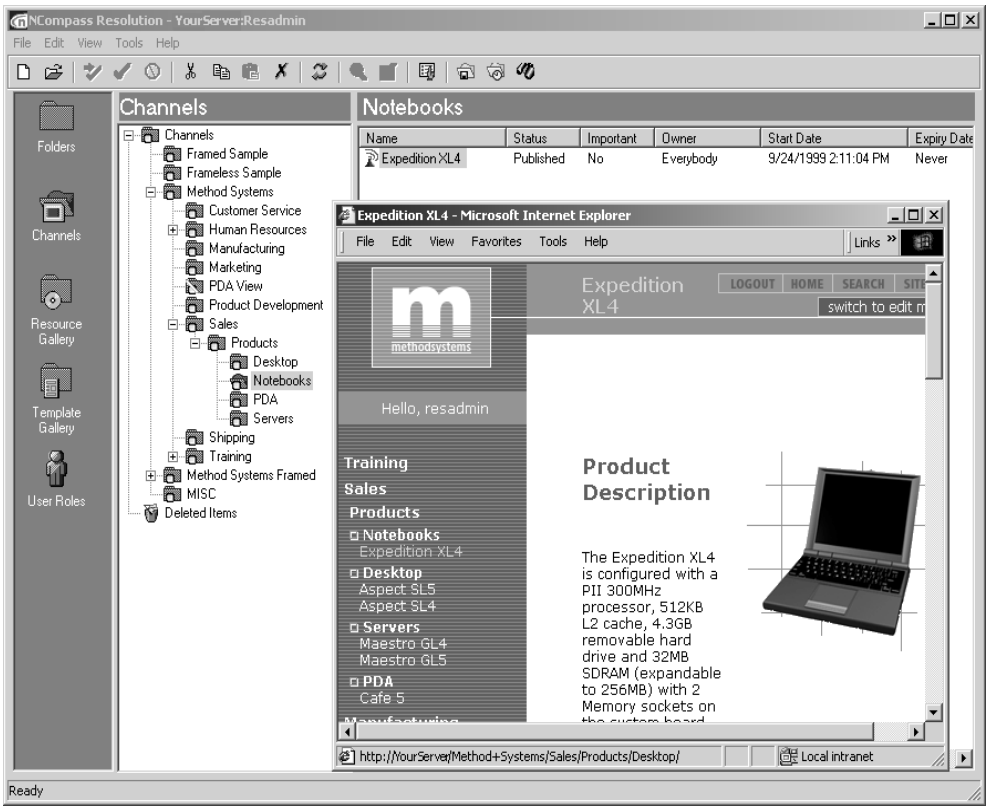
Site Builder structure

Channels:

- show the navigational structure (the “site map”) of a Web site—used to store, organize, and manage access to content
- store postings
- control access. For instance, an intranet has channels that can only be viewed by employees in the subscriber group
- can have start and end dates.

Note
It is good practice to create a folder hierarchy that follows the same structure as the channel structure. This will help you locate a page quickly.

The Site Builder and Web Author



Templates:

- determine page structure and design
- are contained in template galleries
- can be used by many pages
- contain placeholders.

Placeholders:

- are “containers” for content. They can contain text, graphics, attachments, and links
- are where template designers determine the formatting characteristics and the degree to which authors can format content
- are where authors add content.

Postings contain:

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

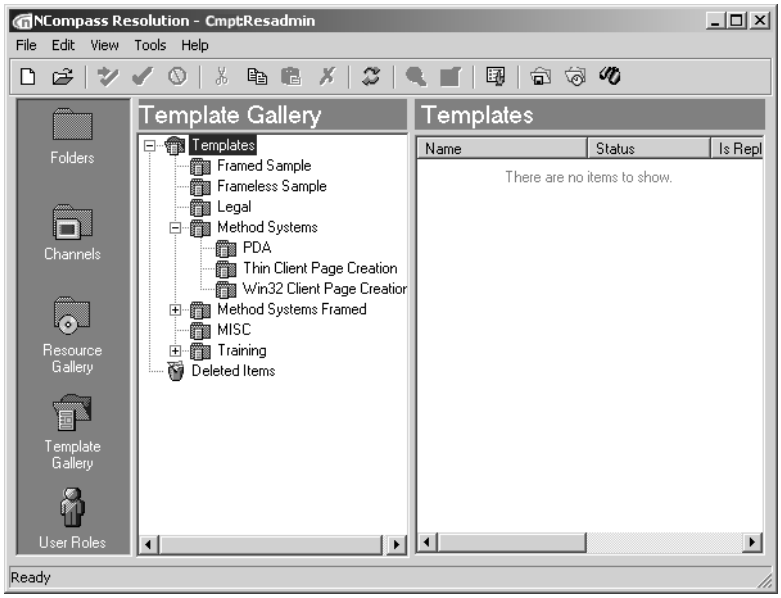
Site Builder galleries

Template Gallery

The template gallery is a container used to control and manage access to templates.

1. In the Site Builder, click the **Template Gallery** icon.

   The template gallery appears.



The Template Gallery

2. Click and expand the template gallery window.

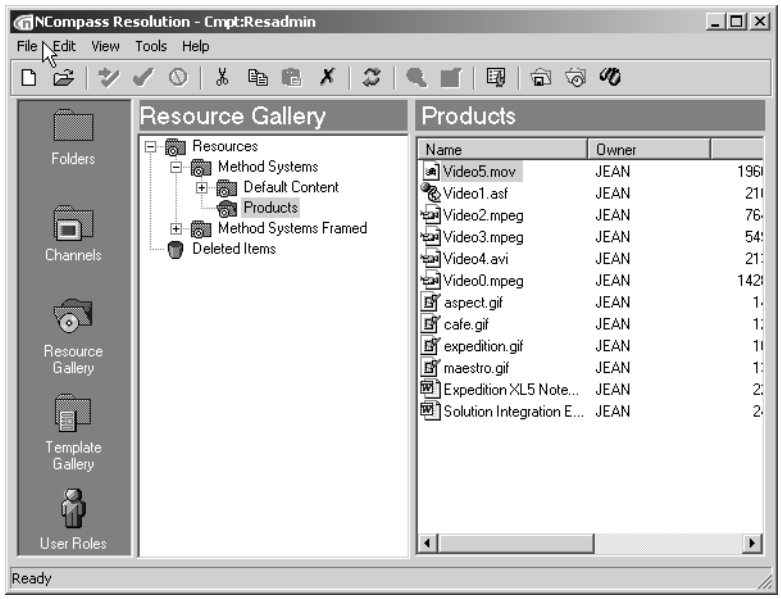
   You can find templates used for your site here.

Resource Gallery

The resource gallery is a container used within MSCMS 2001 to organize and manage access to resources.

1. Click the **Resource Gallery** icon.

   The resource gallery appears.



The Resource Gallery

2. Expand the Method Systems gallery and click "Products."

   Note the different file types.

Resources:

- are stored in "resource galleries." Access to resource galleries can be restricted to certain groups
- can be any Multipurpose Internet Mail Extension (MIME) type file.

Examples of resources:

- graphics (GIF, JPEG, PNG)
- video documents
- text documents.

It is possible to use resources in templates, on Web pages as attachments, or as viewable images. The resource gallery allows you to manage your resources effectively. For example, storing a company logo in the resource gallery means that every time you update it, all the pages or templates using that logo are automatically updated as well.

Site Builder folders

All content is stored in pages that are contained in Folders. Folders are work areas. To associate or publish content to the live site, the content must be posted into a channel in the site structure.

Getting acquainted with the Site Builder folders

In the Web Author, after the template is selected and placeholders are populated with content, the author saves the work. This series of actions creates a page in a folder.

1. Click **Folders.**
2. Expand the folder hierarchy so that the appropriate folder is visible.



The MSCMS Site Builder

Notes about folders

- If one or more editors have rights to a folder, pages must be approved by one of those editors (or by an administrator) in order to continue through the publishing process.
- If no editor has been configured for a folder, authors can approve their own content.

Reports

Reports are an important source of information. Several out-of-the-box reports are available to the administrator, template designers, and resource managers. If the authors, editors, and moderators use the Site Builder, they will also have access to some reports directly from the Site Builder.

Running a report

You can run a report on:

- pages
- resources
- template objects.

These reports are based on those objects and their use. To run a report, right-click the object and select a resource or Dependant Report.

For example, because templates are used by pages and can use resources, they have two reports—Dependant Report and Resource Report.

Viewing reports

1. Make sure you are logged on as an administrator in the Site Builder.
2. Click **Folders.**
3. Browse to **Method Systems > Intranet > Sales > Products > Desktops**.
4. Right-click the Aspect SL5 page and click **Resource Report.**

   A report stating all the objects in use by that page appears.
5. Close the report window.
6. Click **Resource Gallery.**
7. Browse to the “Products” gallery under “Method Systems.”
8. Right-click the expedition.gif and click **Dependant Report.**

   A report stating all the objects using that resource gallery item appears.
9. Close the report window.
10. Click **Template Gallery.**
11. Browse to the General Use gallery under Method Systems.
12. Right-click the Intranet Product template and click **Resource Report.**

    A report stating all the objects in use by that template appears.

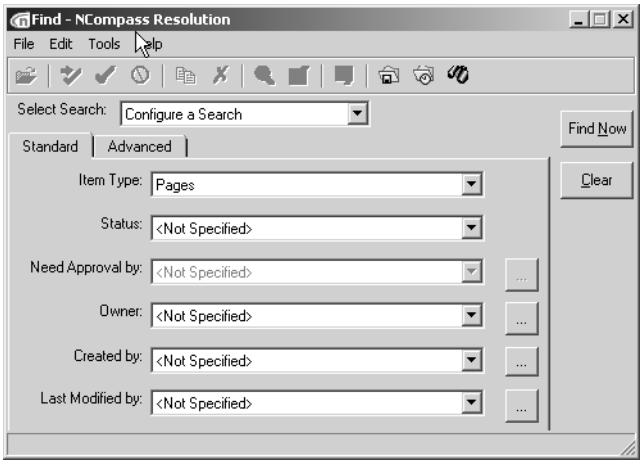


A Resource Report

13. Close the report window.
14. Right-click the same template and click **Dependant Report.**

    A report stating all the objects using that template appears.
15. Close the report window.

In MSCMS 2001, there is another good source of out-of-the-box reports. These reports are generated with the **Find** button. The **Find** button is located on the window toolbar and looks like binoculars. Like many things in MSCMS 2001, the result is fully dynamic.



You can search by different criteria using the Find command

When you are an administrator and configuring a search, you can choose from:

- Pages waiting my approval
- Postings waiting my approval
- Declined pages I own
- Declined postings I own
- Waiting pages I own
- Waiting postings I own
- Pages starting within 7 days
- Postings starting within 7 days
- Pages expiring within 7 days
- Postings expiring within 7 days
- Pages with broken links.

An advanced search is more detailed in terms of particular dates you might be looking for. You can access this search by clicking the **Advanced** tab.

Module 6

Setting up Publishing:
Creating Containers for Users

Understanding the primary tasks

Overview This section familiarizes you with how to set up publishing by learning the process of creating containers for users.

Objectives By the end of this section, you will be able to:

- create and delete channels
- create and delete folders
- create resource galleries
- create template galleries.

