Avectra netFORUM

CMS TRAINING MANUAL

Version 0.2

Table of Contents

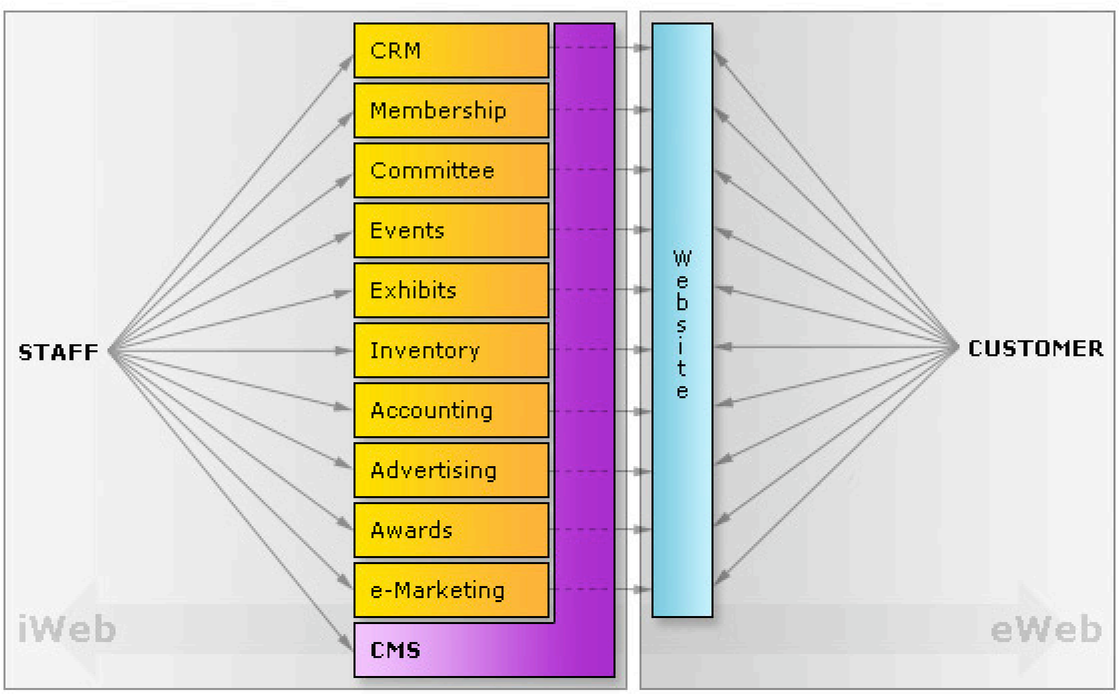
INTRODUCTION

iWeb and its counterpart eWeb are two unique, counter-facing applications, designed as the interfaces to your netFORUM database. iWeb is the internal administrative web application and eWeb is the public/client facing website. This public facing eWeb website is built and managed through the CMS module (Content Management System) in iWeb. Using CMS you can make any of the data in your organization's database accessible through eWeb. netFORUM is SQL-based, so any query that can be done in iWeb can be reproduced in eWeb. You can make this information public or make it strictly accessible through certain membership conditions.

The netFORUM CMS:

- Manages multiple websites.
- Manages multiple templates.
  - Delivers completely different look-and-feel for different websites or sections using default content areas.
  - Separates content from presentation or "look-and-feel."
- Enables dynamic content publishing.
- Supports staff workflow for approval and publishing processes
- Dynamically displays content and functionality from the membership system including forms, profiles and lists
- Manages dynamic search setups to allow flexible searches on data in the membership system

The following illustration shows the relationships within netFORUM with respect to how the CMS is the gatekeeper to the public facing website.



BASELINE EWEB

“Baseline,” as it is commonly referred, is the default eWeb site. When you open CMS for the first time (on a new installation) it is the one website available. It is a generic website composed of essential functionality pre-built and ready to use for your organization’s public netFORUM site.

Do Not Change!
The “Baseline” eWeb website is the fundamental model for creating sites in CMS. If you change Baseline it will affect all new sites you make going forward. Changing Baseline may also remove eWeb components from the upgrade path. This includes the Baseline site itself and any forms or wizards.

eWeb Walkthrough
The Baseline website contains these basic components:

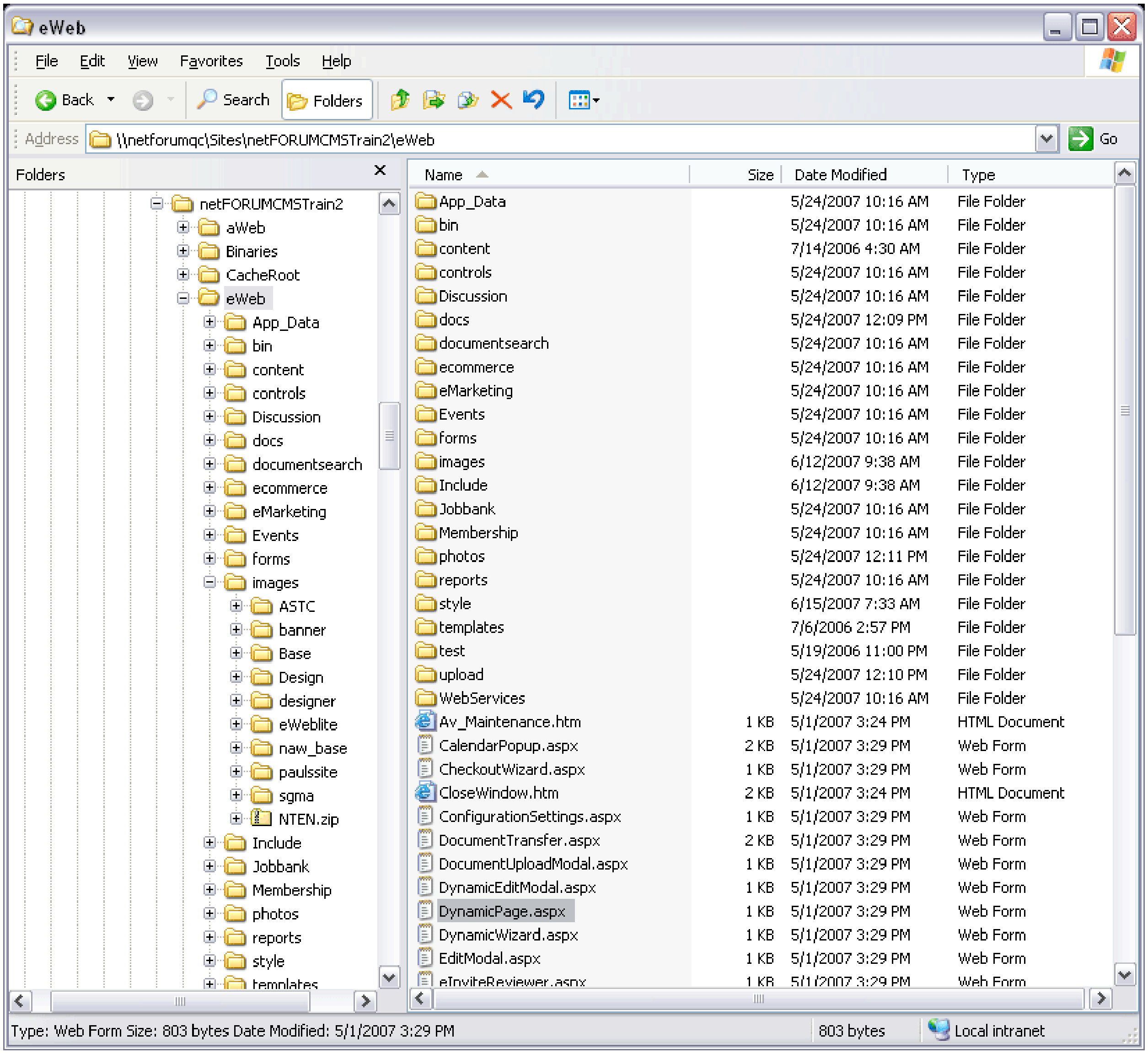
- User Registration (with Access Control)
- Event Info and Registration
- Online Store (with Merchandise, Publications, Subscriptions, Membership, Certifications, Events, and Donations categories)
- Shopping Cart checkout
- Committees module (with membership and document library)
- Transaction report
- Member/Organization Directory

Using the CMS and SQL you can create any number of your own dynamic queries based on the information contained in your netFORUM database. Or, you can purchase additional modules from the Baseline Plus library such as:

- News Archive
- Document Library
- Discussion Groups
- Job Board
- Online Communities
- Abstracts
- FAQs
- Chapter Information
- Chapter Directory
- Committee Directory
- Member Directory (advanced)
- Advanced registrant information
- Request Info
- Site Search

FILE SYSTEM OVERVIEW

Outside of CMS there is a file system on the web server where the physical files are located. Some files you will have access to and some you won't, but it is a good idea to know what these files are and what they're for. There are common folders that contain your documents and images; there are virtual folders that are shared between eWeb and iWeb; and there are system files used by the application that compose the websites.



Common Folders

If your netFORUM implementation is hosted with Avectra on a shared server you will not have full access to the file system. However you will have access to a few important folders for eWeb. Access to these folders is granted through WebDAV (Web-based Distributed Authoring and Versioning). This is a fancy name for setting up drag and drop file access through a mapped drive. Drive mapping is common in a network environment and Avectra will supply instructions for mapping a drive to your desktop. Managing files on your eWeb site will be as easy as dragging and dropping.

- **Images** – No explanation needed here except that since you may have more than one website in your eWeb you may want to create a unique sub-folder for each one to keep your images organized.
- **Docs** – This is a general folder for any documents you want to make available online: PDFs, Word docs, or images. Again, you may want to make sub-folders to organize you documents.
- **Style** – CSS and XSL files are stored here.
- **Upload** – Online store product images and downloads are stored here.

