

Estrada[®] 3.1
Administrator Manual

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Estrada® 3.1 Administrator Manual

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Chapter 1: Administrator Basics

As an Estrada administrator, your role is to oversee the development of the content and to manage authors' access to designated sections of the site. Administrators can also control the appearance of the site's user side. Several key administrative concepts are introduced below.

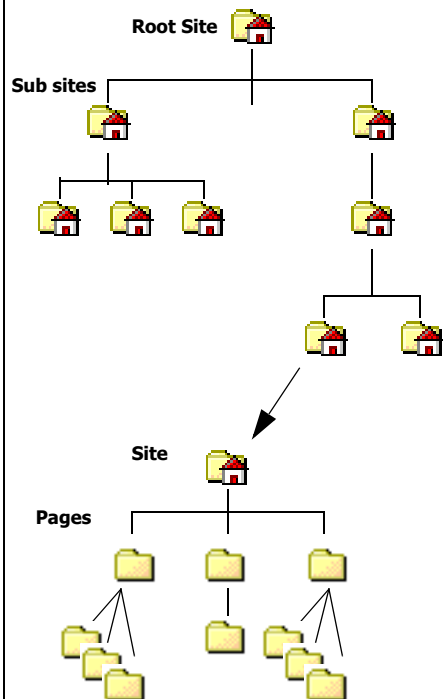
Site hierarchy

In Estrada, each page can contain zero or more links to other pages, and other pages can contain even more page links, creating a hierarchical structure. At the top of this page hierarchy is the home page of the site.

The hierarchical structure of Web sites is similar to that of Web pages. Frequently, larger sites can contain other smaller sites. For example, a company site may encompass several company division sites. In turn, each company division site can have several departmental sites and so on.

Likewise, the structure of Estrada content and permission to edit that content can also be seen as a hierarchy based on sites. Administrators can easily create sub-sites within the sites that they control and set author's permissions to access those sites or sub-sites.

Figure 1: Site hierarchy, page hierarchy



Root site

The topmost, all-encompassing site within an Estrada installation is called the *root site*, and the home page of the root site is called the *root page*. Similarly, the administrators of the root site are called *root administrators*. If you are a root administrator, you have complete control over an Estrada installation. Root administrators have the capability to manage the available site templates and locations as well as manage the access permissions of all Estrada administrators and users.

Site access permissions

In order to work on a site, authors must have access permissions to this site. Access permissions can be granted in two ways. Author's permissions that are explicitly set by an administrator are called *direct* access permissions. The access permissions that are automatically extended from a higher-level site are called *indirect* access permissions.

Access permissions follow the site hierarchy. In other words, if you have permission to access a site, then you automatically have access to all sites within that site. (See "Author access permissions" on page 7)

Templates

While authors can create and manage the content of the pages, certain elements of the page when viewed from the user side remain the same throughout the site. These elements form the site's overall visual identity, called the *template*, creating easy navigation and a consistent look and feel

throughout the site. These elements also reinforce brand equity. (See Figure 2:Template example, user side view on page 3.) An Estrada site may include one or more templates.

The template is completely separate from the site's content and can be easily replaced with other templates. The same content can be presented using totally different templates, depending on which one is chosen to wrap around the content in a particular situation.

Site administrators have the ability to assign one or more templates for a site or any of its sub-sites. When more than one template is assigned to a site, the information on the user side can be displayed in different graphic identities, depending on the template in which the information is presented.

Example:

A company decides to post its main contact information into a text brick on an Estrada page that is part of its Corporate Information site. So the contact information displays on the user side within the Corporate Information site's template.

Later, the company decides to copy the contact information to other pages throughout its site, including Sales, Human Resources, and Customer Services. If all three of these other sites employ their own templates, the content will display within a different template in each instance.

Figure 2: Template example, user side view

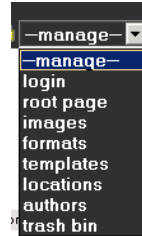


Manage Menu

The **manage** menu is a drop-down menu located at the top of the author side page. (See Figure 3: Manage menu.) By clicking to open the **manage** menu, root administrators can access the following functions:

- **login** - properties of the author or administrator's current login. The password can be changed from this option. (See "Changing your password" on page 7 of the *Estrada Author Manual*.)
- **root page** - takes you to the author side of the root page. (See "Root site" on page 2)
- **images** - library of images available for use with bricks. (See Chapter 6, "Managing the Image Library" in the *Estrada Author Manual*.)
- **formats** - allow customization of how Estrada bricks are displayed on the user side. (See "Formats" on page 22)
- **templates** - make templates available to administrators for use with Estrada sites. (See "Templates" on page 18)
- **locations** - manage the locations that are defined to be used in conjunction with templates. (See "Locations" on page 17)
- **authors** - manage the authors and administrators for the Estrada installation. (See "Author access permissions" on page 7)
- **trash bin** - manage the attributes related to the trash bin. (See "Trash bin" on page 26)

Figure 3: Manage menu



Administrators for sites other than the root site have access to three **manage** menu items: **login**, **root page**, and **images**.

Chapter 2: Managing Sites

To make the process of site creation and management more intuitive, most site manipulation operations are done using the familiar author operations. For instance, creating a site repeats many steps used to create pages, described in the *Estrada Author Manual*. Working with sites is tightly integrated with page brick operations, allowing you to quickly learn the administrative operations.

Working with sites

Site manipulation involves four basic operations:

- creating a new site
- converting an existing page into a site
- converting a site back into a page
- deleting a site.

Creating a new site

Creating a new site in Estrada closely resembles inserting a new page. The only additional step involves a checkbox, which appears in Estrada only when you are logged on as an administrator.

To create a new site from the author side of Estrada:

- 1 Click the **-insert-** drop-down menu. (See Figure 4: Creating a new site.)
- 2 Select **page** from the menu.
- 3 The **insert page** dialog box will appear.

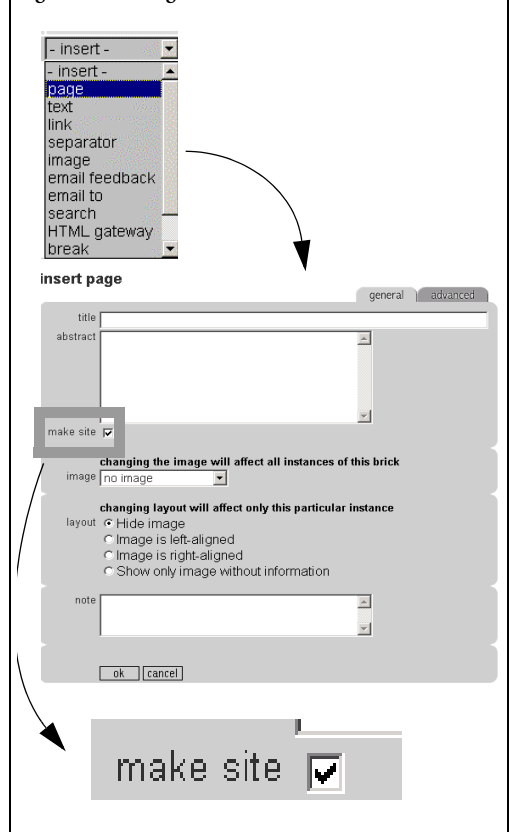
4 Enter the title of the new page in the **title** field.

