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Chapter 1  Welcome to  
CommonSpot Content Server 4.0

In a very short while, Web technology has evolved from a dull, efficient text-presentation medium to a purveyor of dynamic multimedia displays. At the same time, the embedded formatting codes — in HTML and its successor languages — that give a Web page its appearance and interactive capabilities have grown increasingly complex and time-consuming to learn. Thanks to a suite of powerful features, with CommonSpot, the least technical of users can now go where only pros have gone before.

CommonSpot empowers any and all Web site users with:
- sophisticated authoring tools,
- extensive metadata support,
- flexible formats for structuring pages,
- intuitive wizards, offering step-by-step guidance for tool usage, and
- powerful content scheduling and personalization features to deliver content based on the time of day and/or an audience’s interests,
- expiration and freshness reminder tools for delivering timely information,
- knowledge sharing and discovery tools to help users find, access and organize information, quickly and easily,
- granular level security that can be applied at the subsite, page element or template level
- version history
- distributed administration to allow those closest to the content manage the process,

all this while never leaving the Web browser.

Users do not have to learn any new software or programming languages. The technicalities of Web authoring are hidden behind commonly understood screen components — icons, menus, and wizards — that are added to the standard browser and tailored, page by page, to the role and permissions of the individual user. Individuals or departmental teams can now take responsibility for Web authoring and publishing, instead of funneling all the work to a small cadre of specialists.

1.1 Feature Overview

WithCommonSpot Content Server 4.0, users can leverage the Web to its fullest extent by participating directly in the medium and communicating ideas and information with colleagues, business partners and customers without having to depend on technical HTML Web resources. No longer constrained by their dependence on Webmasters, all users can now share information from the desktop with anyone, anywhere, effortlessly and in real-time.
CommonSpot accomplishes all of this by providing benefits in the following six key areas described in detail below: empowered authoring and publishing, presentation management, content scheduling and personalization, content management, distributed administration and security, knowledge sharing and discovery.

1.1.1 Empowered Authoring & Publishing

All of CommonSpot’s content is created and edited within the browser and Web page. No client software is required, nor is it necessary to learn HTML. Participants from developers to content contributors are presented with intuitive and dynamic menus and User Interface components that engage CommonSpot’s functionality.

1.1.2 Presentation Management

CommonSpot’s presentation management features provide users with the tools they need to communicate their ideas in a manner that best suits the information.

A robust, template-driven Web-authoring system gives authors the flexibility to present their content in the most effective way, while preserving the site’s overall design integrity. Web pages, as well as other templates are constructed from a simple collection of design, layout, and formatting attributes, which makes Web authoring an efficient process of adding content to templates.

CommonSpot’s versatile elements provide a predetermined format for presenting content on a page from straight text to images, PDF to HTML, Link Bars to custom ColdFusion scripts. Users build Web pages by simply inserting the appropriate elements on a page. Each element provides a “click here” interface with interactive dialog wizards that prompt users through various presentation options.

1.1.3 Scheduling & Personalization

CommonSpot has powerful personalization features that give authors the flexibility to create and deliver content based on several different variables, including the timeframe they wish to present the data, the audience they wish to target and/or the specific page categories or subsites they wish to direct the data to. This scheduling of data can be accomplished either via insertion of a Schedule/Personalize element, or explicit specification of any sub-item (i.e. a particular bullet within a bulleted list), restricting ‘read’ rights within element security, or through the creation of multiple virtual ‘targeted audience’ pages (multiple pages rendered from the same URL based on the audience).
1.1.4 Content Management

CommonSpot provides a host of tools for managing the publishing process and keeping content fresh.

1.1.5 Distributed Administration & Security

CommonSpot allows organizations to distribute the management and administration of access and security rights to those closest to the content. A robust roles-based security model allows department managers, workgroups, content owners and strategic business partners to participate in publishing and managing Web content, without having to sacrifice security or compromise the integrity of the site.

1.1.6 Knowledge Sharing & Discovery

Knowledge Sharing & Discovery tools enable information consumers to be more productive information managers. Finding, accessing, organizing, and using information can be accomplished more easily, quickly and effectively. Integrated with the publishing process, these tools can extend the value of the author’s content and reduce the “authoring” and maintenance requirements of the publishing communities.
Chapter 2  Login

Chapter 2 walks you through the steps of logging into CommonSpot, a necessary first step in accessing its Web publishing and content management functionality.