Administrators set up and organize the virtual workspace where MSCMS 2001 users author and publish pages, and they grant user access to the Web Author. Administrators also assign publishing roles to users and create rights groups. This process establishes *who* can do *what* in *which* containers.

Setting up publishing involves three primary tasks:

1. 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.
2. 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.
3. 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. This way, content authors for the Sales folder know which channel they should submit the postings to. In the Web Author, you must also 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 in this module 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
- 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 for hierarchy-based URLs

A hierarchy-based URL is an address for an item stored in a 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(SCA).

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 MSCMS 2001 Web site's channel hierarchy, avoid using names that are identical to your 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 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 Author 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 MSCMS 2001 Web site.
5. Assigning rights groups to the channel determines who can work in the channel and who can view postings published there.

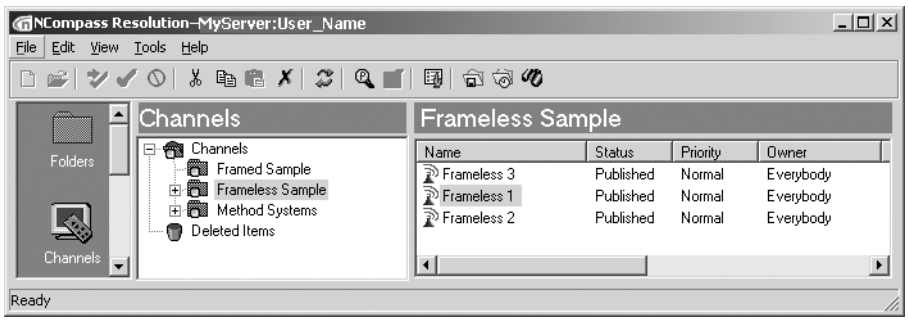
Creating the MSCMS 2001 documents channel

The MSCMS 2001 documentation suite is shipped in PDF format. The documents are stored in a folder on the MSCMS 2001 Installation CD. To make these PDFs available for download by your site 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. This way, any user can access the documentation from your site.

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

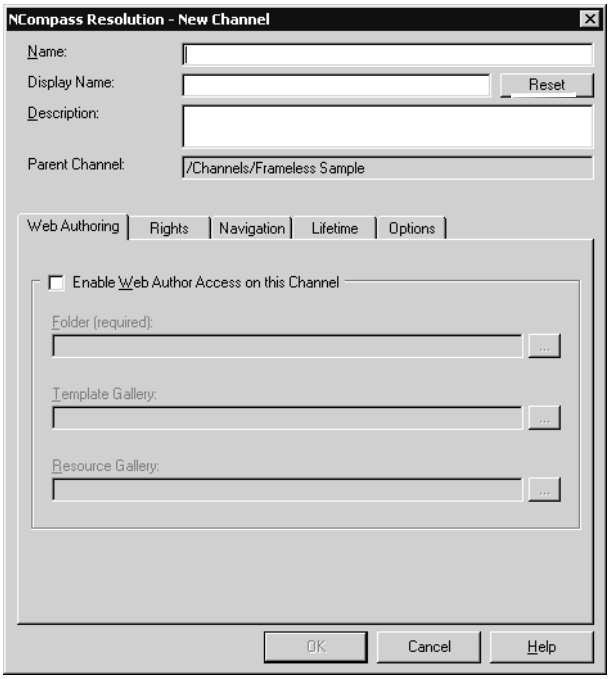
1. Open the Site Builder, and click the Channels icon to display the channels hierarchy.



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**.

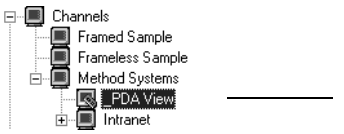
   The New Channel dialog box opens.



The New Channel dialog box

3. (Be sure to have read "Conventions for naming and using channels" in this module 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. For more information, 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. You will learn how to do this in "Creating Folders" later in this module. 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 also applies 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 MSCMS 2001 administrator role so they can assign navigation templates to channels themselves.

The main function of navigation templates is to generate links to 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.

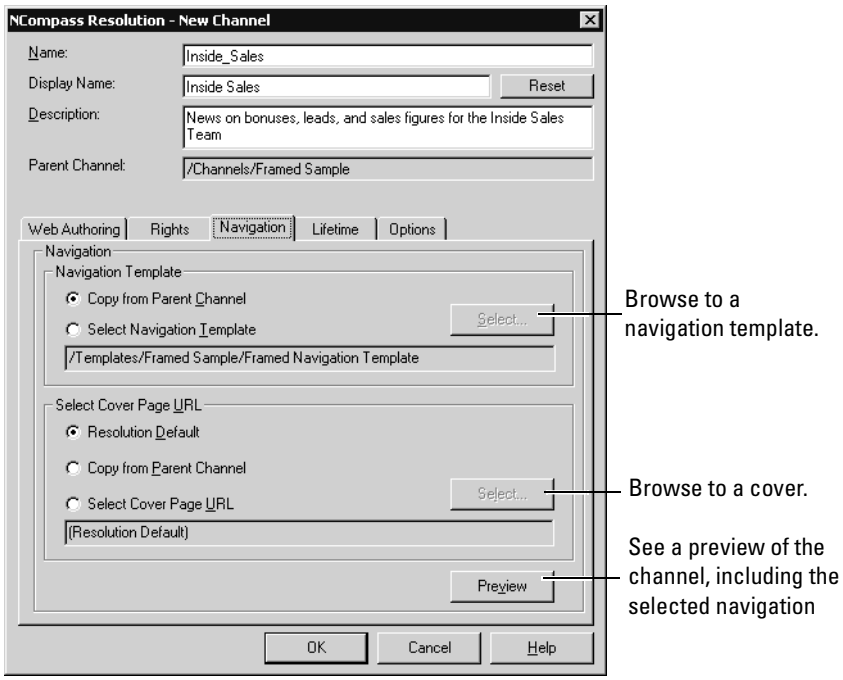
Framed sites: When assigning a channel as a cover page for a framed channel, make sure subscribers have access to the channel you assign as a cover page. Otherwise, they will see the default cover page located in the `NR/Shared/cover.asp` virtual directory.

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

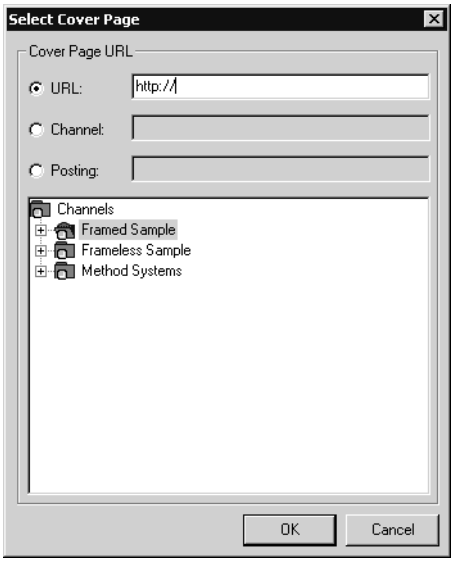
2. To designate the channel as important, click the **Options** tab and select the "Important Channel" option. When subscribers do a "What's Important" search, MSCMS 2001 returns this channel. The channel's icon in the Site Builder changes to signify it is an important channel.

   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.

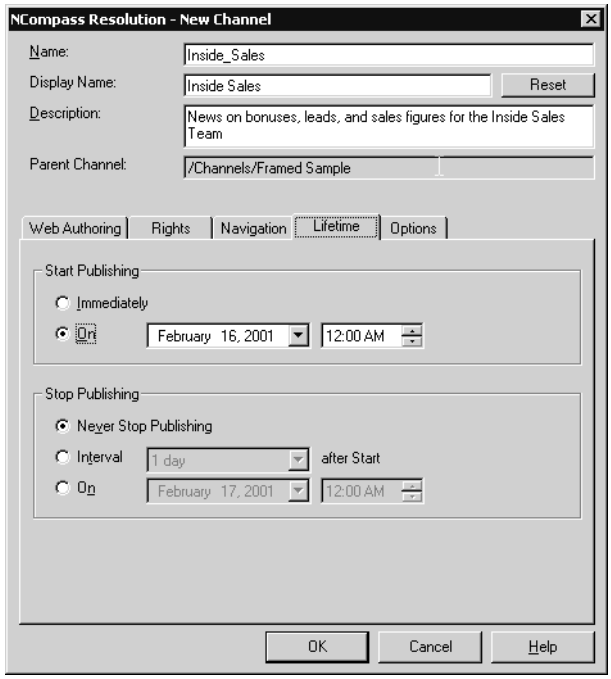
Note

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:

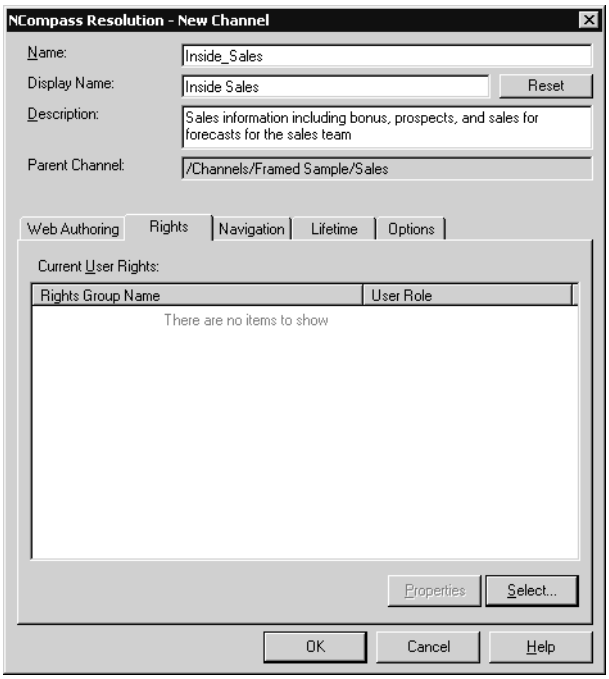
   - Never Stop Publishing: the channel is available for publishing until this option is changed, or the channel is deleted.
   - Interval: select this option and select a time period (day, week, month) for when the channel expires.
   - On: select a specific date in the future after the channel expires.

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 instructions on creating other containers such as folders later in this module. After you have finished creating containers, you can create rights groups and assign them to the containers.

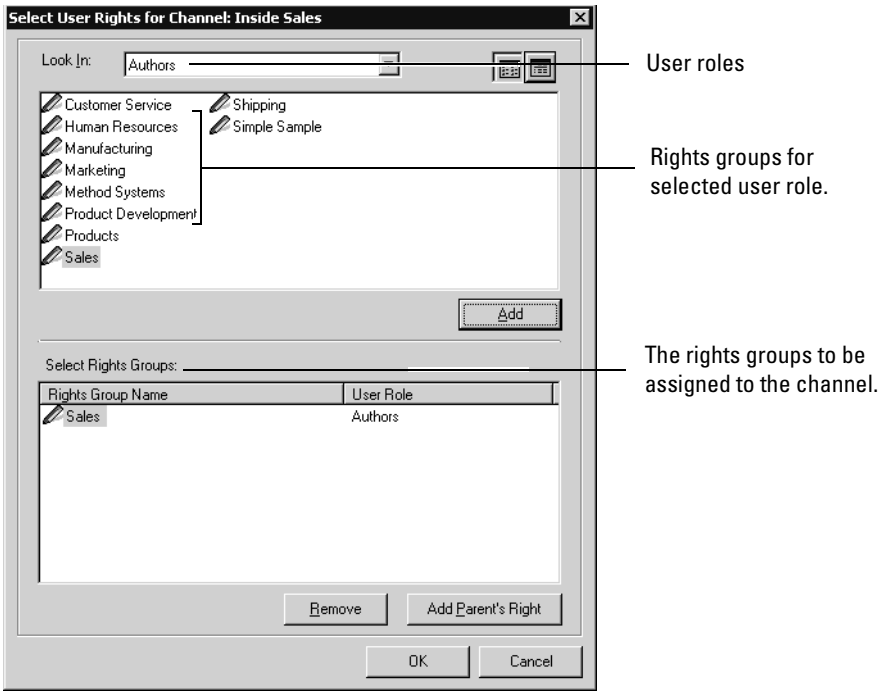
Assigning rights groups to the channel allows the rights group members to work there. In order to browse your Web site, users must also be assigned subscriptions rights to channels.

