

Estrada[®] 3.5
Administrator Manual

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Estrada® 3.5 Administrator Manual

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Written and designed at Gandalf Development, Inc., 3021 Lorna Square, Suite 100, Birmingham, AL 35216, USA www.gandalfdev.com

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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.

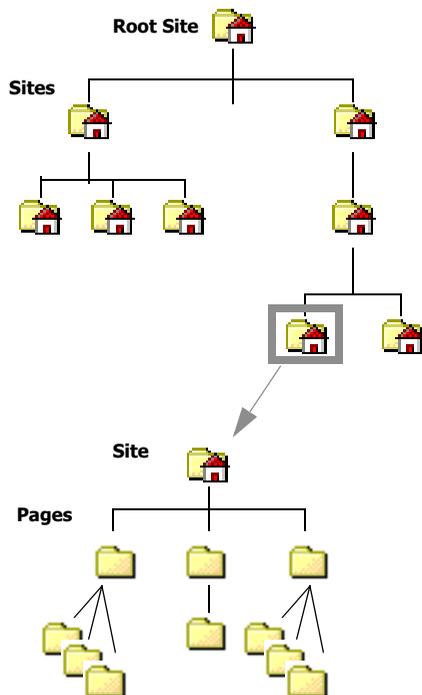
Site hierarchy

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:User side view of a page, template and content areas, indicated 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.

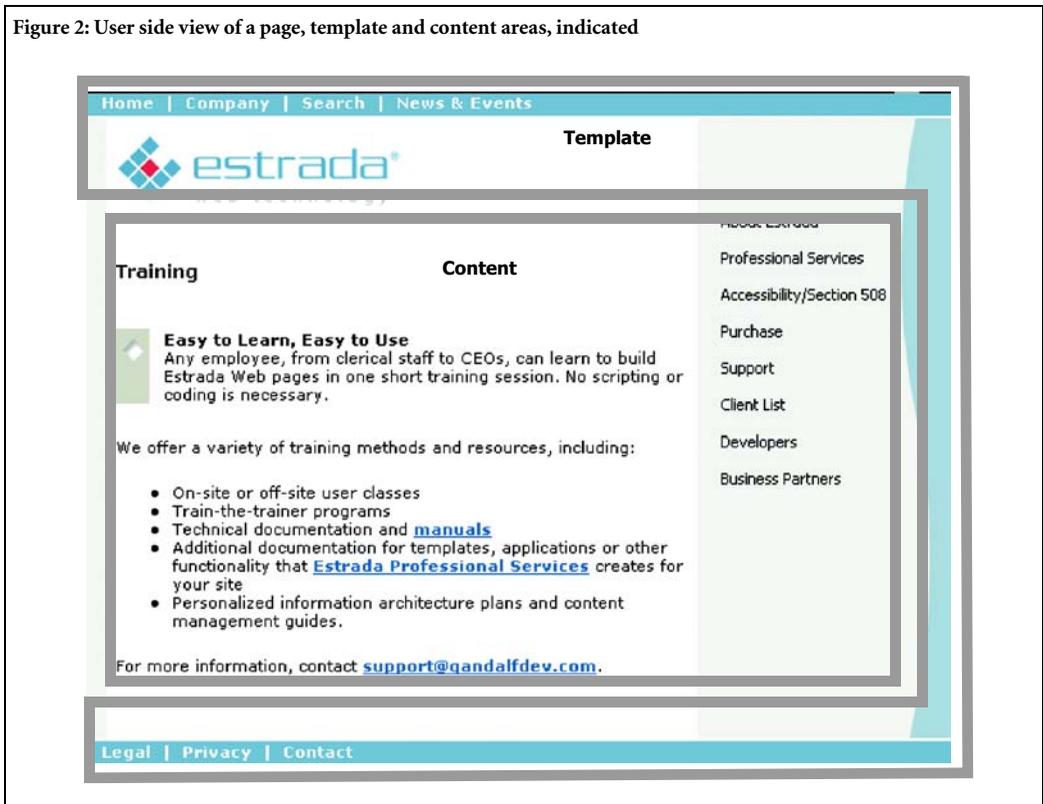
Site administrators have the ability to assign one or more templates for a site or any of its sub-sites. When more than one template is assigned to a site, the information on the user side can be displayed in different graphic identities, depending on the template in which the information is presented.

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: User side view of a page, template and content areas, indicated



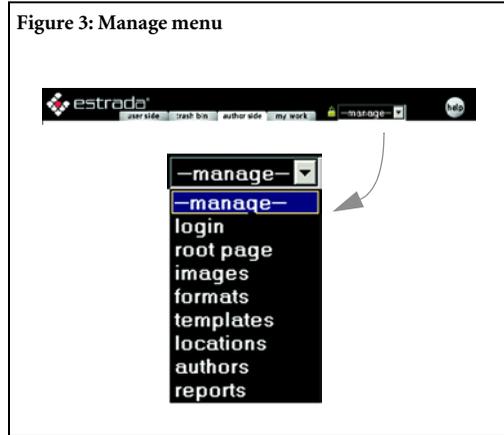
Manage Menu

The **manage** menu is a drop-down menu located at the top of the author side page. (See Figure 3: Manage menu.) To access the **manage** menu, click the menu. Root administrators have access to all of 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 5, "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 21)
- **templates** - make templates available to administrators for use with Estrada sites. (See "Templates" on page 16)
- **locations** - manage the locations that are defined to be used in conjunction with templates. (See "Locations" on page 15)
- **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 24)
- **reports** - Available only to root administrators, Estrada management reports provide extensive

information about your site's activity, content, users, and more. (See "Site Management Reports" on page 26)

Figure 3: Manage menu



Administrators for sites other than the root site have access to three **manage** menu items only: **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.

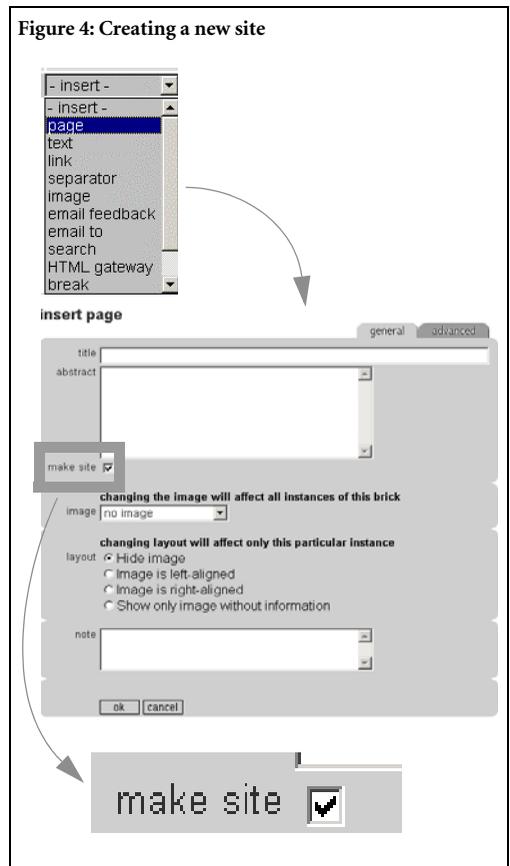
4 Enter the title of the new page in the **title** field.

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.

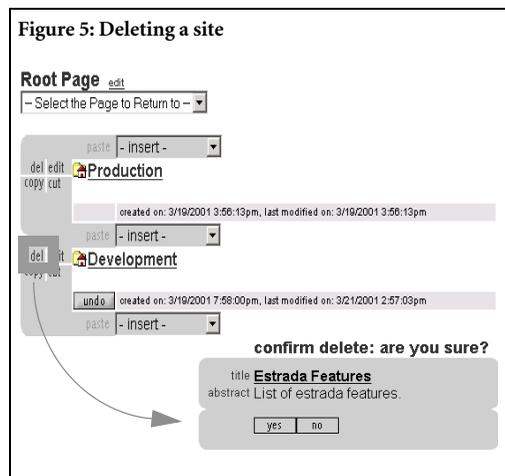
5 Click the **ok** button to unmake the site.

