

TECHNICAL DOCUMENTATION 

**CROWNPEAK DESKTOP CONNECTION (CDC)
INSTALLATION GUIDE
VERSION 2.0**

NOVEMBER 2012

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INTRODUCTION

Welcome to the CrownPeak Desktop Connection (CDC)! With this tool, you can edit template files using your favorite desktop editors like Notepad++, Dreamweaver, Visual Studio and Eclipse. You can also upload multiple files like images or PDF files or upload large files like videos.

We welcome any comments you have on improving it! Please send them to support@crownpeak.com.

SUMMARY

The main purpose of this application/plugin is to

- Allow developers to edit existing templates
- Allow developers to create templates in C# or Classic API
- Allow all users to upload asset files such as images and PDFs

HOW IT WORKS

The Standalone CDC is an MS Windows application that you install on your desktop. The core component allows most desktop editor programs to be used to edit templates.

For developers using CrownPeak C# API and Standalone Desktop Connection, we provide IntelliSense integration with Visual Studio 2010 and Visual Web Developer Express 2010.

The Eclipse plugin connects directly to the web service for template editing. It does not include the bulk upload feature.

INSTALLATION

STANDALONE

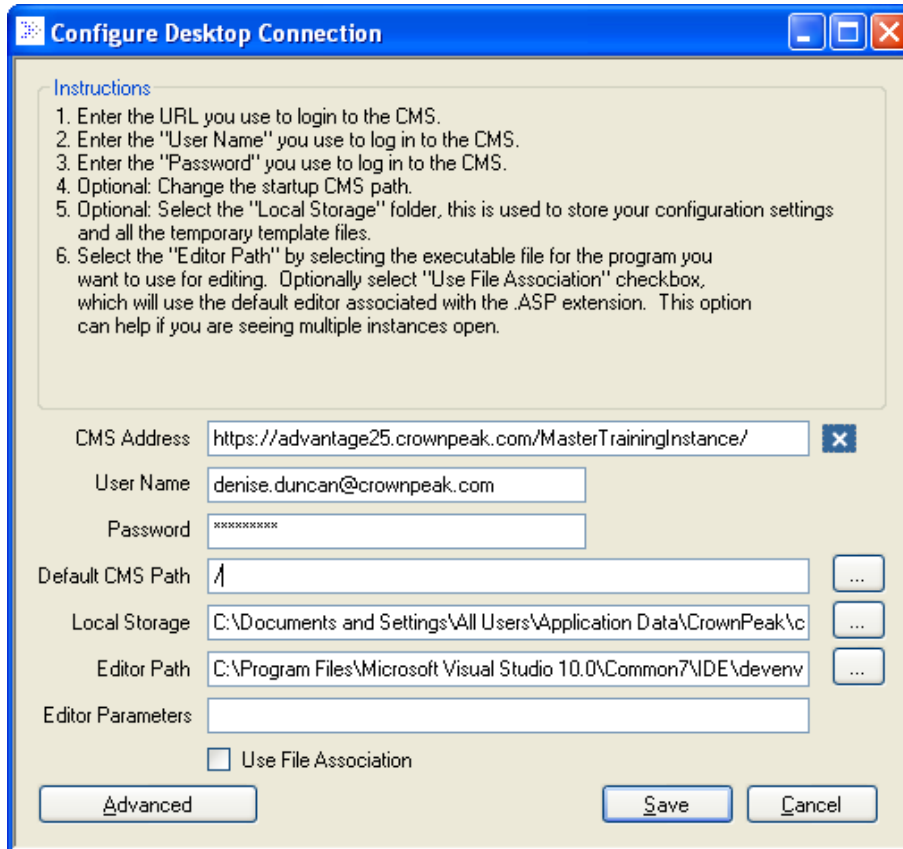
- Install from <http://cdc.crownpeak.com/standalone.aspx>
- Includes IntelliSense integration for CrownPeak C# API.
- Application will automatically check for updates every time the it starts
- Requires .NET 3.5
- For IntelliSense integration, Visual Studio 2010 or Visual Studio Web Developer Express 2010 is required. Otherwise, use with any external editor. (Visual Studio, Dreamweaver, Visual Studio Express Editions, Textpad, etc...)

ECLIPSE PLUG-IN

- Install from <http://cdc.crownpeak.com/dc/EclipsePlugin/Release/>
- Requires Eclipse 3.3 - 4.2 from <http://eclipse.org>.
- Requires Java 1.42 or better.