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 MSCMS 2001 site.

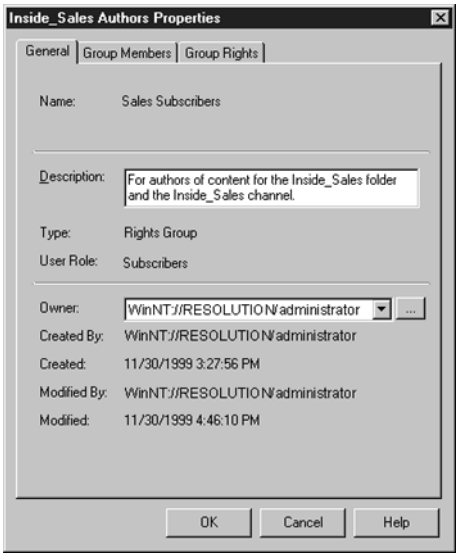
   Or:

   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.

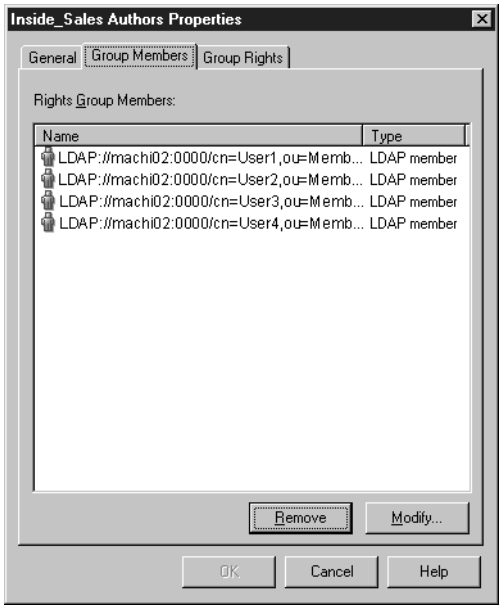
5. Click **OK** to close the Select User Rights Groups dialog box.