2.1 Contents

- Login
- Pending User Actions
- Password
2.2 Login

Depending on the type of site (Internet, intranet or extranet), certain pages can be accessed similarly for all users and may not require specific security permissions. For these types of pages it may not be necessary for end users to be authenticated. To handle this, CommonSpot supports assignment of security permissions to anonymous users. If a page's access needs to be restricted to certain users or groups or content within the page is personalized based on the users profile or the user is a contributor and is trying to add or edit content, the user must be authenticated.

CommonSpot provides the following facilities for a user to login and become authenticated:

- Login through User Login dialog accessible from the Login menu icon
- Login through the 'login.cfm' URL
- Automatic Login through NT Authentication
- Automatic Login through cookies

2.2.1 Login Through User Login Dialog

It is important to note that once you are logged in, if there has been no activity for 30 minutes, you will automatically be logged off.

Click the Login menu icon and select Login to bring up the User Login dialog.

User ID

Click in the text area to create a blinking cursor and type in your assigned User ID.

Password

Type in your Password (it will not show on the screen). The first time you login to CommonSpot, you will be prompted to change your assigned password.
2.2.2 Login Through 'login.cfm' URL

If the CommonSpot Indicators are hidden from anonymous users, as is typically the case for Internet or extranet sites, content contributors will need to be logged in and be authenticated via a special URL. Within each site or subsite's root directory exists a ColdFusion module named 'login.cfm'. Users can Login to CommonSpot by typing 'login.cfm' in the browser's address bar.

2.2.3 Automatic Login Through NT Authentication

When NT Authentication is enabled in CommonSpot, the user is authenticated via NT Challenge/Response. If the user is running Internet Explorer as his/her browser and is logged into the Domain, the user will automatically be authenticated without any prompting. If running Netscape, or otherwise not logged into the Domain, the user will be prompted via the browser for the appropriate UserID and Password.

2.2.4 Automatic Login Through Cookies

When a user checks the box ‘Automatically login next time’ the Cookie Authentication method is enabled, and retrieves the UserID from a locally stored Cookie. Only when accessing any functionality requiring secured access (i.e. authoring or approval of content) is the user prompted for their CommonSpot password to validate authentication.

2.3 Pending User Actions

Pending Actions is a user’s to-do-list. It conveniently provides through a single consistent wizard interface, a list of work that is outstanding or pending an individual user’s action.
### 2.3.1 Pending Action Types

Pending Actions tracks, lists and hypertext links to content and pages including the following types of activities:

- **Work In Progress** – newly created or modified content that is "in progress" and not ready for public distribution
- **Changes Referred Back** – listing of content that has been referred back by an approver for change
- **Pending Approval** – listing of content requiring approval
- **Subscription notification** – listing of alerts notifying user when designated content has been changed
- **Content freshness reminders** – listing of alerts notifying user of content that requires updating
- **Work requests** – listing of work assigned and outstanding for the individual
- **Publishing tasks** – listing of publishing tasks owned or assigned to the individual
- **Broken Links** – listing of all links that are no longer active, and need to be repaired.

To bring up Pending Actions immediately after logging in, check **Show Pending Actions**. If you do not want to view the Pending Actions dialog now uncheck the box by clicking on it.

Pending Actions is always accessible from the page & template management icon menu. To navigate directly to the page requiring your action, click on the name of the page.
2.4 Password

2.4.1 Change Password

If you want to change your password, login in with your current user name and password, and click **Change Password**. Enter your new password information, and click **OK** to save the new password. If you change your mind and would like to keep your current password as is, click **Cancel**. You will be returned to the **Login** dialog.

```
Change Password
Please enter your new password. Choose a password which is easy to remember but difficult for others to guess.

New Password: [Enter your password]

Verify: [Retype your new password to verify]

[OK] [Cancel]
```

When you are finished in the **Login** dialog, click **OK**. Once logged in, you will automatically be in the **Read** view mode. The **View Mode** menu icon replaces the Login menu icon.

Now you are ready to create a page, create a template, edit a previously published page, approve proposed new content, change a page’s security permissions, etc. CommonSpot facilitates the entire range of activities associated with a complex Web site, including authoring, editing, design, and administration.

Everyone using the application to contribute to the Web site is assigned a particular role (either by the site administrator or by a departmental administrator). Depending on your role in the development of the Intranet site, you will be granted certain permissions that will provide you with access to certain features.