CONFIGURATION

STANDALONE



1. Enter the URL you use to login to CrownPeak
2. Enter the "User Name" you use to log in
3. Enter the "Password" you use to log in
4. Optional: Change the startup path. Defaults to "/System/Templates"
5. Optional: Select the "Local Storage" folder, this is used to store your configuration settings and all the temporary template files

Only for Standalone Desktop Connection

6. Select the "Editor Path" by selecting the executable file for the program you want to use for editing.
Optionally select "Use File Association" checkbox, which will use the default editor associated with the .ASP or .ASPX extension. This option can help if you are seeing multiple instances open.

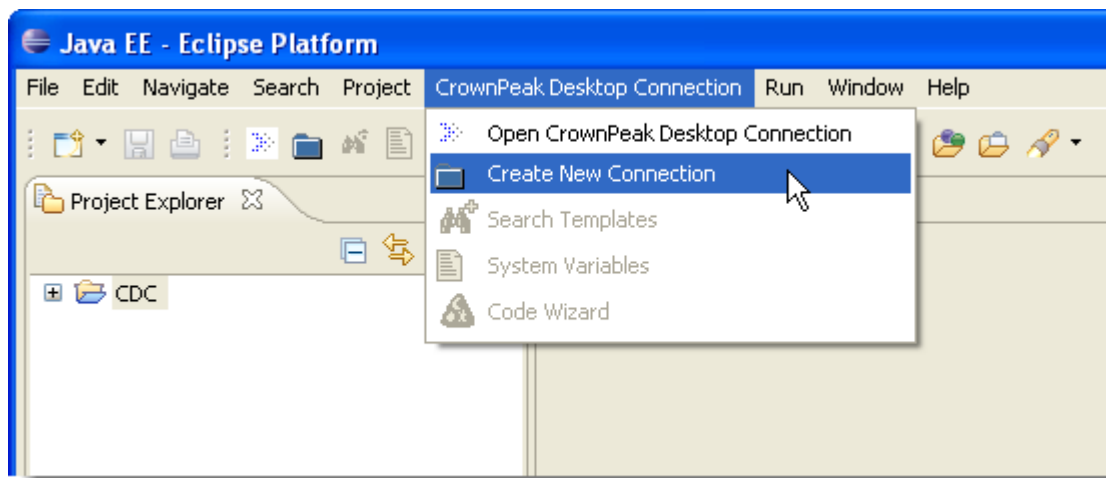
C# API Configuration

See the C# API System Configuration Guide for additional instructions on configuring the Standalone Desktop Connection for IntelliSense integration.