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

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 the module on "User Roles and 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 "Channel" is the root channel name:

```
Channel
  Method Systems
      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.

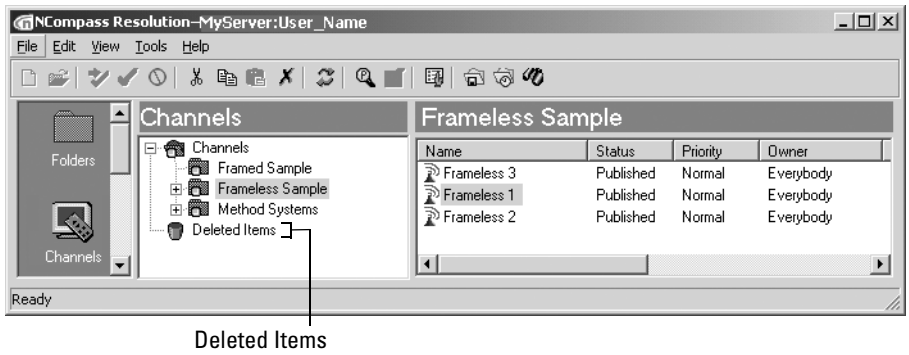
The channel's URL does not contain the root channel's name when a user views a channel in a Web browser. However, a navigation template programmer can set the root channel's name to appear in its cover page.

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"). Expand or collapse the tree structure by clicking the + or - symbol.
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 module.

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

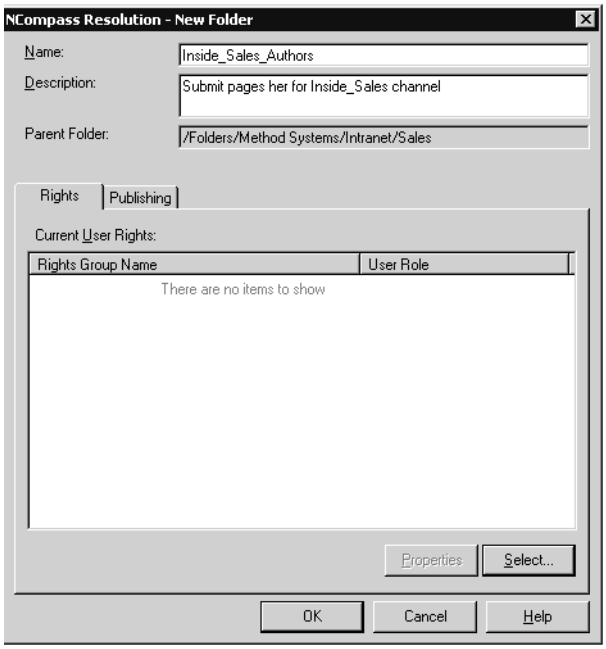
Folders in the Site Builder are inextricably connected to postings in the Web Author. When an author creates a new posting in the Web Author and submits it for approval, the page for that posting is stored in a folder on the Site Builder.

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 folder hierarchy by clicking the **Folders** icon.
2. Right-click the folder of your choice in the Folders area where you want to create the new folder. Select **New > Folder**. The New Folder dialog box opens.



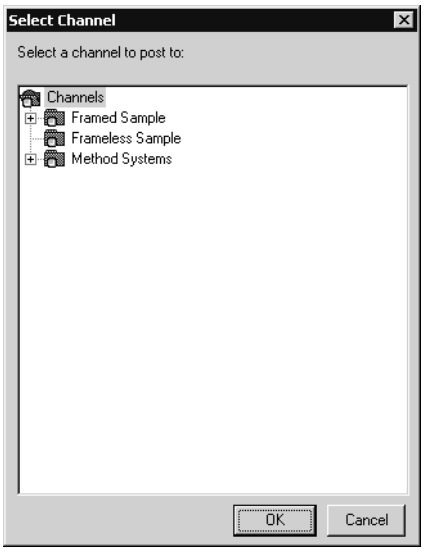
New Folder dialog box

3. Name the new folder to make it easy to identify, such as the subject matter of the pages that will be contained inside. For example, if it's where pages related to inside sales will be submitted, name it "Inside Sales."
4. Enter a description of what is to be contained in the folder 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

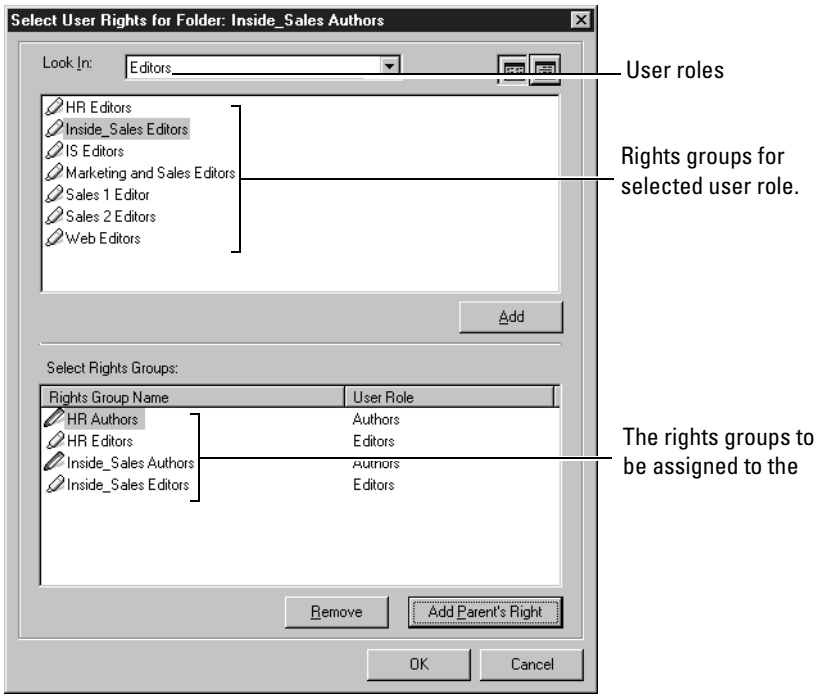
6. Select a channel to use as the folder's default channel, such as Frameless Sample, and click **OK**. The Select Channel dialog box closes.

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

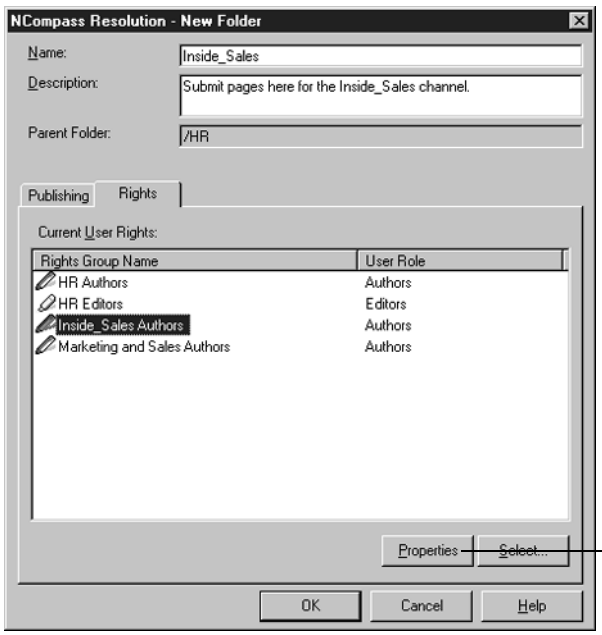
3. Select a user role from the Look In box. You can assign authors and editors to the folder.

   Or:

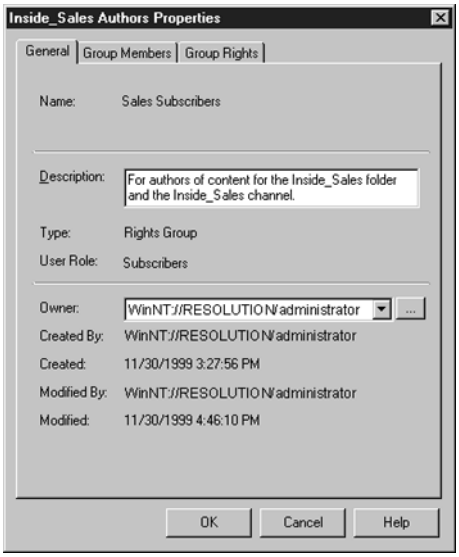
   *To assign the folder the same rights groups as its parent folder, click **Add Parent's Rights**. The parent folder's rights groups appear in the Selected Rights Groups box.*

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**.

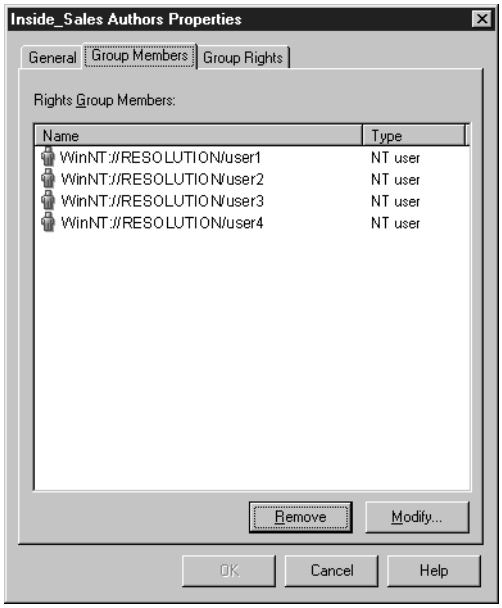


6. In the Current User Rights area, select a Rights Group and click **Properties**. The Rights Group Properties dialog box opens.



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

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 MSCMS 2001 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 and 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 into 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.

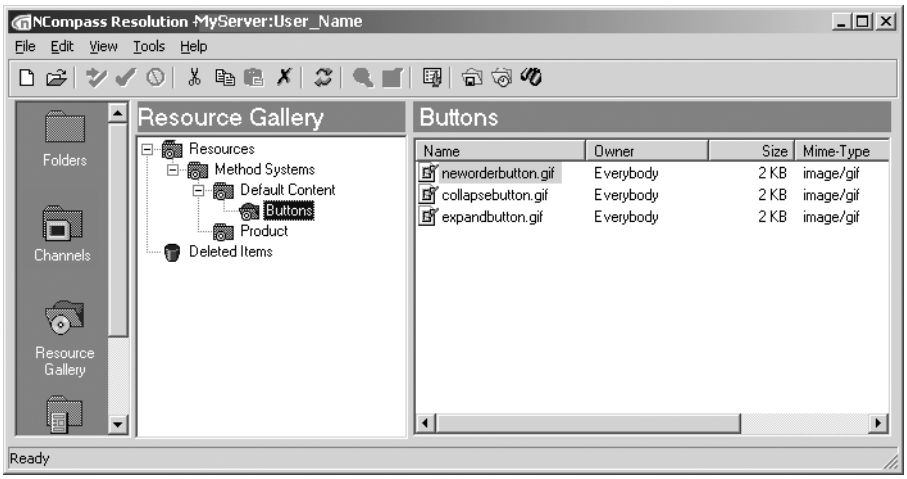
There is a default limit of 200 on the number of items that can be purged from MSCMS 2001 in one operation. This limit can be increased or decreased.

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.

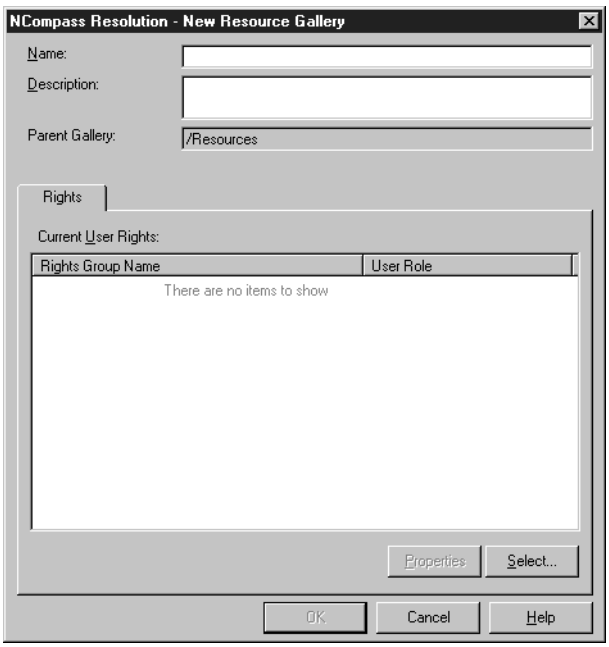
Creating Resource Galleries, step 1: naming and describing the resource gallery

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



MSCMS Site Builder, with Resource Gallery hierarchy

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.



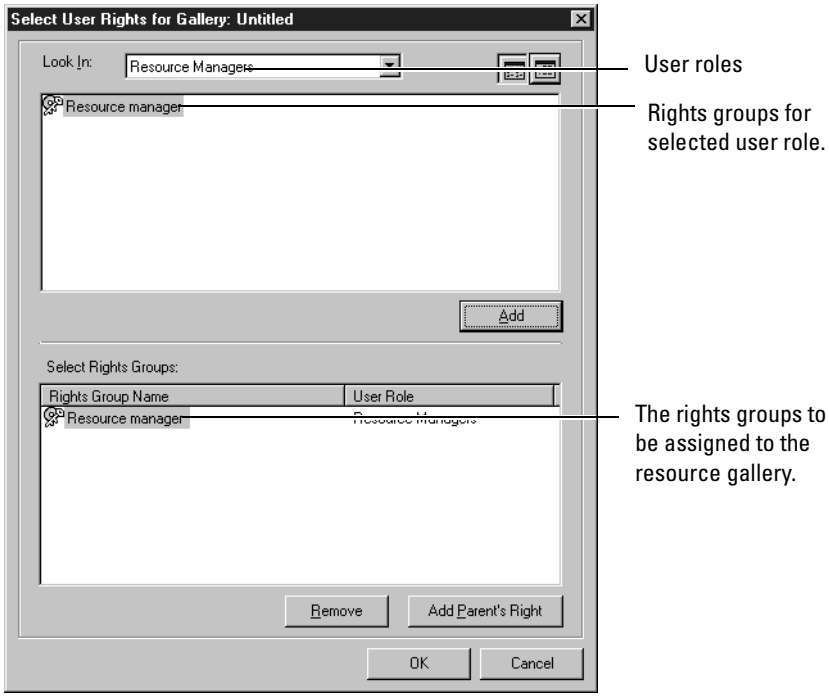
New Resource Gallery dialog box

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

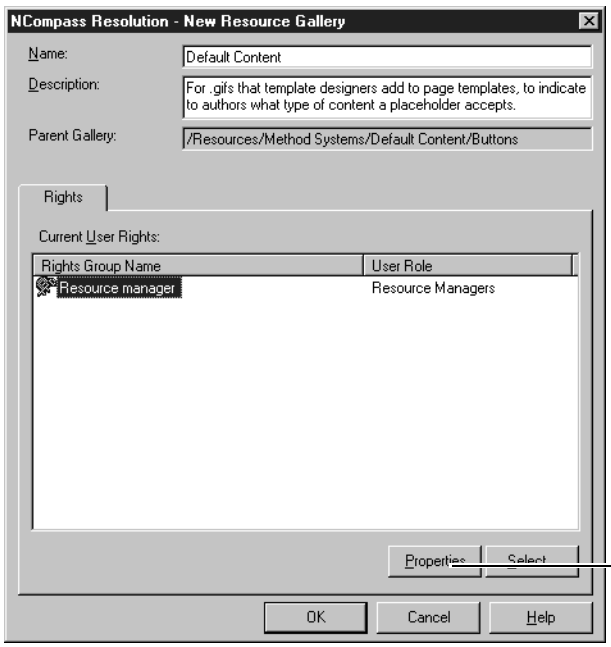
2. Select a user role from the Look In drop-down list. You can assign resource managers, authors, editors, and template designers to the resource gallery.

   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.*

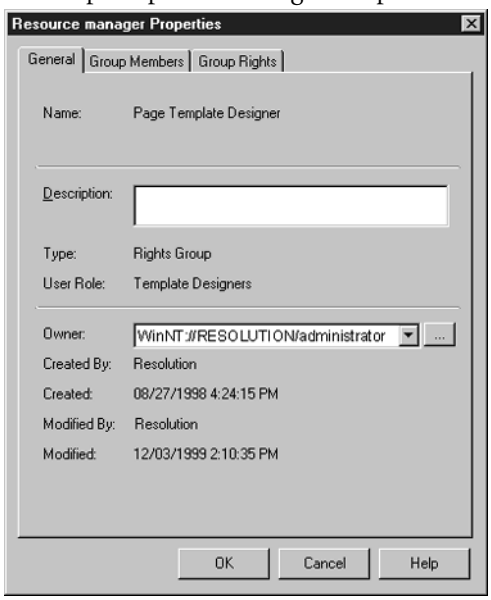
3. Select rights groups from the Look In box, and click **Add**. The rights groups appear in the Selected Rights Groups box.

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

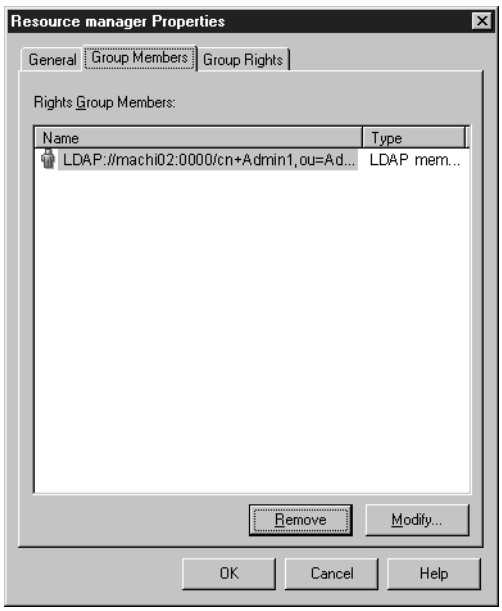


Click to view the members of a Rights Group.

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

7. Close the Group Rights Properties dialog box. To modify members of the rights group, see the module on "User Roles and 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.

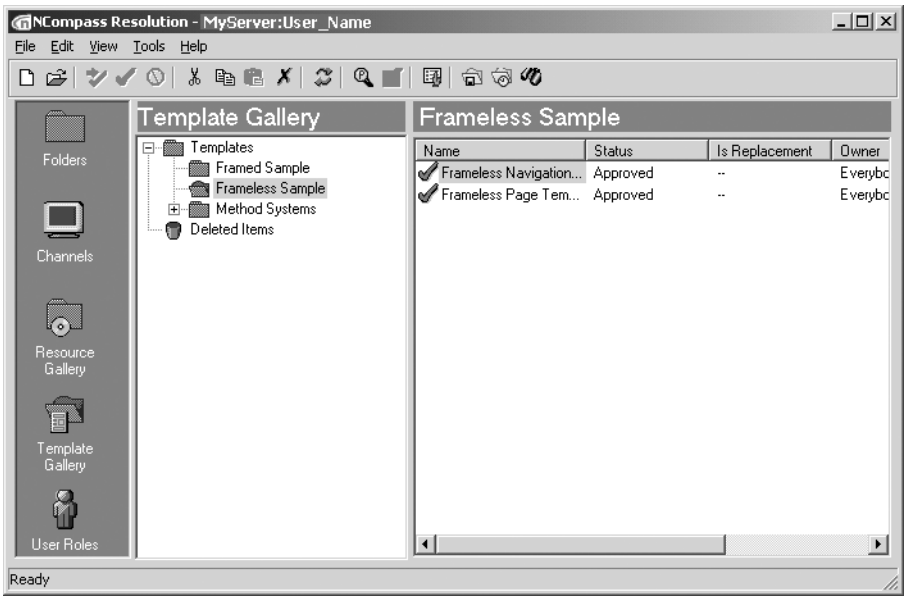
Creating Template Galleries

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.

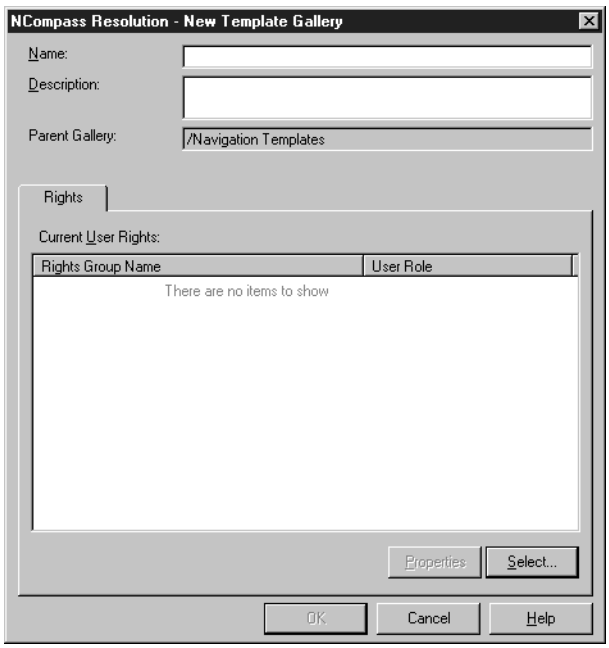
Creating Template Galleries, step 1: naming and describing the template gallery

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



MSCMS Site Builder, with Template Gallery hierarchy

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



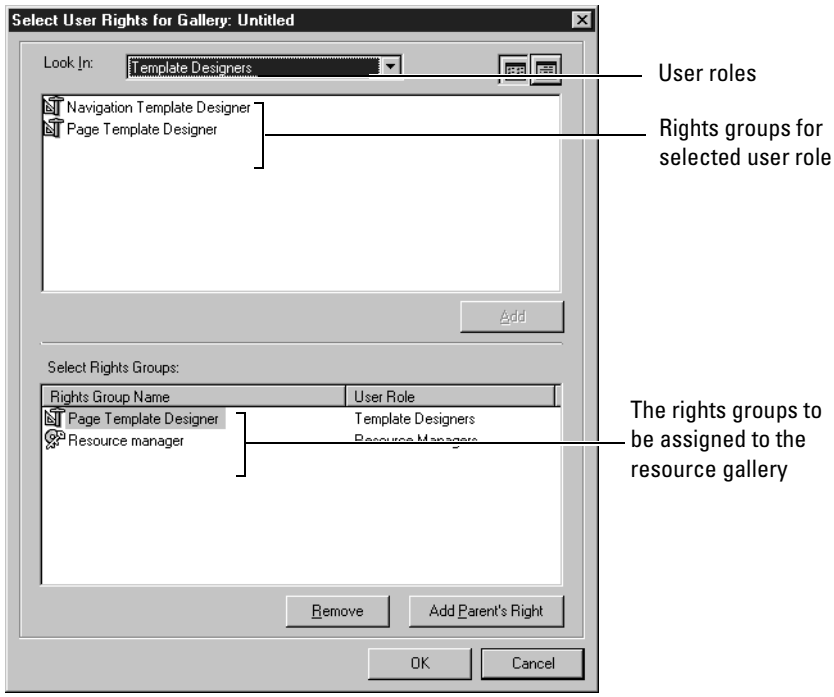
New Template Gallery dialog box

3. Name the new template gallery something that would to make it easy to identify. In this case you may wish to just name it "Test Gallery" for now. An example of why naming is so important, is if the gallery is going to contain navigation templates, name it so that authors will not confuse it with a gallery that contains page templates.
4. Enter a description about the contents of the gallery 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

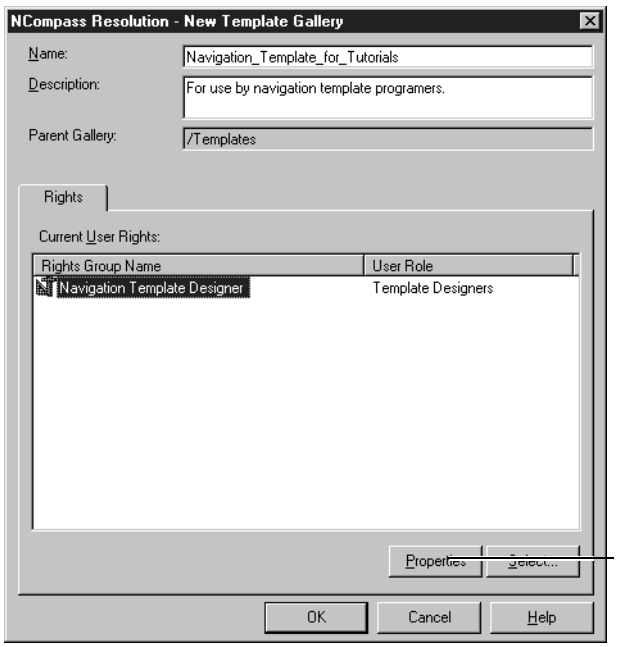
2. Select a user role from the Look In drop-down list. You can assign authors, editors, and template designers to the template gallery.

   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.*

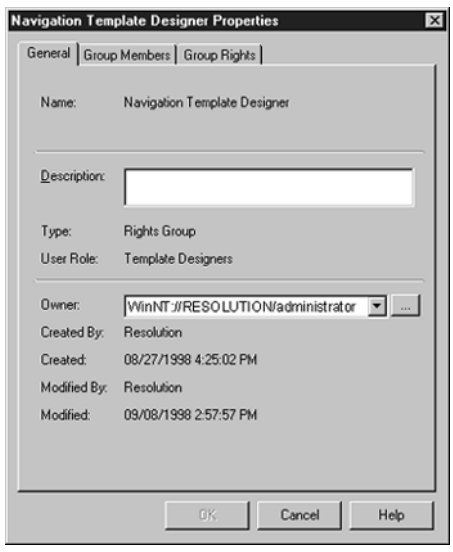
3. Select rights groups from the Look In box, and click **Add**. The rights groups appear in the Selected Rights Groups box.

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



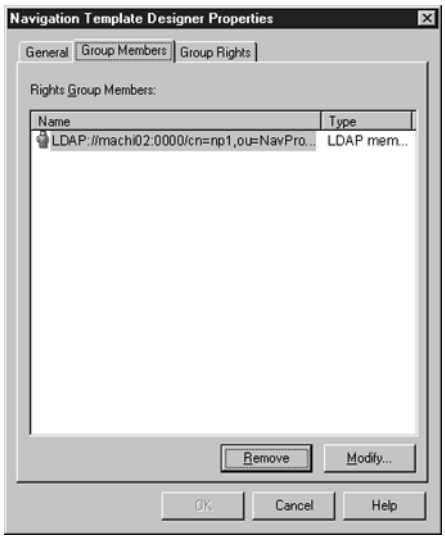
Click to view the members of a Rights Group.

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

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.

Module 7

User Roles and Rights in the Site Builder

User roles and rights in the Site Builder

Overview

In this section we will revisit rights and rights groups in greater detail. You will see the process involved in assigning rights to user roles in the Site Builder.

Objectives

By the end of this section, you will:

- understand the administrative role in viewing and assigning group rights
- understand user role similarities and differences in the group rights menus.

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 Content 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 a MSCMS 2001 rights group, which is a group of one or more users. Each role in MSCMS 2001 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.

User group access in the Site Builder

Site Builder Roles	Folders	Channels	Templates	Resources	User Roles
Author	W ✓	W ✓	✓	✓	✗
Editor	W ✓	W ✓	✓	✓	✗
Moderator	✗	W ✓	✗	✗	✗