5 Enter the abstract of the new page in the **abstract** field (optional).

6 Click to check the **make site** checkbox.

7 Click the **ok** button to create the site.

Figure 4: Creating a new site



Making a site

Sometimes, you need to convert an existing page into a site. During this operation, all sub-pages of the page that you wish to make a site will become pages that belong to the new site and behave according to the settings for the newly created site. The operation is built upon a page edit operation.

To make a site:

- 1 Click the **edit** button located to the left of the page brick.
- 2 The **edit page** dialog box will appear.
- 3 Edit the contents of the brick (optional).
- 4 Check the **make site** checkbox. (See Figure 4: Creating a new site.)
- 5 Click the **ok** button to make the site.

NOTE: The undo action has no effect on the make site operation. Undo rolls back only the changes that you made to the brick while editing it.

Unmaking a site

There are cases when one of your sites no longer needs to be a separate entity within a larger site, which is when you unmake the site. Unmaking a site converts all the pages within the site that you are unmaking into pages that will then belong to the *parent site*, the higher level site that contains the site that you wish to unmake.

To unmake a site:

- 1 Click the **edit** button located to the left of the site brick.
- 2 The **edit page** dialog box will appear.
- 3 Edit the contents of the brick (optional).

4 Check the **unmake site** checkbox.

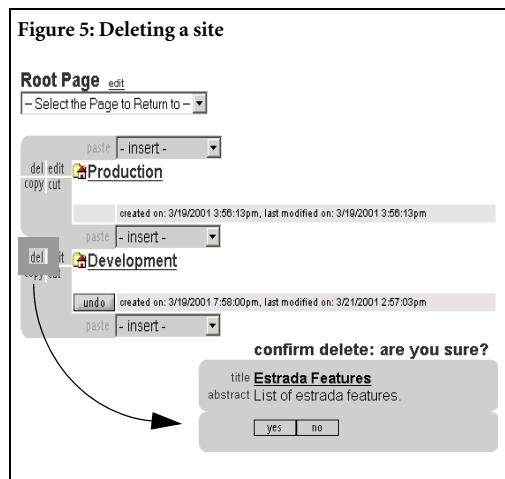
5 Click the **ok** button to unmake the site.

CAUTION: Unmaking a site will cause all site settings to be lost. After a site is unmade, all pages within it will behave according to the settings for the parent site.

Deleting a site

A site can be deleted. To delete a site:

- 1 Click the **del** button located to the left of the site brick.
- 2 A **confirm delete** dialog box will appear. (See Figure 5: Deleting a site.)
- 3 Click the **yes** button to confirm and delete the site.



Note: Thanks to the existence of the trash bin, deleting a site is not as drastic as it sounds. Refer to the Estrada Author Manual for instructions on retrieving bricks from the trash bin.

Author access permissions

In a large content management system, the ability to control an author's access to resources is crucial to the proper operation of the system. With the hierarchical site structure and direct and indirect access permissions, you can efficiently limit an author's access to one single site or extend the author's access permissions to encompass unlimited numbers of sites.

Site access list

Each site has an access list, showing all users who have access to the site, whether each has direct or indirect access, and the level of each person's access. (See "Site access permissions" on page 2) As an administrator, you can view access list of your sites at any time.

To go to the site access list:

- 1 Click the **edit** button located to the left of the site brick for which you wish to review the permissions.
- 2 The **edit page** dialog box will appear.
- 3 Click the **permissions** link.
- 4 The **site access list** dialog box will appear, showing you which authors and administrators have access to this site. (See Figure 6: Site access list.)

Those names listed in the **direct** field have direct access to the site, while those in the **indirect** lower shaded area have indirect access; they also have access to this site by virtue of having access to a higher-level site. (See "Site access permissions" on page 2)

Figure 6: Site access list



To return to the author side:

- 1 Click the **cancel** button.
- 2 The **edit page** dialog box will appear.
- 3 Click the **cancel** button to return to the author side.

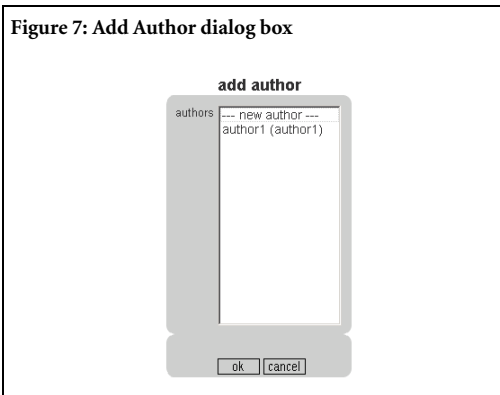
Adding an author to the site access list

Any author who already has access to a site in Estrada can be given access to another site by being added to the other site's access list. Administrators can also specify the author's level of authorship rights.

- 1 Go to the **site access list** dialog box. (See Figure 6: Site access list.)
- 2 Click the **--- add author ---** choice from the direct menu.
- 3 Click the **ok** button.
- 4 The **add author** dialog box will appear. (See Figure 7: Add Author dialog box.)
- 5 From the **authors** menu, select the author to whom you wish to grant access.

- 6 Click the **ok** button.
- 7 The **author access** menu will appear.
- 8 Click one of the access level radio buttons to select the author's access level. (See Figure 9: Author access dialog box.)
- 9 Click the **ok** button to add author to site access list.

Figure 7: Add Author dialog box



Creating a new author

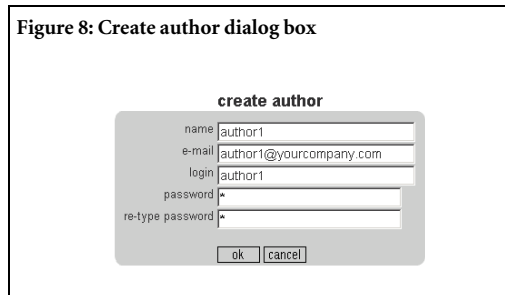
You can also add new Estrada authors. The information that needs to be supplied while creating a new author includes the author's name, e-mail address, login name, and password. When picking the login name, prepare a couple of alternatives in case the login name is already taken. Estrada recommends that you establish a system for forming login names, such as taking the first letter of an author's first name and adding it to the front of the last name. You may wish to include the author's middle initial to avoid login name overlap for people with common surnames. Under this

naming convention, an author named Mary Beth Ampers would receive the login name **mbampers**.

To create a new author:

- 1 Go to the site access list dialog box (See "Site access list" on page 7).
- 2 Click **--- add author ---** choice from the direct menu.
- 3 Click the **ok** button.
- 4 The **add author** dialog box will appear. (See Figure 7: Add Author dialog box.)
- 5 Click **--- new author ---** choice from the direct menu.
- 6 The **create author** dialog box will appear.

