

**TECHNICAL DOCUMENTATION** 

## **DEVELOPER TRAINING GUIDE FOR CLASSIC API**

**CROWNPEAK CMS**

February 2012

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## INTRODUCTION

This Developer Training Guide is intended to provide an overview of the development process, with a particular focus on template programming.

To prepare for the lessons in this document, CrownPeak recommends some familiarity using the CMS as a regular end user. You should have logged into your custom CMS instance and used the CMS to create, edit, and publish content to your live Web site. As an end user, you should have read the CrownPeak CMS User Guide, which explains the interface and concepts of CMS's in general.

Once you are familiar with the uses of the CMS, you should review the Administrator and Developer documentation. This includes the Admin Guide, The Design Patterns document, the Developers Reference Guide, and the API Reference Guide. Being familiar with these manuals will make this training document easier to digest.

All of this documentation should be available in the Help menu of your CMS instance. If a guide is not available to you, please contact your CrownPeak Administrator to make it available.

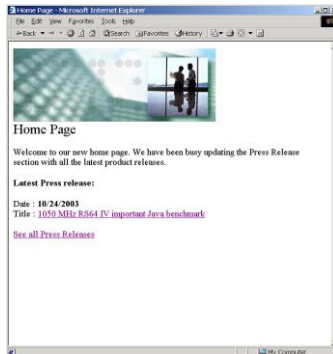
If you are more interested in modifying the look and feel of your site in the template files, you may want to review the Developer Reference Guide instead and review the Templates and Template Files section of that document. Also, be sure to read the Tips section of that document; there are many useful time-saving suggestions there. In addition, the Common Actions document has tips on development tasks we have encountered regularly when implementing CMS instances.

At CrownPeak Technology, we take great pride in the CrownPeak CMS development environment. It is the same interface that we use to develop all of our projects, so we welcome any suggestions for improvement!

Note: A zip file containing sample html files and graphics is included with this document. If you did not receive the file, please contact CrownPeak.

# BUILDING A SIMPLE SITE WITH PRESS RELEASES

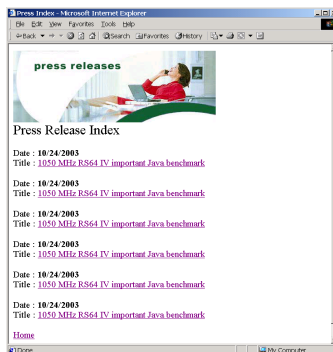
For this training, you will be working with a simple site that uses minimal HTML. The purpose of the HTML files is to provide a structure to create templates within the CMS.



## ➤ Home Page

The Sample Home page structure contains an image, message and the most recent press release.

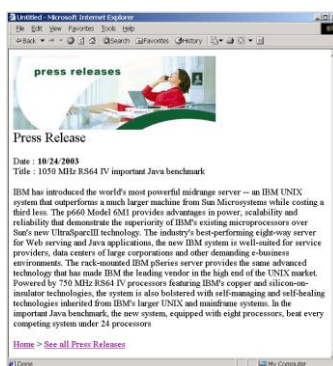
The image can be deleted or changed and the message can be edited. The title of the most recently dated asset within a referenced press releases folder is automatically inserted into the page.



## ➤ Press Release Index Page

The Press Release Index Page shows the titles of all the press releases sorted in chronological order.

This page is automatically built by the CMS by reading the number of assets within a referenced press releases folder.










## ➤ Press Release Page






The Press Release Page shows all of the content for a single press release.

## OVERVIEW OF FILE/FOLDER PATHS AND DESCRIPTIONS

The CMS file system is structured like the Microsoft Windows system, and looks similar to what you see when you open a folder in Windows Explorer. Even though the data is contained in an SQL database, the assets should be located within a logical and hierarchal structure.

The example CMS structure below shows one possible way the file and folder hierarchy can look with a sample site which contains a home page, press release index, and a press release detail page:

CMS Site File Path	Description
 /Site/Press Releases	Folder containing press release assets
Round 2 Funding Approved	A sample press release asset
Q3 financials	A sample press release asset
ACME deal signed	A sample press release asset
 /Site/Press Index	Folder containing press index page
Press index	The press index asset (typically only one since it is republished when releases are added, but other versions of a page can exist that are set up for publishing at different times)
 /Site/Home Page	Folder to contain the Homepage asset
Homepage 2003_05_10	A Home Page asset (typically only one home page is live at a time)
Homepage 2003_06_15	A Home Page asset (typically only one home page is live at a time)
 /Assets	Folder containing site-wide images or other media files similar to /images or /graphics on many sites.
Home.jpg	The graphic used on the home page (ex. corporate logo)
Press.jpg	The press release page logo image
System Template Path	Description
 System	The system folder – most of the admin files are usually in here
 Templates	All of the templates are usually stored in this folder
 Press Release	This folder contain all of the template files for the Press Release Template
input.asp	This input.asp template file defines the input form for entering new press releases
post_input.asp	This template file is run when the user clicks on save from the input form – can be used for field validation and any post submit data manipulations, cleanup etc.
output.asp	This output.asp template file defines the final output HTML for a press release

filename.asp	This template file allows the final published filename of press releases to be modified via code beyond the publishing configuration.
 Press Index	This folder contains all of the template files for the Press Index Template
output.asp	Defines the HTML layout of the press index page – automatically grabs a list of press release titles from the /Press Releases folder
 Home Page	This folder contains all of the template files for the Home Page Template
input.asp	Defines the home page input form – in this case a single text field for the welcome message and an image upload
System Template Path	Description
output.asp	Defines the HTML layout of the home page – uses the welcome message, and grabs the three most recent press release titles from the /Press Releases folder
upload.asp	This template file allows thumbnails of uploaded images to be displayed in the input template
preview.asp	The preview.asp template file allows for any special CMS preview options not needed for site publishing.
 Models	This folder contains all the models in the system – a model consists of assets that are cloned when the File > New menu is used
 Press Releases	The Press Release Model folder – anything in here is available in the New menu for the folder that uses this Model.
Press Release	A blank press release asset (just like in /Site/Press Releases). This is the simplest model – a single asset. Much more complex models can be created with parallel and nested folders and multiple assets. Recursive models are also possible.
 Home Page	The Home Page Model folder
Home Page	A blank Home Page

## ➤ Configuration Settings

For the above assets, the following configurations apply. There are many configuration properties for things like access control, workflow, etc. The following are just a few related to editing:

File Path	Configuration Settings
/Site/Press Releases/	<b>Model</b> is set to /System/Models/Press Release
/Site/Press Releases/* and /System/Models/Press	<b>Template</b> is set to /System/Templates/Press Release

File Path	Configuration Settings
Release/Press Release	<b>Publishing properties</b> are not set since the filename.asp template file will create a code generated filename with an asset ID and data for the filename. Example: 2003_10_21_13524.html
/Site/Press Index/Press Index	<b>Template</b> is set to /System/Templates/Press Index
	<b>Publishing properties</b> are set to press_index.html
/Site/Home Page/	<b>Model</b> is set to /System/Models/Home Page
/Site/Home Page/* and /System/Models/Home Page/Home Page	<b>Template</b> is set to /System/Templates/Home Page
	<b>Publishing properties</b> are all set to the same file – index.html. When one gets published on top of the current one, the current one is <b>automatically retired</b> by the system.

## ➤ Workflow

Assets also have a Workflow specification (detailed later in this document) that configures a workflow for that asset. The workflow represents the document lifecycle that content will go through from creation to eventual retirement and archiving.

Once an asset is created, workflow commands are represented as CMS menu items such as Edit > Send for Approval, Edit > Reject, Edit > Approve, would be used to take the asset through the workflow steps up to publishing.

Scheduling is also configured during the workflow either by the user, or automatically by the system.

**Note:** A combination of the publishing properties and workflow can establish multiple publishing points for servers such as QA, Stage, and Live.

## STEP-BY-STEP CONSTRUCTION

The following sequence of steps walks through the process of developing the sample site shown above.

In normal production, some of the steps have shortcuts or wizards. But for the purpose of this exercise, you will gain a better understanding of the system and development architecture by working through the process in more detail.