Resource Manager	✗	✗	✗	W ✓	✗
Template Designer	✗	✗	W ✓	✓	✗
Administrator	W ✓	W ✓	W ✓	W ✓	W ✓
Subscriber	✗	✓	✗	✗	✗

Legend

✓ Read only access. A **"W"** indicates read/write access.

✗ No access

User role functions

User Roles

- Your role (subscriber, author, editor, moderator, template designer, administrator, resource manager) determines what actions you can carry out in containers.
- In the Site Builder, the **User Roles** icon is available to the administrator only.
- The administrator keeps track of all users with user roles, enabling them to log on and play a role in Content Management Server.
- The administrator chooses an NT, Active Directory or an LDAP user or group and allows that user or group to be an author, an editor, or a moderator.

Authors

Authors create pages and submit them for approval by an editor. Some users have rights to author in more than one folder. Authors usually post their own pages to a channel, though in some cases it may require editor approval.

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. They can approve or decline pages. They can also revise pages before approving them.

Editors are assigned to Site Builder folders. 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 ask for the schedule, the page, or both to be revised. Alternatively, they can revise the schedule of a posting before approving it. However, they cannot revise the page content itself. Moderators can change the order of postings.

Resource managers

Resource managers are responsible for managing resource galleries and their 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 page uses a page template.
- Navigation templates allow subscribers to navigate the channels of a 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.

Template designers are most likely to be Web site programmers. They typically know HTML, VB Script, ASP, and JavaScript. The administrator assigns folders to each template designer in the template gallery where the designers create, edit, and store their templates.

Administrators

Administrators can do all tasks that any other role can do. However, administrators are solely responsible for setting up MSCMS 2001 hierarchies (folder, channel, gallery) and MSCMS 2001 rights groups. Administrators automatically have subscription rights to all channels.

To view users on a domain, the administrator account must have "Access computer for network" rights on that domain's Primary Domain Controller (PDC). If these rights have been removed, administrators cannot assign rights or add users to MSCMS 2001 rights groups. If "Access computer from network" rights have been removed, the network administrator must reassign them.

Subscribers

Subscribers are those who can browse the site, but not edit it. A user can belong to one or more subscriber groups. As an example, the HR department could allow certain users to view the company's private content in a secured channel.

Subscribers are users outside of, or within, the organization who have viewing only access to pages published on the site. Internal users are given access to one or more subscriber groups. External users can log on to your site as guests. They browse channels to which guest subscribers group members have been given access.

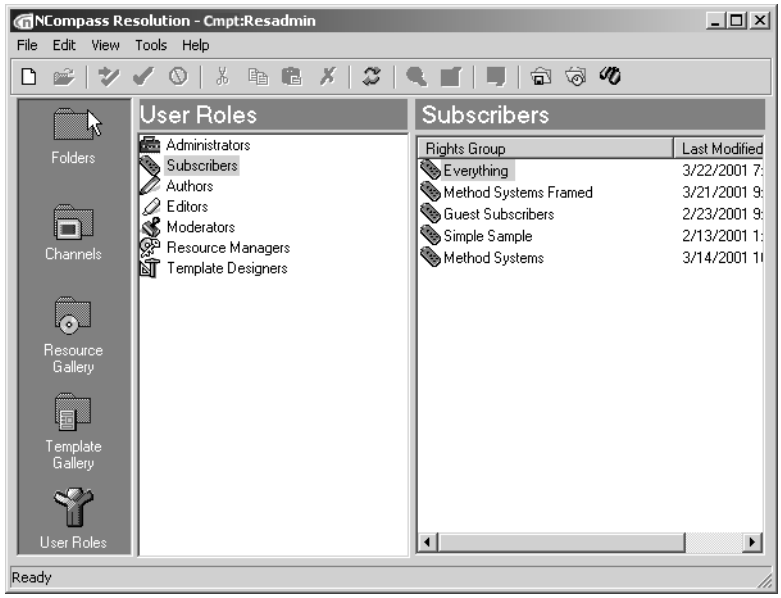
Subscribers do not have access to the MSCMS 2001 authoring environment unless they are also an author, editor, resource manager, template designer, or administrator. Any Windows NT/2000 LDAP account can be assigned to the subscriber role, provided the account resides on a domain that is in a trust relationship with the machine hosting the MSCMS 2001 server.

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 view content they have created as it would be seen by a subscriber.

User role rights

Exploring different user roles

1. Click the **User Roles** icon. Only an administrator has access to this icon.



The administrator User Roles view

2. Click **Author.**
3. In the Rights Group pane, double-click the first rights group you see.
4. Click the **Group Rights** tab.

   You can see the rights of that group.
5. Click **Editor.**
6. In the Rights Group pane, double-click the first rights group you see.
7. Click the **Group Rights** tab.

   You can see the rights of that group.
8. Click **Moderator.**
9. In the Rights Group pane, double-click the first rights group you see.
10. Click the **Group Rights** tab.

    You can see the rights of that group.
11. Click **Resource Manager.**

12. In the Rights Group pane, double-click the first rights group you see.
13. Click the **Group Rights** tab.

    You can see the rights of that group.
14. Click **Template Designers.**
15. In the Rights Group pane, double-click the first rights group you see.
16. Click the **Group Rights** tab.

    You can see the rights of that group.
17. Click **Administrator**.
18. In the Rights Group pane, double-click the first rights group you see.
19. Click the **Group Rights** tab.

    You can see the rights of that group.
20. Click **Subscriber Roles**.
21. In the Rights Group pane, double-click the first rights group you see.
22. Click the **Group Rights** tab.

    You can see the rights of that group.

Modifying group rights

1. Click **User Roles > Subscribers.**
2. Right-click the "Guest Subscriber" group.
3. Select **Properties.**

   You can see what rights the Guest Subscriber has in the properties box.
4. Select "Group Members."
5. Click **Modify.**
6. Click the domain or container and select the wanted users and/or groups.
7. Click "Group Rights."

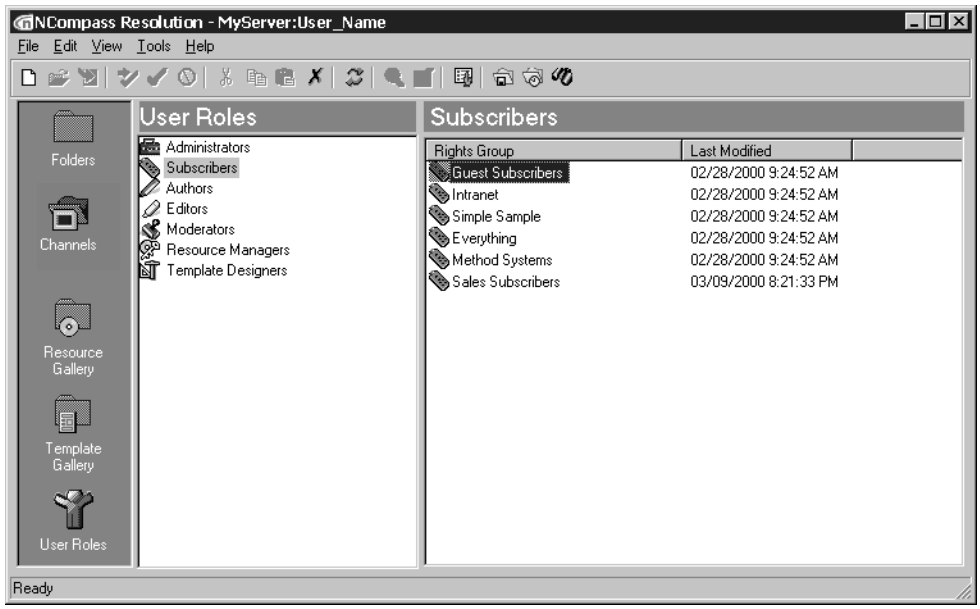
   Notice that the channel structure is the exact channel structure that the user has access to.

Assigning publishing rights to users

The following shows the 3-step process to assign publishing rights to users.

Step 1: creating a rights group

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



Subscriber roles and subscriber rights groups

2. Click the user role Subscribers.

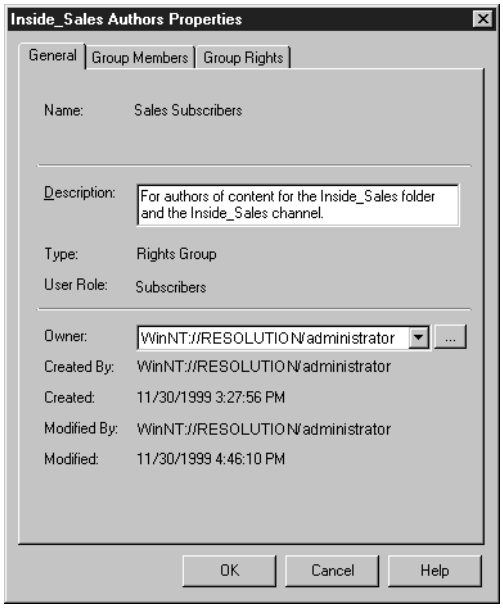
   A list of existing rights groups for Subscribers is displayed on the right.

3. Right-click the Method Systems 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 does not allow duplicate names of rights groups.

5. Double-click the rights group you just created.

   The Properties dialog box opens.



Rights Group Properties dialog box

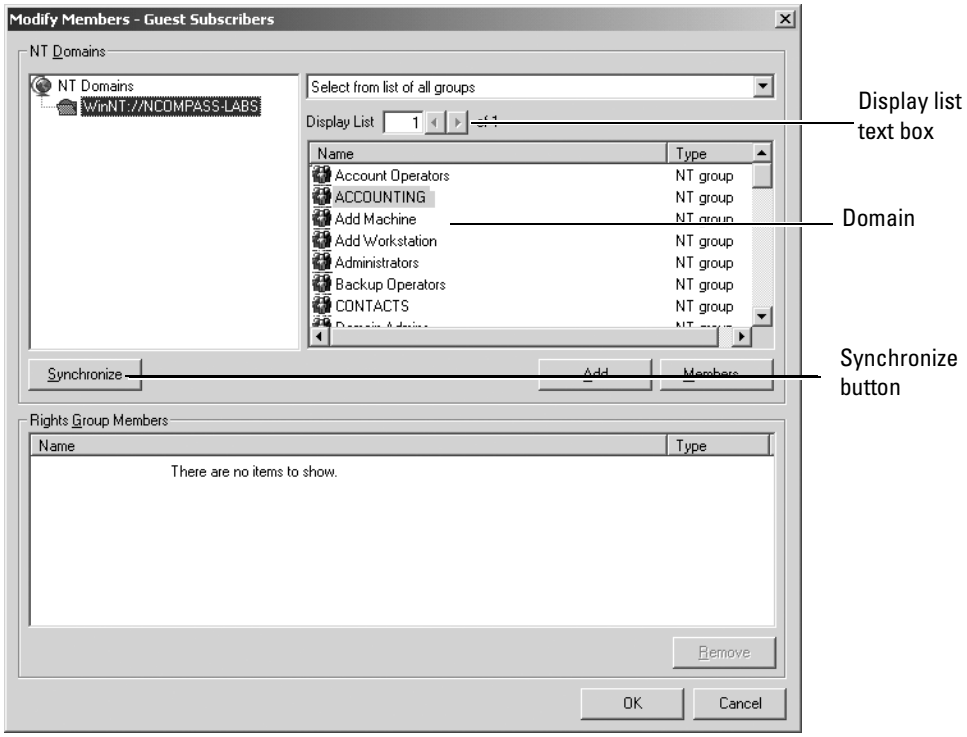
6. On the General tab of the dialog box, enter a description of up to 256 characters. Enter a description. This description should indicate which containers the rights group has rights to.

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 NT 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. If new users have been recently created, click **Synchronize**. 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 NT, and the Organizational Units if using Site Server, or the Organization Units and containers if using Active Directory.