Figure 8: Create author dialog box



7 Enter new author's information:

- Author's name in the **name** input field.
- Author's e-mail address in the **e-mail** input field.
- Author's proposed login name in the **login** input field.
- Author's password in the **password** input field.
- Author's password in the **re-type password** input field.

8 Click the **ok** button.

9 The **author access** dialog box will appear (See Figure 9: Author access dialog box on page 9.).

10 Click one of the access level radio buttons to select the author's access level.

11 Click the **ok** button to add the author to site access list.

Note: If the proposed login name already exists in Estrada, a message will appear asking you to choose another login name. Choose another login name and continue the operation.

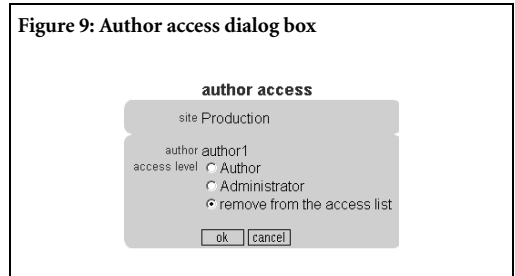
Changing an author's access permissions

To change author access permissions:

- 1 Go to the **site access list** dialog box (See Figure 6: Site access list.).
- 2 Select the author whose rights you wish to modify.
- 3 Click the **ok** button.

4 The **author access** dialog box will appear.

Figure 9: Author access dialog box



5 Click one of the access level radio buttons to select the author's access level.

- **Author** - grants access to add and modify content to this site.
- **Administrator** - grants access to site and the ability to grant others either administrative- or author- level access to the site.
- **remove from the access list** - Use this option to take away author's access to the site.

*Note: The **remove from the access list** function affects access only to the site for which you are currently changing permissions and any sub-sites contained within that site. The author's access permissions to all other sites will not be affected.*

6 Click the **ok** button to change author's access rights.

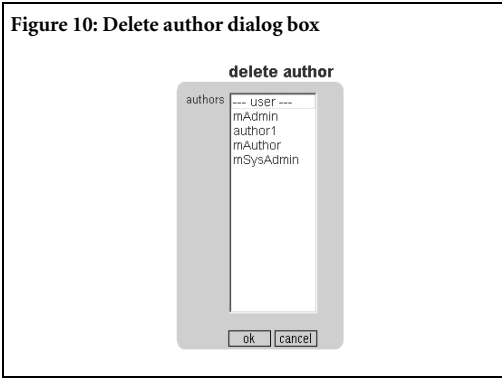
7 The **site access list** dialog box will appear.

8 Click the **cancel** button to return to the author side.

Removing an author from Estrada

If you are a root administrator, you may use this option to completely remove an author from the system. This option is useful when a person should no longer have access to any Estrada sites.

Figure 10: Delete author dialog box



To remove an author from Estrada:

- 1 Click the **-manage-** drop-down menu.
- 2 Select **authors**.
- 3 The **delete author** dialog box will appear.
- 4 Select an author from the **authors** menu.
- 5 Click the **ok** button.
- 6 The **confirm delete: are you sure** dialog box will appear.
- 7 Click the **yes** button to delete the author from Estrada.
- 8 Click the **cancel** button to return to the author side.

CAUTION: Removing an author from Estrada is a permanent action and cannot be undone. All author's access

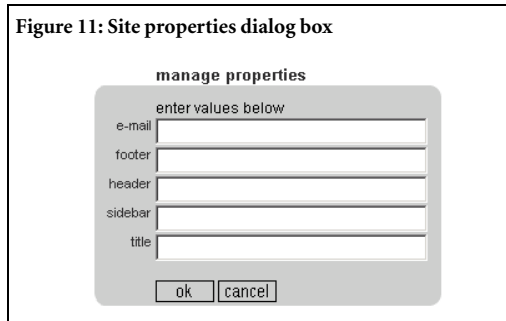
permissions are removed. To reinstate an author, follow the steps for “Creating a new author” on page 8.

Site properties

On occasion, you need a convenient way to make minor changes to the appearance of a template within a specific site. Rather than having to create a new template, you can use the site properties to change designated areas of a template. To set or edit a site's property attributes:

- 1 Click the **edit** button to the left of the site brick.
- 2 The **edit page** dialog box will appear.
- 3 Click the **properties** link.
- 4 The **manage properties** dialog box will appear. (See Figure 11: Site properties dialog box.)

Figure 11: Site properties dialog box



- 5 Enter the property value in the corresponding input field.
- 6 Click the **ok** button to set the property.
- 7 The **edit page** dialog box will appear.

8 Click the **cancel** button to return to the author side.

*NOTE: To turn off any of the properties, simply delete the text in the corresponding property field. Then click **ok** to save your changes.*

Page id and text properties

Several properties are available to modify the template that is used to display the content. There are two types of properties: *page id property* and *text property*.

Page id properties hold the identifier of another Estrada page that contains content that feeds the property. A page identifier is also known as the Estrada **durki** value, which is associated with each Estrada page. You can find the durki value by going to the user side of any Estrada page and looking at the URL (Web address); the durki value for that page is the number located after the equal sign. For example, the durki value is 26 for the following URL:

<http://www.gandalfdev.com/e3front.dll?durki=26>

Once the value of a page id property has been set, the contents of the page are added to the designated section for the site's template. This feature serves as a convenient way to add the same content element throughout the site. Unlike those elements which are hardcoded into the template (making them changeable only by your template creator), items that are displayed using the header, footer, and sidebar properties can be easily modified by the site administrator. For information on making major alterations or redesigning templates, consult your system administrator or see the *Estrada Template Developer Manual*.

Text properties hold the property value directly. In other words, the site displays the text that is entered into a text property field. Some examples of text properties include metatags, keywords, and description. Text properties are only operational if the template supports these properties. This means that the template developer must first insert the required Estrada tags into the template in order for text properties to work properly. The particular sections of the template that are affected by these properties depends upon where the template developer inserted the corresponding Estrada tags. Consult your root administrator regarding any text properties that may be available for your site.

Header

A page identifier property, the **header** property is where you can enter the page identification (durki value) of a page that contains content meant to be displayed in the header of a site. For example, a header could be used to display a company logo or text message on all pages throughout a site.

Footer

Similar to the header, the **footer** property contains the identifier of the page that feeds content to be appended at the end of each page throughout the site.

Title

The **title** property feeds content from a designated page so that it displays in the location where the page title would normally appear.

Sidebar

To establish a consistent navigation or information tool, administrators may designate a page to feed links and other information to a **sidebar**. This property enables you to update what appears on the sidebar of all pages throughout a site from one central location.

Email feedback

The **email feedback** property is a text property. It holds the email address to which all messages sent through the email feedback function will be directed.

Note: Your Estrada installation may offer additional types of site properties. If so, consult your Estrada root administrator for more information.