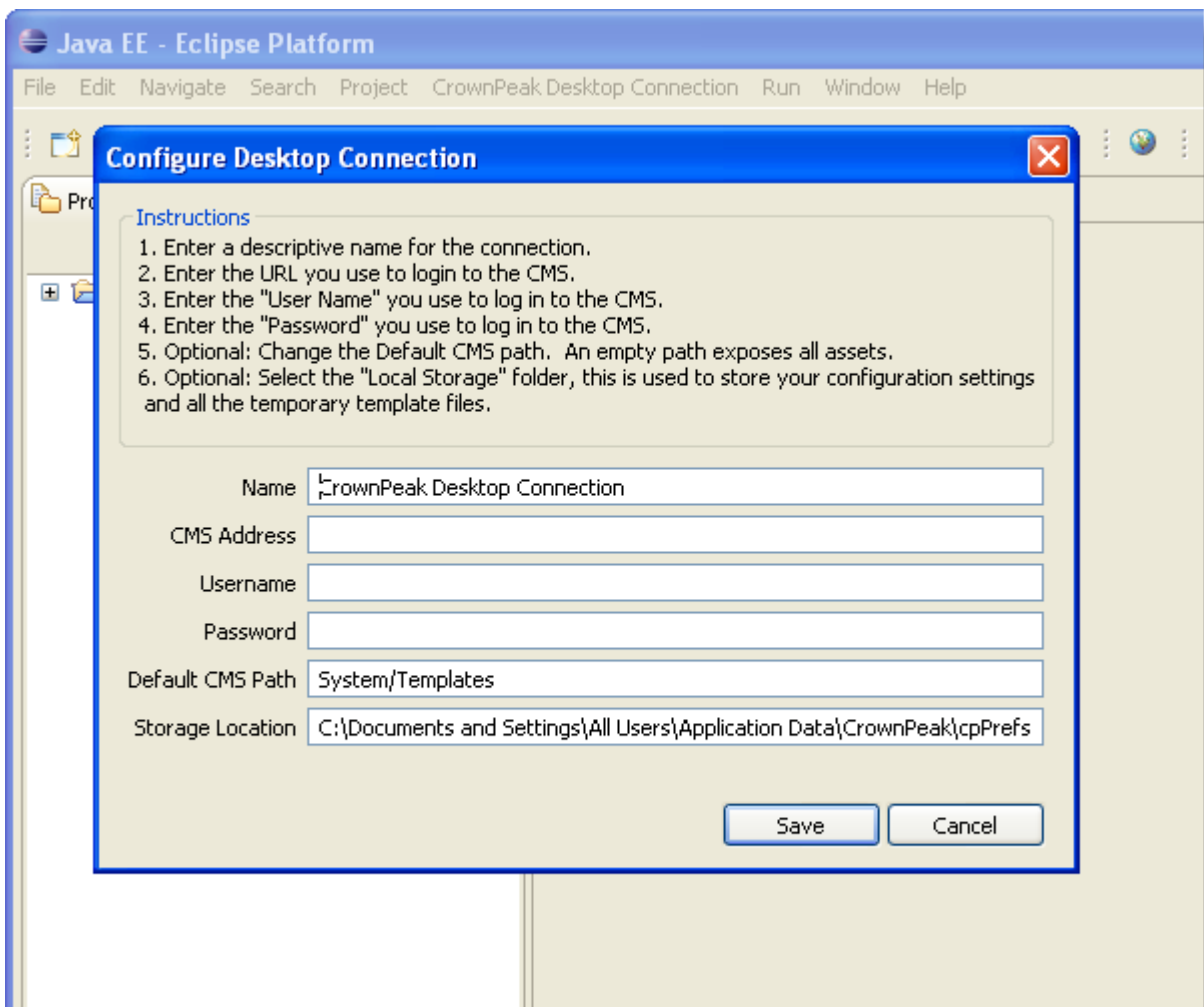
ECLIPSE

Configuring for the First Time

1. Install and Restart Eclipse according to instructions on <http://cdc.crownpeak.com/eclipse.aspx>
2. Create a new project or select an existing project to mount the template file system.
 - a. Project name: The path to the project relative to the workspace. This should already be filled in, but can be changed using the "Browse..." button.
 - b. Folder Name: The folder can be any name you want, so long as it is unique in the project.