Note

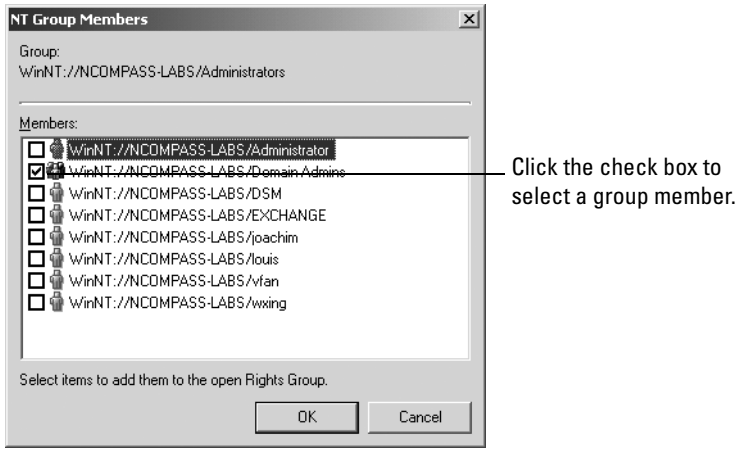
Generally, you want members of any subscriber rights group to have access to the channels that have been assigned to the Guest Users rights group. If a subscriber rights group has access to only a few channels, it may save time to assign those channels to the Guest User rights group.

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 NT).



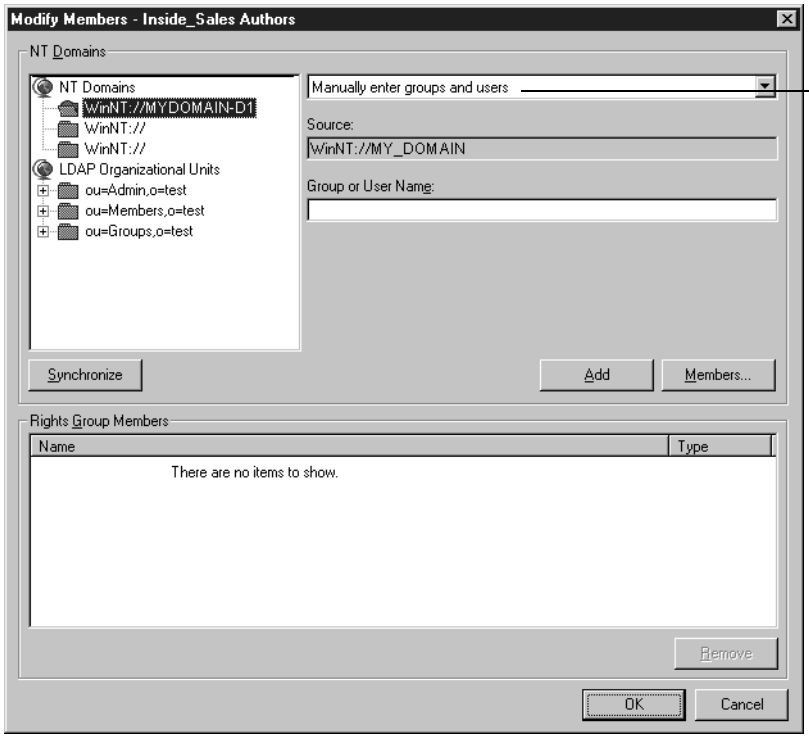
Group Members dialog box

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 them (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

Click **Synchronize** for an immediate refresh of your Site Builder. Otherwise, your Site Builder will be updated automatically within 15 to 20 minutes.



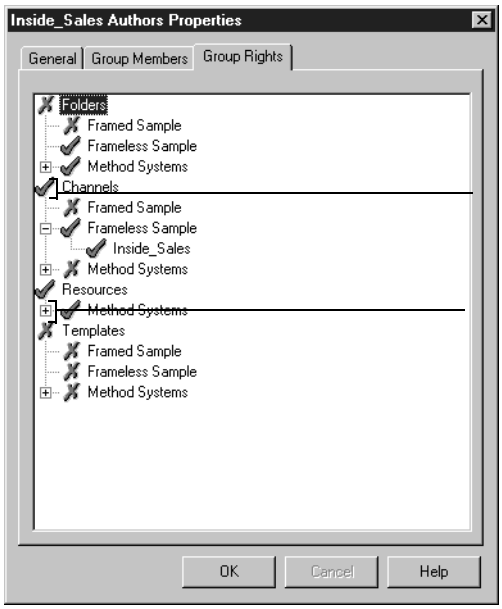
You can also select groups and users manually by clicking "Manually enter groups and users" from the drop-down list.

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.

Step 3: assigning containers to a rights group

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 cross 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 can 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.

Module 8

Creating Templates in the Site Builder

Creating templates in the Site Builder

Overview

This section familiarizes you with the process of template creation.

Objectives

By the end of this section, you will be able to:

- select a template gallery, HTML editor, and a page template
- understand the template design palette
- manipulate placeholders in a template
- use the different applications for page and navigation templates.

To create or modify a template, users must be in a template designer user group and have access to one or more containers in the template gallery. In MSCMS 2001 there are two types of templates and both are created the same way, but each serves an entirely different purpose.

While logged on as an administrator, you can access all containers.

Navigation Templates

Templates Summary

- Each channel must have a navigation template. Templates are selected using the channel properties.
- In a frameless site, the navigation template code contains a re-direct to a posting.
- In a framed site, the navigation template properties are assigned the frameset file and should populate a frame.
- Authors and editors cannot select navigation templates.

Channels are containers that represent the site structure. They have no content. When a user clicks a channel hyperlink, the content displayed is a posting of a page in that selected channel.

Remember that with a navigation template, you do not create any navigation. That is, a navigation template has nothing to do with "navigation." So what is a navigation template? The navigation template provides the association from the channel hyperlink to content.

Framed navigation templates will display their associated frameset. Frameless navigation templates use table cells to lay out navigation elements. Only MSCMS 2001 template designers and administrators can create and edit navigation templates.

Navigation templates are ASP scripts assigned to every channel. They are created using the Site Builder and an HTML editor. When a user clicks on a channel link, the ASP script determines the behavior of the browser.

There are two types of site navigation—frameless and framed.

Frameless navigation sites

In a frameless site, the navigation template does not actually contain navigation. Actual navigation is referenced in the page templates.

In frameless navigation, the navigation template redirects you to a posting—since the content is in the posting and not the channel. Thus, on a frameless site, a navigation template is associated with the channel objects only.

In this particular instance of a frameless site, a recommended best practice is to have the script in the navigation template be a simple "re-direct." This will re-direct navigation to a specific posting. In this case, that specific posting is called "default." This is the reason why there is a posting called default in each channel.

Framed navigation sites

A framed site:

- displays each frame as a posting
- determines which frame is called and where it is placed on the Web page by using the frameset file.

A frameset file is located on the server file system. It determines which frame has been called and its position on the Web page. The frameset file must be located on the file system of the server. The navigation template points to the frameset file for the channel, and depending on the frameset file, a posted page could end up being three or more separate postings.

For example:

<html>Navigation</html>	Navigation template populates this frame
<html>posting 1</html>	Posting 1 (could be dynamic or manually set)
<html>posting 2</html>	Posting 2 (could be dynamic, manually set or a file on the file system)

For a framed site, in part of the "Navigation Template Properties," you set the "frameset" file. Normally the frameset file resides on the file system and is called ***"frameset.asp."*** This file determines the frames of the Web page. Each frame must be populated by an HTML page. One of the frames could be populated by the script inside the navigation template itself and the others by postings.

Every time a user clicks on a link that points to a channel, the navigation template script executes. The possibilities with ASP, VBScript, and HTML are abundant.



Note

A "cover" page property is associated with "Channel Properties." This property is used with a framed site. The cover page is used to populate a frame automatically when the frame has no content. By default, MSCMS 2001 supplies a cover page to any frame. Even the Channel Properties "cover page" is not set. That content is set in the Server Registry and points to a file on the file system called ***"cover.asp."***

It is advised that you save Navigation templates in different folders from page templates.

Your view of the Site Builder and Web Author looks like this:



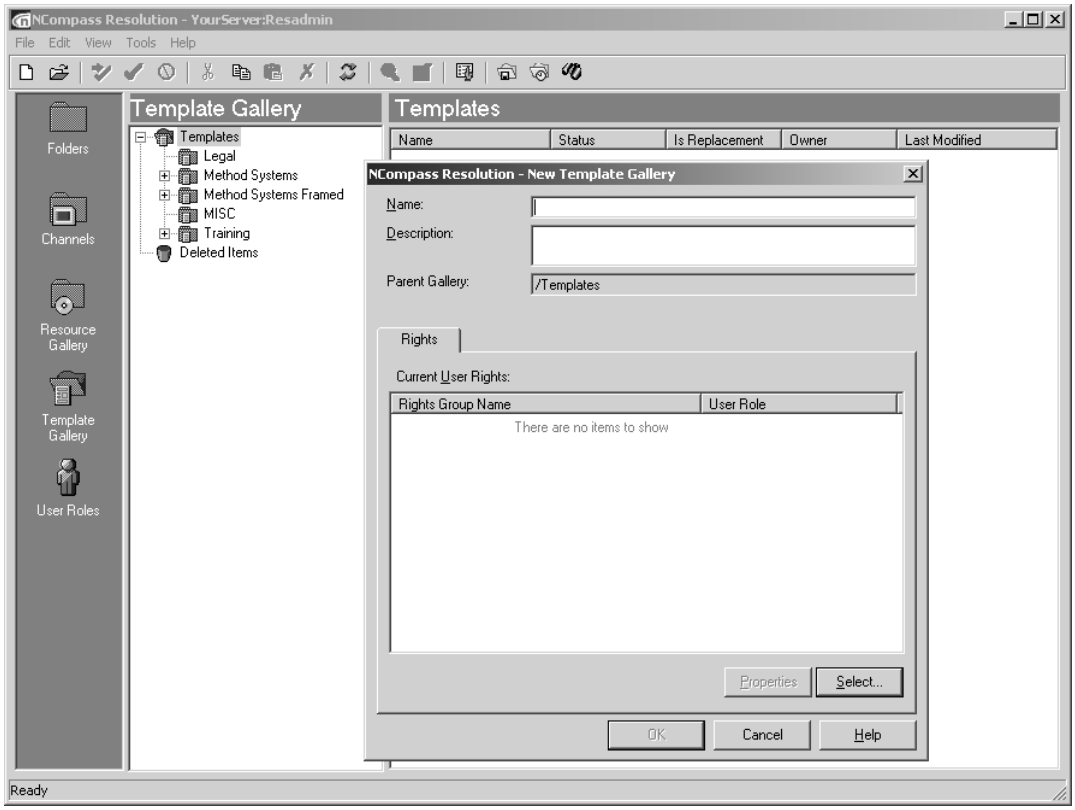
Creating a template

The next three tasks involve selecting a template gallery, specifying an HTML editor, and creating a simple page template.

Normally the administrator would associate a user with a new gallery, but in this case it is not necessary.

Selecting a gallery

1. Click the **Template Gallery** icon.
2. Right-click the top level folder.
3. Select **New > Gallery.**



The template window is displayed and you can type the name of the new gallery

4. Type in your choice of name for the new gallery and click **OK.**

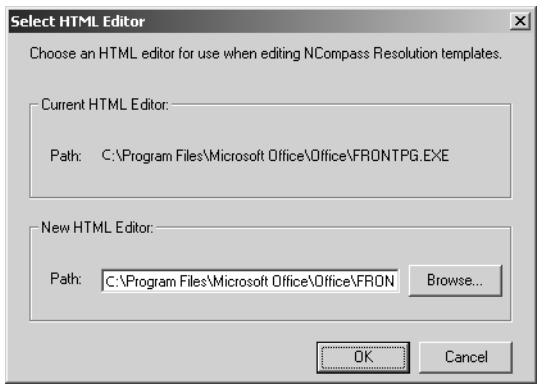
Some HTML editors are "What You See Is What You Get" (WYSIWIG) and will change script without notifying the user. Be careful using these editors and any ASP code. Once the HTML editor is launched, MSCMS 2001 does not add or change code in your HTML editor.