File Paths
These common folders are located in the eWeb folder. When inserting links or references to files in these folders you will create file paths that look something like this:

"images/header.gif"
"docs/instructions.pdf"

Virtual Folders
Some files you will manage and upload through iWeb, such as product images for merchandise in the Online Store, or committee documents made available to chapter members. Because of general security measures, there is no direct connection to iWeb through eWeb. There would be no way for a customer to see product images uploaded through the Inventory system in iWeb. To answer that issue, virtual folders are set up on the server so iWeb and eWeb can share these common files. A virtual folder is simply a pointer to a common, isolated folder on the server where security can be maximized.

System Files
The rest of the files and folders in the eWeb file system are system files. These are mostly C# programmed application files used for the many functions of the eWeb site. You may come to recognize a couple of them: startpage.aspx and dynamicpage.aspx. These are the two most common files that are used to pull together all the disparate elements of an eWeb page and assemble them when someone clicks a link.

CSS Overview

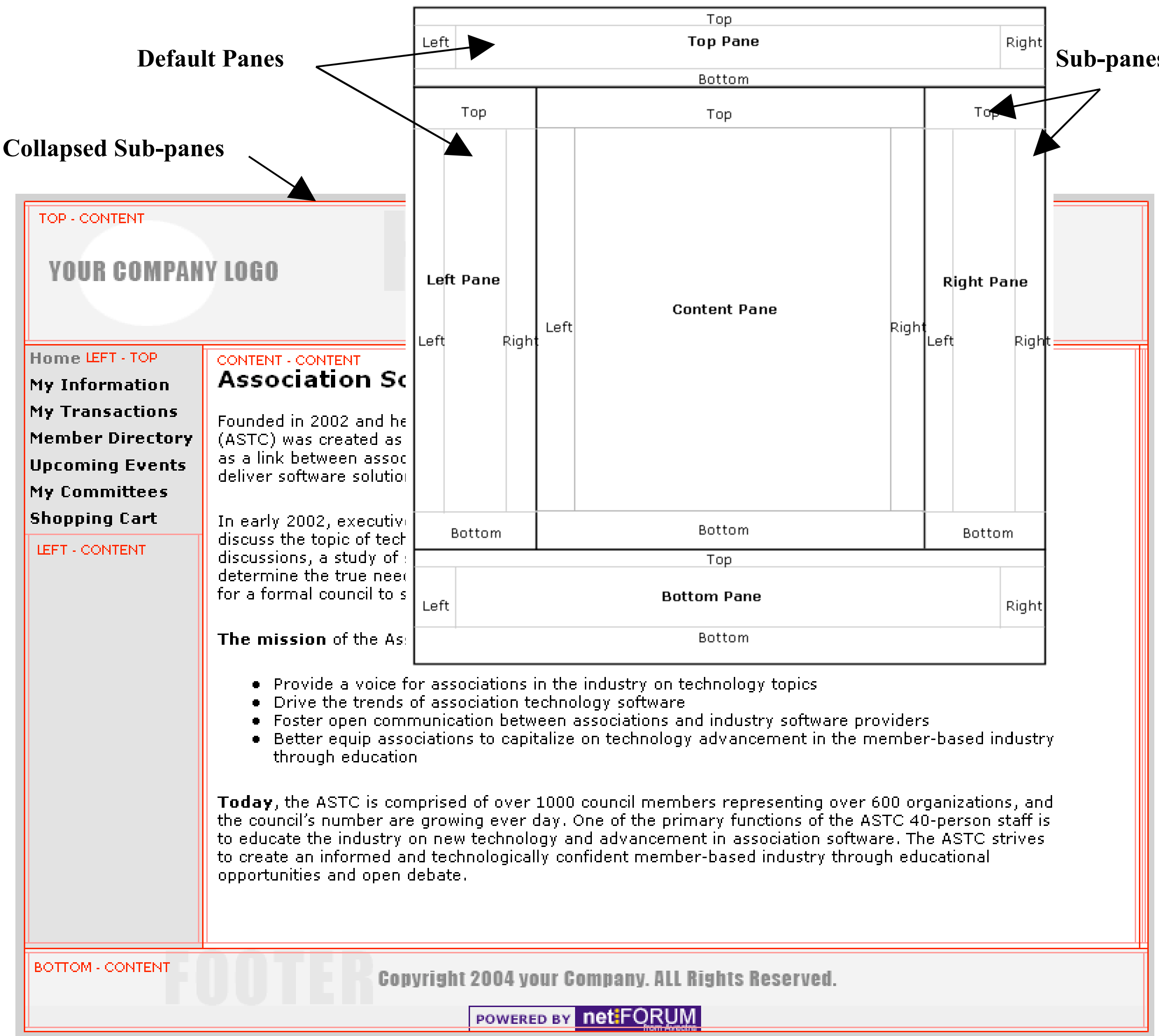
As mentioned above, there are numerous forms and wizards pre-built as components in eWeb, as well as a complex HTML framework to support it. As such, a very large collection of CSS classes has been designed to specify the look and feel of this structure. This is what makes up the baseline CSS stylesheet document. You can edit this document as you wish, but it is a good idea to make a backup should you change something unaware of any site-wide implications. Certainly you will want to add your own classes to this document since it is loaded by the framework automatically as the primary CSS stylesheet.

CMS HEIRARCHY

Framework

The “Framework” of an eWeb page is the underlying HTML table structure that content is rendered into. The layout is divided into five major “Panes” designated as Top, Left, Content, Right and Bottom. These panes are then subdivided into five sub-panes with the same designations. Various types of content are position in these divisions using the CMS tool. Each division of the framework has an ID so that it can be easily manipulated using CSS.

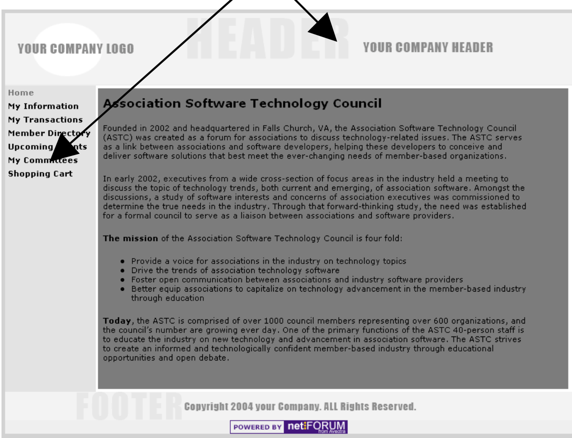
Note that all major panes except for the Content pane are reserved for “Default” content (discussed later) and all sub-panes except for the Content sub-pane are reserved for “System Links” (also discussed later). Essentially, all manageable content will go in the Content sub-pane of any major pane.

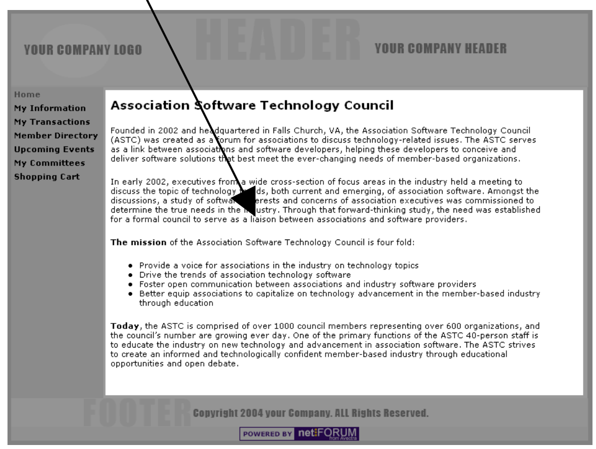


Default Panes

As mentioned above, the "Default" panes are the outer-most panes of the page framework. They are reserved for "default" content – that is, content that will reside on a page "by default." In other words, headers, menu panels and footers, that remain consistent across a site or a section reside in these default panes. Defaults can be assigned to the entire site or to specific "Sections." "Section Defaults" can override "Site Defaults" in the same location on pages within a specific section. A simple example of this is if you want a page to open up in a pop-up, you may not want the site header, footer or navigation to display, instead, you may just want a "Close Window" button.