3. Open the wizard by selecting "Create New Connection" from the CrownPeak Desktop Connection menu.

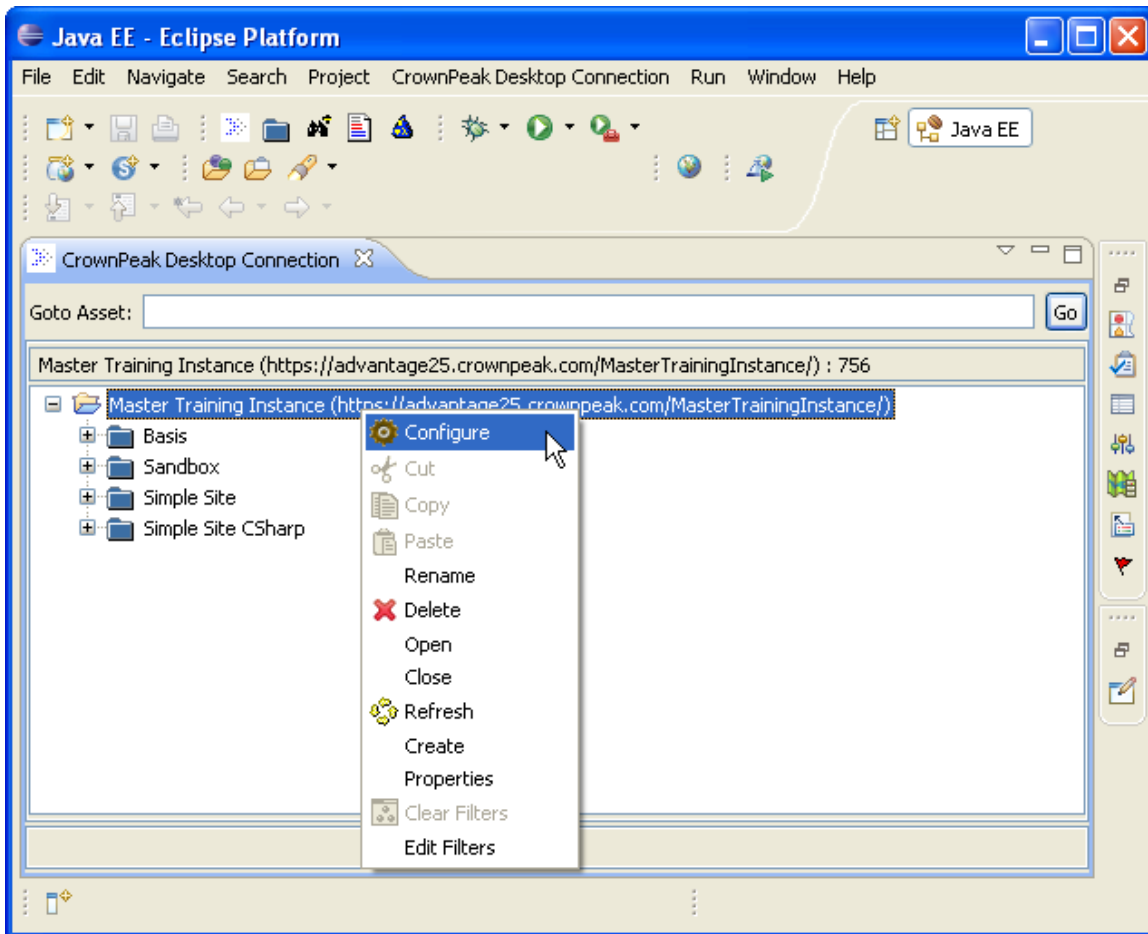


4. Enter the properties in the dialog:
 - a. Name: The name that appears in the Eclipse window. Used to identify each CrownPeak instance.
 - b. CMS Address: The URL you use to connect to CrownPeak
 - c. Username: Your CrownPeak login.
 - d. Password: The password you use to login.
 - e. Default CMS Path: The root folder for your connection. It would usually be "System/Templates".

- f. Optional: Select the "Local Storage" folder, this is used to store your configuration settings and all the temporary template files
5. Click "Finish"

Configuring an Existing Connection

1. Select the instance that you wish to configure.
2. Right-click and select “Configure”



3. Edit the properties in the dialog.
4. Click “Save” to save the settings and close the dialog.
5. There is a connection status window available. If you make a change and the plug-in fails to connect, the status will appear there when you click “Save”. Also, the dialog will stay open.

FEATURES & INSTRUCTIONS

For more information on using CDC, take a look at our video user guide available at

<http://cdc.crownpeak.com/documentation.aspx>.

C# API FEATURES

- Standalone Desktop Connection offers IntelliSense integration
- Users are able to update Visual Studio projects and libraries from the CDC explorer

EDITING

- The user can double-click on a template file to open it in their designated editor. The user can also choose "Edit" from the context menu of the template file.
- The template file is stored locally on your computer, and removed when the CDC is closed in the Standalone version, or the template file is closed in Visual Studio Add-in.
- The user may manually unlock individually locked files, or select "Unlock all my locked files" by right clicking on the root folder.
- The Standalone version will unlock any open files only when the CDC is closed. Users can also manually unlock files from the CDC Explorer.
- User may change the top level path, which defaults to "/System/Templates", by right clicking on root folder and selecting "Change path".
- Files locked by other users will be opened in READ ONLY mode.

TEMPLATE SEARCH

- Template Search, displays file CMS path, line # and source with the search string highlighted.
- Double click on a line to open the file in the selected editor. The user can usually select "Ctrl-G" in many editors to go to the line displayed in the results.
- The Visual Studio Add-in will take you to the proper line and highlight the search string.

SYSTEM VARIABLES

- This feature is only compatible with templates written in the Classic API.
- System Variables displays the CMS variables in gray. Custom variables are displayed in bold. Custom variables will be added to the list when a template file is opened.
- Double click on a variable to place it in the clipboard. You can also select the variable and click on "Copy to clipboard".
- Visual Studio Add-in will paste directly where the cursor resides.

OTHER

- Only one instance of the program is allowed to be running.
- The application will remember the following settings:
 - What folders were expanded
 - Window size and location
 - Legend maximized/minimized
 - Last used upload destination path and upload model.

KNOWN ISSUES

- The following template operations are not currently available. These are available in CrownPeak's browser interface:
 - Clone
 - Move
- /System/Library files (with *.cs extension) can only be created in the CrownPeak's browser interface. Once created these files are accessible and editable from the CDC.
- /System/Library files (with *.cs extension) do not include IntelliSense integration.

TROUBLESHOOTING TIPS

VISTA INSTALLATION

An administrator must install .NET 3.5 directly from Microsoft. It can be downloaded from:

<http://www.microsoft.com/downloads/details.aspx?FamilyId=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en>

CLICKONCE (AUTO UPDATING)

Things to check if ClickOnce is not working properly on client machine:

- Make sure ".application" file type is set to "Application Deployment Support Library" (Folder options, file association)

SUPPORT

For more information on using CDC, take a look at our video user guide available at

<http://cdc.crownpeak.com/>.

If you have any questions on installation, configuration, or use of the CDC, or if you encounter any errors, please contact support@crownpeak.com.