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 Eстрада 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.

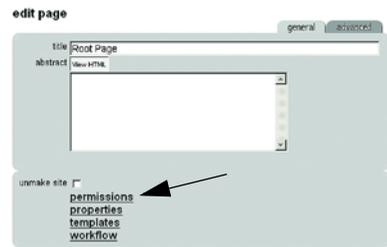
Site access list

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. (Figure 6)
- 3 Click the **permissions** link.

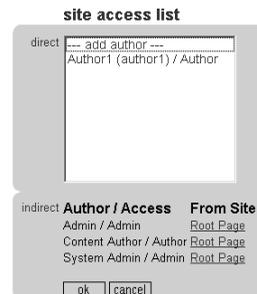
Figure 6: Edit page dialog box, permissions link indicated



Note: If your Estrada installation does not have the Workflow component installed, you will not see the Workflows link in the Edit Page dialog box.

4 The **site access list** dialog box will appear, showing you which authors and administrators have access to this site. (Figure 7)

Figure 7: 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.

To return to the author side:

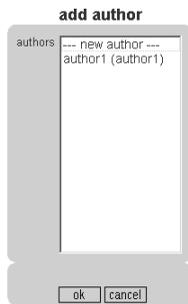
- 1 Click the **cancel** button.
- 2 The **edit page** dialog box will appear (Figure 6 on page 7).
- 3 Click the **cancel** button to return to the author side.

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 (Figure 7).
- 2 Click the --- **add author** --- choice from the direct menu.
- 3 Click the **ok** button.
- 4 The **add author** dialog box will appear (Figure 8).

Figure 8: 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 (Figure 10 on page 9)

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

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 (Figure 8).

5 Click --- **new author** --- choice from the direct menu.

6 The **create author** dialog box will appear (Figure 9).

Figure 9: Create author dialog box



The 'create author' dialog box is a light gray window with a title bar. It contains five input fields: 'name' with 'author1', 'e-mail' with 'author1@yourcompany.com', 'login' with 'author1', 'password' with a masked asterisk, and 're-type password' with a masked asterisk. At the bottom, there are two buttons: 'ok' and 'cancel'.

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 (Figure 10 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 (Figure 7 on page 7).

2 Select the author whose rights you wish to modify.

3 Click the **ok** button.

4 The **author access** dialog box will appear (Figure 10).

Figure 10: Author access dialog box



The 'author access' dialog box is a light gray window with a title bar. It shows 'site: Production' and 'author: author1'. Under 'access level', there are three radio buttons: 'Author' (selected), 'Administrator', and 'remove from the access list'. At the bottom, there are two buttons: 'ok' and 'cancel'.

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.

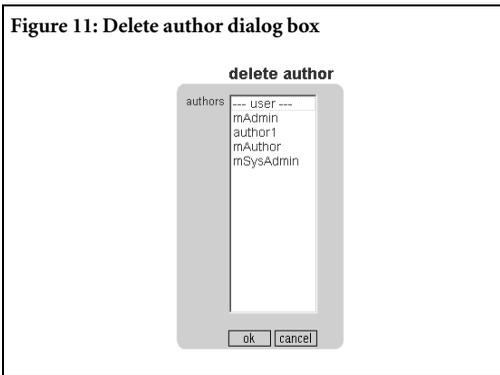
*Note: The **remove from the access list** function affects access only to the site for which you are currently changing permissions and any sub-sites contained within that site. The author's access permissions to all other sites will not be affected.*

- 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 11: 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 may 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 a designated area of a template (called a *placeholder*) or a specific brick function.

There are two categories of properties: *page id property* and *text property*.

The effect of site properties extend throughout the site for which they are set. In other words, if you set or change a site property, such as creating a footer to appear at the bottom of a page, this footer will appear on every page throughout the site. At the same time, site properties can only affect the site for which they are set. To create the same results on multiple sites using properties, you must make changes to the properties for each site that you wish to affect.

Page identifier properties

Page identifier properties work by pulling information from a separate feeder page to display that information within a placeholder of the template. Page properties work by recording the page identified, or numerical identification, of the page that contains the data to be displayed. A page identifier is also called the **durki value** in Estrada. Once the value of a page identifier 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*.

Locating the Page Identifier

You can find the page identifier or 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

Header

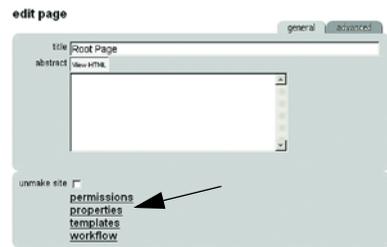
A page identifier property, the **header** property permits you to enter the page identifier or durki value of a page that contains content meant to be

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.

To set or edit the header property:

- 1 Click the **edit** button to the left of the site brick where you wish to set or edit the property.
- 2 The **edit site** dialog box will appear (Figure 12).

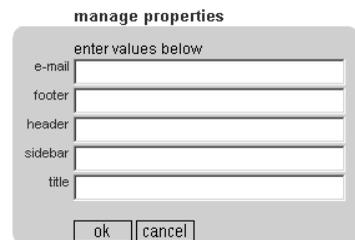
Figure 12: Edit page dialog box, properties link indicated



Note: If your Estrada installation does not have the Workflow component installed, you will not see the Workflows link in the Edit Page dialogue box.

- 3 Click the **properties** link.
- 4 The **manage properties** dialog box will appear (Figure 13).

Figure 13: Manage properties dialog box



5 Enter the page identifier for the feeder page that you created into the **header** field.

6 Click **ok**. The **edit page** dialog box will appear (Figure 12 on page 11).

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

Footer

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

To set or edit the footer property:

1 Click the **edit** button to the left of the site brick where you wish to set or edit the property.

2 The **edit page** dialog box will appear (Figure 12 on page 11).

3 Click the **properties** link.

4 The **manage properties** dialog box will appear (Figure 13 on page 11).

5 Enter the page identifier for the feeder page that you created into the **footer** field.

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

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

Sidebar

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

To set or edit the sidebar property:

1 Click the **edit** button to the left of the site brick where you wish to set or edit the property.

2 The **edit site** dialog box will appear (Figure 12 on page 11).

3 Click the **properties** link.

4 The **manage properties** dialog box will appear (Figure 13 on page 11).

5 Enter the page identifier for the feeder page that you created into the **sidebar** field.

6 Click **ok**. The **edit page** dialog box will appear (Figure 12 on page 11).

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

Title

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

To set or edit the title property:

1 Click the **edit** button to the left of the site brick where you wish to set or edit the property.

2 The **edit site** dialog box will appear (Figure 12 on page 11).

3 Click the **properties** link.

4 The **manage properties** dialog box will appear (Figure 13 on page 11).

5 Enter the page identifier for the feeder page that you created into the **title** field.

6 Click **ok**. The **edit page** dialog box will appear (Figure 12 on page 11).

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

Text properties

Text properties display or use exactly what you enter into the property field. In other words, the template displays or uses the text that is entered into a text property field, unlike page id properties which pull data from a separate feeder page.

Email feedback

The email feedback property allows you to designate one email address to which you wish to direct all messages that visitors send through email feedback bricks on this site. To set this property, enter the email address into the **email feedback** field. The email feedback property is a text property.

To set or edit the email feedback property:

- 1 Click the **edit** button to the left of the site brick where you wish to set or edit the property.
- 2 The **edit page** dialog box will appear (Figure 12 on page 11).
- 3 Click the **properties** link.
- 4 The **manage properties** dialog box will appear (Figure 13 on page 11).
- 5 Enter into the **email** field the email address where you wish to direct all email sent through email feedback bricks on this site.
- 6 Click **ok**. The **edit page** dialog box will appear (Figure 12 on page 11).
- 7 Click the **cancel** button to return to the author side.

Other 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.