Default Panes **"Page"**





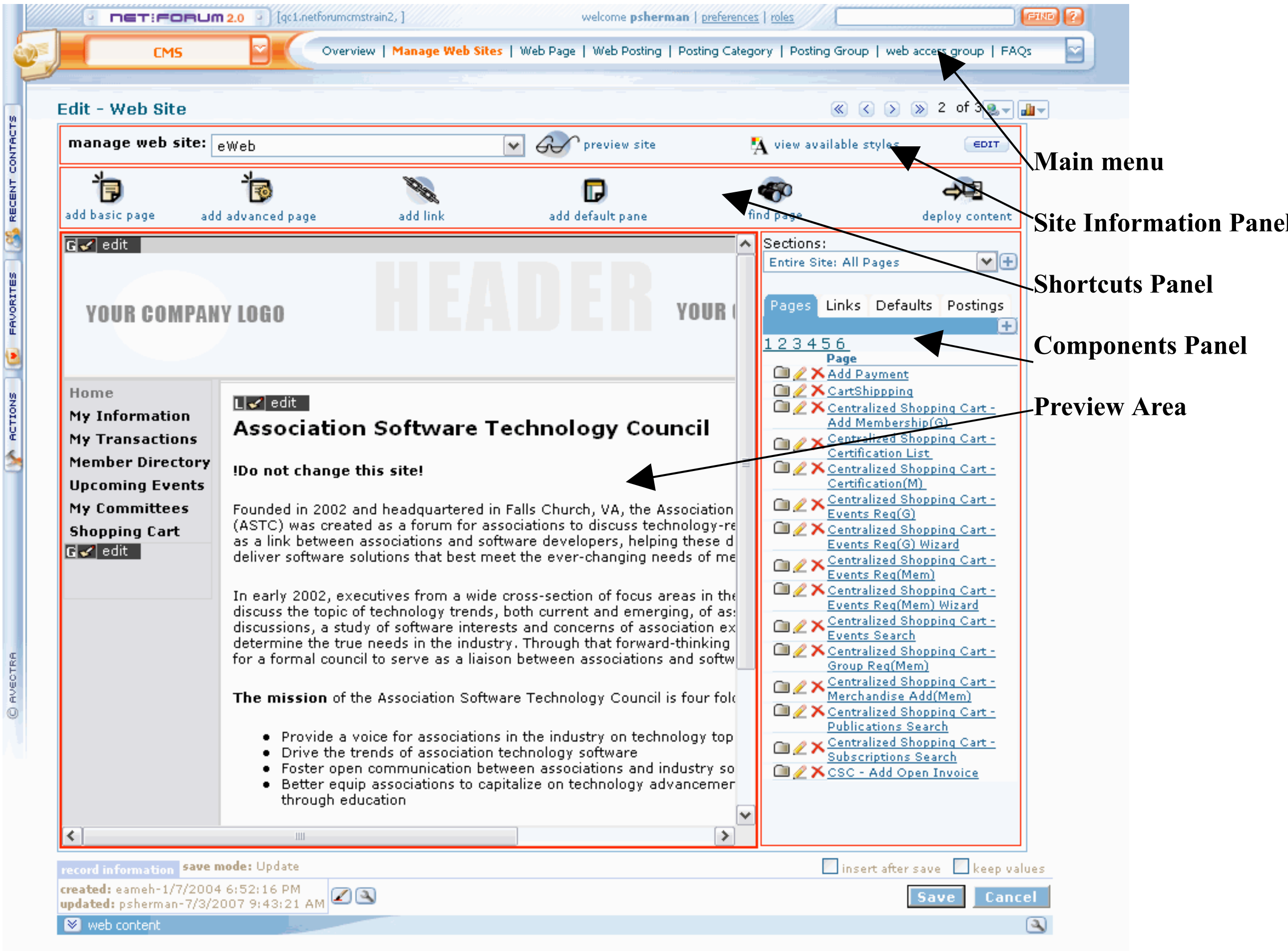
What is a "Page"?

What is a page then? When you create a page in CMS, you are defining the contents of the center, Content pane only. The header, footer, and any side-panes are rendered *by default*.

Content Details – A page can be further divided onto "Content Details." A Content Detail is a unique content element, as well as a unique content type. These content details are arranged in the Content Pane by a user defined table structure. Each content detail has attributes to define its position in the table grid including row, column, row-span and column-span.

Content Details

CMS INTERFACE OVERVIEW



Panels

The CMS interface is composed of several panels that contain access points to CMS functionality.

Main menu – In the main menu bar you will find the major sections of the CMS including places to manage websites, find and create pages, manage Postings and much more.

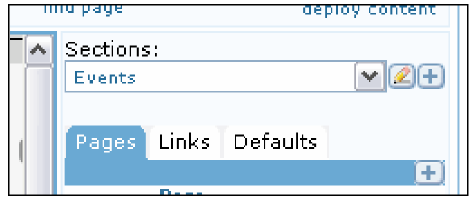
Site Information Panel – This panel allows you to manage site-level settings including site ID, layout dimensions and CSS file definition. You can preview the site in a new window by clicking the Preview Site button. You can also switch to edit another site by selecting it in the Manage Web Site drop-down.

Shortcuts Panel – Several commonly used shortcuts can be found here. The most significant of which is the Deploy tool.

Preview Area – You are able to preview and navigate the site while you are working with this feature.

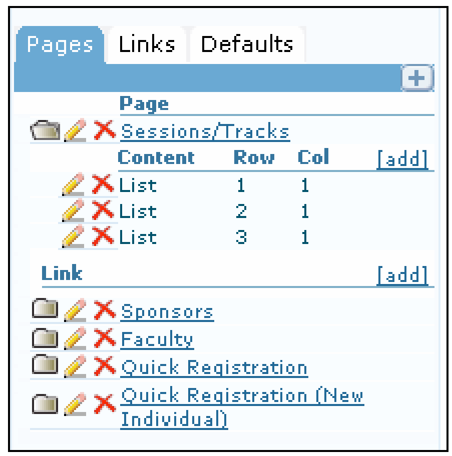
Components Panel – Access to all content elements can be found here. The contents of the Components Panel are determined by the Section in the Section drop-down. By selecting the respective tabs below you can manage Pages, Links, Defaults and Postings.

Sections (dropdown)



In CMS, Sections are a way to organize and apply specific settings to a group of pages. You can add or edit the properties of a section by clicking the plus or pencil icon next to the Section drop-down.

Pages (tab)



The Pages tab displays all the pages of a website. They are indexed and can be sorted by page description.

Page

A page in CMS is a container of one or more content details. The page definition itself has a number of properties including a page ID, page title, and visibility conditions. Content details are then created and added to the page definition. You can edit the properties of a page by clicking the pencil icon next to the page description. To reveal the Content Details of a page click the folder icon to open it. To create a new page, click the plus sign icon in the Pages title bar.

Content Detail

A Content Detail is a unique content element of a specific content type that compose a page. Several Content Details can be added to a page and are arranged in the Content Pane by defining the row and column arrangement. You can edit a Content Detail by clicking the pencil icon next to the content type description. To add a new Content Detail, click the "add" link located at the right end of the "Content" header.

Content Type

Content Types define a Content Detail. Common content types include HTML, List (SQL), Control (C# programmed), Form and Wizard. Each content type has unique properties required to compose it and are necessarily separate.

Links (tab)

The concept of Links is unique to netFORUM CMS and somewhat difficult to wrap your arms around. When we talk about "links" we are talking about "system links." This is different from a typical static link as system links are rendered by the system and are dynamic in nature. These dynamic links are created in CMS to allow specific access control and maintain an anonymous connection to its target. For example, you can generate a link for a page and place it in a menu; if the visibility condition is not met for the target page, the link will also not be visible in the menu. Additionally, if you change the ID of the page (page code), the link will remain effective since the link is connected by the unique data key.

There are two types of system links: Site and Section. As the name suggests, a Section Link is associated with a section and will only display on pages within the particular section. Site Links will display on all pages not specifically set to ignore Site Defaults. Site and Section links can only be positioned in the outer sub-panes of default panes.

Links have two layers in netFORUM CMS. The top layer is its positioning; the bottom layer contains the target information. This bottom layer is called an "available link" and can be created, reused or duplicated as necessary for use in different positions.

Defaults (tab)

The Defaults tab reveals access to the default pane make-up. As mentioned previously there are two types of defaults: Site and Section. Section defaults are used where you want a unique header or menu panel to display on a particular page or set of pages. Site defaults are global and appear on all other pages. You can also set properties of defaults under the Default Pane Properties header in this panel. To edit a default pane, click the pencil icon next to the particular default you wish to edit.

TIP! – Editing Content (Rich Text Editor vs. "None")

netFORUM 2.0 offers a couple of options for the way content is entered into an HTML-type content detail. By default the content editor is a Rich Text editor. That means you can use standard controls to modify the font size, color and style, among other things. You can still edit the HTML directly by checking the Show HTML checkbox. Unbeknownst, the rich text editor actually reformats HTML to a particular standard. This may be acceptable for most, but if you are a code guru you might find this a little inefficient. netFORUM 2.0 allows you to turn off the rich text editor and type code as you like it.

TIP! – DON'T TOUCH BASLINE!

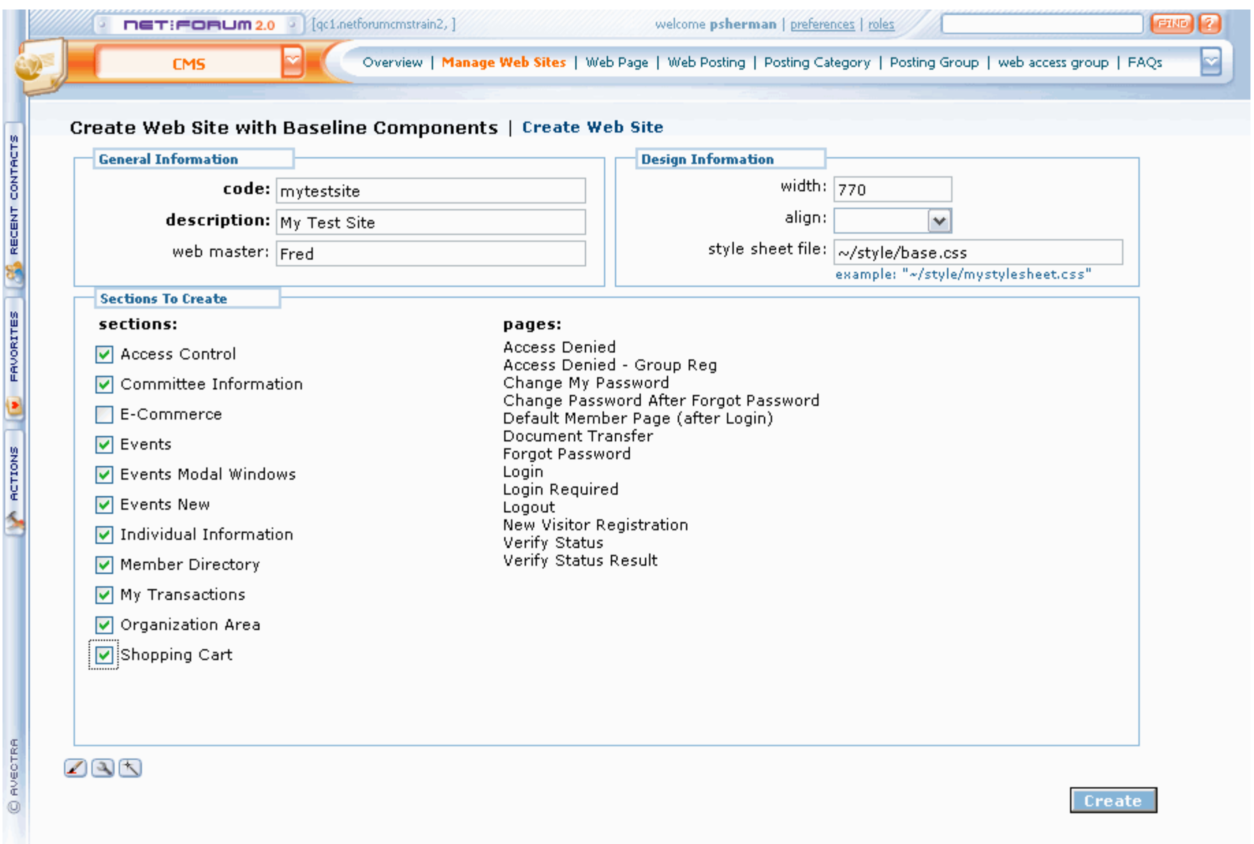
The "Baseline" eWeb website is the fundamental model for creating sites in CMS. If you change Baseline it will affect all copies you make going forward. You may also remove yourself from the upgrade path. This includes the Baseline site itself and any forms or wizards.