## ➤ Content Folders and Global Images

In preparation for this site, you need to set up the following content folders:



Folder Name	Path	Contents
Home Page	/Site/Home Page	Editions of the homepage (mostly the welcome text)
Press Releases	/Site/Press Releases	Individual press releases
Press Index	/Site/Press Index	Press releases index

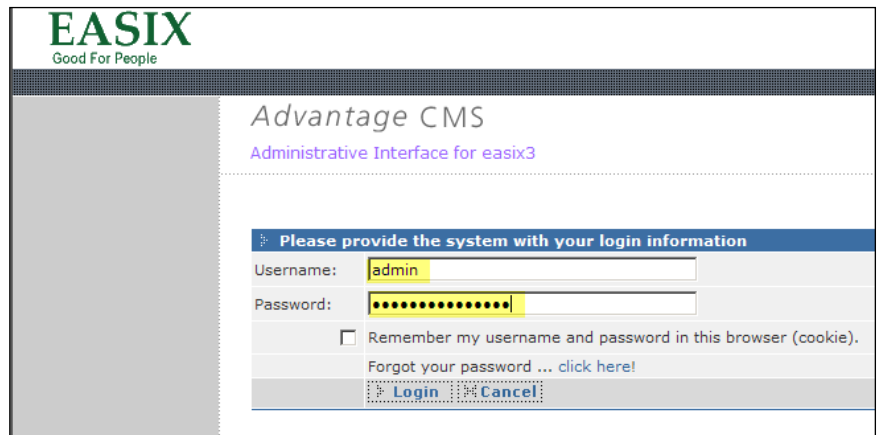
**Note:** Only one file will be in the Press Index folder since it will publish automatically if any press releases change. An index page of this type can be placed anywhere in the system. Another common location would be in the /Site/Press Releases folder. We are using a separate folder in this case to avoid confusion since the Press Release folder will only contain press releases. If the site has multiple single index pages, you can use a /Site/Indexes folder. You can also place the index file in the Press Releases folder—but then hide it so it won't normally be displayed.

### ➤ Lesson 1: Create a Folder for the Press Releases

Press releases make up the main content for this sample site. The following steps will configure how they are created, edited, and displayed.

The /Site/Press Releases folder will hold the content for the Press Releases. To create that folder:

1. Log in to the system:



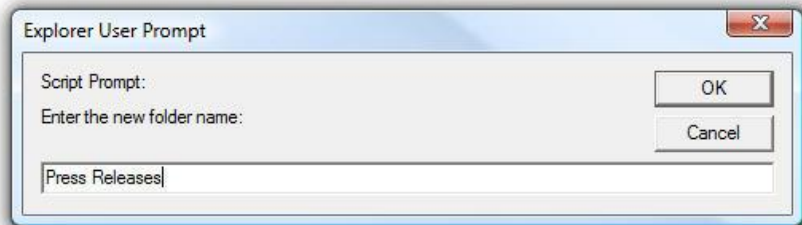
You should have already received your account information. The URL will be something like [http://advantage\[n\].crownpeak.com/\[PROJECT\]](http://advantage[n].crownpeak.com/[PROJECT]).

2. Choose File > Open (do not select any of the Open submenus).
3. Click on the Site folder to open it.

Type	Label	Status	Changed By	Size	Changed On
Folder	Assets		CrownPeak Admin	3	6/7/2007 15:03:36
Folder	Site		CrownPeak Admin	5	12/3/2007 17:17:42
Folder	System		CrownPeak Admin	12	6/4/2007 10:56:17

- Choose File > New > Folder.

This dialog box appears:



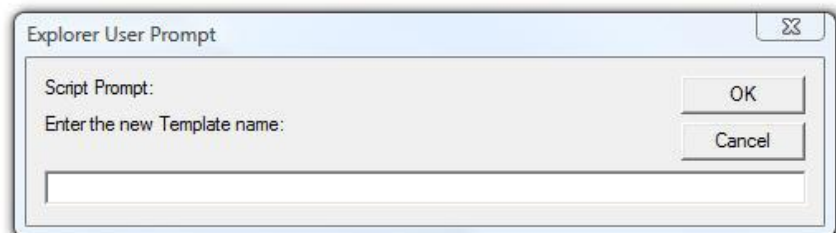
- Type "Press Releases" in the dialog box and click OK.

## 7 Lesson 2: Create a Template for Press Releases

The Press Release template files define the related input and output forms. To create the folder that contains the templates:

- Choose File > Open (do not select any of the Open submenus).
- Click on the System folder.
- Click on the Templates folder.
- Choose File > New > Template.

This dialog box appears:



- Type "Press Releases" in the dialog box and click OK.
- Click on the new Press Releases folder.

Notice that newly created template folder contains two files: input.asp and output.asp:

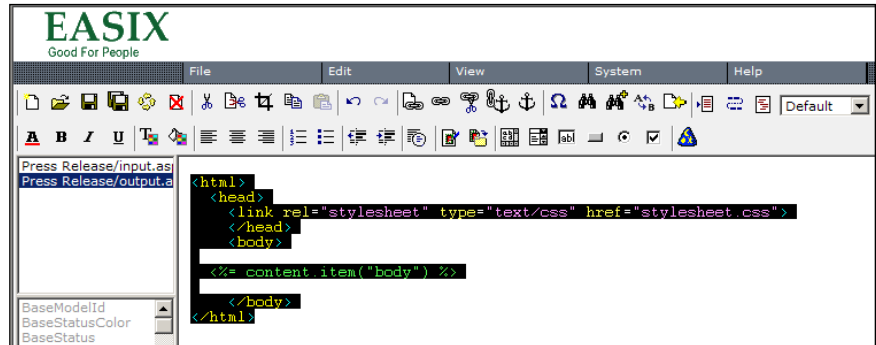
Type	Label	Status	Changed By	Size	Changed On
	input.asp		Don Henry	0 B	2/29/2008 09:39:58
	output.asp		Don Henry	0 B	2/29/2008 09:39:58

The input.asp template file defines the data entry form for creating and editing press releases. The output.asp template file defines how a press release will look on the final Website.

- Select the output.asp template file by clicking on its label.
- Choose Edit > Edit.

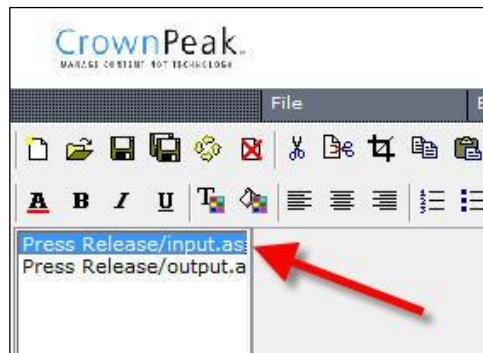
The Edit page opens.

- Click on the source code pane:



- Delete the code (<Ctrl>A, <Delete>).

- Click on the input.asp template file in the top left file list pane:



- Click on the source code pane again

- Delete the code (<Ctrl>A, <Delete>).

- Go back to the output.asp template file by clicking on the output.asp template file in the file list pane.

- Paste the following HTML into the source code pane:

```
<html>
<body>
<br>
<font size="+2">Press Release</font>
<p>
Date : <b>10/24/2003</b><br>
Title : 1050 MHz RS64 IV important Java benchmark
<p>
IBM has introduced the world's most powerful
midrange server -- an IBM UNIX system that
outperforms a much larger machine from Sun
Microsystems while costing a third less.
```

The p660 Model 6M1 provides advantages in power, scalability and reliability that demonstrate the superiority of IBM's existing microprocessors over Sun's new UltraSparcIII technology.

The industry's best-performing eight-way server for Web serving and Java applications, the new IBM system is well-suited for service providers, data centers of large corporations and other demanding e-business environments.

The rack-mounted IBM pSeries server provides the same advanced technology that has made IBM the leading vendor in the high end of the UNIX market. Powered by 750 MHz RS64 IV processors featuring IBM's copper and silicon-on-insulator technologies, the system is also bolstered with self-managing and self-healing technologies inherited from IBM's larger UNIX and mainframe systems.