Staging

For sites where content approval is necessary before publishing the content, you can activate staging. By activating staging, you are implementing a requirement that all new content be reviewed and approved by you or another site administrator before the content is published on the user side.

In a staged site, there are three types of content views: *content under development*, *content for review*, and *staged content*.

Content under development is any content that you are working on but that has not yet been submitted to an administrator for review.

Content for review is content that you have finished developing and have submitted to the site administrators for review and approval

Published content is content that has been reviewed and approved by an administrator and has been published on the user side of the Web site. (See "Submitting content for review" on page 14).

Note: Everyone with administrative access to a site has the ability to review and approve any content for that site.

Turning staging on

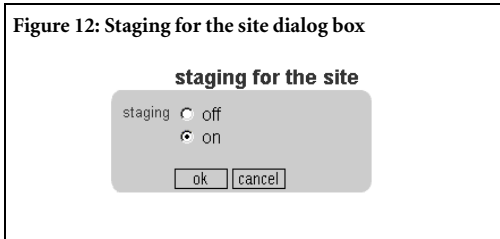
The first step in activating staging for a site is to turn staging on. Turning staging on for an existing site causes the newly staged site brick's title and abstract to be unpublished (not viewable from the user side) on all page(s) where the staged site's origin brick and shortcut bricks (if any) are located. Turning staging on effectively hides all internal links to the staged site; however, the staged site's content remains visible on the user side.

To make the staged site's title and abstract visible again, either make a change to the site brick, review and re-publish it, or turn staging off for the site. (See "Submitting content for review" on page 14) and (See "Publishing staged content" on page 15).

To turn staging on:

- 1 Click the **edit** button to the left of the site brick where you wish to use staging.
- 2 The **edit page** dialog box will appear.
- 3 Click the **staging** link.

4 The **staging for the site** dialog box will appear. (See Figure 12: Staging for the site dialog box.)



5 Select the **on** radio button and click **ok**.

6 The **edit page** dialog box will appear.

7 Click the **cancel** button to return to the author side.

Turning staging off

A staged site may also be easily converted back to the ordinary site by turning the staging off. Before performing this action, keep in mind that all staged content will automatically become published (viewable to the end user) as soon as staging is turned off.

To turn staging off:

1 Click the **edit** button next to the site brick.

2 The **edit page** dialog box will appear.

3 Click the **staging** link.

4 The **staging for the site** dialog box will appear. (See Figure 12: Staging for the site dialog box.)

5 Select the **off** radio button and click **ok**.

6 The **edit page** dialog box will appear.

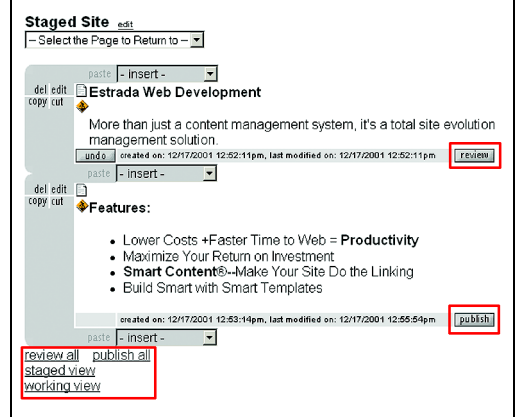
7 Click the **cancel** button to return to the author side

CAUTION: When staging is turned off, all bricks on the author side will be automatically published, replacing all bricks that were previously on the user side. Before turning staging off, be sure that all bricks on the author side are ready for publication.

Working with a staged site

Once a site has staging activated, you will see new control links on the author side view of the site. (See Figure 13: Administrator staging control buttons.) These links and buttons provide the capability to use the staging functions.

Figure 13: Administrator staging control buttons



Administrators for a staged site see the following links and buttons:

- review all
- review
- publish all
- publish
- staged view
- working view

Authors for a staged site see only the following:

- review all
- review
- staged view
- working view

Staging views

You have three views of a staged site at your disposal to assist in developing, reviewing, and publishing your site:

- *user side* is the public view that shows all published content. This is what visitors to your Web site currently see. You access this view from the author side of any Estrada page by clicking the **user side** tab at top of the page.
- *staged view* shows a user side view of your published content plus content that you have submitted for review to your site administrator(s). This is a private view that allows an author or administrator to view the staged content from a user's perspective *before* the content is published. An **approve this page** button appears on this view, which provides the

equivalent functionality of the **publish all** button. (See "Publishing staged content" on page 15)

- *working view* shows a user side view of your content as it is being developed. Think of it as a sneak preview of your work in progress. Use this view as you are developing your content to verify that it appears the way that you intend for it to look to your Web site visitors.

Submitting content for review

Once an author has completed development of one or more pieces of content, the author can submit the content to the site's administrators for review and approval. The content can be submitted through either of the following two methods:

- Click the **review** button associated with each brick ready to be submitted. (See Figure 13: Administrator staging control buttons.)
- Click the **review all** button to submit all bricks on the page ready to be submitted. (See Figure 13: Administrator staging control buttons.)

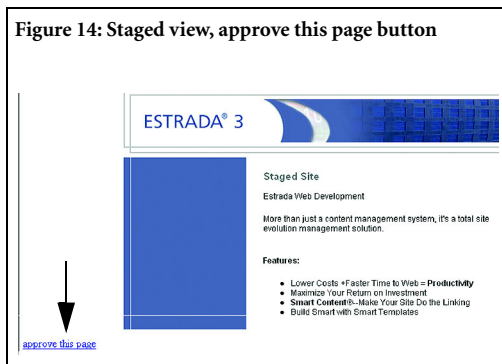
Note: Review all works for the bricks on the current page, not the entire site.

When an author submits content for review, Estrada sends an email notification to the administrator of the site (or all of the administrators, if there is more than one) where the content resides.

Publishing staged content

After the staged content has been submitted for review, an administrator can see a preview of how it will look from the user side by clicking on the **staged view** button. You can then publish the content by any of the following three methods:

- From the staged view, click the **approve this page** button to publish *all content on that page* which has been submitted for approval.



- From the author side view, click the **publish all** button to publish *all content on that page* that has been submitted for approval. (See Figure 13: Administrator staging control buttons.)
- From the author side view, click the **publish** button located in the lower right corner of *each individual brick* that you wish to publish. (See Figure 13: Administrator staging control buttons.)

To examine the current user view (the live site as it currently appears to Web visitors), click the **user side** view tab at the top of the author side of the page.

Chapter 3: Managing Locations and Templates

Managing site templates simply means controlling the graphic identity of a site. Your sites can have one or more templates associated with them. You control the template using two components of Estrada, *locations* (See "Locations" on page 17) and *templates* (See "Templates" on page 18). It's a matter of defining locations and templates and then making the proper associations between them.

Note: Only root administrators can perform most functions required for managing templates and locations.

Each Estrada site has a *default template* that is used if no other templates have been defined for the site or for all access via URLs not defined through the locations component. Locations allows you to define alternate templates (rather than the default template) for your site that will display when a Web visitor accesses the site via specifically designated URLs

Example:

A company named Gandalf Development uses the same Estrada site, Jobs, with the URL www.gandalfdev.com/e3front.dll?durki=13 to present job listings to both internal employees and the general public. One template, named Public, is set as the default for the site, so it is the one that most Web visitors will see.