Exercise 1 – Create New Site

Copy Baseline

The first thing you need to do when developing your look and feel in CMS is to make a copy of the Baseline eWeb site. This is the site in your web site list called *Baseline Site with Core Components*. Making a copy will give your new site all of the functionality available by default and maintain the integrity of the baseline model.

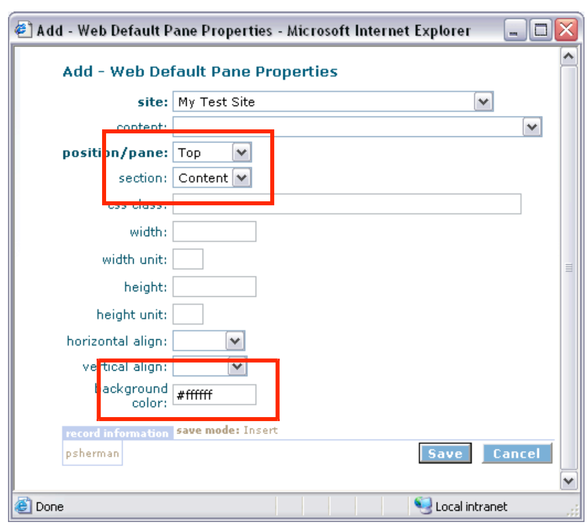
1. To make a copy, first find and click the Add Web Site link in the Manage Web Sites menu of the main menu bar. You will see a screen like the one below.
2. Enter a "site code" in the code box. This is a 10 character code of only alpha-numeric, underscores and dashes characters. (Required)
3. Enter a Description. (Required)
4. Enter Design Information as you wish (for this exercise, enter the style sheet file exactly as you see it in the example: "~/style/Base.css").
5. For this exercise go ahead and select all of the modules (note that some modules are integral to the site, like Access Control and Individual Information).
6. Click the Create button and wait for the prompt. When complete, the page will refresh with your new site ready for editing.



Edit Default Panes

Now that you have made a copy of Baseline you can begin customizing the look and feel.

1. First, make sure that the correct site code is in the Manage Web Site box at the top of the screen, and click the "Edit" icon at the top of the preview window. This will allow you to edit the header of your site.
2. Check the Show HTML checkbox, select all the text in the Content window with your mouse and delete it. Then uncheck the Show HTML checkbox (if you prefer). You can now add your own content.
3. Copy and paste images from your favorite website into the Content window. When you are working on your company site you will have access to the images folder and will insert images manually using HTML (<img src="images/thissite/image-name.gif">).
4. You might want to set the background color of the header. Click the Defaults tab in the components panel and click the plus sign icon on the Default Pane Properties title bar. In the pop-up window select the "position/pane" and "section" as shown in the image below, and enter the hex value or color name of the desired color in the "background color" field (white, #ffffff, maroon, etc.). Save.
5. Right click in the preview window and select Refresh from the menu to see the changes.



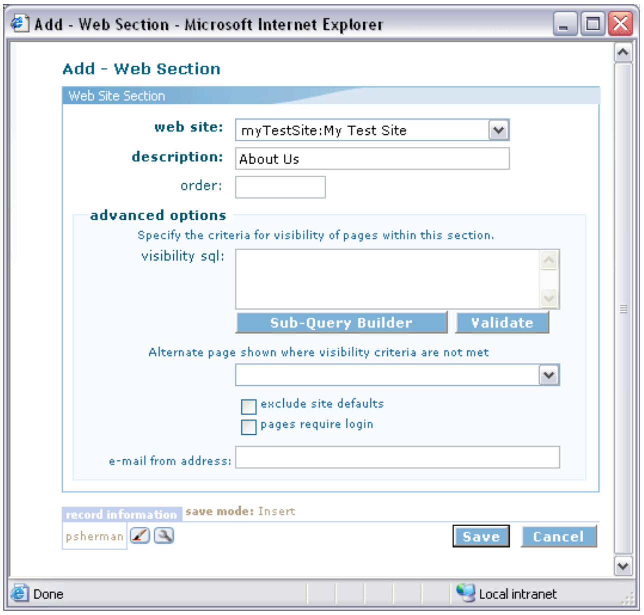
You may also want to customize the footer pane as well.

Exercise 2 – Create New Section

For this next exercise we will create a new section with some pages to build the next exercises on. We will create an About Us section with two pages. Then we will create System Links (Site and Section) to the pages.

Create a New Section

1. Click the plus sign next to the Sections drop-down.
2. Select the web site and enter a description for the section. Note that the description and order fields are only used to describe and sort the section list (drop-down).
3. Save.



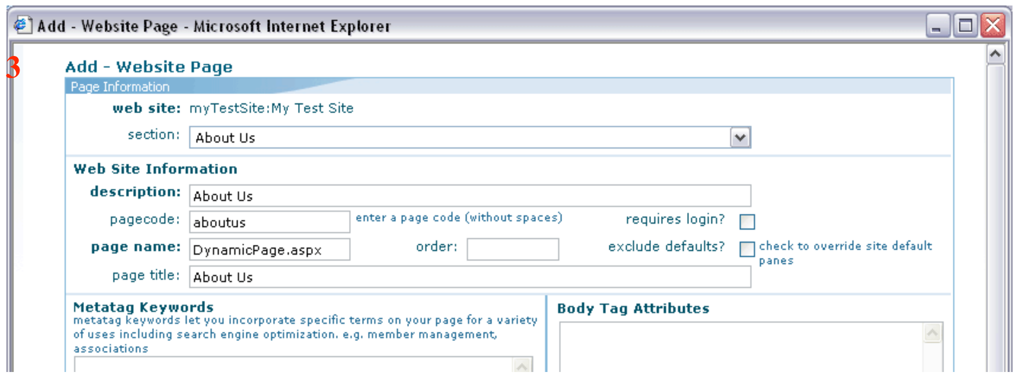
Create Pages (About Us, Press Releases)

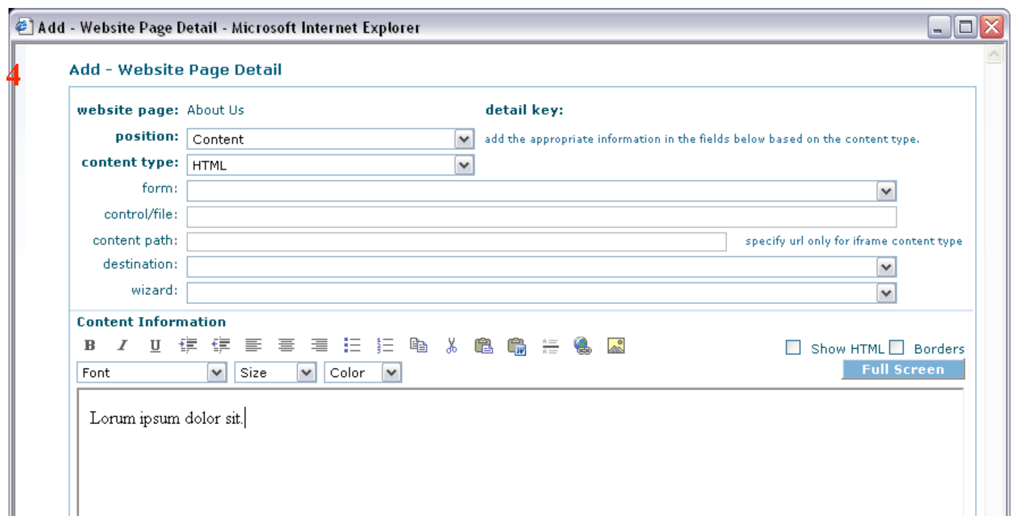
We will create two pages: one will be the About Us landing page and the other will be the Press Releases page.

Create About Us page

1. Make sure the About Us section is selected in the Sections drop-down, and the pages tab is selected.
2. Click the plus sign at the end of the Pages title bar to add a page.
3. In the resulting pop-up (page properties) enter the information as shown in the image below and save.
    a. Section: About Us
    b. Description: About Us
    c. Pagecode: aboutus
    d. Page Name: DynamicPage.aspx
    e. Page Title: About Us

4. Create a Content Detail for the About Us page:
    a. Click the folder icon of the About Us page to open it.
    b. Click the “Add” link on the Content title bar
    c. In the resulting pop-up make sure the Content Type is “HTML” and enter some content in the Content Information field (Greek/Latin text is fine). Save.