Select an HTML editor

1. Click **Tools** at the top menu of your Site Builder screen.

   An option list becomes available.

2. Select the "Select HTML Editor" option and pick the executable of your HTML editor by using the **Browse** button. Browse to the location on the user PC where the HTML editor is installed. Select the executable file of the HTML editor.



Selecting an HTML editor window

   The HTML editor you select launches every time you create a new template or edit an existing one.

3. Click **OK**.

Page templates

Page templates are one of the key tools in building sophisticated pages easily. 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. This way an author can quickly create different versions of the page to suit different audiences.

Authors and editors must use a page template to provide structure and design to their pages. They do not have access to navigation templates, but the same process is used to create both page templates and navigation templates.

Selecting a new page

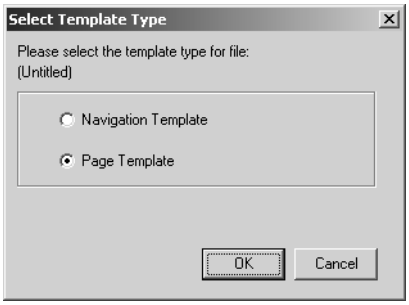
1. Select the gallery we created and right-click it.

2. Select **New > Template.**

   The template type window appears.

3. Select **Page.**

   Two applications are launched—the design palette and your selected HTML editor.



Selecting a page template

Template Design Palette

In the template gallery, you can right-click any template to edit it. When you click **Edit Template HTML** or **New Template**, the template design palette opens. The design palette manages the joint session between and the HTML editor. The palette provides access to items in the resource gallery as well as HTML edit controls that can be dragged and dropped into proto-templates. When the HTML editor saves the template, the new version of the template is written to the MSCMS 2001 database.

The design palette contains your link to the:

- MSCMS 2001 server and database
- resource galleries
- controls and placeholders.

- Because of the communication link, the script you write in the HTML editor will be saved to the MSCMS 2001 server. You can create placeholders from the Controls tab.
- If you close the design palette, you will lose the link and will not be able to save changes in your code to the MSCMS 2001 server.


Note
It is important to remember not to change the reference numbers in your code.

We will create a simple page template in the pages to follow.

The particulars of editing...

- If you are using MS FrontPage, the basic script of a Web page is automatically inserted for you.
- For the first page template we will use the basic code on your template and add a table to it.
- The result is a simple page template without any functionality.
- An HTML editor, such as FrontPage, may allow for quick table creation. In the following exercise we will employ this method. You may do steps 1 to 6 by typing code as well.

Authors and editors are not able to edit or modify the title. MSCMS 2001 allows for the insertion of images from the resource gallery and from your file system. The same is true for attachments, video files, or any “mime” types that can be made available on the Web.

As a template designer you must be aware of potential results when an author or an editor inserts content in your page. In the following exercise, you should allow for authors or editors to insert content into the lower left-hand cell. You can do this with placeholders.

The “Controls” tab allows you to insert placeholders in areas of your Web page—your template—where your contributors will add content. Notice that all placeholders are considered images in your HTML editor. It is possible to name a placeholder. This is good practice, in case you want to reuse the content later.

Note
You will need your design palette open to do the following tasks since it is your link to the MSCMS 2001 server.

Editing a template

The following example contains instructions specific to Microsoft Frontpage.

1. After your HTML editor has opened (see previous task “Selecting an HTML editor,”) click the **HTML** tab on the bottom of the window.

   You see the HTML source code here.

2. Click your mouse in between the < body > < /body > tags.
3. Click **Table > Insert > Table.**
4. Type “**3**” in the “rows” field and “**3**” in the columns field. Click **OK.**
5. Click the “Normal” tab.
6. In that table, middle cell, top row, type the word ***“Title”*** and bold it and position it in the middle of the cell.

   The word “Title” in this particular template is embedded in the template.

7. Insert an image (drag and drop) from the resources into the top left cell.

   This image is located in the resource gallery and is not editable or deletable by the authors or the editors.

Note
Do not drag and drop the image from the preview area. The preview creates a temporary file that will be deleted next time the server is started. The result will leave a broken link.

8. Insert a second image from your resource gallery in the top right cell.

   This image comes from a virtual folder on your Web site.

9. In the design palette, select the “Controls” tab.

   You can see the “HTML Edit Control.”

10. Click the HTML Edit Control and drag and drop it (copy and paste if using Notepad) into the lower left-hand cell of the table.

    You now have a placeholder. Add a second placeholder to this template.

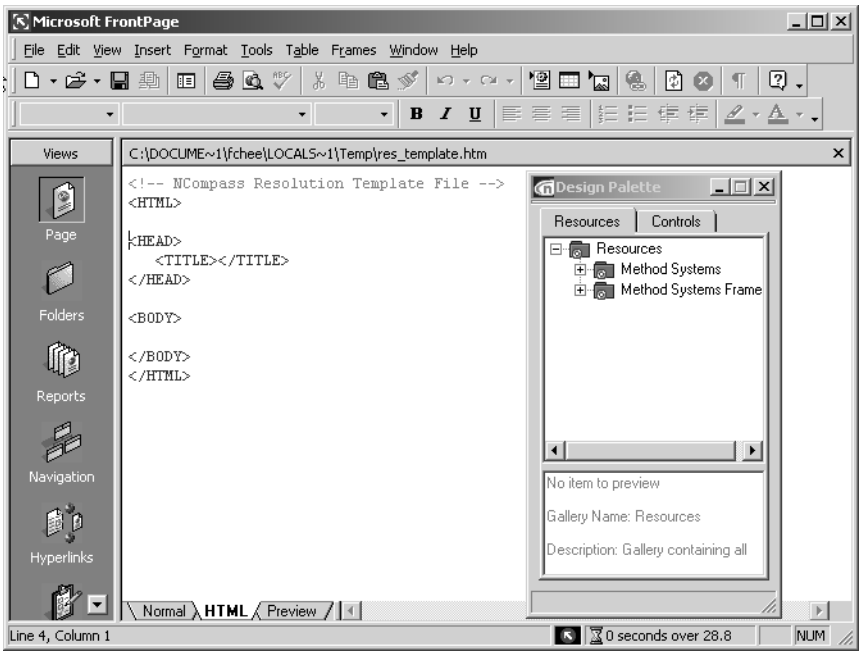


The HTML edit control in the design palette

11. Click the HTML Edit Control and drag and drop (copy and paste if using Notepad) into the lower right-hand cell of the table.

    Now we have two areas where authors and editors can insert content.

12. Make sure you see the code of the template on your screen.



Your HTML editor with the MSCMS 2001 design palette

By naming placeholders, it is easier to locate them using the MSCMS 2001 Publishing API and reuse the content.

In this template—you should see the code on your screen—it is possible to add as much HTML, VBScript, ASP, and JavaScript as you want. You can also use other Web technologies like Java. When the script in the template is complete, save it. It is possible to preview the recently saved template without closing the HTML editor and the design palette.

Return to the Site Builder to see the template you just created. This template is located in the same folder from which you right-clicked and selected the new template.

The preview will indicate any code errors there may be in the template. If there are errors, you can fix them in the template, save it, then refresh the preview. You will then see the results of your code fix. If there are not any errors, the code is accepted. By closing the design palette and the HTML editor you have completed step one of creating a template in MSCMS 2001.