Permissions may be defined globally, at the site level, or more locally at the page or element level. CommonSpot presents menus, dialogs, and an intuitive User Interface tailored to the permissions of the current user. The tools you see pertain only to activities you are authorized to carry out.
2.4.2 Forgot Password

If you forget your password, you can have it emailed to you. Click on the Login icon, and in the User Login dialog, click on **Forgot Password?**

Enter the email address associated with your CommonSpot account. Your user id and password will be emailed to that address.
Chapter 3  The Essential Building Blocks
– Templates

Chapters 3 and 4 discuss the essential building blocks of CommonSpot. In Chapter 3 we focus on the template as a ready-to-use framework for empowering users to create pages, as well as a tool for maintaining the look and feel of certain pages of the site.

3.1 Contents

- Overview
- Template Driven Web Pages
- Template Gallery
- Dynamic Linkage
- Template Hierarchy
- Saving Pages as Templates
3.2 Overview

At the heart of CommonSpot’s publishing system are the template and the element, each contributing to the simplification of creating, updating, scheduling, personalizing and managing Web content. Instead of creating HTML pages and storing them as static code, CommonSpot separates presentation from the content. Templates, the structuring elements, format and layout properties as well as security permissions are managed separately in a centralized database repository.

3.3 Template-Driven Web Pages

A template is an assemblage of design, layout, and formatting attributes, along with recurrent content, that serves as a framework on which to construct both Web pages and other templates.

The structural framework provided by a template simplifies Web authoring by eliminating the need to design and lay out a page from the ground up. Authors begin creating a page by determining what kind of design and formatting elements are best suited to the content they wish to publish. From the Template Gallery, they then choose a template that contains or will accommodate those elements. Templates can be used as defined, modified to suit individual needs or created from scratch.

CommonSpot provides a number of ready-made templates that can incorporate the “look and feel” of the Web site and offer typical formatting and layout options. These basic forms can be filled directly with content and published as Web pages, or they can be modified to make customized pages. The same template can even serve very different purposes from one department to another.

With the page’s basic framework in place, authors simply click where directed, and pop-up wizards guide them through the submission of content. The content is immediately integrated into the predefined structure of the template.

Any CommonSpot user who has template-creation rights (which are granted by the site administrator) can easily modify templates to satisfy precise needs. The result is a corporate-wide development process in which the people who best understand the content presented design the templates. Eventually a site will accumulate an extensive gallery of customized and specific templates serving every corporate purpose.

3.4 Template Gallery

All Web pages created in CommonSpot are based on templates, so the first step in creating a page is choosing a suitable template. If you have page-creation rights granted by the Site Administrator, your Page & Template Management menu icon will include the option Create New Page.
Clicking on **Create New Page** activates the **Template Gallery**, a wizard containing descriptions and thumbnail illustrations of the standard CommonSpot templates plus a categorized listing of other specifically created templates.

![Template Gallery](image)

An evolving Web site can accumulate a large number of pages and templates. CommonSpot organizes the templates into logical categories to make them easy to keep track of. Categories may be displayed or hidden from users as appropriate.

When you open the **Template Gallery**, the lists are collapsed by category. Click on a category name to display all the templates in that category, or click on **Expand all** to display the entire set of templates.

![Template Gallery](image)

Scroll through the expanded gallery to get an idea of the range of choices available to you. Remember that a template does not have to be used “as is.” You can always add more features and functionality as needed (as long as this capability has not been restricted by the template’s creator).
When you find the template closest to the type of Web page you intend to create, click on its name. By clicking on the template name, the Create New Page dialog appears and prompts you to enter the information CommonSpot uses to identify the page. After that, you are returned to the main browser window.

The new page will contain any content embedded in the template you chose, along with the template's structural elements, which embody the logic that determines how new content will be rendered on the page.

3.5 Dynamic Linkage

For most, Web authoring means laboriously creating one page after another, each with its embedded HTML codes. With CommonSpot, templates remain dynamically linked to all pages (and other templates) created from it, so that a change made to the base, or parent template, will be inherited automatically by all the pages and templates created from it. Recurrent content or design features can then be embedded in a template, and if the need for modification arises, a simple change in the template will update an entire site quickly and easily.

Every template created in CommonSpot is linked in this way to the template it was created from and the templates and pages based on it. The network of linkages constitutes the Web site’s central nervous system, ensuring that no page is ever left out of the updating loop.