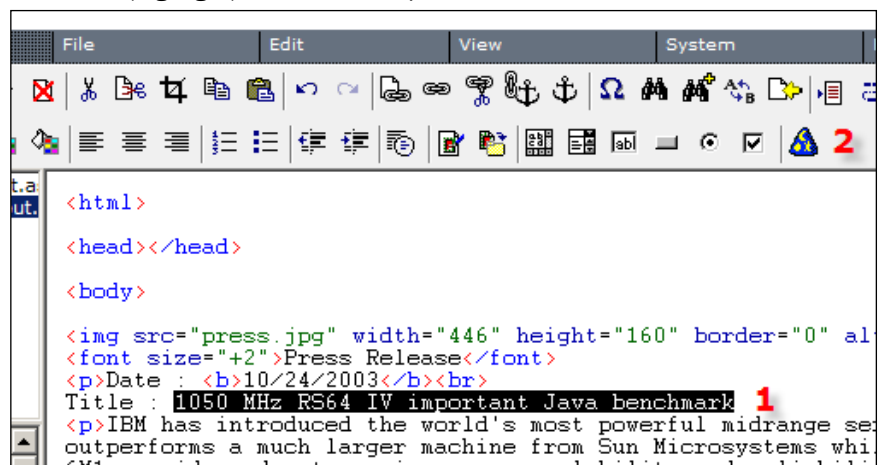
In the important Java benchmark, the new system, equipped with eight processors, beat every competing system under 24 processors

```
<p>
<a href="index.html">Home</a> > <a
href="press_index.html">See all Press Releases</a>
</body>
</html>
```

**Note:** You might need to click on the Word Wrap or Format HTML buttons to format the code properly after pasting. These are in the top row of buttons, just to the left of the pull down Choose.



16. Select (highlight) the title of the press release:

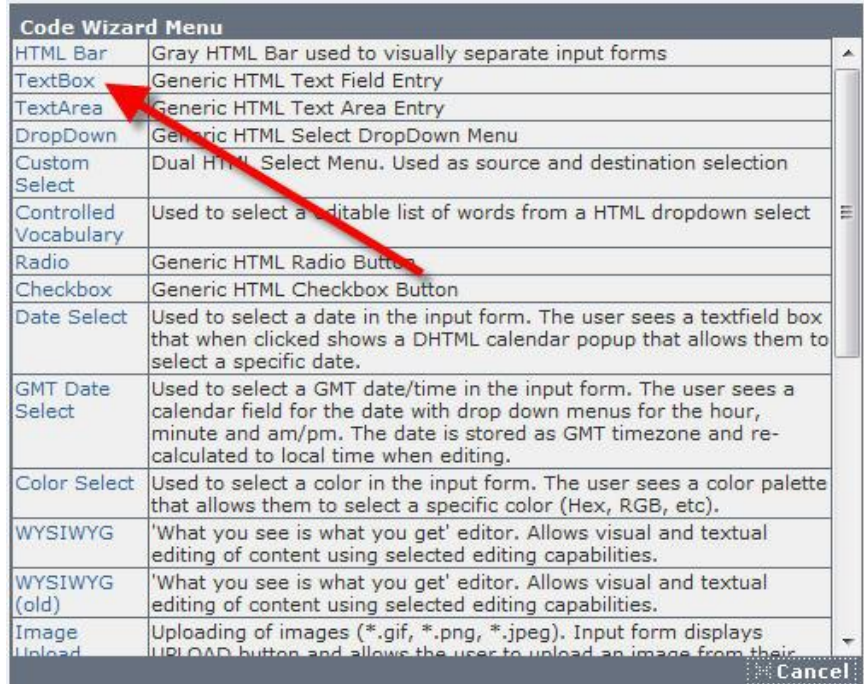


17. Click the Code Wizard button:



The Code Wizard menu appears.

## 18. Click TextBox:



The Insert Textfield Code window appears:

19. Type "Title" in the Name field and click **Insert**.

Notice how the display code was added. Switch to the input.asp template file and look at the input form code that was added (a conventional HTML input field). This field is now complete—no other field definition effort is required.

## 20. Return to the output.asp file.

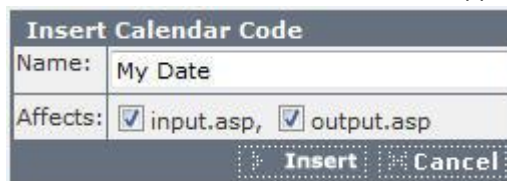
## 21. Select (highlight) the date of the press release (10/24/2003) in the source code pane.

22. Click the **Code Wizard** Button.

Code Wizard Menu appears.

23. Click **Date Select**.

The Insert Calendar Code window appears:



## 24. Type "Date" in the name field and Insert.

Notice that the input.asp template file uses a special extended field in the CMS. That field will allow the user to use a popup calendar to enter the date (no extra code required). The Code Wizard contains a number

of extended fields.

25. Return to the output.asp file.
26. Select (highlight) the body of the press release (all the text between those <p> tags) in the source code pane.
27. Click the **Code Wizard** button.
28. Click **WYSIWYG**.

The Insert Rich Text Code window appears:

Leave the name as “page\_text.”

29. Click Insert.

Notice how the output form for this item is simple (also notice the extended input form field). WYSIWYG widget options can be established per template like this, or in the group permissions, depending on how you need to control them.

30. Click on the Save icon for each template file.
31. Choose View > Folder to exit the template editor.

### ➤ **Lesson 3: Create a Seed Press Release**

The next step in the process is to verify the input and output forms by creating a sample asset using the new template:

1. Choose File > Open (do not select any of the sub menus).
2. Click on the Site folder.
3. Click on the Press Releases folder.
4. Choose File > New > Upload.

The Upload File screen appears:

Upload File	
Filename	<input type="text"/> <input type="button" value="Browse..."/>
Label	<input type="text"/>
Path	/Assets/images/
Versioning	
Change Comment	<input type="text"/>
Note: this comment appears in the asset versions interface	
MetaData	
Title	<input type="text"/>
Category	--Select--
Description	<input type="text"/>
Keywords ( comma delimited list )	<input type="text"/>

5. Select a blank text file from your computer using the Browse button and then click Save.

The file now appears in the folder.

6. Select (highlight) the file.
7. Choose Edit > Rename.

A dialog box appears.

8. Type "Press Release" in the dialog box and click OK.
9. Select (highlight) the file.
10. Choose View > Properties > Template.
11. Click Browse next to the Template Folder field:



A window appears showing the contents of the Template folder.

12. Select (highlight) the Press Release folder and click Select.

Template Properties /Site/Press Releases/Asset_Seed.txt	
Name	Asset_Seed.txt
Location	/Site/Press Releases/
Template Id	0
Template Folder	<input type="text" value="/System/Templates/Press Release"/> <input type="button" value="..."/>
Also Apply Properties To	
<input type="checkbox"/>	Siblings - files around/next to this file.
<input type="checkbox"/>	Neighborhood - files at or below:
<input type="checkbox"/>	Models - other files based on the same model as this file.
<input type="checkbox"/>	Labels - any file with the same name as 'Asset_Seed.txt'.
<input type="checkbox"/>	Workflow - other files based on the same workflow as this folder/file.
<input type="checkbox"/>	Status - other files in the same status as this folder/file.
<input type="checkbox"/>	Workflow & Status - other files in the same status in the same workflow as this folder/file.
Related Menus	
<input type="button" value="▶"/> /System/Templates/	Browse to the Templates folder

13. Click Save.

You have now associated the asset with a template. The asset is a collection of name/value pairs, and the template controls how those fields are edited and displayed.

Next, you will edit (input.asp) and preview (output.asp) the new asset.

**Note:** Keep in mind that setting up the template and other configurations is done by developers. Once the system is setup, end users never go through these steps.

14. Select (highlight) the blank asset.

15. Choose Edit > Edit.

You see the three fields we set up. Test them out.

16. Click **Save and Preview**.

17. Select (highlight) the asset on the Worklist

18. Choose View > Preview (or simply click on the icon).

Notice that the images and link do not work. You will fix those in the following steps.

19. Choose View > Folder to show the folder for the asset.

The most recently viewed asset is italicized.

## ➤ **Lesson 4: Upload images to use in site content**

We will now upload some site-wide graphics.