Deactivating Site Properties

To turn off any of site property:

- 1 Click the **edit** button to the left of the site brick where you wish to set or edit the property.
- 2 The **edit page** dialog box will appear (Figure 12 on page 11).
- 3 Click the **properties** link.
- 4 The **manage properties** dialog box will appear (Figure 13 on page 11).
- 5 Delete the page id or text in the field for the property that you wish to deactivate.
- 6 If you wish to deactivate more than one site property, repeat steps 1-5 for each property that you wish to deactivate.
- 7 Click **ok**. The **edit page** dialog box will appear (Figure 12 on page 11).
- 8 Click the **cancel** button to return to the author side.

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

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 15) and *templates* (See "Templates" on page 16). 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, which are discussed in this chapter.

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 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. (Figure 14).

- 2 Select **locations**.

- 3 The **manage locations** dialog box will appear (Figure 14).

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

- 5 The **insert location** dialog box will appear (Figure 14).

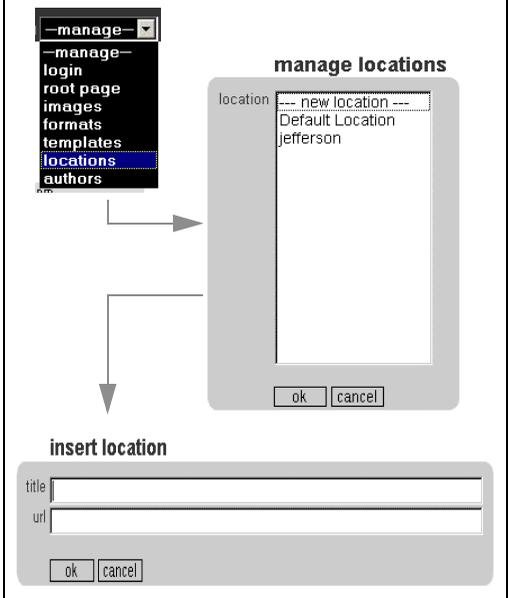
- 6 Enter the location information:

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

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

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

Figure 14: 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 (Figure 14 on page 15).
- 2 Select **locations**.
- 3 The **manage locations** dialog box will appear (Figure 14 on page 15).
- 4 Select the desired location from the location menu.
- 5 The **edit location** dialog box will appear (Figure 14 on page 15).
 - **title** input field: Change the location title.
 - **url** input field: Change the location URL.
- 6 Click the **ok** button.
- 7 The **manage locations** dialog box will appear (Figure 14 on page 15).
- 8 Click the **cancel** button to return to the author side.

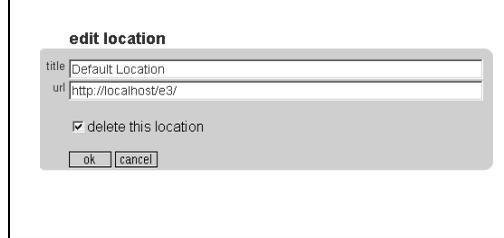
Deleting a location

To delete a location:

- 1 Click the **-manage-** drop-down menu (Figure 14 on page 15).
- 2 Select **locations**.
- 3 The **manage locations** dialog box will appear (Figure 14 on page 15).
- 4 Select the desired location from the location menu and click **ok**.

- 5 Click the **delete this location** check box and click **ok** (Figure 15).

Figure 15: 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 (Figure 16 on page 17).
- 2 Select **templates**.
- 3 The **manage templates** dialog box will appear (Figure 16 on page 17).
- 4 Click **---new template---** and click **ok**.

5 The **import template** dialog box will appear (Figure 16).

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.

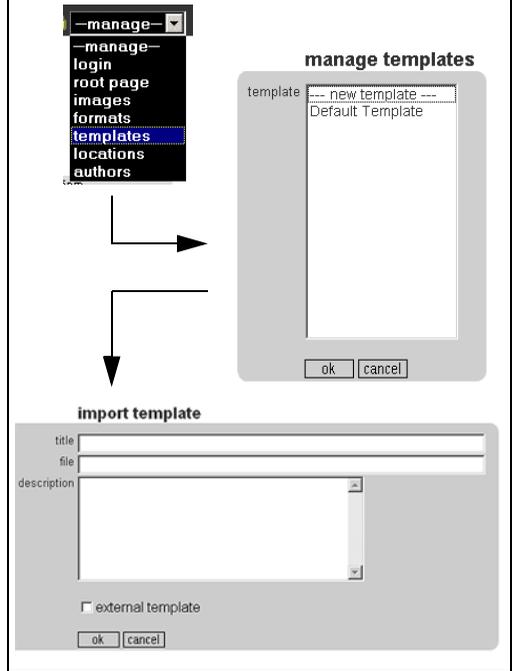
8 Click **cancel** at the **manage templates** dialog box.

Changing a template

To edit the attributes of an existing template:

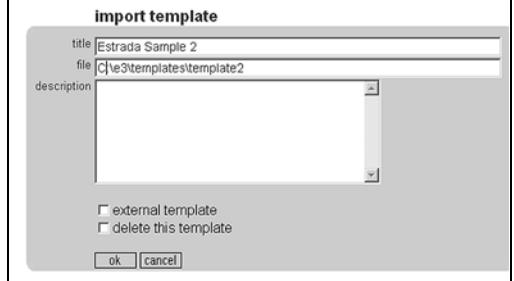
- 1 Click the **-manage-** drop-down menu. (Figure 16)
- 2 Select **templates**.
- 3 The **manage templates** dialog box will appear (Figure 16).
- 4 Click the name of the template that you wish to change and click **ok**.

Figure 16: Managing templates



5 The **import template** dialog box will appear (Figure 17).

Figure 17: 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:

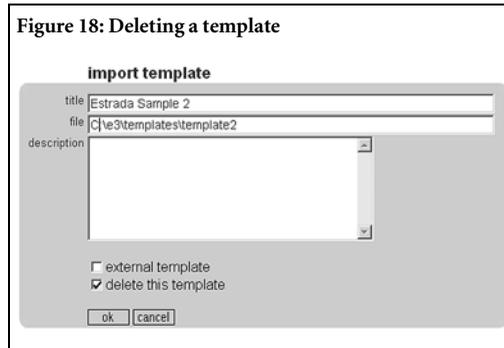
- 1 Access the appropriate template through the **manage templates** dialog box. A dialog box for changing that template will appear. (See "Changing a template" on page 17)
- 2 Without changing information in the input fields, click **ok** on the **import template** dialog box. The update template file will be re-imported into Estrada.

Deleting a template

To delete a template:

- 1 Click the **-manage-** drop-down menu (Figure 16 on page 17).
- 2 Select **templates**.
- 3 The **manage templates** dialog box will appear (Figure 16 on page 17).
- 4 Click the name of the template that you wish to change and click **ok**.
- 5 The **import template** dialog box will appear (Figure 18).

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

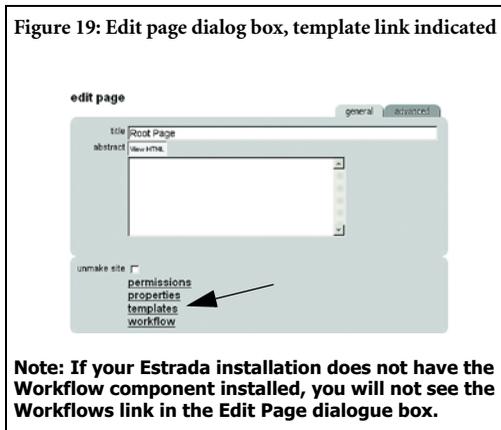


Assigning a template

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.