3.6 Template Hierarchy

In order to implement dynamic linkage of templates, CommonSpot keeps track of the lineage of every page and template. This important information is presented in the Template Hierarchy dialog, a dialog that tracks the templates that were used in the construction of a page. The Template Hierarchy dialog is available for every page and every template from the Page & Template Management menu. However, only those who have template-creation rights (which are assigned by the site administrator) have access to the Template Hierarchy dialog.

The Template Hierarchy for a page will display a listing of the templates from which the current page is derived, as well as all of the pages that derive from the parent template. This feature is useful if your are trying to determine which pages derive from any given template.
The sample Template Hierarchy pictured above, is for a top level page. The information presented shows that the current page was created from the template called Products Benefit Template. In turn, Products Benefit Template was created from another template called Products Template, which was derived from the 1x1 Base, which in turn was derived from the Base Template. The Base Template in turn derives from the Body Template, which is the lowest level base template. The lowest level templates are ColdFusion CFM modules, and thus are not directly editable from CommonSpot. Changes to the base level templates are made using an HTML editor such as ColdFusion Studio. All other levels of the hierarchy are editable (with proper permissions) by clicking on the hyperlink.

Any change made in the lower level templates (such as the 1x1 Template in this example) will be inherited by higher level templates (such ast the Products Template), and by all pages and templates created from Products Template, including the current page, as long as the modified component or feature has been retained by the creators of Products Template and the current page.

Also presented in the Template Hierarchy is a listing of all of the pages that derive from the parent template – in this case the Products Benefit Template.

This record can prove invaluable to a template creator who needs to decide where in the hierarchy to introduce a change, based on which pages and other templates that will inherit the change.

It is important to remember that linkage works in one direction only. Changes made to a template do not affect its parent template (the one it was based on). Hence a change in Products Benefit Template will have no effect on the Products Template, and a change in the 1x1 Base will not affect the Base Template.
3.7 Saving Pages as Templates

Any page created in CommonSpot can be saved as a template. In order to create a template, you must first begin by creating a page.

To create a template that is simply defined by rows and columns, first create a page with only a tabular layout element defined and **Save As Template**. A template can be laid out to include numerous elements such as Text Block, image or bulleted list, requiring the page creator to just “click to add content.” Thus, you would first create a page that contained those elements and **Save As Template**.

A template may contain both elements and content that will recur on all inherited pages. To accomplish this, you would first create a page, place the elements on the page, submit the content...
that you wish to have displayed on all pages that will derive from the template into the element(s), and then **Save As Template**.

The **Save As Template** option can be found off the **Page and Template Management** menu.

Selecting the **Save As Template** option brings up a second wizard dialog that presents options for saving the page as a template. The **Save As Template** wizard displays two options for saving the page as a template.

**Converting the current page to a template** will update the page to a template. The page, now a template, will be renamed and therefore the page as it previously existed will be lost.
After selecting the radio button, click on Next to take you to the Save Current Page as a Template wizard.

Enter the Category in which to organize and find the template. Provide a distinguishing Template Name in order for other people to know and utilize it. Provide a Description of the template for reference. Be sure to include the purpose of the template and some distinguishing characteristics in terms of its content or layout. When you have finished completing all the information, click on Finish to save the page as a template.

Copying the current page as a template and changing its inheritance to derive from the new template, allows you to essentially copy the page and save it as template, while preserving the integrity of the page and the ability of users to navigate to it. The page will now derive from the template newly created. Any changes made to the template will propagate to the page as well.
Once you have made your selection, click on **Next**. Once again the **Save Current Page as a Template** wizard will open and you will be prompted to classify and rename the new template, as well as offer a description.
Chapter 4 The Essential Building Blocks – Elements

CommonSpot’s use of elements greatly simplifies the user’s ability to create exciting, media rich Web pages. Intuitive wizards help guide the user through the process of presenting elements on the page, changing their layout characteristics and associated formatting attributes, and finally submitting content.

In this chapter we will discuss the value of elements in the effortless creation of templates and Web pages. A complete list of all the elements available out-of-the-box and the related wizards is provided.

Security may be assigned at the element level as well, offering granular level access control of not only who is managing the content, but also who can view it.

Refer to Chapter 13 for more information on CommonSpot’s security features.