1. Choose File > Open (do not select any of the sub menus).
2. Click on the folder icon for the Assets folder to open it.
3. Click on the folder icon for the images folder to open it.
4. Choose New > Asset.
5. Click Browse to upload the home.jpg file.

The other fields can be left blank. The file name will be taken from the file and the meta fields are optional.

6. Repeat this process to upload the press.jpg file.

## ➤ **Lesson 5: Add Image Links to the Press Release Template**

The image links need to be established in the template.

1. Choose File > Open > Templates.
2. Click on the Press Release folder to open it.
3. Right-click the output.asp template file and choose Edit.



4. Change the HTML `` to `">`
5. Click **Save**.
6. Choose File > Open.
7. Click on the Site folder to open it.
8. Click on the Press Release folder to open it.
9. Click on the sample Press Release asset icon.

Notice the image is now linked in.

10. Choose View > Folder to go back to the list of press releases.

From the Press Releases folder with no assets selected, or from the Site folder with the Press Releases folder selected:

11. Choose View > Properties > Access.
12. Click View to expand the view options.
13. Select the Everyone check box for the In Open Menu property.
14. Click New to expand the New options
15. Remove the check boxes from the New Dependency options for now.
16. Click **Save**.
17. Click the Refresh Folder icon in the blue path bar (third icon from the right), or use the right-click menu on the top menu bar (to the left of the File menu), and Refresh the menus. You can also log out and then back in.

The File > Open menu will now allow you to go right to the Press Releases folder.

These permissions may be tuned up later. For now, everyone who can view the folder will also see it in their Open menu.

## ➤ **Lesson 6: Create a Model for Press Releases**

We will fix up the links to the index and homepage later. Right now, we will set up a new model for Press Releases so that making them will be easier. Making a model creates the menu option.

1. Choose File > Open.
2. Click on the System folder icon to open it.
3. Click on the Models folder icon to open it.
4. Choose New > Folder
5. Name the new folder "Press Release Model."
6. Select the folder.

7. Choose View > Properties > Access.
8. Click View to show the view detailed properties.
9. Deselect any selected check boxes in the Open column.  
We don't want the model folder itself showing up in our Open menu.
10. Click **Save**.
11. Go into the Press Release Model by clicking on its folder icon.
12. Choose File >New > Upload.
13. Use Browse to upload a blank text file.
14. Select the asset by clicking on it once.
15. Choose Edit > Rename.
16. Rename the file to "Press Release."
17. Select the asset by clicking on it once.
18. Choose View > Properties > Template.
19. Click on the "..." button next to the Template Folder field.
20. Select (highlight) the Press Release folder.
21. Click Select then click Save.
22. Choose File > Open > Press Releases.

With no assets selected:

23. Choose View > Properties > Models.
24. Click on the "..." button next to the Model Folder field.
25. Select the Press Release Model folder and click **Save**.

Test out the new menu item.

26. Choose File > New > Press Release.

This creates a new asset (cloned from the model) and takes you to edit.

27. Add some data and either click **Save** and **Preview**—or just **Save** to go back to the folder with no preview.

Test this out a few times to build up some press releases. Notice that the names are all "Press Release." You can rename them by selecting them in the folder and choosing Edit > Rename. In the next step, we will take advantage of the Title field to set the file name when you save an asset.

## ➤ **Lesson 7: Controlling the CMS Label**

In the previous step, the file names are all set to "Press Release." Most implementations set the CMS Label to a value from the content itself. The Label can also be some combination of fields if you want. It is easily under template control.

The best place to set the CMS Label is in the Press Release `post_input.asp` template file, which is run when the user clicks on Save or Save and Preview in the input form.

1. Choose File > Open > Templates.
2. Click on the Press Release folder.
3. Choose File > New > `post_input.asp`.
4. Add the following code to the template file:

```
<% Dim folder_content
<%
  if content.item("title") = "" then content.add
  "_CMSError", "Please enter a press release title"
  content.add "_CMSLabel", content.item("title")
%>
```

The first line sets a CMS error if the title is blank. If `post_input.asp` sets the `CMSError`, then the input form will be brought up again with the error at the top.

The second line sets the `CMSLabel` system field using the Press Release title field. Note that the `CMSLabel` will filter out some characters that are not valid in file names.

In addition to a single field, you can compute a longer string by truncating, adding dates or other fields.

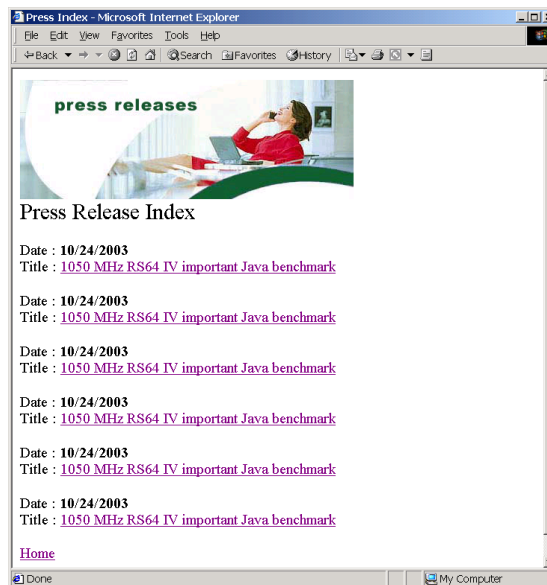
The CMS Label can be used for the file name—or not—depending on your specific needs.

5. Save your changes.
6. Go into the `/Site/Press Releases` folder and edit all of your assets and save them.

After editing and saving, notice that the CMS labels are now set.

## ➤ **Lesson 8: The Press Index Folder and Template**

Now that the Press Release template is almost complete, we will shift over to the Template for the Press Index, which shows a list of all press releases in the system with links from the titles to the individual Press Release pages:



For the Press Index, we will create a separate folder and a single asset.

**Note:** No model is necessary since the index is fully automatic; there is no editable content on that page in this sample. The Home Page steps later will show a template where part of the page is automatic and part is editable. Since this template has no editable content of its own, there will be no input.asp template file.

### ➤ **Lesson 9: Create a Folder for the Press Index**

In this example, we will make a separate folder to hold the single Press Index asset.

1. Go to the Site folder.
2. Click on the File > Open menu (do not select any of the sub menus).
3. Click on the icon for the Site folder.
4. Choose File > New > Folder.
5. Type "Press Index" in the dialog box.

### ➤ **Lesson 10: Create a Template for the Press Index**

The Press Index template file determines the output form for the Press Index page. There is no input.asp template file since no separate content needs to be entered to build the Press Index.

1. Go to the templates folder.
2. Choose File > Open > Templates.
3. Choose File > New > Template.

A dialogue box appears asking for the new template name.

4. Type "Press Index" and click **OK**.
5. Click on the Press Release Index folder icon.
6. Select the input.asp template file.
7. Choose Edit > Delete.
8. Select the output.asp template file.
9. Choose Edit > Edit.
10. Click on the source code pane.
11. Delete the code (<Ctrl>A, <Delete>).
12. Paste the following HTML into the source code pane:

```
<html>
<body>
"
width="446" height="160" border="0" alt=""><br>
<font size="+2">Press Release Index</font>
<p>

<% asset.setParam "sort_order", "date DESC" %>
<% set list = asset.getList("/Site/Press
Releases/") %>
<% do while list.nextEntry %>
Date : <b><%= list.item("date") %></b><br>
Title : <a href="<%=
asset.getLink(list.item("_CMSID")) %>"><%=
list.item("title") %></a>
<p>
<% loop %>

<a href="index.html">Home</a>
<p>
</body>
```

This template gets a list of the assets in the Press Release folder (sorted by date) and displays their date and title with a link to the asset. The list returned is managed by the CMS and is state dependent so that, for example, when you publish the index, only live press releases will be shown.

13. Click **Save**.

## 7 Lesson 11: Create a Press Index Asset

We now need to create a sample Asset using the new template to verify the output forms.