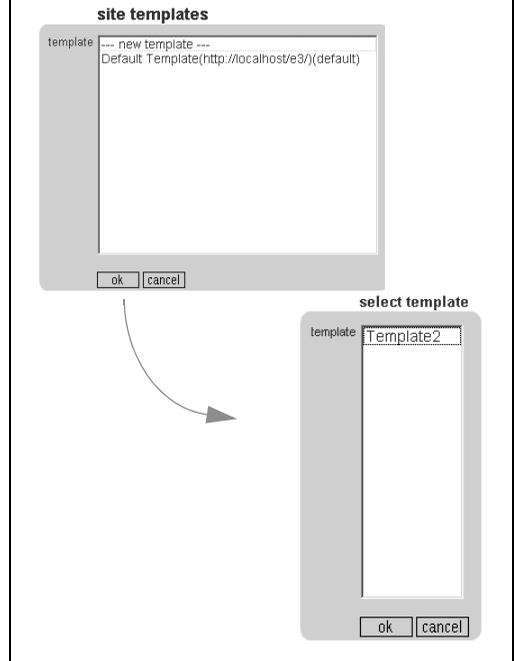
To assign a template to a site:

- 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 (Figure 19).



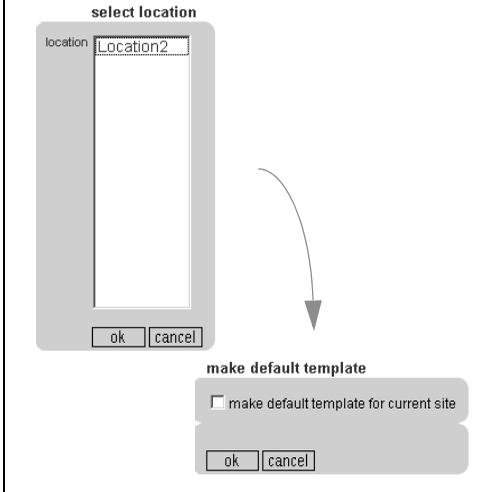
- 3 Click the **templates** link.
- 4 The **site templates** dialog box will appear (Figure 20 on page 19).
- 5 Click **---new template---**.
- 6 The **select template** dialog box will appear (Figure 20 on page 19).
- 7 Select the template that you wish to assign to this site.
- 8 Click the **ok** button.

Figure 20: Site templates & select template dialog boxes



- 9 The **select location** dialog box will appear (Figure 21).
- 10 Select a location to be associated with the template.
- 11 Click the **ok** button.
- 12 The **make default template** dialog box will appear (Figure 21).
- 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 20.) Otherwise, leave the check box empty.
- 14 Click **ok** to assign the template.

Figure 21: Select locations & make default template dialog boxes



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 15.) 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 19)

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 (Figure 20 on page 19).

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

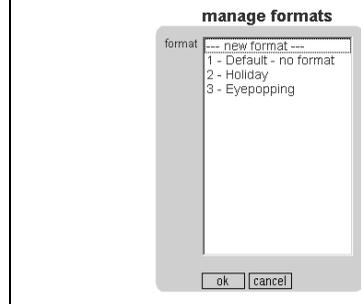
Formats enable you to customize the user side appearance of entire classes of Estrada bricks, such as text bricks or email feedback bricks, consistently throughout your site. You can modify one or multiple classes of bricks. Similar to style sheets yet less complex, formats work by adding HTML to existing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

Figure 22: Manage formats dialog box



In the **manage formats** dialog box, each format is listed with its format id, located to the left of the format name (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 17)

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.

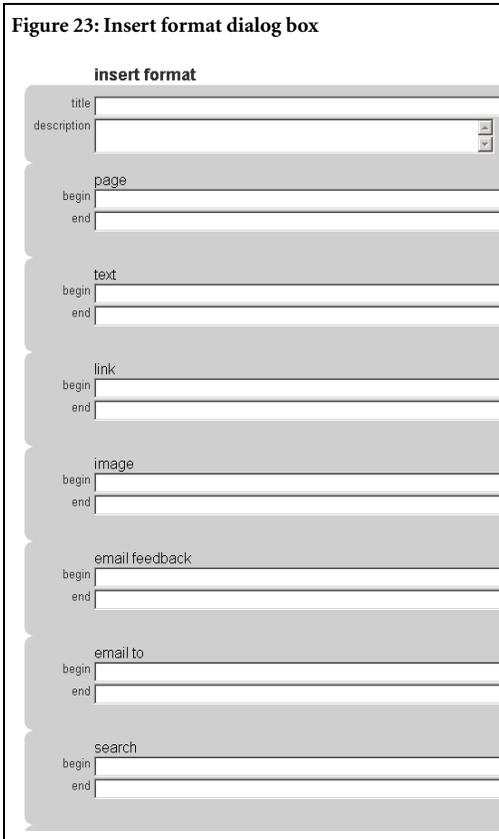
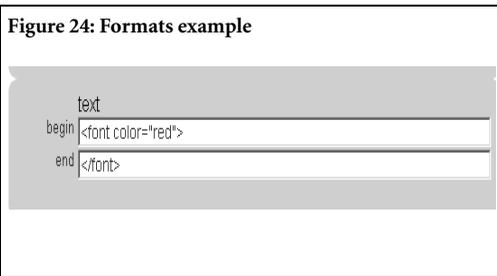
Adding a New Format

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 (Figure 23 on page 22).
- 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.

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



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 (Figure 22 on page 21).
- 4 Select the format that you wish to modify from the **formats** list.
- 5 The **edit format** dialog box will appear. (Figure 24).
- 6 Make your desired changes and click **ok**.

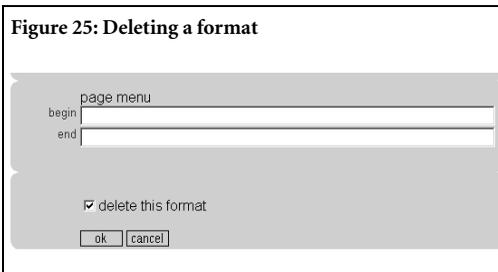
Deleting a format

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 (Figure 22 on page 21).
- 4 Select the format that you wish to delete from the formats list.
- 5 Click the **delete this format** check box and click **ok** (Figure 25).

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; therefore, always back up the Estrada database before you empty the trash bin.

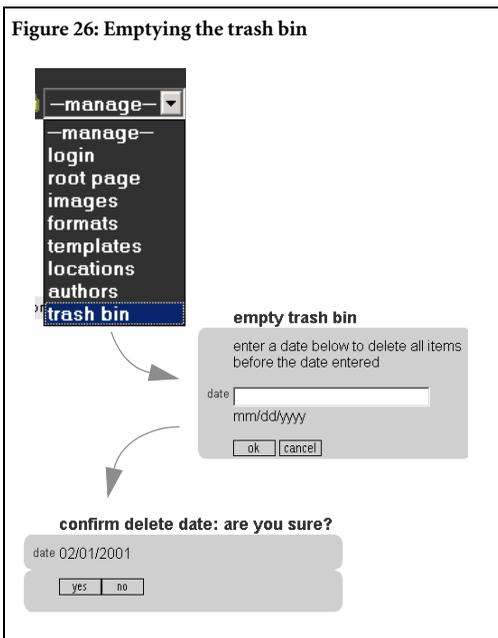
To empty the trash bin:

- 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 (Figure 26).
- 3 Select **trash bin**. The **empty trash bin** dialog box will appear (Figure 26).

4 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 (Figure 26).

- Click **yes** to permanently delete the trash bin bricks, or
- Click **no** to cancel the operation.



Full Text Search

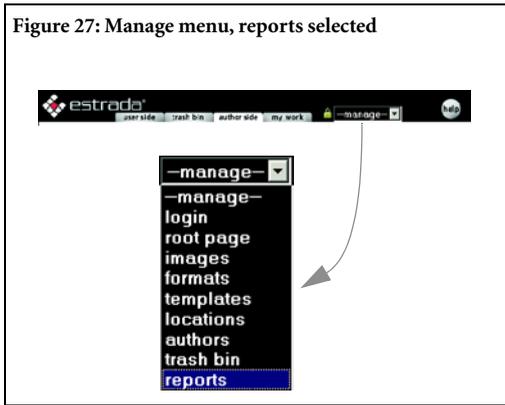
The full text search capability of Estrada is provided through Microsoft SQL Server. (See “Full text search” on page 25 of the *Estrada Author Manual*.) The Full Text component must be added to the SQL Server database through the SQL Server installation process.