4.1 Contents

- Elements as Modular Units
- Using Elements
- Element Gallery
  - Forum Elements
  - Hyperlink Elements
  - Image Elements
  - Layout Elements
  - Miscellaneous Elements
  - Page Set Elements
  - Search Elements
  - Text Elements
- Common Link Wizard
- Creating Pop-up Menus
- Custom Elements
- Custom Element Render Handlers
4.2 Elements as Modular Units

CommonSpot leverages the efficiency and flexibility of a modular system by separating form from content. Instead of storing Web pages as static chunks of HTML code, CommonSpot keeps the content and the structuring elements in different databases, assembling and serving up Web pages on the fly as the relevant URLs are requested. This unique approach enables any number of authors participating in the creation and management process to re-use elements endlessly, in a myriad of combinations, to create Web pages tailored to the precise needs of every department. And thanks to dynamic template linkage, a common “look and feel” can still be preserved in the midst of boundless diversity and dispersed responsibility.

The element is a predefined object or logic that defines how content will be rendered when presented on the page. CommonSpot’s gallery of versatile structuring elements provides an exhaustive list of ways in which to present information on a Web site from a simple Text Block to a drop down list of links, text around an image to a hierarchical menu.

Elements simplify contributing content. Each element has a set of “Click here” wizards or dialogs that prompt the user through all of the associated content options.

4.3 Using Elements

CommonSpot’s elements handle everything from straight text and images to hypertext links, PowerPoint presentations, and video clips with equal facility. Most authors will find the application’s suite of elements sufficient for their every need. However, it is also possible to construct new elements for specialized purposes.

The right to create elements for the site is granted by a site administrator. Web developers in creating a base template in ColdFusion may programmatically insert the desired elements and attributes.

Site designers, Webmasters, and content authors build Web pages either by choosing a template containing the desired elements or by inserting appropriate elements from the Element Gallery onto a page.
4.3.1 Inserting an Element

To insert an element onto a page, whether you are starting from a blank page or modifying an existing template or page, you simply click on the ghosted text “Click here to insert element” which will automatically open a second window displaying the Element Gallery. Elements are categorized by their function to make it easy to find what you need.

When you open the Element Gallery, the lists are collapsed with only the category names displayed. To open a particular category’s list, click on its name in the gray bar. To open all the categories at once and view the complete gallery, click on Expand all.

Each element is listed with its name in boldface and a brief explanation of its function underneath. When you find the element you need, click on its name to insert it onto your page. If you want to leave the gallery without making a selection, click Cancel.

(NOTE: PowerPoint and Word elements are not available on the Solaris platform.)

4.3.2 Copying an Element

You may wish to copy an existing element to another location on a page, or to another page or template. To do so, in Author mode, click on the element properties icon for the element you wish to copy, and select Copy Element from the menu.
By selecting Copy Element, you will be copying the element, including all of its layout properties, as well as the content of the element. You can paste the element on the current page, or on another page or template. *(To paste the element on another page, you will need to get out of author mode for the page you are copying the element from, navigate to the page on which you wish to paste the element, and get into author mode for that page.) To paste the element, click on the ghosted text ‘Click to insert a new element’. The element that you copied will now display in the Element Gallery above the list of available element categories as Paste Element, as shown in the example below.

4.3.3 Deleting an Element

To delete an element from a page or template, click on the element properties icon for the element, and select Delete Element from the menu.
You will be prompted with the following warning message. Click OK to proceed with the deletion of the element.

If you are deleting an element that had previously been approved and published, you will need to approve the deletion in order for the change to become effective. Click on the icon in order to submit the deletion for publication. Refer to Chapter 8 for more details on the workflow approval process. If you are deleting an element that has not yet been published (still Work in Progress), the deletion will be immediately effective.

4.4 Element Gallery

4.4.1 Forum Elements

4.4.1.1 Discussion Forum element

There are two main elements in the Forum Element category within the element gallery. The Discussion Forum element can embed a discussion board within a CommonSpot page. The Discussion Forum Component element allows you to select from a variety of components that display information about a specific forum or user with a datasheet.
Note: If FuseTalk is not configured for the subsite, the Discussion Forum element will not appear in the Element Gallery as shown below. For details on configuring FuseTalk for the subsite, refer to the FuseTalk installation section in the Administrator Guide.

To add a discussion forum to a page, FuseTalk must be configured for use within the subsite the page resides in. If FuseTalk has been configured, you can simply click on a gray “Click here to add new element” link to add an instance of the discussion board. From the Element Gallery, select the Discussion Forum element.