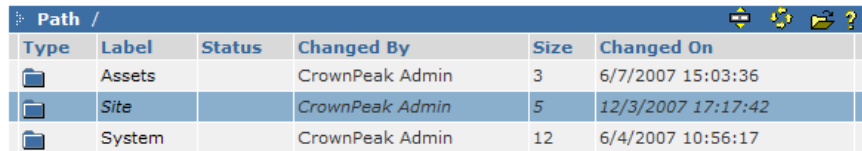
1. Go to the site folder.
2. Choose File > Open (do not select any of the sub menus).
3. Click on the Site folder icon.
4. Click on the Press Index folder icon.
5. Choose File > New > Upload.
6. Upload a blank text file.
7. Rename the uploaded file to “Press Index.”
8. Select the asset by clicking on it once.
9. Choose View > Properties > Template.
10. Click the “...” button next to the Template Folder field.
11. Select (highlight) the Press Index folder and click **Select**.
12. Click **Save**.

You can now view the asset:

13. Click on the icon for the Press Index (to the left of the name).

## 7 Lesson 12: Create a Home Page Folder

1. Choose File > Open (do not select any of the Open submenus).
2. Click on the Site folder to open it.



Type	Label	Status	Changed By	Size	Changed On
Folder	Assets		CrownPeak Admin	3	6/7/2007 15:03:36
Folder	Site		CrownPeak Admin	5	12/3/2007 17:17:42
Folder	System		CrownPeak Admin	12	6/4/2007 10:56:17

3. Choose File > New > Folder.

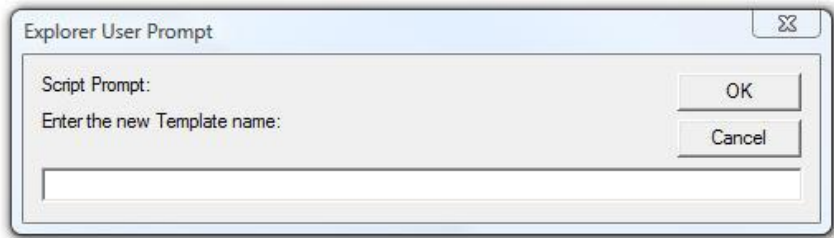
A dialogue box appears asking for the name of the new folder.

4. Type “Press Releases” in the dialog box and click OK.

## 7 Lesson 13: Create a Template for the Home Page

1. Choose File > Open (do not select any of the Open submenus).
2. Click on the “System” folder.
3. Click on the “Templates” folder.
4. Choose File > New > Template.

This dialog box appears:



5. Type "Home Page" in the dialog box and click **OK**.
6. Click on the new Home Page folder.  
Again, the newly created template folder contains two files: input.asp and output.asp.
7. Select the output.asp template file by clicking on its label.
8. Choose Edit > Edit.  
The Edit page opens.
9. Click on the source code pane:
10. Delete the code (<Ctrl>A, <Delete>).
11. Click on the input.asp template file in the top left file list pane.
12. Click on the source code pane again.
13. Delete the code (<Ctrl>A, <Delete>).
14. Go back to the output.asp template file by clicking on the output.asp template file in the file list pane.
15. Paste the following HTML into the source code pane:

```
<TR align="justify" valign="top" bgcolor="F0F0F0">
  <TD>Name</TD>
  <TD><INPUT size=50 type="text" name="_CMSLabel"
value="<%= content.item("_CMSLabel") %>"></TD>
</TR>
<TR align="justify" valign="top" bgcolor="F0F0F0">
  <TD>Message</TD>
  <TD>
  <TEXTAREA rows=10 cols=50 name="message"><%=
content.item("message") %></TEXTAREA>
  </TD>
</TR>
```

The Name field lets the user directly set the CMS Label so it can be renamed easily. Most authors like to use some part of the date when the page will go

live (for example, "September Home Page" or "Home Page for Fall Conference").

The CMS Label is used as a convenience in this case since the Home Page file name on the Web server will be set to index.html. Also, the system will be configured so that only one edition of the Home Page can be live at a time (see the Workflow section for details).

Use the following code for the output.asp template file:

```
<html>
<body>
"
width="446" height="161" border="0" alt="">
<br>
<font size="+2">Home Page</font>
<p>
<%= content.item("message") %>
<p>
Latest Press release:
<p>
<% asset.setParam "limit", "1" %>
<% asset.setParam "sort_order", "date DESC" %>
<% set list = asset.getList("/Site/Press
Releases/") %>
<% do while list.nextEntry %>
Date : <b><%= list.item("date") %></b><br>
Title : <a href="<%=
asset.getLink(list.item("_CMSID")) %>"><%=
list.item("title") %></a>
<p>
<% loop %>
<p>
<a href="<%= asset.getLink("/Site/Press Index/Press
Index") %>">See all Press Releases</a></body>
</html>
```

The last call to `asset.getLink` sets up the link from the Home Page to the Press Index.

## ➤ Lesson 14: Create a Seed Home Page

Like before, load a blank asset in the `/Site/Home Page` folder and set the template to the new Home Page template. You can now edit the initial Home



Page and fill in the text area. Then you can preview the page and see the message and the first press release.

## ➤ **Lesson 15: Create a Model for Home Pages**

The Home Page model will let you make a new Home Page from the File > New menu. You can also clone an existing asset to get a copy of the current message in case you just want to make an update or add to it.

For convenience, you can add the Home Page folder to your open menu. From the Home Page folder with no assets selected, or from the root folder with the Home Page folder Selected:

1. Choose View > Properties > Access.
2. Click View to expand the View options.
3. Select the Everyone check box for the In Open Menu property.
4. Click New to expand the New options.
5. Remove the check boxes from the New Dependency options for now.
6. Click Save.
7. Click Refresh to refresh the menus. (You can also log out and back in.)

The File menu now allows you to go right to the Home Page folder.

These permissions may be tuned up later. For now, everyone who can view the folder will also see it in their Open menu.

8. Go to the /System/Models folder.
9. Choose File > Open.
10. Click on the System folder icon.
11. Click on the Models folder icon.

You now need to add a new folder for the Home Page Model and go into the folder.

12. Choose File > New > Folder.
13. Name the new folder "Home Page Model."
14. Select the folder and choose View > Properties > Access.
15. Click View to show the view detailed properties and remove any checks in the Open column.

You don't want the model folder itself showing up in the Open menu.

16. Save your changes.
17. Go into that folder by clicking on its folder icon.

You now need to create a blank home page.

18. Choose File > New > Upload.

19. Upload a blank text file.
20. Select the asset by clicking on it once.
21. Choose: Edit > Rename.
22. Name the file "Home Page."
23. Select the asset by clicking on it once.
24. Choose: View > Properties > Template.
25. Click on the "..." button next to the Template Folder field.
26. Select the Home Page folder and click **Select**.
27. Click **Save**.
28. Choose File > Open > Home Page.

With no assets selected:

29. Choose View > Properties > Models.
  30. Click on the "..." button next to the Model Folder field.
  31. Select the Home Page Model folder and save.
- You can now test the new menu item:
32. Choose File > New > Home Page.

## ➤ Lesson 16: Finish the Links Between Assets

In the last couple of templates, we added links to the other pages with the `asset.getLink` function. The last thing to do is go back to the Press Releases and Press Index Templates and fix up the remaining links.

1. Add Links from Press Releases to the Press Index and Home Page:

Edit the Press Release `output.asp` template file and change the following from:

```
<a href="index.html">Home</a> > <a href="press_index.html">See all Press Releases</a>
```

To:

```
<a href="<%= asset.getLink("/Site/Home Page/") %>">Home</a>> <a href="<%= asset.getLink("/Site/Press Index/Press Index") %>">See all Press Releases</a>
```

The link to the Home Page is to the folder. The CMS decides automatically which one to use while in preview mode, and when publishing (only one is live, so only one is used). While in preview mode, the most recently viewed page is used—allowing you to build up a future preview by browsing.

2. Add Links from the Press Index to the Home Page:

Edit the Press Index `output` template file and change the following from:

```
<a href="index.html">Home</a>
```

To:

```
<a href="<%= asset.getLink("/Site/Home Page/")
%>">Home</a>
```

The templates are now complete. Going through the above steps is important since any advanced implementations will require you to know where the important configuration options are located.