However, the site administrator uses locations to set an additional template, named Employee, to display if Web visitors were to use the company's Intranet to access the Jobs site. The administrator accomplished this by using locations to associate the Intranet's URL, www.intranet.gandalfdev.com/jobs, with the Employee template.

Thus, the Jobs site, has two templates: Public and Employee, which function in this manner:

- As the Jobs site's default template, the Public template displays in most situations except those that are defined by locations.
- The Employee template displays only when a visitor accesses the Jobs site via the URL www.intranet.gandalfdev.com/jobs.

In both cases, the site displays the same content, but uses different templates in specified situations.

Locations

The *locations* component allows you to associate a URL with a particular template. When you associate a template with the designated URL using locations, the site will display using the template only when visitors enter the pre-specified URL into their Web browsers.

The scope of the relationship between locations and templates is at the site level. This means that within a *single* site, a location can be associated only with one single template. However, in a *different* site, you can associate this same location with a different template. As a result, there can be multiple locations within a single site, each one associated with a different template. In a site using multiple locations and templates, there can be only one default location and template pair.

Configuring IIS to work with Locations

You should be aware that for locations to work properly, virtual directories must also be configured in IIS (Internet Information Server). Each location that you define will need a corresponding virtual directory that redirects the user to the proper Estrada page. Contact your IIS administrator to help configure IIS to work with your defined locations.

Adding a location

Only *root administrators* may update the list of available locations.

To insert locations into Estrada:

- 1 Click the **-manage-** drop-down menu. (See Figure 15: Managing locations.)

- 2 Select **locations**.

- 3 The **manage locations** dialog box will appear.

- 4 Click the **---new location---** and click the **ok** button.

- 5 The **insert location** dialog box will appear.

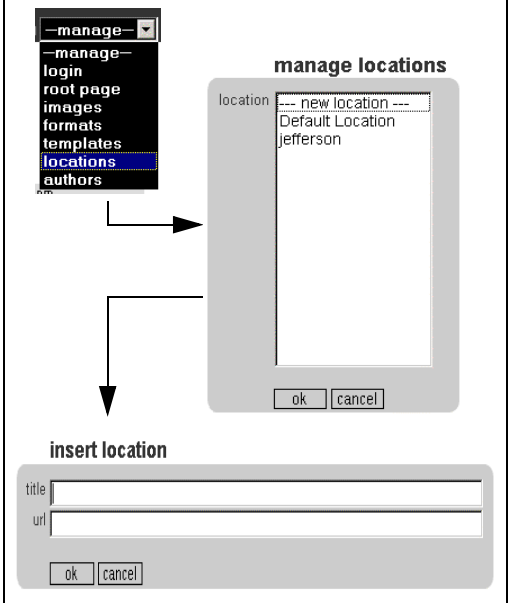
- 6 Enter the location information:

- The title of the location (which is used to display the location in lists) in the **title** input field.
- The URL in the **url** input field.

- 7 Click the **ok** button to insert the template.

- 8 Click **cancel** at the **manage locations** dialog box.

Figure 15: Managing locations



Changing a location

If you need to move your site to a new URL or if you made a mistake when adding a location, you can change the location properties.

To change an existing location:

- 1 Click the **-manage-** drop-down menu. (See Figure 15: Managing locations.)
- 2 Select **locations**.
- 3 The **manage locations** dialog box will appear.
- 4 Select the desired location from the location menu.
- 5 The **edit location** dialog box will appear.
- 6 Change the location title in the **title** input field.
- 7 Change the location URL in the **url** input field.
- 8 Click the **ok** button to change existing location.
- 9 The **manage locations** dialog box will appear.
- 10 Click the **cancel** button to return to the author side.

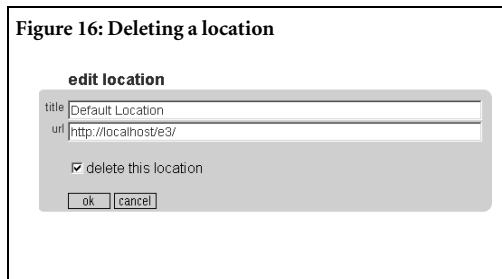
Deleting a location

To delete a location:

- 1 Click the **-manage-** drop-down menu.
- 2 Select **locations**.
- 3 The **manage locations** dialog box will appear.
- 4 Select the desired location from the location menu and click **ok**.

- 5 Click the **delete this location** check box and click **ok**. (See Figure 16: Deleting a location.)

Figure 16: Deleting a location



Templates

A template controls the graphical identity for a site. A typical template file is created with a variety of HTML tags, xml tags, and images that specify how a Web site should look on the user side. You can import the template file into Estrada and assign it to the sites where you want the template to apply.

Importing a template

The process of creating a new graphic identity for a site begins with importing a new template. Only root administrators can perform this task. To import templates into Estrada:

- 1 Click the **-manage-** drop-down menu. (See Figure 17: Managing templates.)
- 2 Select **templates**.
- 3 The **manage templates** dialog box will appear.

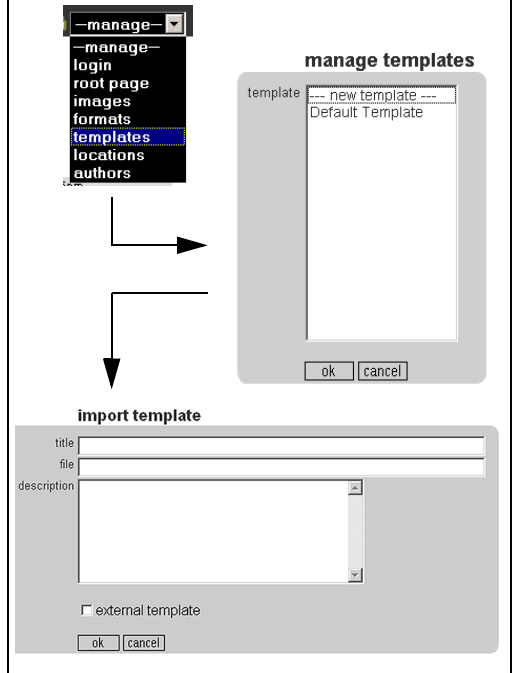
- 4 Click **---new template---** and click **ok**.
- 5 The **import template** dialog box will appear.
- 6 Enter the template information:
 - The name of the template (which is used to display the template in lists) in the **title** input field
 - The full path to the template file (including the filename) in the **file** input field
 - If this is an external template (a template file that exists in a location other than within Estrada), select the **external template** checkbox. External templates allow the integration of scripting languages within templates. Your Estrada root administrator can assist you in determining whether your site uses external or internal templates (which are template files stored within Estrada and which do not employ scripting languages).
 - A description of the template in the **description** input field (optional).
- 7 Click the **ok** button to import the template.
- 8 Click **cancel** at the **manage templates** dialog box.