Create Press Releases page

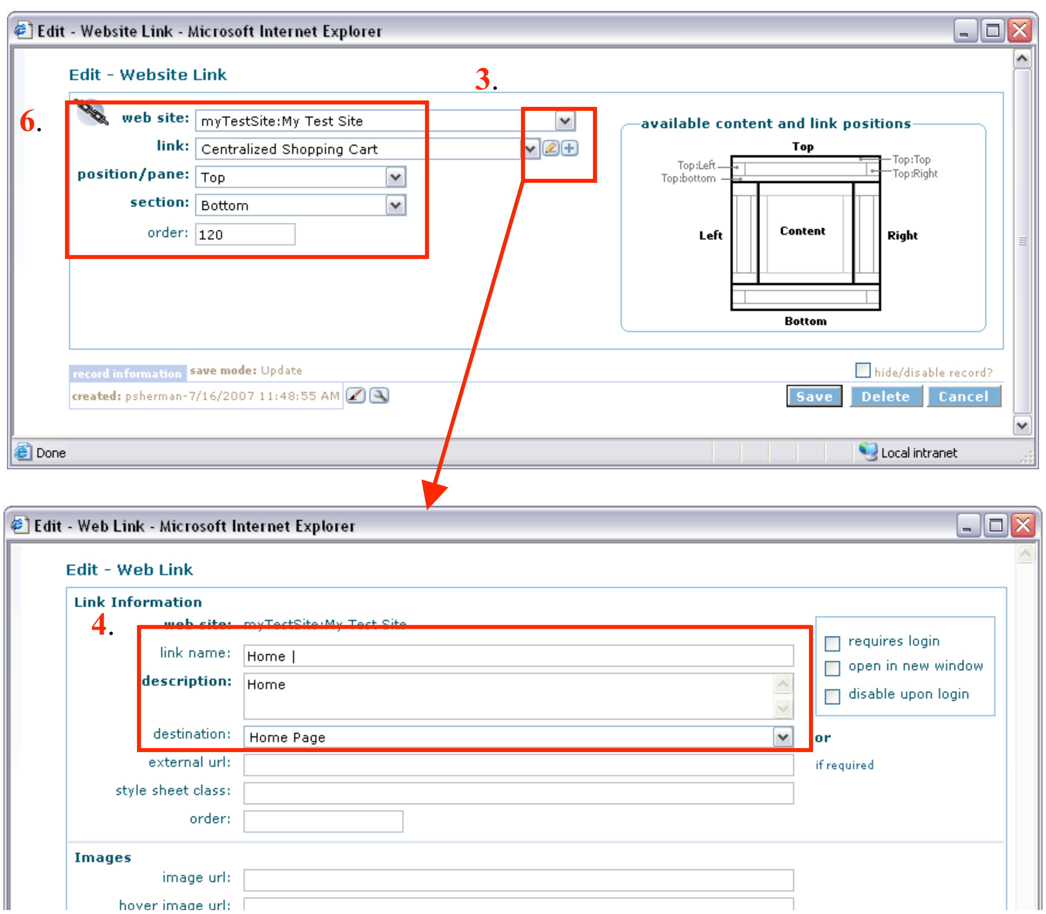
1. Create another page using the instructions above, only set the following properties differently:
    a. Description: Press Releases
    b. Pagecode: prlist
    c. Page Title: Press Releases
2. Create a Content Detail using the instructions above.

Create Links (Main, Section)

Next we will create a Site link to the About Us page as well as a Section Link to each sub-page.

Site Link

1. Set the Section drop-down to Entire Site and select the Links tab.
2. Click the plus sign icon on the Site Links title bar.
3. In the resulting pop-up, click the plus sign at the right end of the Link drop-down.
4. In the subsequent pop-up enter the following information:
    a. Link Name: About Us |
    b. Description: About Us
    c. Destination: About Us
5. Save.
6. In the remaining pop-up enter the following information:
    a. Make sure your site is selected in the first drop-down
    b. Link: About us
    c. Position/Pane: Top
    d. Section: Bottom
    e. Order: 5
7. Save.



Section Links

1. Select the About Us section in the Section drop-down.
2. Select the Links tab.
3. Click the plus sign on the Links title bar to add a link.
4. In the resulting pop-up, again, click on the plus sign at the right end of the Link drop-down.
5. In the subsequent pop-up enter the following information:
    a. Link Name: About Us
    b. Description: About Us
    c. Destination: About Us
6. Save.
7. In the remaining pop-up enter the following information:
    a. Make sure your About Us section is selected in the first drop-down
    b. Link: About us
    c. Position/Pane: Left
    d. Section: Top
    e. Order: 10
8. Save.
9. Repeat steps 3-8 for the Press Releases link only replace instances of "About Us" in step 5 a-c, 7b with "Press Releases" and 7e 20.
10. Sit back and gloat over your hard work!

POSTINGS OVERVIEW

Postings are a form of dynamic content. They provide a way to deliver static content within a dynamic template. The most elementary and understandable use of postings is with press releases, for which this tutorial is based. Using SQL we will create page templates that read from the database and return postings content. A page template could be used to display any one posting or a list of postings. Postings can be categorized and subcategorized, and sorted in any number of ways. Entire sites have been set up based on postings. Postings also has a workflow, so you can grant some users privileges as writers, some as approvers and some as publishers. For this example you will have the privileges of all three. Postings are a powerful way to present content.

In the previous exercise, we prepared a page for press releases. In the following exercises we will be creating a list of press releases (postings), a template to display the full story, a search and search results. First, though, we will create some posting content (press releases) of our own to get an idea of what fields are available and just how postings work.

Prerequisite: You or someone on your team will need to grant you the privileges of writer, approver and publisher in the CMS. This is done in the netFORUM Admin module, under User and is accomplished following these steps:

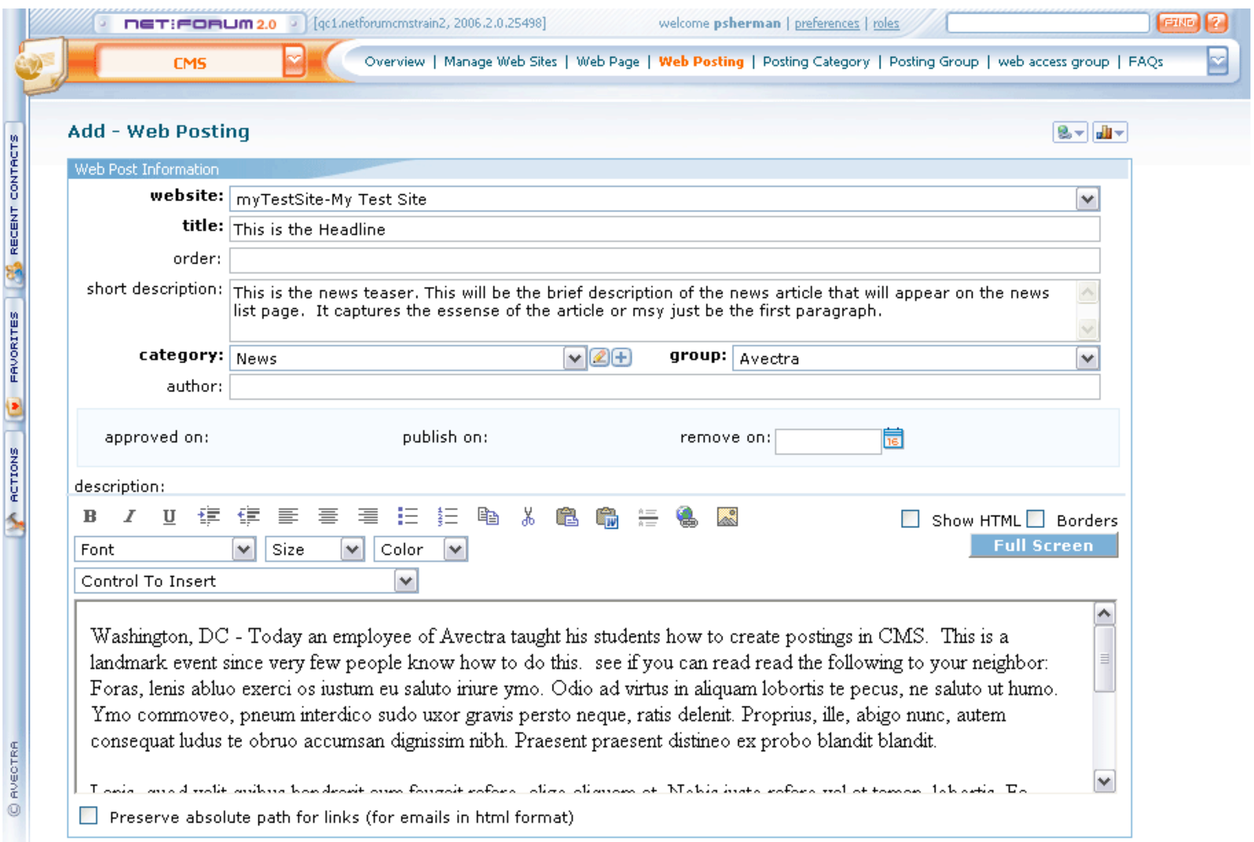
1. Select the user form the list.
2. Expand the Groups child-form by clicking the down arrows to see if the privilege has not already been granted. If not:

3. Click the plus sign at the right end of the Groups title bar.
4. Select netforumCMSWriter and save.
5. Repeat step 4 for netforumCMSApprover and netforumCMSPublisher.
6. Go back to the Admin Overview page.
7. Click Populate Group Privileges
8. Select the user you have just granted privileges from the drop-down and click the Continue button. This process takes several moments. Click the Close Window button when process is complete.
9. Under the Admin Overview menu is the Clear Cache function. Click that and click the OK button on the resulting page.
10. Reset your session by clicking the netFORUM logo plate in the top-left corner of the screen.

Exercise 3 – Create Postings

For this exercise you will want to create at least two postings so that your postings list will actually be a list.

1. In the CMS menu bar select Add Web Posting from the Web Posting drop-down.
2. Fill out the Posting form similarly to the example below and Save.
3. Repeat this process to create at lease two postings.



Note: Category and Group drop-downs contain a limited number of pre-created topics. For your own purposes you could create your own categories and groups using the functions in the main menu bar.