## ➤ **Lesson 17: Configuring Groups and Users**

For the purposes of this sample site, we will establish three roles:

- Authors will create and edit press releases, but will need Editor or Admin approval to go live. Authors will not be able to edit the home welcome message.
- Editors will have edit and approval capabilities for both press releases and the home page.
- The Admin level is the one you are already using, with access to system configuration, reports etc., and the ability to edit, approve, and launch any site content.

These roles are already established as groups in the default CMS setup. So, for the next few steps, you can just review the settings—or change them as you deem appropriate.

### AUTHORS, EDITOR AND ADMIN

Repeat the following steps to view the group permissions for the three user groups.

1. Choose System > Configure > Groups
2. Select (highlight) a group name.
3. Choose Edit > Edit Group (or just double-click the group).

CrownPeak CMS has a very fine granularity of group permissions. Combined with the workflow permissions and file/folder permissions, a very tailored user experience can be created for all roles. These permissions are hierarchical, so you can only see and assign permissions that you have in the system.

### SET UP SAMPLE USERS

1. Choose System > Configure > Users.
2. Choose File > New User.
3. Enter a username and password that you will remember.

The password should be at least 6 characters long, and include a number and extended character.

4. Enter a First and Last Name.
5. Click on the Author group check box.
6. Switch to the Preferences tab.
7. Check the boxes under Default Browse State to include Draft, Pending, Stage, and Live.
8. Save the new user.
9. Repeat the above steps to create a new Editor and Admin level user, adjusting the groups accordingly. The Admin user should be in all groups so that they can administer those users.

## 7 **Lesson 18: Configuring Publishing**

The next step is to configure the servers and file names for the assets being created in the CMS. The final location is affected by many parts of the system configuration, allowing for centralized management. For example, changing the server only requires a change in one place.

### FTP EXPORT AND GLOBAL PUBLISHING SETTINGS

1. Choose System > Configure > Export > FTP.
  - a. The name should be Live Site
  - b. Hostname, username, password are the normal FTP settings
  - c. The root path is the path from the FTP root to the Webroot

2. Save the configuration.

On the far right of each row of the FTP servers, there is a TEST button.

3. Click this button to open a pop-up window that will run a series of tests on the FTP connection to the server specified. This will let you know if the connection works properly.

If there are errors, you may need to correct your configuration in the CMS, or speak with the administrator of the FTP server to which you are trying to connect.

4. Choose System > Configure > Package.
  - a. The Publishing Package Name should be Live Site
  - b. FTP Server should be Live Site
5. Save the configuration

In this example, we will only configure one Live Site server. When you add a server and save the settings, however, a new line will appear so

that you can configure as many servers as necessary.

Many configurations also include a Stage Site server. These server names become important in the workflow as you decide which server has the file at each stage of the workflow.

**Note:** For convenience, each server setup in the FTP Export configuration will appear in the system folder as a virtual folder.

## ➤ **Lesson 19: Publishing for the Press Release Index**

The Press Release Index is a single file on the Web site named `press_index.html`, so you can configure it directly in the CMS GUI.

1. Choose File > Open.
2. Click on the Site folder icon.
3. Click on the Press Index folder icon.
4. Select (highlight) the Press Index asset.
5. Choose View > Properties > Publishing.
6. Choose the Live server in the Server drop-down menu.
7. Set the path to `/`.
8. Add `press_index.html` to the file name.
9. Click **Save**.

## ➤ **Lesson 20: Publishing for the Home Page**

The Home Page(s) publishing configuration is very similar to the Press Release Index. The main difference is that there are several Home Page assets in progress in the CMS, but only one can be live at a time.

Since the CMS automatically takes care of file conflicts like this, we simply set the publish parameters for all Home Pages the same. When a new one goes live, the current one will be retired automatically. We also need to be sure to set the publishing parameters for the Home Page model so that new ones will already be set.

1. Choose File > Open > Home Page.
2. Select one of the Home Page assets.
3. Choose View > Properties > Publishing.
4. Choose the Live server in the Server dropdown menu.
5. Set the path to `/`.
6. Add `index.html` to the file name.
7. Select the Templates check box in the Also Apply Properties To section.

## 8. Click **Save**.

On the resulting screen, leave all the assets selected and click Save. By using the Apply To check boxes, we can change all the assets (including the model, rendered in boldface) in one quick step.

## ➤ **Lesson 21: Publishing for Assets**

The images in the /Assets/images folder can also be configured directly in the GUI. Go to that folder and set the publishing properties. We'll use a generic directory, so change the path to /images/ for both, and change the file name to home.jpg or press.jpg accordingly.


## ➤ **Lesson 22: Publishing for Press Releases**

The Press Releases will use a different scheme for file names. Instead of using the publishing properties, the filename.asp template file will be used to set the press releases file name under program control. This is done to ensure file name consistency, and to avoid namespace collision (two files with the same file name).

1. Choose File > Open > Templates.
2. Click on the Press Release Folder.
3. Choose File > New > filename.asp.
4. Paste the following code into the source code pane:

```
<% content.add "_CMSPublishPath", "/Press/" &  
content.item("_CMSId") & ".html" %>
```

This code sets the published file name to use the CMS ID. You could also use combinations of other fields such as date or the CMS Label. With the filename.asp template file, you have complete control over the target file name.

5. Click the disk icon .
6. Choose File > Open > Press Releases.
7. Select a sample press release.
8. Choose View > Properties > Publishing.
9. Set the first HTML server to use the Live Site.
10. Leave all the other fields blank. Note that adding items and saving add new lines. The Media settings are for images or files attached to an asset.
11. Apply the properties to the Template so that all press releases including the model will be updated.

12. Re-select a press release, and use the View > Properties > Publishing menu to see the final file name and URL.

Once a Press Release asset is published, you can use the View > Properties > General to see the actual file names generated; this will include the file names for any attached files or images.

## ➤ **Lesson 23: Configuring Workflow and Approvals**

Similar to templates and publishing, the workflows are centrally configured. Assets and models are then assigned a specific workflow. In this example, we will establish one Workflow for the Press Releases and one for the Home Page.

### CREATE AN EDITOR WORKFLOW FILTER

At its most basic, a Workflow Filter controls the visibility of a Workflow command. Because the Workflow commands are what typically allow an asset to move from one step to the next, the Workflow Filter is instrumental in defining what can be done, when it can be done, and who may do it.

The Workflow Filter interface is fairly simple—and somewhat like a SQL query builder. It allows you to determine the relevant field on which to search, a comparison type, and a value to search for. A Boolean join is also provided, meaning that a single Workflow Filter can grow to be quite complex despite the simple interface. Also note that the searchable field setting is vast; individual user or group clicks can be tracked, as well as any of the system or template variables within the CMS.

The most common use of Workflow Filters is to create an approval process, thereby defining who has the right to determine if an asset may continue moving through the Workflow or not. An approval process can be singular or configured to allow for multiple serial or parallel approvals. For serial approvals, you can also use Workflow steps:

1. Choose System > Configure > Workflow Filters.
2. Choose File > New Workflow Filter.
3. Enter “Editor” as the name of the filter.
4. For Search Fields, select Group Editor Clicks.
5. For Comparison, select **less than**.
6. For Value, enter **1**.
7. For Boolean Join, select **AND**.

A new Search Fields menu will be added to continue building the filter.

8. Repeat the above process for the Admin group, selecting Group Admin

Clicks for the Search Fields setting, and omitting the Boolean Join step.

9. Click **Save**.

### CREATE PRESS RELEASE WORKFLOW – “NORMAL WORKFLOW”

The Workflow Configuration interface is one of the more unique aspects of CrownPeak CMS. It represents the Workflow graphically, tying into the **States** and their colors (more on States later) to help represent each step.

Transitions from step to step are indicated through a series of arrows and icons. Step labels, command arrows, and icons can be clicked to bring up configuration popups to provide for the customization of the Workflow.

Taken as a whole, the result is an intuitive overview of the Workflow, which also provides a high degree of configurability, without overwhelming the user.

The Press Release Workflow will have the following states:

- **Draft:** Everyone can edit. Everyone can send for Approval, which places the document in the Pending state.
- **Pending:** Editors and Admin can Edit, Approve, and Publish to Live (asset moves to Live state), and Reject (asset moves to Rejected state).
- **Rejected:** Everyone can edit. An edit and save moves the document back to the Draft state.
- **Live:** Asset is live on the Website. Editors and Admin can edit and redeploy the document. They can also Retire the document.
- **Retired:** Asset is removed from the live Web site.