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.

Chapter 5: Site Management Reports

Available only to root administrators, Estrada management reports provide extensive information about your site's activity, content, users, and more. Most reports can be set up to include all sites within an Estrada installation or an individual site, and you may customize what data to include as well as the display format.

Administrators can access all of the site management reports by selecting **reports** from the **manage** menu (Figure 27).



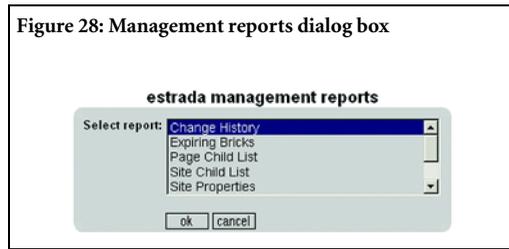
Estrada provides the following eight management reports: Change History, Expiring Bricks, Page Child List, Site Child List, Site Properties, Site Tree, User Roles, and Workflow Status. Generating and reading each report is discussed in detail in the following sections of this chapter.

Change History

The **Change History** report generates detailed information about bricks that have been changed, including when they were changed, how, and by whom.

To generate a **Change History** report:

- 1 Select **reports** from the **manage** menu (Figure 27). The **estrada management reports** dialog box will open.



- 2 Select **Change History** from the **Select report** list. The **Change History** dialog box will open (Figure 29 on page 27).

- 3 **Select site:** Select **---- all ----** for a report that covers all sites within your Estrada installation, or select the name of a specific site to limit the report to that site.

- 4 **Select user:** Select **---- all ----** for a report that covers all users, or select a name to limit the report to a specific user.

- 5 **Change type:** Select **---- all ----** for a report that covers all types of changes to bricks, or select a change to limit the report to that type of

6 Brick type: Select ---- **all** ---- for a report that covers all types of bricks, or select a brick to limit the report to that specific brick type.

7 Format (optional): Enter the time period that you wish the report to cover. Enter the start date in the **From** field and the end date in the **To** field, using this format **m/d/yyyy**. (For example, July 31, 2002 would be entered as 07/31/2002).

8 Order By: Select from the following options to determine how the results will be ordered:

- Default:** Results will be listed alphabetically by site name.
- Site Name:** Results will be listed alphabetically by site name.
- User ID:** Results will be listed alphabetically by user name.
- Date:** Results will be listed according to the date when they occurred.

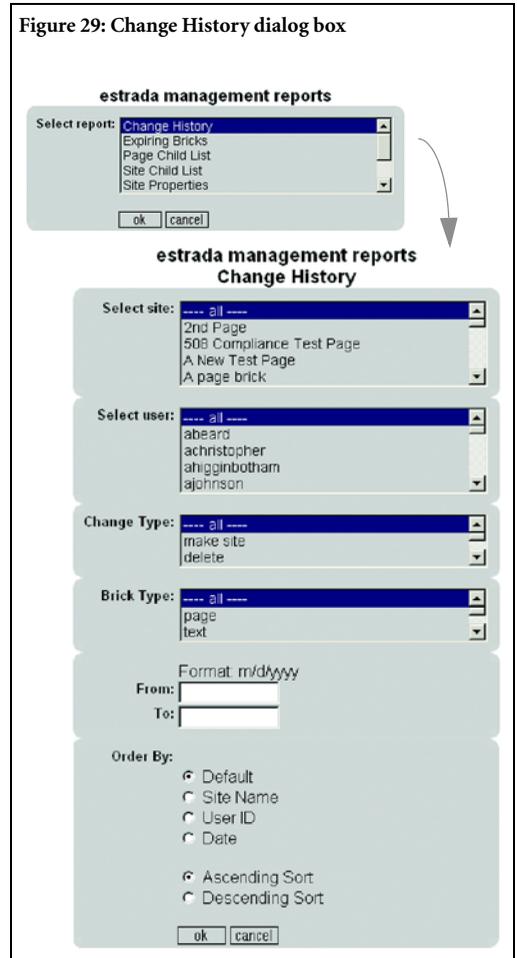
Select one radio button to sort the report results:

- Ascending Sort:** Displays results in order of the lowest to the highest.
- Descending Sort:** Displays results in order of the highest to the lowest.

9 Click **ok**. Your report will display (Figure 30).

10 When you are finished with the report, click the **ok** button at the bottom of the results to return to the **estrada management reports** dialog box.

Figure 29: Change History dialog box



Change History Report Results

The **Change History** report includes the following fields (Figure 30):

Date: Date when the change was made

Author: Login name of the user who made the change.

Site: Site to which the changed brick belongs.

Page Changed or Page containing

Modified Brick: The page brick itself or the page brick that contains the modified brick.

Operation: Nature of the change.

Brick Type: Type of brick modified.

Brick Position: The placement of the brick in relation to the top of the page that contains it. For example, a **2** indicates that the modified brick is second brick from the top.

Figure 30: Change History report

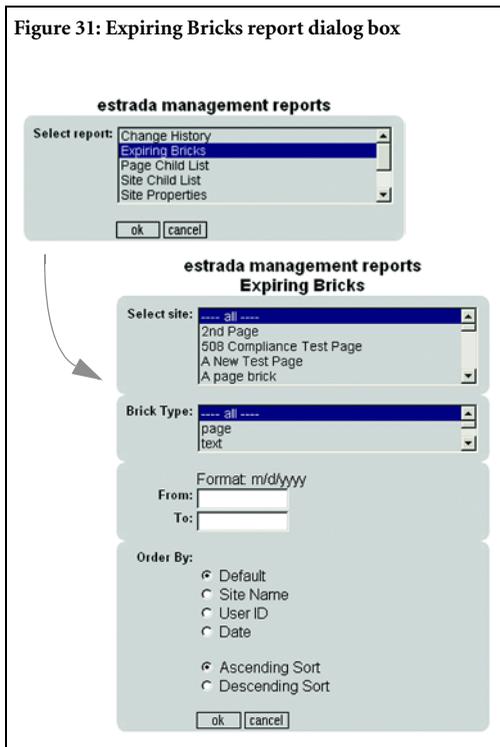
Change History						
Sorted By: Change Date						
Date	Author	Site	Page Changed or Page containing Modified Brick	Operation	Brick Type	Brick Position on Page
3/22/2002 10:14:17 AM	rrutsky	Estrada Web Technology	~Top Nav Bar	edit	link	1
3/26/2002 10:18:27 AM	rrutsky	Estrada Web Technology	Professional Services	edit	text	9
3/29/2002 3:03:15 PM	rrutsky	Estrada Web Technology	Client List	edit	text	3
4/1/2002 6:40:31 PM	yshapochka	Estrada Web Technology	New Estrada 3.5 Streamlines Business Processes	insert	separator	19

Expiring Bricks

The Expiring Bricks report generates a detailed report listing bricks that have been scheduled and when they are due to expire. (See “Scheduling bricks” in the Estrada Author Manual.)

To generate a **Change History** report:

- 1 Select **reports** from the **manage** menu (Figure 31). The **estrada management reports** dialog box will open.
- 2 Select **Expiring Bricks** from the **Select report** list. The **Expiring Bricks** dialog box will open (Figure 31).



3 **Select site:** Select ---- **all** ---- for a report that covers all sites within your Estrada installation, or select the name of a specific site to limit the report to that site.

4 **Brick type:** Select ---- **all** ---- for a report that covers all types of bricks, or select a brick to limit the report to that specific brick type.

5 **Format** (optional): Enter the time period that you wish the report to cover. Enter the start date in the **From** field and the end date in the **To** field, using this format **m/d/yyyy**. (For example, July 31, 2002 would be entered as 07/31/2002).