Changing a template

To edit the attributes of an existing template:

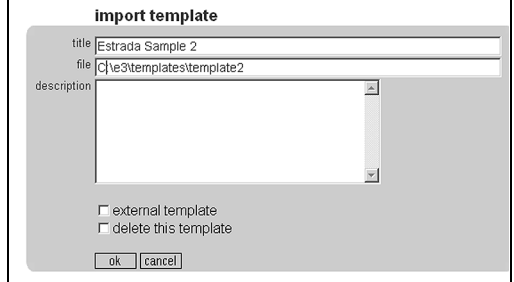
- 1 Click the **-manage-** drop-down menu. (See Figure 17: Managing templates.)
- 2 Select **templates**.
- 3 The **manage templates** dialog box will appear.
- 4 Click the name of the template that you wish to change and click **ok**.

Figure 17: Managing templates



- 5 The **import template** dialog box will appear. (See Figure 18: Changing a template.)

Figure 18: Changing a template



6 Change the information in the appropriate input field, then click **ok**.

Caution: If any change is made to the referenced template file for an Estrada template, the template file must be re-imported.

Re-importing a template

To re-import a template file:

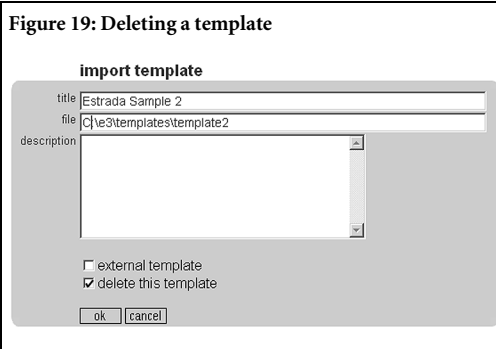
- 1 Access the appropriate template through the **manage templates** dialog box. A dialog box for changing that template will appear. (See "Changing a template" on page 19)
- 2 *Without* changing information in the input fields, click **ok** on the **import template** dialog box. The update template file will be re-imported into Estrada.

Deleting a template

To delete a template:

- 1 Click the **-manage-** drop-down menu.
- 2 Select **templates**.
- 3 The **manage templates** dialog box will appear.
- 4 Click the name of the template that you wish to change and click **ok**.
- 5 The **import template** dialog box will appear.

6 Click the **delete this template** checkbox and click **ok**.



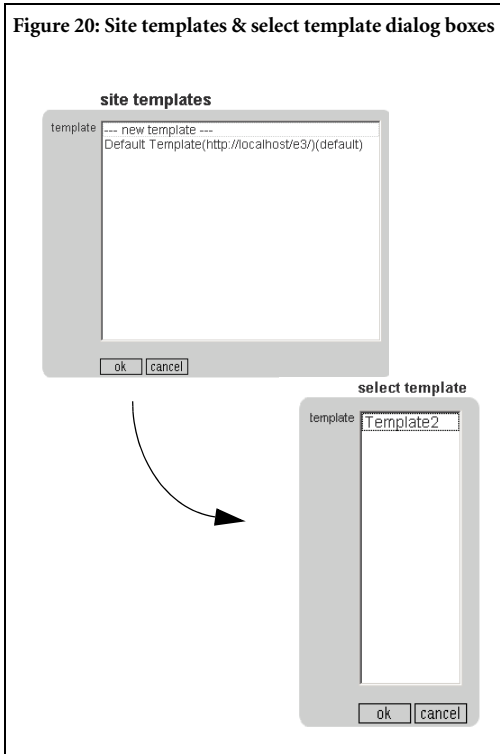
Assigning a template

Once you have added the necessary locations and templates to Estrada, you can assign a template to a site to control the graphical look of the site.

To assign a template to a site:

- 1 Click the **edit** button located to the left of the the site brick to which you wish to assign the template.
- 2 The **edit page** dialog box will appear.
- 3 Click the **templates** link.
- 4 The **site templates** dialog box will appear. (See Figure 20: Site templates & select template dialog boxes.)
- 5 Click **---new template---**.
- 6 The **select template** dialog box will appear.
- 7 Select the template that you wish to assign to this site.
- 8 Click the **ok** button.

Figure 20: Site templates & select template dialog boxes



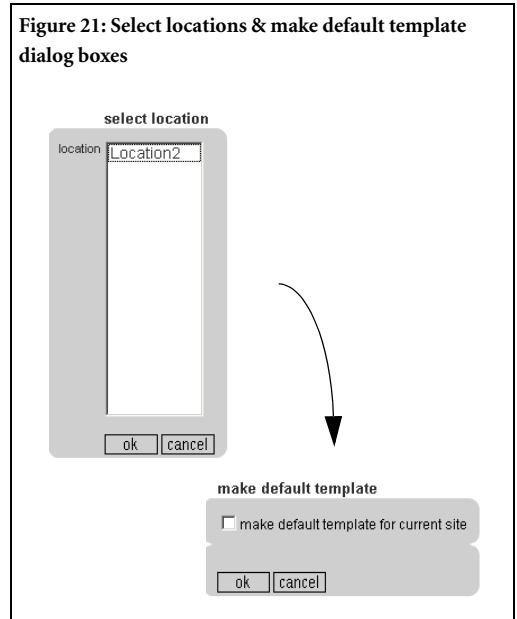
9 The **select location** dialog box will appear. (See Figure 21: Select locations & make default template dialog boxes.)

10 Select a location to be associated with the template.

11 Click the **ok** button.

12 The **make default template** dialog box will appear. (See Figure 21: Select locations & make default template dialog boxes.)

Figure 21: Select locations & make default template dialog boxes



13 If the template is to be the default template for the site, click the **make default template for the current site** checkbox. (See “Default template” on page 22.) Otherwise, leave the check box blank.

14 Click **ok** to assign the template.

15 Click **cancel** at the **site templates** dialog box.

CAUTION: Assigning a template results in an immediate change of the graphic identity on the user side. Please make sure the template that you are assigning is relevant to the content.

Default template

For each of your sites, a *default template* must exist that controls the template that is used to display the site for all user access that has not been otherwise not defined through locations. (See "Locations" on page 17.) The default template will appear in the **site templates** dialog box tagged with **(default)** at the end. (See Figure 20: Site templates & select template dialog boxes.) Identifying the default template is done at the time of assigning a template. (See "Assigning a template" on page 20)

This is straightforward when the task is to assign a new template as the default. But what if the default template needs to be changed from an existing assigned template to another? The procedure involves first removing the template that you want to become the default and then re-assigning it, making sure to select the **make default template for current site** checkbox.

The switch from one default template to another:

- 1 Click the **edit** button to the left of the site brick where you wish to apply the default template.
- 2 The **edit page** dialog box will appear.
- 3 Click the **templates** link.
- 4 The **site templates** dialog box will appear.
- 5 Select the template that you wish to make the default and click **ok**.
- 6 The **remove template from site** dialog box will appear.
- 7 Click the **remove template from current site checkbox** and click **ok**.