This sample workflow is fairly simple. There are many options available including scheduled or timeout transitions, escalations, multiple approval steps, multiple staging steps, and many others too numerous to list here.

1. Choose System > Configure > Workflows.
2. Select the full workflow.
3. Choose Edit > Clone Workflow.
4. Double-click the new workflow.
5. Set the Name to “Normal Workflow.”
6. Delete the Stage step, using the Delete Step button (looks like an “X”) underneath the colored bar.

**Note:** Holding your mouse over the buttons will bring up a “tooltip” to help describe what the button does.

7. Delete the Suspended and Archived steps.



8. For Pending, modify the old Approve to Stage command.
  - a. Click on the “Approve to Stage” command text to display its configuration.
  - b. Change “Approve to Stage” to “Approve to Live”.
  - c. Change the “goto step” menu to “Live: Document is Live”.
  - d. Make sure that Editor is set as the Workflow Filter.

Once you click **OK**, you should see the Workflow representation update accordingly.

Or,

For Retired, remove the commands and timeout by clicking on their title and clicking on “Delete” in the corresponding popup.

9. Click **Save**.

There are a lot of options for the workflow, allowing for very sophisticated configurations. The scheduling options will present a new menu item where the users can set the dates for such actions as going live, retiring, notification for old content, etc. The timeouts allow for automatic transitions and escalations.

#### CREATE HOMEPAGE WORKFLOW – “EDITOR WORKFLOW”

Since the Home Page doesn’t change very often, those assets will have a more streamlined workflow for Editors and Admin only.

- **Draft:** Editors and Admin can create and edit. Editors and Admin can publish.
  - **Live:** Asset is live on the Website. Editors and Admin can edit and redeploy the document. They can also Retire the document.
  - **Retired:** Asset is removed from the live Website.
1. Choose System > Configure > Workflows.
  2. Select the Normal Workflow.
  3. Choose Edit > Clone Workflow.
  4. Double-click the new workflow (or click once and use Choose Edit > Edit Workflow).
  5. Set the Name to “Editor Workflow.”
  6. Delete the steps for the Pending and Rejected States.
  7. For Draft, setup a single command “Deploy” that goes to the step for the Live state with no Approval.

You create a new command by doing the following:

- a. Click anywhere on the colored bar for that step.

The Route Selection menu appears.

- b. Click **Command** to create your new command.

No Approval is needed since we will use File permissions to prevent editors from working on the Home Page assets.

8. Save the new workflow.

## ASSIGN THE PRESS RELEASE WORKFLOW

Now that we have the workflows created, we need to assign them to the assets in the system.

1. Choose File > Open > Press Releases.
2. Select one of the Press Releases.
3. Choose View > Properties > Workflow.
4. Choose the Normal Workflow (and also apply to other assets with the same template).
5. Change them all.

Note that the Model is also set. Now any new Press Releases will automatically have the correct workflow.

### Assign the Home Page Workflow

1. Choose File > Open > Home Page.
2. Select one of the Home Pages.
3. Choose View > Properties > Workflow.
4. Choose the Editor Workflow (and also apply to other assets with the same template).
5. Change them all.

Note that the Model is also set. Now any new Home Page will automatically have the correct workflow.

## ➤ **Lesson 24: Configuring Access Control for Folders and Files**

There are three levels of permissions (or Access Control Lists – ACL's) in CrownPeak CMS. All three are combined in the most restrictive way to ensure system security. The levels are (listed here in order broadest to finest scope):

- **Group Permissions:** This level controls which actions are allowed to a group of users. The Group permissions are configured in the System > Configure > Groups area of the system.

- **State (Workflow) Permissions:** This level controls which actions are allowed for each group at each step of the Workflow for a given asset.
- Workflow Permissions are configured in two places. The Workflow Commands may have approval processes which limit who can use that Command, and who gets notified for pending approvals (the approval processes are setup via the Workflow Filters).
- There are also State files and folders in the /System/States folder that set the File permissions and/or Folder permissions for documents/folders in that state. (See more on States below.)
- File/Folder Permissions: This level is like conventional OS file permissions, except there is a much finer granularity. To see these, you can select any file or folder, then use the View > Properties > Access menu. The File/Folder Access Properties also show you whether a function is limited by Group or State/Workflow ACL.

## STATE FILES

The State files in the /System/States folder set the file permissions for documents in that state. If you edit one of them, you can set the color for that state in the CMS. You can rename them to set the name of a state. Editing their file/folder permissions (select one, then use the View > Properties > Access menu) sets the overlay permissions for all assets in that state. By doing this, you can establish a setup where authors can edit a document in the draft state, but not the live state.

In general, the access permissions for the State files are all turned on except when you want to explicitly remove that function at that step of the workflow. This is done since the file/folder permissions of the assets themselves (or group permissions) are used to control general access.

State files are separated from Workflows in this manner for two reasons. The first is that State files are often shared between workflows, so this approach reduces redundant effort and possibility for error. The second reason is that a shared State file is how the CMS knows that two assets are actually on the same server etc. for dependencies.

## FILE/FOLDER PERMISSIONS

The File/Folder Permissions are accessed by selecting an asset, and then using the View > Properties > Access menu, and then choosing Access Properties from the right click menu.

**Important Note on the View Permission:** If you turn off the “View” permission (under the View ACL grouping) for the groups that you are in, and you save

the ACL changes, **you will no longer be able to view that asset**. Undoing this requires the intervention of the CrownPeak CMS product development team because they have to make the modification directly in the CMS database. Thus, be mindful when setting/unsetting the “View” permission.

## PRESS RELEASES FOLDER

The press release folder should be visible by all users:

1. Choose File > Open.
2. Click on the Site folder icon.
3. Select the Press Releases folder.
4. Choose View > Properties > Access.
  - a. All groups ON for View and Open Menu
  - b. All groups OFF for Preview
  - c. All groups ON for New Model
  - d. All groups ON for all permissions
  - e. Editors and Managers ON for all permissions
  - f. All others OFF
  - g. Editors and Managers ON for all permissions
  - h. All groups ON for Set Alerts and General
  - i. All others OFF
  - j. All groups ON for all permissions
5. Click **Save**.

The individual permissions are documented online by using the question mark icon. You can configure the system to allow as few or as many permissions as make sense for your organization.

## PRESS RELEASE ASSETS

The Press Release assets are also available to everyone.

1. Choose File > Open > Press Releases.
2. Select a sample Press Release.
3. Choose View > Properties > Access.
  - a. All groups ON for View
  - b. All others OFF
  - c. All groups ON for Edit, Rename, Delete, Move, and Copy
  - d. All groups OFF for Checkout and Shortcut
  - e. Editors and Managers ON for all permissions

- f. All others OFF
  - g. Editors and Managers ON for all permissions
  - h. All groups ON for Set Alerts and General
  - i. All others OFF
  - j. All groups ON for Workflow, Audit, Version, and Comments
  - k. All groups OFF for Similar
4. Select the Templates check box in the Also Apply Properties To section.
  5. Click **Save** to save your changes and apply the changes to all Press Releases.

### PRESS INDEX FOLDER

The Press Index folder is only visible to admin users, and there are no new assets to be created in the folder.

1. Choose File > Open.
2. Click on the Site folder icon.
3. Select the Press Index folder.
4. Choose View > Properties > Access.
  - a. Editors and Managers ON for View
  - b. All others OFF
  - c. All OFF (we only have one index)
  - d. All OFF
  - e. Editors and Managers ON for all permissions
  - f. All others OFF
  - g. Editors and Managers ON for all permissions
  - h. All others OFF
  - i. All groups ON for all permissions
5. Click **Save**.

Once the View Permission is turned off, you can either leave the others on or off as you prefer. Since the user cannot view an asset, the others are also not accessible. Leaving the others on allows Admin users to make changes—but, in this case, moving or renaming the folder would invalidate the path encoded in the templates. So, turning off those permissions may serve as a reminder

### PRESS INDEX ASSET

The Press Release Index asset is available to editors and admin users only.