Publishing and Approval

Now that the postings have been created they just need to have the publish date set and be approved for publishing. However, this process is not particularly necessary. As designed, this process is intended to be carried out by two individuals with unique roles. It is only necessary to complete this process if your SQL lists are set up to filter on these properties. In our example they are required, so you will need to follow these steps. Also note that once a posting is "approved," the Category and Description fields become un-editable. To edit a posting after it has been approved, it has to first be unapproved.

1. From the Web Posting menu select List Web Postings.
2. Select the posting you wish to process.
3. Expand the Publishing Information child form by clicking the down arrow on the left.
4. Click the pencil icon to open the settings pop-up.
5. Set the Publish Date to the date of the article, and save.
6. Next, Expand the Approval child form and click the pencil icon.
7. Set the Approval Date and save.

Exercise 4 – Create Postings List

In this exercise we will modify the Press Releases page so it shows a list of press releases (postings). We will add a bit of pre-written SQL that searches the database for postings with a certain category and group. The SQL also checks to see if the posting has been approved, if the publish date has arrived and remove date has passed.

Add SQL to List Page

We need to go back and edit the Press Releases page we created earlier.

1. From the Manage Web Sites Web Sites List select your site for editing
2. Select the About Us section from the Sections drop-down.

3. Open the folder of the Press Releases page and click the pencil icon of the Content Detail.
4. In the properties pop-up, change the Content Type to "List."
5. Select "Web Posting eWeb" from the Form drop-down.
6. Check the Show HTML checkbox and copy and paste the supplied SQL "News List" (without the "####..." title line; see attached document) into the text area.
7. Save.

You should see a list of postings in your Press Releases page.

Exercise 5 – Create Postings Template

Now that we have a list of press releases we need a template page to view the whole story. This involves creating a new page with a single content detail and pre-written SQL to display the selected news article.

Create Template Page

Just as in Exercise 2:

1. Make sure the About Us section is selected in the Sections drop-down, and the pages tab is selected.
2. Click the plus sign at the end of the Pages title bar to add a page.
3. In the resulting pop-up (page properties) enter the following information:
    a. Section: About Us
    b. Description: Press Release
    c. Pagecode: prtemplate
    d. Page Name: DynamicPage.aspx
    e. Page Title: Press Release
4. Save.

Add a Content Detail

Create a Content Detail for the Press Release template page:

1. Click the folder icon of the new Press Release page to open it.
2. Click the "Add" link on the Content title bar
3. In the resulting pop-up make the following settings:
    a. Content Type: List
    b. Form: Web Posting eWeb
    c. Check the Show HTML checkbox and copy and paste the supplied SQL "News Template" (without the "####..." title line) into the text area.
4. Save.

Exercise 6 – Build Postings Search

In this exercise we will make a search results page much like the Press Releases list. Then we will add a search control to the Press Releases list page that allows the user to search the articles with keywords.

Create Results Page

Just as was done in Exercise 2:

1. Make sure the About Us section is selected in the Sections drop-down, and the pages tab is selected.
2. Click the plus sign at the end of the Pages title bar to add a page.
3. In the resulting pop-up (page properties) enter the following information:
    a. Section: About Us
    b. Description: PR Search Results
    c. Pagecode: prSearchResults
    d. Page Name: DynamicPage.aspx
    e. Page Title: Press Release Search Results

Create a Content Detail for the Search Results page:

1. Click the folder icon of the Search Results page to open it.
2. Click the “Add” link on the Content title bar and enter the following settings in the resulting pop-up form:
    a. Position: Content
    b. Content Type: List
    c. Form: Web Posting – eWeb
3. Check the Show HTML Checkbox and paste the supplied “News Search Result” SQL text into the Content window.
4. Save.

Create Search Control

We’re going to add two content details to the Press Releases list page, one for the search control and one for the search control label. We’ll need to create a grid structure to arrange the content details on the page.

1. Find the Press Releases list page definition in the About Us section and click the folder icon to expose the content detail.
2. Click the “Add” link to add a new content detail for the search control.
3. Enter the following settings into the resulting pop-up form:
    a. Position: Content
    b. Content Type: Control (ASCX)
    c. Form: Web Posting – eWeb
    d. Control/File: ~/controls/SiteSearchLineNoLabelTop.ascx
    e. Destination: PR Search Results
    f. Row: 2

    g. Column: 2
    h. Save.
4. Click the "Add" link to add a new content detail for the search control label.
5. Enter the following settings in the resulting pop-up form:
    a. Position: Content
    b. Content Type: HTML
    c. Enter a label for the search control (eg. "Keyword Search")
    d. Row: 2
    e. Column: 1
    f. Save.

Finally, we need to make a small adjustment to the primary content detail of the Press Releases list.

1. Click the pencil icon of the content detail with no Row/Column attributes.
2. In the resulting pop-up enter the following attributes:
    a. Row: 1
    b. Column: 1
    c. Row Span: 2
3. Save.

Click the Preview Site icon and test your work.

FORMS & WIZARDS

Overview

The word "form" in netFORUM is somewhat ambiguous. You might think of a form as some fields you fill out on a registration form. Forms in netFORUM have a much greater scale. They are actually the outer layer of object data models. I won't go into any more detail than that here, but needless to say, they are a concept unto themselves. We will mostly consider forms in the traditional respect in this document, except that they are specifically tied to an object. It follows that a wizard is a collection of forms built into a user-flow.

Creating and editing forms requires netForumAdmin access privileges. If you have those privileges you will see little paintbrush icons adjacent to forms in eWeb and iWeb, and magic wand icons adjacent to wizards. You can make changes to forms and wizards by using these functions.

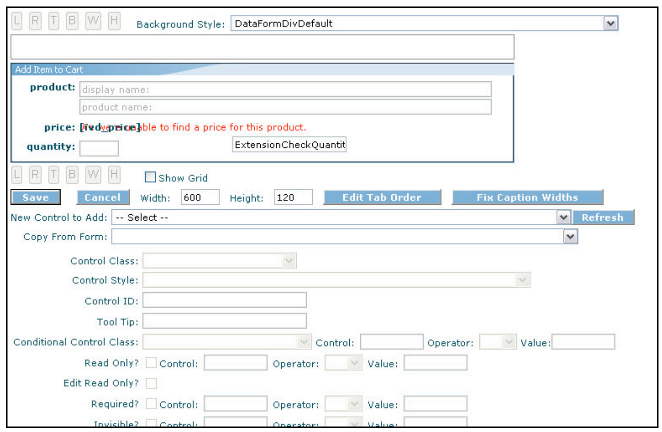
Forms and Wizards are Shared

When you create a new website in CMS the website pages and sections are unique, but the forms and wizards are not. Forms and wizards are shared across eWeb websites and sometimes with iWeb. In other words, the pool of forms can be used in eWeb or iweb. You must always remember that changes made to baseline forms have significant implications to your eWeb implementation including:

- Changes will affect every website where the form or wizard is used.
- If a lock is not applied to the changes the form will be updated by the system during an upgrade, wiping out any customizations.
- If a lock is applied, the form will be bypassed during an upgrade and you will not receive the benefit of the upgrade.
- When migrating eWeb changes from one environment to another, forms do not get "deployed." In fact, only a database administrator can move them, otherwise forcing you to duplicate the changes in each environment.

Whenever you need to customize a form, it is highly recommended that you make a copy of the form and edit the copy.

Editing a Form



Editing a form in netFORUM is easy, except as mentioned above can have significant ramifications. You can access the edit controls of a form by clicking the paintbrush icon adjacent to the form. This will open the Form Designer (right). Using the Form Designer you can move fields by dragging and dropping. You can apply CSS styles by selecting from the Control Class or Background Style drop-down lists. You can choose new fields to add by selecting from the list of available fields in the New Control to Add drop-down. You can add and edit many other attributes as well. Forms can also be edited in iWeb in the Toolkit module.

Copy a Form

To preserve the integrity of the original form you will want to make a copy and apply changes to the new version. There are three different ways to copy a form depending on the extent of the customizations.

1. Create a "Substitute" form – This is the easiest method but it will substitute all instances of the target form.
2. Create a new form based on another – If you want to create a unique instance of a customized form you would use this method.
3. Create a new form with extensions, controls and child forms – this is a highly complex operation and is not covered in this manual, but some forms have very complicated compositions.

Substitute Form

A form may be used in more than one place in netFORUM. For this reason you need to be certain that if you are using this method that you intend to replace all instances with the new version.

1. **Find the original form**
   In the Toolkit>Find Form module, enter the name of the original form in the Form Description field. The form name can be found by editing the wizard or the page detail the original form is assigned to. The results of this search should return the profile of the original form.

2. **Add Substitute**
   Click the Substitute this Form icon in the icon bar of the profile. This will open a dialog pop-up with the new form name prefixed with a standard acronym based on your company's name. Accept the function by clicking the Add Substitute button.

3. **Edit new form**
   Under the Primary tab of the form profile there are four child forms. Expand the Form Substitute child form by clicking the down arrow next to the title. Click the ➪ sign next to the new substitute form. The page will refresh with the substitute form's profile. Click the Design Form icon. A pop-up will open with the Form Designer. As described above, you can move fields by dragging and dropping. You can modify CSS classes by selecting from the Control Class or Background Style drop-down lists. You can choose new fields to add by selecting from the list of available fields in the New Control to Add drop-down.