8 The **site templates** dialog box will appear again.

9 Click **---new template---**.

10 Select the template that you wish to make the default template (the same template that you removed) and click **ok**.

11 The **select location** dialog box will appear.

12 Select the appropriate location and click **ok**.

13 The **make default template** dialog box will appear.

14 Click the **make default template for current site** checkbox and click **ok**.

At the **site templates** dialog box, the default indicator tag, **(default)**, should appear at the end of the template selected to be the new default.

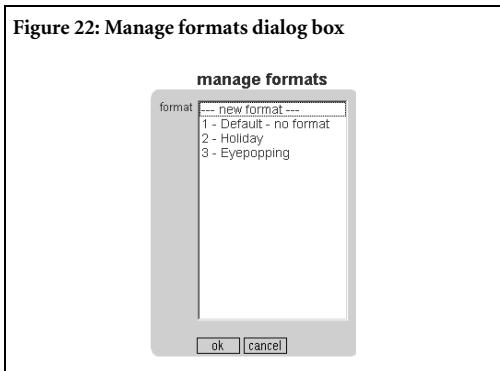
Formats

Formats enable you to customize the user side appearance of entire classes of Estrada bricks, such as text bricks or email feedback bricks, consistently throughout your site. You can modify one or multiple classes of bricks. Similar to style sheets yet less complex, formats work by adding HTML to existing Estrada tags in order to customize the bricks' appearance on the user side.

Note: Formats only customize the brick appearance on a site level. If you have multiple sites in your Estrada installation, you will need to configure formats for each site that you wish to apply formats.

Template Requirements

For your customized formats to work properly, the template to which the formats are to be applied must be configured to accept the formats. The template designer is responsible for making sure that formats will work properly with the template. The template designer must be informed which *format id* to include in the template. The format id is a system-assigned unique numeric identifier. For example, assume there are three formats defined: Default format, Holiday format, and Eyepopping format.



In the **manage formats** dialog box, each format is listed with its format id, located to the left of the format name. (See figure 22.) To reference the Eyepopping format, a template designer should use the **FORMAT="3"** tag in the XML statements used to reference formats.

```
<XML><ESTRADA"
NAME="Main"><DISPLAY WIDTH="420"
FORMAT="3"></DISPLAY></ESTRADA></
XML>
```

To customize a template to use a different format simply requires the template designer to apply the new format id in the XML commands. Once the template designer has made the necessary changes, you must re-import the template (See "Changing a template" on page 19)

Note: The format is applied in the template file, so make sure the template designer and/or administrator is aware of the format id to use in the template.

Adding a New Format

The **insert format** dialog box is built dynamically, meaning that it displays all types of bricks that you can modify using formats.

To add a new format:

- 1 Click the **-manage-** drop-down menu.
- 2 Select **formats**.
- 3 The **manage formats** dialog box will appear.
- 4 Click the **--- new format ---** selection.
- 5 Click the **ok** button.
- 6 The **insert format** dialog box will appear. (See Figure 23: Insert format dialog box.)
- 7 Enter **new format** properties:
 - The format name, as it will appear in the format list, in the **title** input field.
 - A **description** of the format (optional).
 - Enter HTML in the **begin** and **end** input fields for the bricks to be customized. Repeat this step for each class of brick that your wish to modify with this format.
- 8 Click the **ok** button to add new format.

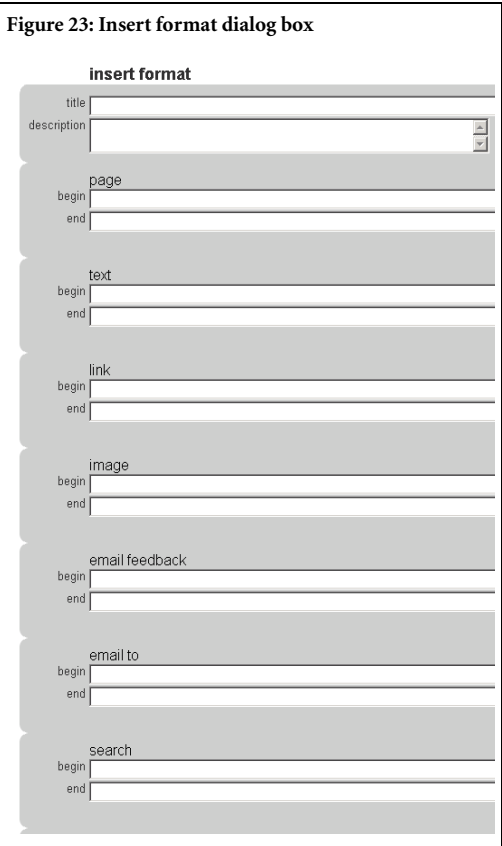


Figure 23: Insert format dialog box

The following figure shows an example of using formats to customize the appearance of text within text bricks:

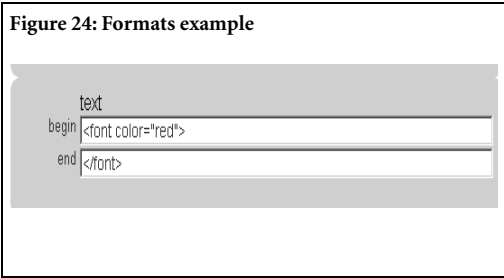


Figure 24: Formats example

The formats example applies the color red to all text displayed within a text brick in a particular template that has been configured to use this format.

Note: Formats apply on all pages within the site using the template with which the formats are associated.

Changing a format

To change an existing format:

- 1 Click the **-manage-** drop-down menu.
- 2 Select **formats**.
- 3 The **manage formats** dialog box will appear. (See Figure 22: Manage formats dialog box.)
- 4 Select the desired format from the formats list.
- 5 The **edit format** dialog box will appear. (See Figure 23: Insert format dialog box.)
- 6 Make your desired changes and click **ok**.

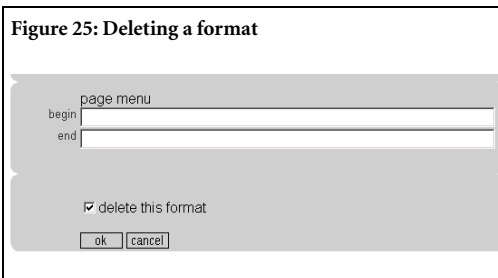
Deleting a format

Formats customize the brick appearance on a site level. If you have multiple sites in your Estrada installation, you will need to delete formats for *each site* from which you wish to remove formats.

To delete a format:

- 1 Click the **-manage-** drop-down menu.
- 2 Select **formats**.
- 3 The **manage formats** dialog box will appear. (See Figure 22: Manage formats dialog box.)
- 4 Select the desired format from the formats list.
- 5 Click the **delete this format** check box and click **ok**. (See Figure 25: Deleting a format.)

Figure 25: Deleting a format



Chapter 4: Housekeeping

There are certain aspects of Estrada that can be configured to meet your specific installation's needs.