Naming a placeholder

1. Visually locate the "ALT" attribute text. Highlight the ALT text.

   It looks like this: "HTML Edit Control 15" of that Placeholder image.

2. Remove the "HTML Edit Control 15" text and replace it with the word "logo" or any other name. Keep the other one as is.



Note

Since we still have the design palette open it is possible to save directly to the MSCMS 2001 server. But before you save it you should view the lower part of the design palette.

3. Bring the design palette to the front and notice the lower area of the design palette. This area indicates you have saved your work.
4. Click the **Save** icon of your HTML editor.

   You can see "Saving Untitled" briefly appear in that area. You have now saved the script to the MSCMS 2001 server.

5. Open your Site Builder and go to the template gallery in which you saved your template.
6. Select the newly created template called "Untitled."

   As you can see there is one called "Untitled". Right-click this template to preview it.

7. Click the **Preview** button of the tool bar and select **Live Site Mode**.

   The preview of the template we just created appears. Notice that it does not include any of the look and feel found on the Method Systems site. It is a plain template with two images—including the one you inserted from the desktop—and two empty placeholders.

8. Close the design palette and the HTML editor.

   You are back to the Site Builder in the template gallery.

Placeholders in templates

The “General” tab is the default tab displayed. On this tab you can locate the name of the placeholder. In this case, we named this placeholder “logo” in the script.

Each placeholder is independent from the others, not only from the ones used on that specific template, but system-wide. It is good practice to name and give placeholder properties to each placeholder. After you set properties to all placeholders in your template, save before exiting.

It is good practice to insert temporary content that indicates to authors and editors the uses of a particular placeholder.

In the screen below you are able to set each of the placeholder properties. Normally, these properties are defined by project specifications. It is possible to insert default content that tells authors and editors the uses of a particular placeholder.

Multiple placeholders in a template

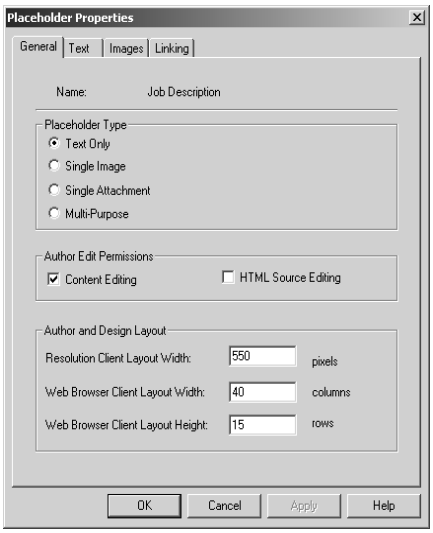
This next step is necessary only if you have one or more placeholders in the template.

1. Right-click the “Untitled” template and click **Open**.

   The Template Design window called “Untitled” template appears.

2. Right-click inside the placeholder on the left-hand side.
3. Select **Placeholder Properties.**

   The Placeholder Properties are set up with different tabs on this window.



The Placeholder Properties window

4. Click **OK** to close the "Placeholder Properties" page.
5. Right-click inside the second placeholder and click **Properties**.

   The Placeholder Properties window appears.
6. As in the first placeholder, set the Properties based on the project specifications for all the placeholders.
7. Click **Close.**

   You are back in the Site Builder.

Now that the navigation is approved, all authors and editors with access to this folder can use this new template.

Naming the template

After you've created the script of a template, inserted placeholders, and set the properties of those placeholders, give the template an appropriate name. The project specifications should also indicate the name of each template created for a site.

1. Right-click your template and select **Rename.**
2. Give a meaningful name to the template.

   Notice that the template status is "Saved." This means it is not yet available to the authors and editors.
3. To make the template available, right-click the template and select **Approve.**

   The icon beside the template changes to a check mark.

Module 9

Tutorial Wrap-up

Overview

Overview

This section is the wrap-up for the entire tutorial. It reviews the topics taught and ensures that you are ready to build your own MSCMS 2001 site.

Objectives

You should now be able to:

- build your site equipped with the tools and strategies you learned in this tutorial
- feel confident moving forward and learning more about the capabilities of Microsoft Content Management Server 2001 to manage your site.

Tutorial review

In this tutorial, we covered the basics of the following topics:

- Authoring and publishing in the MSCMS 2001 Web Author
- The MSCMS 2001 Site Builder and administration
  - Creating containers for users
  - Creating user roles and assigning rights
  - Creating templates.

MSCMS 2001 site planning checklist

In addition to the regular Web site building tasks, when building a MSCMS 2001 site the following need to be considered:

- how your folder and channel structure will operate
- how your workflow will operate
- who needs to be assigned roles
- which areas of the site those roles will be assigned
- how your Web Author will look and operate
- how many and what types of templates you will require
- who will be using the templates and what type of formatting you will allow them
- where you can use the MSCMS 2001 Publishing API to automatically generate pages or to display content in more than one area of the site.

You can learn more about the MSCMS 2001 Publishing API and more about the material covered in this tutorial by referring to the MSCMS 2001 user guides:

- *Setup Guide*
- *Page Template Designer's Guide*: provides details about all aspects of creating and publishing page templates using MSCMS 2001.
- *Site Programmer's Guide*: provides comprehensive information required to work with navigation templates in the MSCMS 2001 Site Builder and MSCMS 2001 Web Author.
- *Publishing API Reference Manual*: covers the details of the Publishing Application Programming Interface (API) for MSCMS 2001.
- *Site Administrator's Guide:* assists site administrators in the technical setup at the customer Web site using MSCMS 2001.

Building your site

Overview

Building a MSCMS 2001 site often takes two phases. The first involves the Web building team and is concerned with setting up the site. The second occurs when the site is handed over to authors to populate it with content. The elements of workflow can then take place.

Site building

Your team will need to:

- design the Web Author user interface
- create the site framework in MSCMS 2001
- create the site-wide navigation
- create page templates
- test the page templates for ease of use for authors
- create and assign workflow groups
- test the workflow.

Content production

To produce content, your authors, editors, and moderators need training on your site.

You are now ready to take advantage of all that MSCMS 2001 has to offer in Web content management.