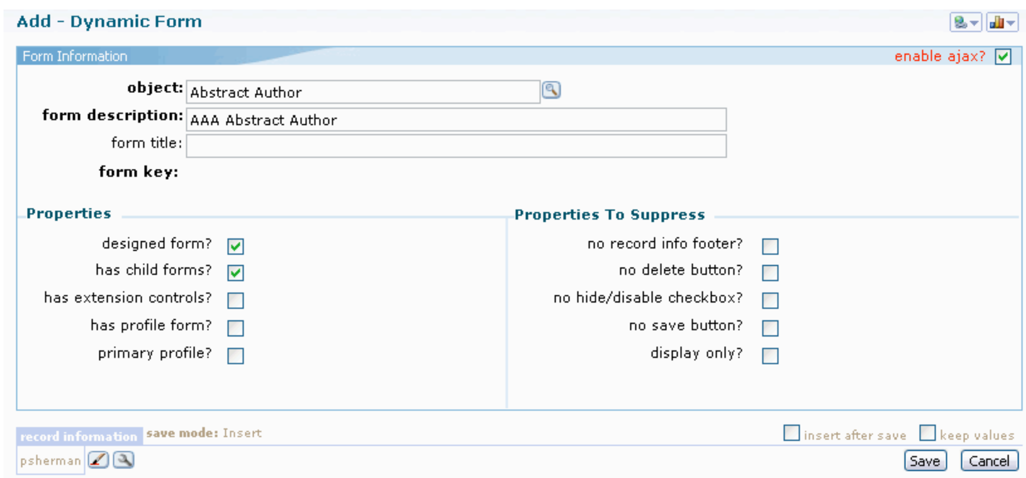
Create a new Form

To copy a simple form for a unique instance, you will create a new form and then copy the form controls (fields and extensions) from the original. Once the new form is created you can edit and replace the original form on a page or wizard.

1. **Get background info**
   To start with, some information is needed to create a new form. You will need to look up the model form and find out what Object it's based on as well as a few important attributes assigned to it. To look up the form, we need the form name. Search for the form in the Forms section of the Toolkit module by entering the "Form Description" (form name). From the results, note the Object and the attributes on the right side of the profile view. We will use these attributes to create the new form.

2. Create new form

In the Forms submenu click the Add Form link. Enter a name in the Description field for the new form, enter and select the Object from the drop down list, and check the checkboxes that correspond to the attributes noted above. Save the form. When the page refreshes, make sure your new form is selected. If not, search for it as described above.



3. Copy attributes

Before you proceed, make sure the new form's profile is displayed on your screen. If it is, click the design form icon. A window will pop up that has a large blank canvas and some controls below it. From the controls select the model form from the "Copy from Form" drop-down. The screen will refresh with the model data form elements. Save this change.

4. Edit the New Form

Now that the new form is copied, you can modify it as you need. As described above, you can move fields by dragging and dropping. You can modify CSS classes by selecting from the Control Class or Background Style drop-down lists. You can choose new fields to add by selecting from the list of available fields in the New Control to Add drop-down.

5. **Replace original form**
   The last thing you need to do is implement the new form. If your new form replaces an existing one, go to the parent page or wizard and simply select the new form from the drop-down list.

Create New Wizard

In netFORUM Wizards are a series of one or more steps in a process, usually composed of a series of forms (i.e. Shopping Cart checkout), where information can be passed from one form to the next. Wizards allow you to customize the buttons of forms, as well as pass foreign data along the process. Unlike forms, there is no way to copy a wizard directly. You must create a Wizard from scratch. Wizards are created in the Toolkit>Wizards module of netFORUM. Before you begin creating a wizard you should have the user-flow already planned out, as it is best to build your wizard from the last step and move backward. This is good to do because, for some steps, you will target the next step in the process.

The process of creating a wizard involves defining the wizard itself, creating the individual steps, and constructing the form buttons and their actions.

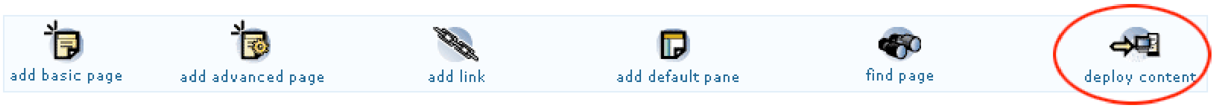
1. Defining the base wizard is simply a matter of entering a wizard title and selecting the location for the buttons.

2. For each step in the wizard you will enter a step description (Form Header), enter the order of the step, select a content type, enter HTML content or select a form for the page, and optionally provide placeholders for any foreign data that needs to be passed along.

3. To create buttons for each step you will define an action for the button (i.e. Save), give the button a caption, enter the placement order in relation to other buttons, enter or select the destination of the button action, and enter placeholders for any foreign data that needs to be passed. You can also apply visibility conditions, or provide an image path to use instead of the standard button.

Note that the term “steps” in wizards is somewhat ambiguous. When creating a wizard you will notice two child forms: Steps and Forms. Rarely used in eWeb, Wizards in netFORUM can have an associated Progress Bar that describes each step of the process (Steps). When we describe the wizard process, we use the term “steps” to describe the series of pages the user steps through to complete his transaction in terms of the entries in the Forms child form. Be sure not to confuse the descriptive term “steps” with the name “Steps” used in the progress bar.

DEPLOYMENT

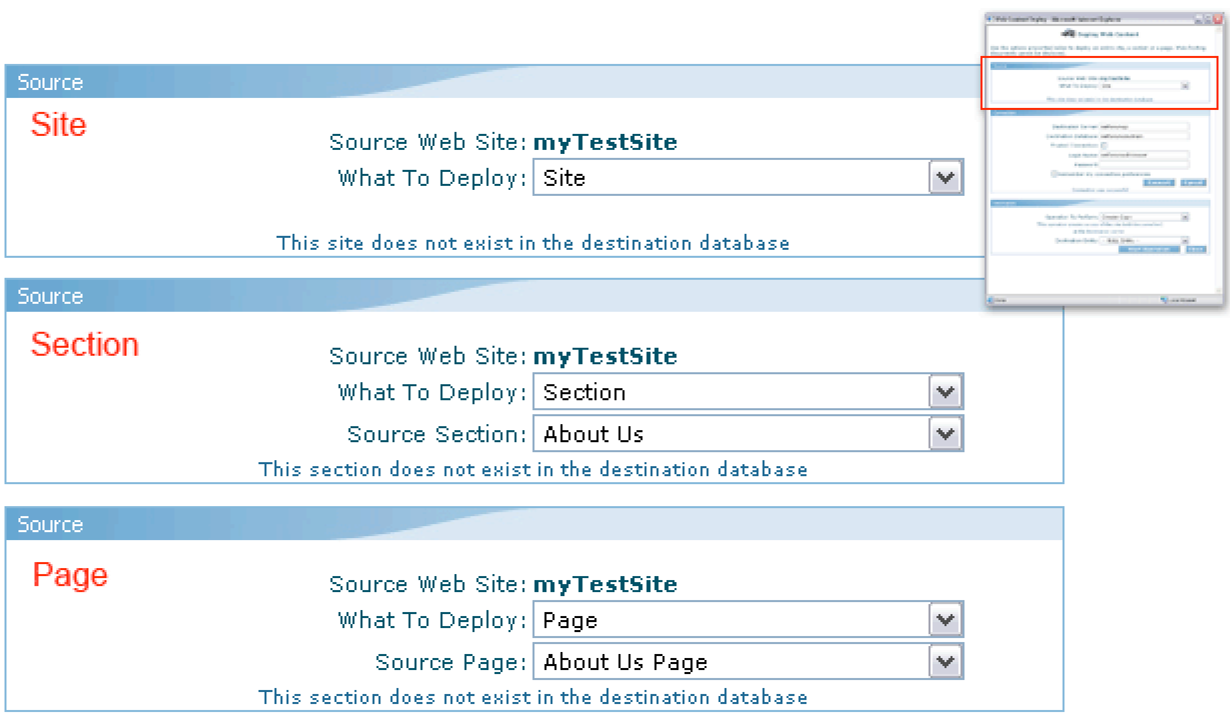


In a typical workflow, you will develop your website in a test environment and then publish (or "deploy") the site to a live environment. This publishing process is done in netFORUM using the Deploy Content tool. You can also use this tool to create a copy of a site or to create a new site.

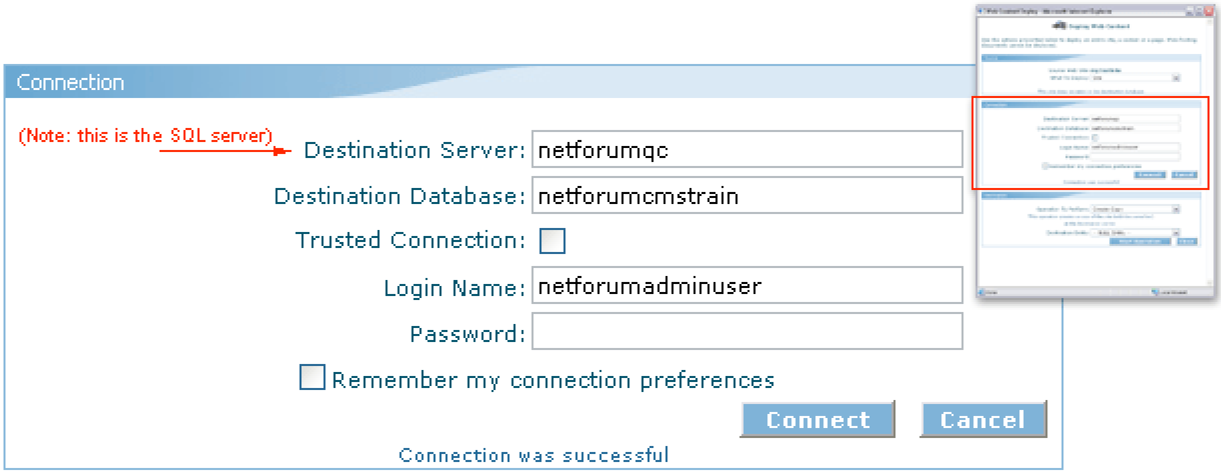
Deployment Interface

There are three parts to the deployment form: Source, Connection and Destination.

Source – From the Source, you can choose to deploy the site (site settings, sections, pages, content, links, defaults, and postings), a single section (with pages and content) or a page (with content details). This information will always be deployed from the site that is currently in your CMS session. This box will indicate if the content exists at the destination once a connection is made.