1. Choose File > Open.

2. Click on the Site folder icon.
3. Click on the Press Index folder icon.
4. Select the Press Index asset.
5. Choose View > Properties > Access.
  - a. Editors and Managers ON for View
  - b. All others OFF
  - c. Editors and Managers ON for Edit, Rename, Delete, Move, and Copy
  - d. All groups OFF for Checkout and Shortcut
  - e. Editors and Managers ON for all permissions
  - f. All others OFF
  - g. Editors and Managers ON for all permissions
  - h. All others OFF
  - i. All groups ON for Workflow, Audit, Version, and Comments
  - j. All groups OFF for Similar
6. Click **Save**.

#### HOME PAGE FOLDER

The Home Page folder is only available to editors and admin users.

1. Choose File > Open.
2. Click on the Site folder icon.
3. Select the Home Page folder.
4. Choose View > Properties > Access.
  - a. Editors and Managers ON for View and In Open Menu
  - b. All others OFF
  - c. Editors and Managers ON for New Model
  - d. All others OFF
  - e. Editors and Managers ON for all permissions
  - f. All others OFF
  - g. Editors and Managers ON for all permissions
  - h. All others OFF
  - i. Editors and Managers ON for all permissions
  - j. All others OFF
  - k. All groups ON for all permissions
5. Click **Save**.

## HOME PAGE ASSETS

Editors and Admin users can create new and edit home pages.

1. Choose File > Open > Home Page.
2. Select a sample Home Page.
3. Choose View > Properties > Access.
  - a. Editors and Managers groups ON for View
  - b. All others OFF
  - c. Editors and Managers groups ON for Edit, Rename, Delete, Move, and Copy
  - d. All groups OFF for Checkout and Shortcut
  - e. Editors and Managers ON for all permissions
  - f. All others OFF
  - g. Editors and Managers ON for all permissions
  - h. All others OFF
  - i. All groups ON for Workflow, Audit, Version, and Comments
  - j. All groups OFF for Similar
4. Select the Templates check box in the Also Apply Properties To section.
5. Click Save to save your changes and apply the changes to all Home Pages.

## /ASSETS/IMAGES FOLDER

The /Assets/images folder is like the Press Index folder, only accessible by Editors and Admin level users. The main difference is that this folder allows new assets to be uploaded as necessary.

1. Choose File > Open.
2. Click on the Assets folder icon.
3. Select the Images folder.
4. Choose View > Properties > Access.
  - a. Editors and Managers ON for View
  - b. All others OFF
  - c. Editors and Manager ON for New Upload
  - d. All others OFF
  - e. All OFF
  - f. Editors and Managers ON for all permissions
  - g. All others OFF
  - h. Editors and Managers ON for all permissions

- i. All others OFF
  - j. All groups ON for all permissions
5. Click **Save**.

#### FILES IN THE /ASSETS/IMAGES FOLDER

This is similar to the Home Pages, but allows more of the asset menus.

1. Choose File > Open.
2. Click on the Assets folder icon.
3. Click on the Images folder icon.
4. Select a sample asset.
5. Choose View > Properties > Access.
  - a. Editors and Managers groups ON for View and Download
  - b. All others OFF
  - c. Editors and Managers groups ON for Edit, Checkout, Rename, Delete, Move, and Copy
  - d. All groups OFF for Shortcut
  - e. All others OFF
  - f. Editors and Managers ON for all permissions
  - g. All others OFF
  - h. Editors and Managers ON for all permissions
  - i. All others OFF
  - j. All groups ON for Workflow, Audit, Version, and Comments
  - k. All groups OFF for Similar
6. Click on the Siblings check box in the Also Apply Properties To section
7. Click Save to save your changes and apply the changes to all siblings.

#### OTHER FOLDERS AND ASSETS

Other folders, such as System, are already configured to be viewed by the admin level users only. The View permissions need only be set at the top level.

### ➤ **Lesson 24: Testing the Implementation**

The implementation of this sample site is complete. The next job is to test the user roles to make sure all the permissions are tuned correctly.



## USEFUL REPORTS

In addition to all of the User Admin (System > Configure > Users) and Group Admin (System > Configure > Groups) screens you have just used, there are a few extra reports that will help a lot with reviewing user roles.

- From the User List, you can select a user, then review the various reports on the View menu. These reports show aggregated menu commands and more for that sample user.
- You can drill down in many of these reports for more detail. Once you have tested a particular user, you will have a good handle on all users with the same set of groups.

## MANUAL USER ROLE TESTING

















You may also want to test each user role by logging in as each one, testing the menus, and also put a document through the full Workflow/document lifecycle. You can either log in with each account, or select a user from the user list and use the Edit > Assume Identity menu option.

## APPENDIX A: EXAMPLES OF CMS USES

The examples below provide an overview of the three primary CMS operations: creating new content, editing content, and publishing content.














### CREATE NEW ASSET

This sequence is followed when creating a new press release in this example:

Step	File Path	Description
1	 /Site/Press Releases	User moves into the Press Releases Folder (via <b>worklist</b> (a.k.a. <b>file/folder mode</b> ) or <b>preview mode</b> ). They could also be browsing the site in preview mode and be on any page that has a link to a Press Release (as long as the access permissions allow dependencies).
2	 System  Models  Press Release	The File Menu shows New > Press Release, based on the model configuration for that folder.
3	 System  Models  Press Release Press Release	When the user selects new, the Press Release asset is <b>cloned</b> from the model folder into /Site/Press Releases/ (since that's where they started – multiple folders may have the same model – new assets go into the current folder).
4	 System  Templates  Press Release input.asp	The input form for the press release is shown since the press release specifies the Press Release template, and the input.asp file is the template file for input.
5	 System  Templates  Press Release post_input.asp	When the user clicks Save, Save and New, Save and Edit, or Save and Preview after editing an input form, the post_input .asp template file is called to validate any fields and perform any data processing.
6	 System  Templates  Press Release output.asp	When the user clicks Save and Preview, the output.asp template file is displayed to show how the page will look when published. (If preview.asp is present, that would be called instead of output.asp.) When Save and New is clicked on, the input.asp file is returned again so that they may create another new asset using the same template – this would be like clicking Save and then going to File > New all in one step. If they instead click Save or Cancel, they would return to the /Press Releases worklist folder view (with the Cancel option meaning that no data is saved and the post_input.asp file is not run). If Save and Edit is clicked, the user is returned to the input.asp view of the asset just saved – the input.asp will be populated with the data they entered, along with any modifications that might have been made by the post_input.asp.









## EDIT ASSET






This sequence is followed when editing an existing press release:

Step	File Path	Description
1	 /Site/Press Releases	User moves into the Press Releases Folder and selects a press release. They could also be browsing the site in preview mode and be viewing a specific press release.
2	 System  Templates  Press Release input.asp	The Edit > Edit menu item will bring up the input form. This is the same as the New Asset sequence except that the input.asp form will populate all the existing content data into the form.
3	 System  Templates  Press Release post_input.asp	When the user clicks on Save and Preview, Save and Edit, Save, or Cancel – same as the New Asset sequence
4	 System  Templates  Press Release output.asp	When the user clicks on Save and Preview, Save, or Cancel – same as the New Asset sequence
4b	 System  Templates  Press Release input.asp	When the user clicks on Save and Edit, Save, or Cancel – same as the step 2 in this sequence.

## PUBLISH

This sequence shows how a press release is published to the web server:

Step	File Path	Description
1	 /Site/Press Releases Round 2 Funding Approved	At the scheduled live date and time, the press release is ready to go live.
2	 System  Templates  Press Release output.asp	The output.asp template file determines the HTML layout of the press release.
3	 System  Templates  Press Release filename.asp	The filename.asp template file determines the final filename for the press release.
4	 /Site/Press Index press index	The dependencies in the asset also cause the press index to be republished.

Step	File Path	Description
5	 /Site/Press Index output.asp	The press index output.asp template file determines the HTML layout of the press release index.
6	 /Site/Home Page Homepage 2003_05_10	The dependencies in the asset also cause the current home page to be republished.
7	 System  Templates  Home Page output.asp	The home page output.asp template file determines the HTML layout of the press release index.



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