6 **Order By:** Select from the following options to determine how the results will be ordered:

- **Default:** Results will be listed alphabetically by site name.
- **Site Name:** Results will be listed alphabetically by site name.
- **User ID:** Results will be listed alphabetically by user name.
- **Date:** Results will be listed according to the date when they occurred.

Select one radio button to sort the report results:

- **Ascending Sort:** Displays results in order of the lowest to the highest.
- **Descending Sort:** Displays results in order of the highest to the lowest.

7 Click **ok**. Your report will display (Figure 32 on page 30).

8 When you are finished with the report, click the **ok** button at the bottom of the report to return to the **estrada management reports** dialog box.

Expiring Bricks Report Results

The **Expiring History** report includes the following fields (Figure 32 on page 30):

Page Changed or Page containing

Modified Brick: The page brick itself or the page brick that contains the modified brick.

In Site: Name of the site to which the changed brick belongs.

Brick Type: Type of brick modified

Brick ID: Page identifier or durki value of the brick

Brick Position: The placement of the brick in relation to the top of the page that contains it. For example, a **2** indicates that the modified brick is second brick from the top

Expiration Date: Date and time when the brick is scheduled to expire.

Figure 32: Brick Expiration report

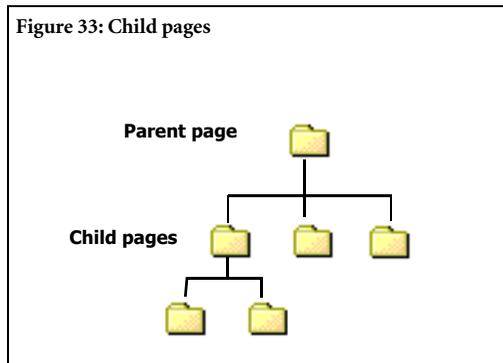
Brick Expiration					
Sorted By: Expiration Date					
Page Expiring or Page containing Expiring Brick	In Site	Brick Type	Brick ID	Brick Position on Page	Expiration Date
Government Web Solutions	Estrada Web Technology	text	709	5	6/30/2002 10:00:00 AM
Government Web Solutions	Estrada Web Technology	page	742	22	7/1/2002 9:00:00 AM
Government Web Solutions	Estrada Web Technology	page	742	4	7/1/2002 9:00:00 AM
Government Web Solutions	Estrada Web Technology	text	708	2	8/1/2002 2:00:00 PM

Page Child List

The Page Child List generates a report showing - *child bricks*, bricks that belong to a specified page (the *parent brick*). In other words, this reports lists bricks that are located below a specified page in the Estrada site structure (Figure 33)

The Page Child report offers the option of generating a list that contains only the immediate child pages (those located only one level beneath the parent page in the site structure) or a list of all child pages, regardless of how many levels below the parent page the child pages are located.

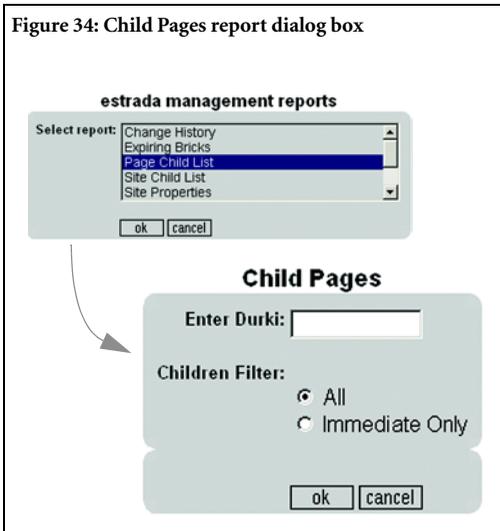
Figure 33: Child pages



To generate a **Child Pages** report:

- 1 Select **reports** from the **manage** menu (Figure 34). The **estrada management reports** dialog box will open.
- 2 Select Page **Child List** from the **Select report** list. The **Child Pages** dialog box will open.

Figure 34: Child Pages report dialog box



3 In the **Enter Durki** field, enter the page identifier or durki value of the parent page for which you wish to generate a list of child pages.

4 **Children Filter**: Select the option that you prefer:

- All**: Display all child pages beneath the parent page, including all levels.
- Immediate**: Display child pages that exist only on the first level immediately below the parent page.

5 Click **ok**. Your report will display (Figure 35 on page 32).

6 When you are finished with the report, click the **ok** button at the bottom of the report to return to the **estrada management reports** dialog box.

Page Child Report Results

The top table of the Page Child report (Figure 35 on page 32) shows details for the parent page that was specified in Step 3. The bottom table shows details for the child pages parent page.

The **Page Child** report includes the following fields:

- Parent**: The site identifier for the parent page.
- Durki**: Page identifier or durki value of the brick.
- Title**: Title of the site brick.

Note: The Child Page report results contains only child pages that are origin bricks, with no shortcuts. This is because shortcuts, no matter where they are located, are merely cloned copies of their origin bricks, and therefore belong to the origin brick's parent page.

Figure 35: Page Child report

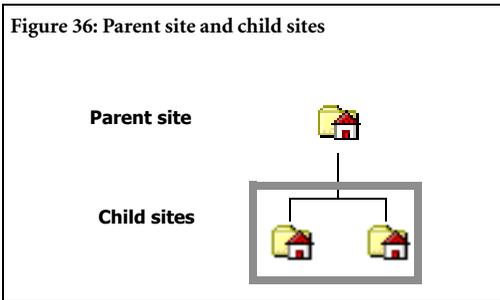
Child Pages for: NEWS		
Parent	Durki	Title
1	17	NEWS
Number of Child Pages: 5		
Parent	Durki	Title
17	222	Estrada Simplifies Section 508 Accessibility Compliance
17	247	Gandalf Development and Stamats Communications Form Strategic Alliance
17	465	Estrada 3.1 Introduces Many New Features
17	505	Estrada Available through PCHS Federal Contract, For Making Government Sites Accessible
17	672	Gandalf Forms Distribution Partnership with SMI

ok

Site Child List

The Site Child List generates a report showing child sites, belonging to a specified parent site.

Figure 36: Parent site and child sites



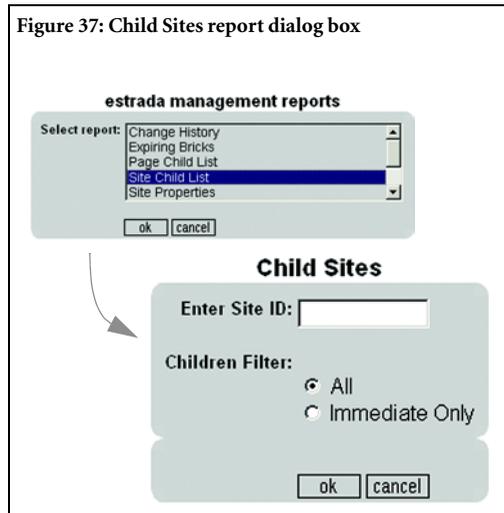
The Site Child report offers the option of generating a list that contains only the immediate child sites (those located only one level beneath the parent site in the site structure) or a list of all child sites, regardless of how many levels below the parent site the child sites are located.

To generate a **Site Child** report:

1 Select **reports** from the **manage** menu (Figure 37). The **estrada management reports** dialog box will open.

2 Select Site **Child List** from the **Select report** list. The **Child Sites** dialog box will open (Figure 37).

Figure 37: Child Sites report dialog box



3 Enter Site ID: Enter the site identifier of the parent site for which you wish to generate a list of site child bricks.

4 Children Filter: Select the option that you prefer:

- **All:** Display all child sites beneath the parent page, including all levels.
- **Immediate:** Display child sites that exist only on the first level immediately below the parent site.

5 Click ok. Your report will display (Figure 38 on page 33).

6 When you are finished with the report, click the **ok** button at the bottom of the report to return to the **estrada management reports** dialog box.

Site Child Report Results

The top table of the Child Site report results (Figure 38) shows details for the parent site that was specified in Step 3. The bottom table shows details for the site child that belong to the parent page.