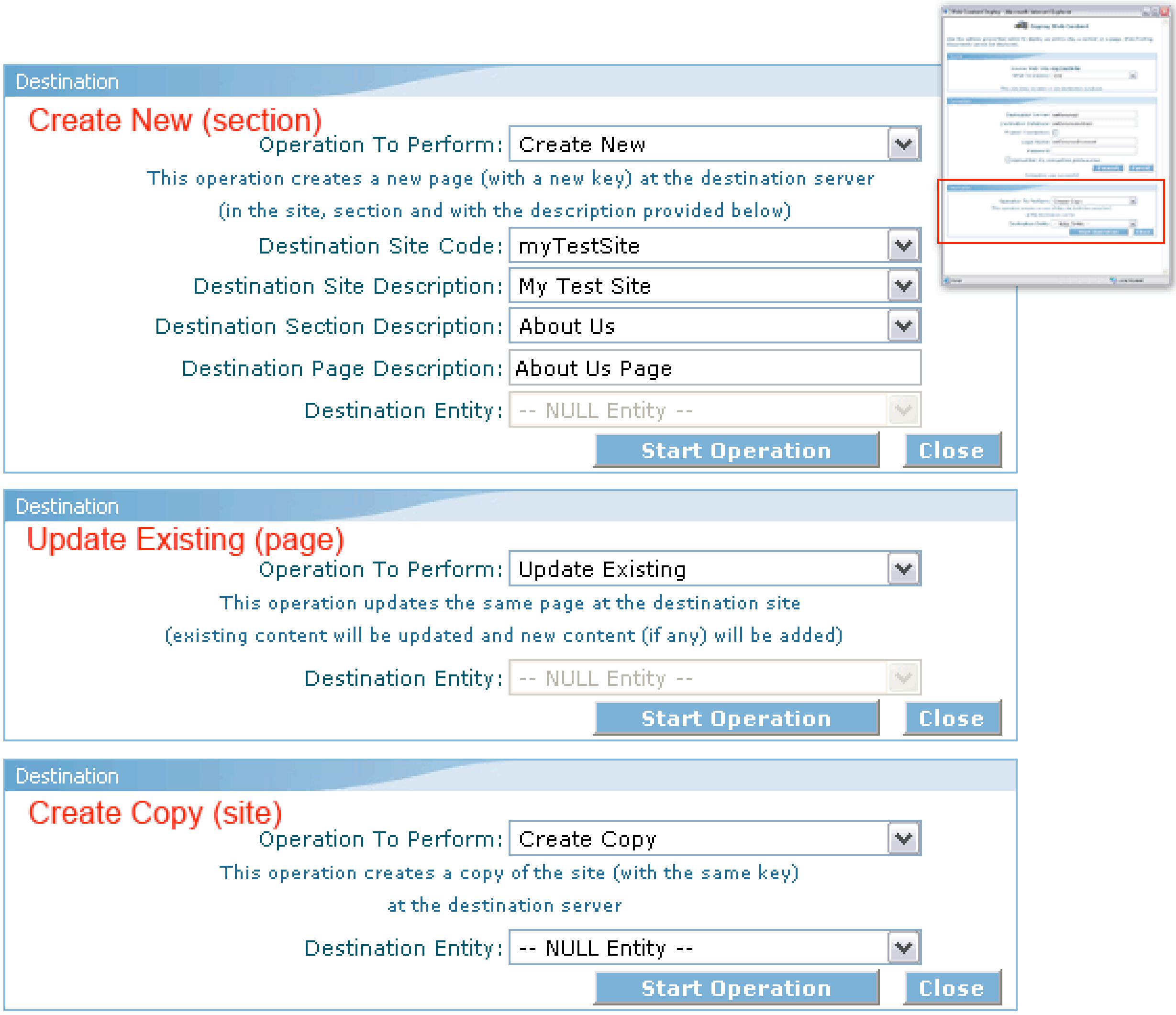
Connection – In the Connection box, you select the destination server and database, and connect. Note that the server to specify is the SQL server, not the web server. Connection login information will be supplied to you and is stored in the Web.config file on the file system.



Destination – The Destination box contains the settings for the target installation. Here you have a number of options depending on whether the content already exists at the destination. The options available and their intended uses are as follows:

> **Create New** – This option is chosen if you want to create a new and unique copy of the source content. This means that it will create the same content with a unique key at the destination. Since it is unique, you have the opportunity to change the name and description of the content. Use this option if you want to make an all-new version of a site or page without association to the original.
>
> **Create Copy** – You will use this option to create an exact duplicate of the original. You will use this when you are deploying from one database to another, from Test to Live, for example. In this way you will be able to maintain a working version and a production version of the site in order to test and preview new pages and functionality.
>
> **Update Existing** – This option will be available if the same content (with the same unique key) exists in the destination database. You will use this option to deploy content from your test site to your live site, for example. It allows you to maintain two sites (in different databases) in direct relationship.
>
> **Replace Existing** – Warning! Do not use this option if you are deploying to the same database. It will delete the source data before it attempts to copy the deleted information.

Note the unique appearance and functionality of the different options:



Destination
Create New (section)
Operation To Perform: Create New
This operation creates a new page (with a new key) at the destination server
(in the site, section and with the description provided below)
Destination Site Code: myTestSite
Destination Site Description: My Test Site
Destination Section Description: About Us
Destination Page Description: About Us Page
Destination Entity: -- NULL Entity --
Start Operation
Close
Destination
Update Existing (page)
Operation To Perform: Update Existing
This operation updates the same page at the destination site
(existing content will be updated and new content (if any) will be added)
Destination Entity: -- NULL Entity --
Start Operation
Close
Destination
Create Copy (site)
Operation To Perform: Create Copy
This operation creates a copy of the site (with the same key)
at the destination server
Destination Entity: -- NULL Entity --
Start Operation
Close

APPENDIX

Training Outline

1. **Introduction**

2. **Baseline eWeb**
    a. Overview
    b. Do Not Change!
    c. eWeb Walkthrough

3. **File System Overview**

4. **CMS Heirarchy**
    a. Framework
    b. Default Panes
    c. What is a "Page"?

5. **CMS Interface**
    a. Panels
    b. Sections
    c. Pages
    d. Page Details
    e. Content Types
    f. Links
    g. Defaults
    h. Editing Your Content

6. ***Exercise 1 – Create New Site***
    a. Copy Baseline
    b. Edit Default Panes

7. ***Exercise 2 – Create New Section***
    a. Create Section
    b. Create Pages (About Us, Press Releases)
    c. Create Links (Main, Section)

8. **Postings Overview**

9. ***Exercise 3 – Create Postings***

10. ***Exercise 4 – Create Postings List***
    a. Add SQL to List Page

11. ***Exercise 5 – Create Postings Template***
    a. Create New Page

   b. Add a Content Detail

12. Exercise 6 – Build Postings Search
   a. Create Search Control
   b. Create Results Page

13. Forms & Wizards
   a. Overview
      1. Forms and Wizards are Shared
   b. Editing a Form
   c. Copy a Form
      1. Substitute form
      2. Create a new form
   d. Create New Wizard

14. Deployment

Postings SQL

News List

```
{BeginPagerProperties}5{EndPagerProperties}
{BeginListSQL}
SELECT
wps_title,
wps_author,
Date = convert(varchar(10), wps_post_date, 101),
wps_key,
wps_short_description

FROM md_web_posting
JOIN md_web_posting_category (nolock) on wps_wpc_key=wpc_key
JOIN md_web_posting_group (nolock) on wps_wpg_key=wpg_key
JOIN md_web (nolock) on wps_web_key=web_key

WHERE
--web_code = 'myTestSite' and
wps_post_date is not null
--and wps_post_date > getDate()-30
and wps_post_date < getDate()+1
and (wps_remove_date is null or wps_remove_date > getDate())
and wps_approval_date is not null
and wpc_category = 'News'
and wpg_group = 'Avectra'

ORDER BY wps_post_date desc
{EndListSQL}

<H1>Press Releases</H1>

<div>{BeginPager}{EndPager}</div><br>

{BeginListDetail}

<div><b><A
href="Dynamicpage.aspx?webcode=PRTemplate&amp;wps_key={wps_key}">{wps_title}</A>
</b></div>
<div style="color:gray">{Date}</div>
<div>{wps_short_description}</div><br>

{EndListDetail}
```

News Template

```
{BeginListSQL}
SELECT
wps_title,
Date = convert(varchar(10), wps_post_date, 101),
wps_html_description

FROM md_web_posting

WHERE wps_key = {wps_key}
{EndListSQL}

<h1>Press Release</h1>

{BeginListDetail}

<div class=heading>{wps_title}</div>
<div style="color:grey">{Date}</div><br>
{wps_html_description}

{EndListDetail}
```

News Search Results

```
{BeginListSQL}
SELECT
wps_title,
wps_author,
Date = convert(varchar(10), wps_post_date, 101),
wps_key,
wps_short_description

FROM md_web_posting
JOIN md_web_posting_category (nolock) on wps_wpc_key=wpc_key
JOIN md_web_posting_group (nolock) on wps_wpg_key=wpg_key
JOIN md_web (nolock) on wps_web_key=web_key

WHERE
--web_code = 'myTestSite' and
wps_post_date is not null
--and wps_post_date > getDate()-30
and wps_post_date < getDate()+1
and (wps_remove_date is null or wps_remove_date > getDate())
and wps_approval_date is not null
```

```
and wpc_category = 'News'
and wpg_group = 'Avectra'
and (wps_html_description like '%{ListSearchTerm}%' or wps_short_description like
'%{ListSearchTerm}%' or wps_title like '%{ListSearchTerm}%')

ORDER BY wps_post_date desc
{EndListSQL}

<h1>News Search Results</h1>
{BeginListDetail}
<div><b><A
href="Dynamicpage.aspx?webcode=PRTemplate&amp;wps_key={wps_key}">{wps_title}</A>
</b></div>
<div style="color:gray">{Date}</div>
<div>{wps_short_description}</div><br>

{EndListDetail}
```