Trash bin

The trash bin is a container that accumulates deleted bricks. Over time, the trash bin can grow larger, consuming database resources. Estrada provides the capability to periodically empty the trash bin. All trash bin bricks with deleted dates *prior* to the date you specify for emptying the trash bin will be *permanently* deleted.

Caution: Emptying the trash bin is a permanent action. Items emptied from the trash bin cannot be recovered; hence, always back up the Estrada database before you empty the trash bin.

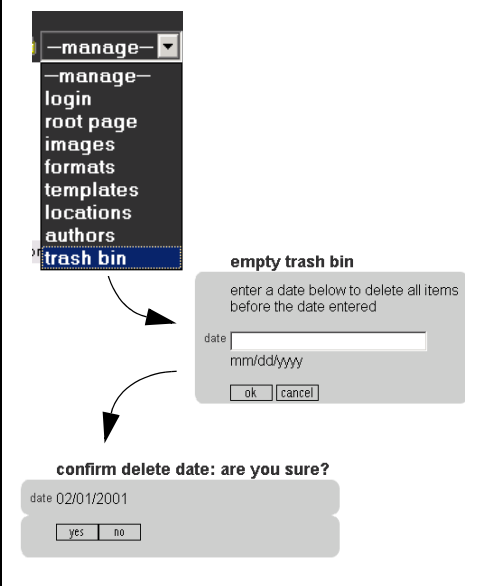
To empty the trash bin:

- 1 Before you empty the trash bin, back up the Estrada database or contact your system administrator to do so.
- 2 Click the **-manage-** drop-down menu. (See Figure 26: Emptying the trash bin.)
- 3 Select **trash bin**.

4 The **empty trash bin** dialog box will appear. Enter a date into the **date** input field. All bricks in trash bin that were deleted prior to this date will be permanently deleted.

5 Click **ok**. The **confirm delete date** dialog will appear. Click **yes** to permanently delete the trash bin bricks or click **no** to cancel the operation.

Figure 26: Emptying the trash bin



Full Text Search

The full text search capability of Estrada is provided through Microsoft SQL Server. (See “Full text search” on page 23 of the *Estrada Author Manual*.) The Full Text component must be added to the SQL Server database through the SQL Server installation process. A schedule controls how often the Full Text catalog is refreshed (or re-indexed). The indexing schedule affects how soon new content will be searchable via the full text search brick. Contact your SQL Server support person to verify your indexing schedule.

Glossary

abstract	A brick's abstract is a text field that can be attached to the brick to describe the content.
administrator	A special type of Estrada author with additional capabilities such as changing the appearance of the site, granting authors permission to edit parts of the site, creating new sites, adding navigation sidebars, etc. (See also <i>root administrator</i> and <i>author</i>).
author	An Estrada user who has the capability to add and edit content for designated sites.
brick	The basic building unit of Web content in Estrada.
browser	The generic name for a program that allows you to view Web sites on the World Wide Web.
category	A subdivision or class of content within a category set. See <i>taxonomy</i> and <i>category set</i> .
category set	A brick used in taxonomy for creating groups of content types that are related in some manner. Category set bricks are only visible on the author side of a page.
content	The material that Estrada authors create and edit on a Web page.
copy	An Estrada brick editing function that allows you to make a duplicate or duplicates of a brick; it is similar to the copy function in a word processing application.
cut	An Estrada brick editing function that allows you to pick up a brick so that it can be moved elsewhere; it is similar to the cut function on a word processing application.
default template	The template or graphical identity that establishes how your site will appear to most end users unless an alternate template has been designated through the locations feature. See also <i>template</i> and <i>locations</i> .
delete	An Estrada brick editing function that allows you to remove a brick and all the material in that brick entirely. See also <i>trash bin</i> .

durki value	The numeric value that identifies each individual Estrada page. See also <i>page identifier</i> .
Estrada Template Library (ETL) template	A type of template, developed using Active Server Pages (ASP), that permits some customization and greater flexibility than standard internal templates, such as template elements that change when viewed from the user side, according to the page or site where the template is being used.
external resource images	Estrada Image Library images with source files located anywhere on the Internet. See also <i>internal resource images</i> and <i>image library</i> .
format	Feature that can be used to customize the appearance of various types of Estrada bricks throughout a single site.
image library	Collection of images that can be associated with Estrada bricks
internal resource images	Estrada Image Library images with source files located in a subdirectory on the Estrada server. See also <i>external resource images</i> and <i>image library</i> .
internal template	A type of template that uses HTML, remains static wherever it is used throughout a site, and offers standard Estrada flexibility, such as changing the name of the page that is displayed in the template on the user side
locations	Can be used by Estrada administrators to cause a particular template to display when a user accesses an Estrada site using a particular URL. See also <i>default template</i> and <i>template</i> .
original brick	A brick that was not created through the use of the copy function, but instead was created using the insert drop-down menu.
page identifier	The numeric value that identifies each individual Estrada page. To locate the page identifier, look at the URL (Web address) for the page. The first number located after the equal sign is the page identifier. See also <i>durki value</i> .
Pandora external templates	A type of template that permits developers maximum flexibility to create dynamic and customized content when pages are viewed on the user side. Pandora template developers must be familiar with Active Server Pages (ASP) and server-side scripting languages that support COM (Component Object Model).
parent site	A site in the site hierarchy that contains lower-level sites within it.

related items	A brick used in taxonomy. When placed on an individual page, the related items brick shows links to related content items on the user side of the page. If a Pandora External Template is being used on the site where a related items brick is placed, the links to related items belonging to the category set selected will be clustered together when displayed on the user side.
root administrator	An Estrada administrator who has complete control over an Estrada installation, including all sites and users. See also <i>administrator</i> .
root page	The top-most page in the hierarchy of an Estrada Web site installation.
root site	The top-most site that encompasses all of the sub-sites in an Estrada installation.
shortcut brick	A copy of an original brick. See also <i>original brick</i> .
site	One or more Web pages that function as a unit, and to which access can be limited to specific authors or administrators. For example, pages within a site may share the same template, or if the author is granted access to an Estrada site, he or she gains access to all pages within that site.
staging	A means to require that all content changes be reviewed and approved by an administrator before making them available for viewing on the user side of an Estrada site.
tag	A brick used in taxonomy to record to which category or categories individual pages belong. Tag bricks are only visible on the author side of the page.
taxonomy	An Estrada feature that enables you to classify content and make connections among related content items. As you add new content or make changes to your site, Taxonomy helps with site maintenance by forging and updating connections.
template	A file that provides the visual design information for one or more Estrada sites, controlling how your site looks to end users. Template files also control which areas of a page contain dynamic and static content. The template file contains HTML coding, images, and Estrada-specific tags.
trash bin	A location where you can retrieve bricks that have been deleted. See also <i>delete</i> .
undo	Feature enabling previous version(s) of a brick to be restored, replacing a current version of the brick.
user	Visitors to an Estrada Web site — people who simply read the information on your Web pages, but have no ability to modify the content of the site.

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