The **Child Site** report includes the following fields:

Parent: Page identifier or durki value of the page brick that contains the site child bricks

Site ID: Site identifier of the parent site

Durki: Page identifier or durki value of the site brick

Title: Title of the site brick.

Note: The Site Child Report results contains only child sites that are origin bricks, with no shortcuts. This is because shortcuts, no matter where they are located, are merely cloned copies of their origin bricks, and therefore belong to the origin brick's parent site.

Figure 38: Child Site report

Child Sites for: Root Page			
Parent	Site ID	Durki	Title
0	1	1	Root Page
Number of Child Sites: 49			
Parent	Site ID	Durki	Title
1	2	3	Corporate Template Test
1	6	9	Diplomat jrN
1	8	11	Omni::Star
1	9	12	Tivoli
1	10	6	Overview

Site Properties Report

The Site Properties report features provides information about a site or sites including: page identifier or durki value, title, URL (if assigned), date of creation, and number of pages that the site contains.

To generate a **Site Properties** report:

- 1 Select **reports** from the **manage** menu (Figure 39). The **estrada management reports** dialog box will open.
- 2 Select **Site Properties** from the **Select report** list. The **Site Properties** dialog box will open (Figure 39).

3 Select site: Select **---- all ----** for a report that covers all sites within your Estrada installation, or select the name of a specific site to limit the report to that site.

4 Format (optional): Enter the time period that you wish the report to cover. Enter the start date in the **From** field and the end date in the **To** field, using this format **m/d/yyyy**. (For example, July 31, 2002 would be entered as 07/31/2002).

5 Order By: Select from the following options to determine how the results will be ordered:

- Default:** Results will be listed alphabetically by site name.
- Site Name:** Results will be listed alphabetically by site name.
- User ID:** Results will be listed alphabetically by user name.
- Date:** Results will be listed according to the date when they occurred.

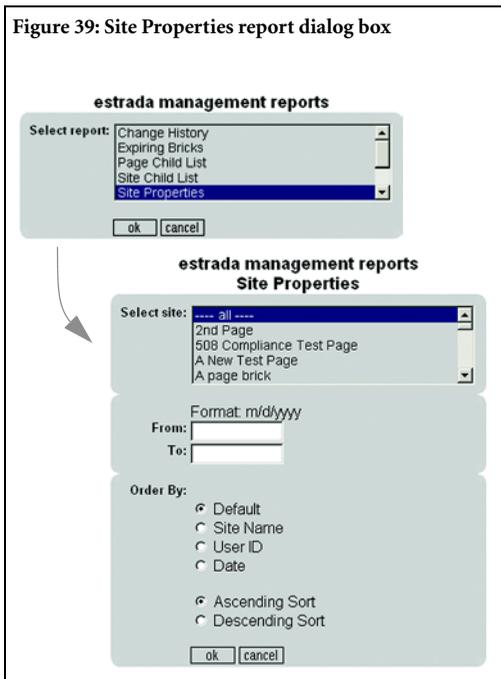
Select one radio button to sort the report results:

- Ascending Sort:** Displays results in order of the lowest to the highest.
- Descending Sort:** Displays results in order of the highest to the lowest.

6 Click the **ok**. Your report will display (Figure 40 on page 35).

7 When you are finished with the report, click the **ok** button at the bottom of the report to return to the **estrada management reports** dialog box.

Figure 39: Site Properties report dialog box



Site Properties Report Results

The Site Properties report results provides information about a site or sites including (Figure 40):

ID: Page identifier or durki value of the site brick

Name: Title of the site brick.

URL: Friendly URL, if one has been associated with the site.

A *friendly URL* is URL that is associated with a designated Estrada page, but usually shorter and more memorable than actual Estrada page URL. Visitors entering a friendly URL into their browsers are automatically redirected to the associated Estrada page. Consult your Estrada system administrator to set up a friendly URL.

Create Date: Date and time when the site was created.

Number of Pages: Number of pages that the site contains, excluding any sub-sites.

Figure 40: Site properties report

Site Properties				
Sorted by: Site Name (default)				
ID	Name	URL	Create Date	Number of Pages (not including subsites)
269	Estrada Web Technology		12/5/2001 1:33:48 PM	71
<input type="button" value="ok"/>				

Site Tree

The Site Tree report enables you to generate an outline list of sub-sites and pages within a specified site.

- 1 Select **reports** from the **manage** menu (Figure 27 on page 26). The **estrada management reports** dialog box will open.
- 2 Select **Site Tree** from the **Select report** list. The **Site Tree** dialog box will open (Figure 41).

Figure 41: Site Tree dialog box

3 Starting page: Enter the age identifier or durki value of the root (highest level) page in the site. For a report covering your entire Estrada installation, use the default value 0.

4 Maximum Number of Levels: Enter the number of levels that you wish to include in the Site Tree results. For a report covering all levels, use the default value 0.

5 Print the Page IDs: Select one of the following two options:

- Yes:** Include page identifiers for sites and pages in the Site Tree results.

- No:** Do not include page identifiers in the Site Tree results.

6 Click **ok**. Your report will display (Figure 42).

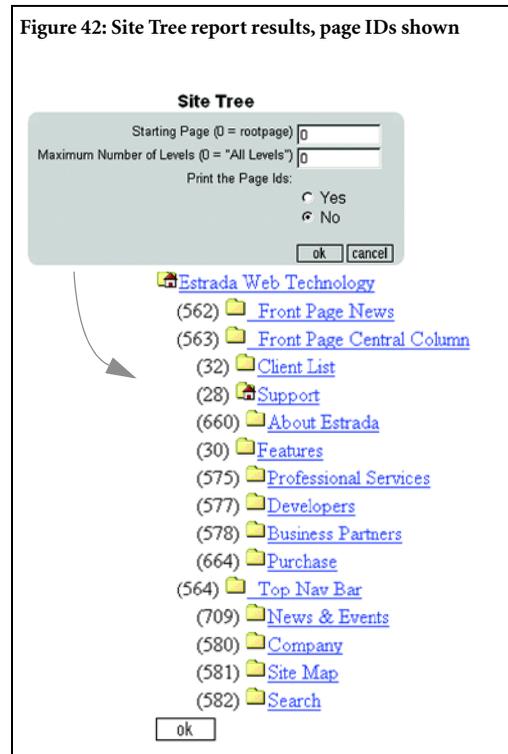
7 When you are finished with the report, click the **ok** button at the bottom of the report to return to the **estrada management reports** dialog box.

Site Tree Report Results

The Site Tree report results display as an outline list. The first item on the list is the home page for the site that you specified in Step 3 of the previous “Site Tree” section. Sub-sites are indicated by site brick icons, while pages are indicated by page brick icons.

The site tree indicates that pages and sub-site belong to a parent site or page by listing them as indented items beneath the parent page. In the sample report (Figure 42), Estrada Web Technology is the parent site for all other items, which are indented and listed beneath this site.

Figure 42: Site Tree report results, page IDs shown



Similarly, pages 709 News & Events, 580 Company, 581 Site Map, and 582 Search all are child pages of page 564 Top Nav Bar.

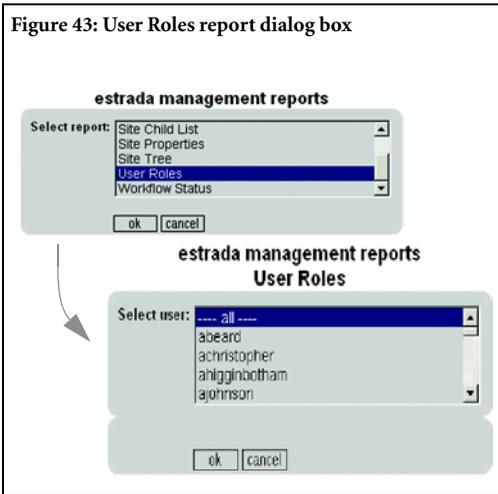
User Roles

The User Roles report provides information about Estrada users, sites and pages to which they have access, and what level of access they have.