Once inserted into the page, click the gray text to configure the Discussion Forum. You will then be presented a dialog box that allows you to select the Discussion forum, category, or thread to display.

Once the forum has been selected, the page will refresh, displaying the FuseTalk forum with the selected form, category or thread in it. An example of this is shown below.
The discussion board will recognize the current CommonSpot user, allowing the user to interact with the system as per the permissions setup by the site administrator. For details on the configuration of FuseTalk, refer to the on-line documentation or instruction guides for FuseTalk.

4.4.1.2 Discussion Forum Components Element

CommonSpot provides a convenient way to insert discussion forum statistics into a page by using the Discussion Forum Components element. This element is, in essence, a pre-configured datasheet element that has been modified to pull specific data from a selected discussion forum. Like a datasheet, this element can be configured by the author to provide several views within one instance of the element.

There are five different functions that a view can be configured for within this element:

**Hot Threads**
These are the most active threads in the forum.

**Most Recent Posts**
Displays the latest posts in the selected forum.

**Top Users**
Displays the most active users of the forum by number of posts.

**Latest Posts**
Shows the most recent messages posted by the current user.

**Private Messages**
Displays a list the private messages for the current user.

The datasheet generated for this element retains all the normal formatting options such as column sorting, drop-down list of views, etc.
4.4.1.3 Inserting a Discussion Forum Component

To insert a component, select an available “click here to insert a new element” link and select the Discussion Forum Components element from the gallery as shown below. Then click the ghosted text to configure the element.

You will then see a dialog similar to the one below. This screen allows the author to manage the views within the element instance. The example below shows two existing views. Using the controls to the right of the listed views, the author can edit, move up, move down, copy, or delete a view. Editing a view allows the author to change the view name, and to select the status of Private (current user only) or Public (everyone with rights to view the page).

Clicking the ghosted text at the bottom of the page will create a new view within the element instance. Here you can give the new view a name, description, access status (Public/Private), and the type of component to display in this view. Clicking Next brings up the next setup dialog.
Once the component type has been selected, the author can choose from the columns available for that component type. The order of the column names in the “Selected Columns” box will determine the left-to-right order of the columns displayed. Clicking **Finish** will save the view configuration and refresh the page.

After the page refreshes, you can select the pull-down View list to check out the new component view. An example of this is shown below. As the related discussion forums are used, the data within the component views will automatically update.
4.4.2 Hyperlink Elements

The Hyperlink elements provide various standard formats for presenting hypertext links on the Web page.

4.4.2.1 Breadcrumb Links

The Breadcrumb element is used as a navigational aide to the user, automatically displaying a horizontal list of links depicting the sub site hierarchy of the current page. The links are ordered from left to right, starting with the root sub-site and ending (depending on the configuration chosen) with the current page’s title or the current page’s sub-site. Each link in the breadcrumb list provides access to the default page within that sub-site.

Though the breadcrumb links are automatically generated from the current page’s sub site hierarchy, there are several options for rendering the breadcrumb list depending on the desired look.

An example of such use of the breadcrumb element is within the PaperThin Internet site. On each page of the site a breadcrumb element is used to provide navigational context for the user. The image below shows the top portion of three pages within the PaperThin site. Notice how the breadcrumb changes to reflect the current position within the site’s hierarchy.
Breadcrumb Links provide a reference point on the page indicating the page’s position in the hierarchal structure of the site. These links orient the user of the page and allow for a visible trail from the home site to the current page’s subsite.

4.4.2.1.1 Layout Properties

The Breadcrumb Properties dialog details the layout options for the breadcrumb element. The Layout Properties dialog can be accessed by clicking on a new inserted element’s ghost text, as illustrated below.

Once the Breadcrumb has been initially defined, the Layout Properties dialog is accessed via the Layout Properties Menu option from the Elements Properties indicator, selecting the Edit Breadcrumb Properties Menu option from the Element Edit Content icon, or simply clicking anywhere on the Breadcrumb element. This element is slightly different than other elements in that the content for the element is dynamically generated, and thus there are no dialogs to enter data, just dialogs to alter the formatting and layout of the output.