To generate a **User Roles** report:

- 1** Select **reports** from the **manage** menu (Figure 43 on page 37). The **estrada management reports** dialog box will open.

2 Select **User Roles** from the **Select report** list. The **User Roles** dialog box will open (Figure 43)



3 From the **Select user** list, select either the login name for the user for whom you want to generate a report or **--- all ---** for a report on all users in the Estrada installation.

4 Click **ok**. Your report will display (Figure 44 on page 38).

5 When you are finished with the report, click the **ok** button at the bottom of the report to return to the **estrada management reports** dialog box.

User Roles Report Results

The User Roles report results include the following data columns (Figure 44 on page 38):

Site: Title of the site brick

Site ID: Page identifier or durki value of the site brick

User Name: Estrada user's name

User ID: Estrada user's login name.

User E-mail: Estrada user's email address

User Role: Estrada user's access permission level per site:

- **author:** author-level access
- **admin:** administrator-level access.

Last Row of the Report Results

The report provides the an overall summary of the user's roles and page access permissions throughout the entire Estrada installation.

Column 1: Name

User: Name of User

Column 2: Roles

Total Admin Roles: Number of sites to which the author has Administrator access permissions.

Total Author Roles: Number of sites to which the author has Author access permission.

Total Sysadmin Roles: Number of instances in which the author has System Administrator access permission.

Total Roles: Total number of instances in which the author has Administrator, Author *and/or* System Administrator access permissions.

Column 3: Pages

Total Admin Pages: Number of pages to which the author has Administrator access permission.

Total Author Pages: Number of pages to which the author has Author access permission.

Total Sysadmin Roles: Number of pages in which the author has System Administrator access permission.

Total Pages: Total number of pages in which the author has Administrator, Author *and/or* System Administrator access permission.

Figure 44: User Roles report results

User Access					
Sorted by: User ID (default)					
Site	Site ID	User Name	User ID	User E-mail	User Role
Corporate Sales	410	Bob Keeshan	bkeeshan	bkeeshan@statesales.com	author
Midwest Region	411	Bob Keeshan	bkeeshan	bkeeshan@statesales.com	admin
User "Bob Keeshan"		Total Author Roles: 1 Total Admin Roles: 1 Total Sysadmin Roles: 0 Total Roles: 2		Total Author Pages: 6 Total Admin Pages: 1 Total Sysadmin Pages: 0 Total Pages: 7	

ok

Column 1 Column 2 Column 3

Workflow Status Report

The Workflow Status Report provides information on Workflow activities within a specific site or the entire Estrada installation.

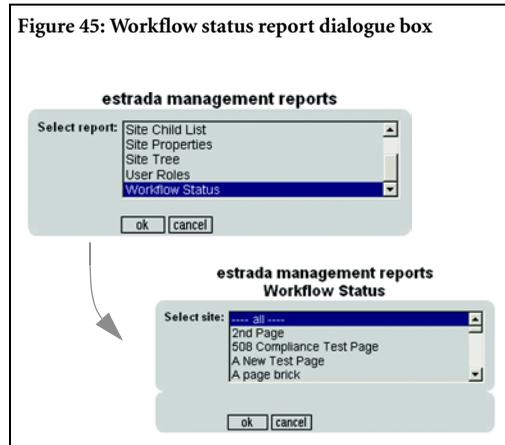
To generate a **Workflow Status** report:

- 1 Select **reports** from the **manage** menu (Figure 45). The **estrada management reports** dialog box will open.

Select **Workflow Status** from the **Select report** list. The **Workflow Status** dialog box will open (Figure 45)

- 2 From the **Select site** list, select either the name of the site for which you want to generate a report or **--- all ---** for a report on all sites in your Estrada installation.

Figure 45: Workflow status report dialogue box



- 3 Click **ok**. Your report will display (Figure 46 on page 39).

4 When you are finished with the report, click the **ok** button at the bottom of the report to return to the **estrada management reports** dialog box.

Workflow Status Report Results

The **Workflow Status** report results (Figure 46) display results for workflow-activated sites in which content is being changed or reviewed. The report results are divided into segments for each Workflow-activated site included in the report. For each Workflow-activated site, horizontal banners show:

Site Name: Title of the workflow site brick

(ID): Site identifier of the site brick

*Note: All identifier values are **negative** for all new page, site and other bricks that are created on Workflow-activated sites. If these bricks are approved for publication, their identifiers change to positive values.*

Under each Workflow site and identifier, each row represents an individual page that is being created or reviewed through a workflow process on that site. Information about each page is organized into the following columns:

Bundle: The identifier of the bundle to which the page belongs

Date Created: Date that the bundle was created

Workflow Name: Name of the workflow review chain

Page: Title of the page brick

Author: Name of the Estrada user who created the bundle.

Assigned To: Estrada user to whom the page is currently assigned, with the user name in parentheses.

Position: The position within the Workflow review chain of the Estrada user to whom the page is assigned. This field shows the name of the assignee's role, as it was defined when the

Figure 46: Workflow Status report

Workflow Status						
Site Name (ID)						
Status						
Bundle	Date Created	Workflow Name	Page	Author	Assigned To	Position
Estrada Workflow 3.5 (87)						
review						
29	6/25/2002 2:33:31 PM	Test Team	Black Hole (-108)	Becki Rutsky (r)	Becki Rutsky (r)	Reviewer 1 (1)
29	6/25/2002 2:33:31 PM	Test Team	Miscellaneous (-93)	Becki Rutsky (r)	Becki Rutsky (r)	Reviewer 1 (1)
29	6/25/2002 2:33:31 PM	Test Team	Submit Your Resume (-89)	Becki Rutsky (r)	Dimitri Glazkov (dglazkov)	Reviewer 2 (2)
<input type="button" value="OK"/>						

Workflow was created, followed by the ordinal position of that role, from lowest to highest, in parentheses. For example, a reviewer who is the second from the lowest in a workflow chain would have a position that displays as **(2)**.

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.
author view	A content view available only for workflow-activated sites that shows <i>all</i> content and changes (whether they are bundled or not) within the context of the site's template.
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> .
default workflow chain	Automatically established when Workflow is activated for a site, the default workflow chain comprises all users who have access permissions to the site (both authors and administrators) as workflow users, and the administrator who originally created the site as the publisher.
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.
friendly URL	URL that is associated with a designated Estrada page, but usually shorter and more memorable than actual Estrada page URL. Visitors entering a friendly URL into their browsers are automatically redirected to the associated Estrada page.
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	A unique 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.
publisher	The highest-level reviewer of a Workflow chain who decides whether or not to publish all content changes within a site for which Workflow has been activated. See also <i>Workflow</i> , <i>Workflow chain</i> , and <i>reviewer</i> .
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.
reviewer	An Estrada user and member of a Workflow chain who approves or rejects all content changes within a site for which Workflow has been activated. See also <i>Workflow</i> , <i>Workflow chain</i> , and <i>publisher</i> .
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.

site identifier	A unique numeric value that identifies each individual Estrada site. To locate the page identifier, go to the author side of the parent page of, or to a page containing a shortcut of the site whose identifier you seek. Mouse over the origin or shortcut brick, and the URL of the author side of the site will display in the status bar of your browser. The first number located after the first site= is the site identifier.
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.
Workflow	A feature that enables you to define processes in which designated individuals must review all content changes before they can be published to the user side. Workflow is especially useful for sites with sensitive content. Workflow chains can be modeled after an organization's business procedures.
workflow chain	A group of Estrada users who review content changes within a specific site, following a specific hierarchical process.
workflow chain members	A special class of Estrada users who have been assigned to a workflow chain to review content changes, following a specific hierarchical process, within a Workflow-activated site.
workflow users	Estrada users who have access permissions to a Workflow-activated site

workflow view

A content view available only for workflow-activated sites that shows content changes that have been submitted for review as well as already published content. Workflow view does *not* display content that is under construction but not yet bundled (submitted for review).

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