The individual options designate the text or image that appears before, between and after the Breadcrumb links associated with the particular page. The Breadcrumb will appear
horizontally on the page but can be **Left**, **Center**, or **Right** aligned. The user can select from **Display Name**, **Site Name** or **Description** to display as the subsite name while the option to display current subsite can be set as **Always Display**, **Never Display** or conditionally by hiding when rendering subsite’s default page. The current page’s title can be included as the last element in the list by checking the corresponding box. Finally, check the check box if the page set title for page set members should display.

<table>
<thead>
<tr>
<th>Breadcrumb Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please select the appropriate rendering options for the Breadcrumb element.</td>
</tr>
<tr>
<td><strong>Before Label:</strong> Text: <strong>You are here:</strong></td>
</tr>
<tr>
<td><strong>Separator String:</strong> Text: <strong>&gt;</strong></td>
</tr>
<tr>
<td><strong>After Label:</strong> Text:</td>
</tr>
<tr>
<td><strong>Horizontal Alignment:</strong> Left</td>
</tr>
<tr>
<td><strong>SubSite Name to displays:</strong> Display Name</td>
</tr>
<tr>
<td><strong>Display Current Subsite:</strong> Hide when rendering subsite’s default page</td>
</tr>
<tr>
<td><strong>Default Page List:</strong> index.dfm, default.dfm</td>
</tr>
<tr>
<td>✓ Display the Current Page’s Title</td>
</tr>
<tr>
<td>✓ Display page set title for page set members.</td>
</tr>
</tbody>
</table>

### 4.4.2.2 Bulleted List

The **Bulleted List** element is a list that organizes data through the use of bullets.

- Empowered Content Owners
- Interactive Browser-Based Application
- Simplified Web Page Creation
- Supports Different Levels of Expertise

CommonSpot offers numerous ways in which to create the **Bulleted List**. A list can be bulleted with an assortment of symbols and each bulleted item can be linked to another Web page, an external URL, a Word or PDF document or appear as normal text.

#### 4.4.2.2.1 Layout Properties

With each element you work with, as well as with the Bulleted List, it is important first to define its layout properties — left, center, or right aligned; inclusion of a heading or not; multiple headers, single line or paragraph style; etc.
The Bulleted List Layout Properties wizard offers twelve different ways of structuring the list depending on the alignment of the list, single line of text versus a paragraph style, and if desired no header, single header or multiple headers.

Select the option that meets your layout needs by clicking on the corresponding image.

After you have selected the layout for the Bulleted List, choose the value for the indent level and spacing between items. To allow insertion of other elements below the bulleted item and to permit rich text editing, check the boxes respectively.

**4.4.2.2 Indent Level**

You may prefer to indent the entire list of bulleted items. Select the level of indentation that fits your needs. The Bulleted List example presented below is indented 2 levels:

**Benefits**

- Empowered Content Owners
- Interactive Browser-Based Application
4.4.2.2.3 Spacing Between Items

You have the option to increase the line spacing between each bulleted item either from 1–10 pixels or from 1 – 10 lines. The list below has a spacing of 1 pixel between each item.

**Benefits**

- Empowered Content Owners
- Interactive Browser-Based Application

4.4.2.2.4 Allow Insertion of Other Elements Below the Bulleted Item

Often in a Bulleted List it is necessary to include an item that is something other than text, perhaps an image or spreadsheet. If you check Allow insertion of other elements you will see in Author Mode the addition of “Click here to insert element” after each of the bulleted items. You will then be able to specify the type of element you wish to insert by choosing an element from the Element Gallery. A Bulleted List is just one of three elements – Tabular Layout, Bulleted List, Multi-Section that allows you to insert other elements within the element itself.

4.4.2.2.5 Rich-Text Editing

The Rich–Text Editor control permits rich–text editing capabilities that allow enhanced flexibility in the presentation of the bulleted list. The advanced button within the Bulleted List Layout Properties links to the Rich Text block Advanced Options dialog detailing the toolbar options available to include within the text block editor. Check those options that should be visible on the rich text–editor toolbar within the Edit Bulleted List dialog. A picture of the Rich Text block Advanced Options dialog appears containing all of the toolbar options available.
Because all of the options are checked above, they will be included in the Rich Text block Editor control, as illustrated below:
4.4.2.2.6 Bulleted List Style

You have the opportunity to choose the style of the Bulleted List. For each type, either symbolic or numeric there are several different bullet styles to choose from.

First choose the list type and then click on the image of the bullet type you wish to use. If you prefer no bullets, you may do so.
When you have selected the layout options for the Bulleted List, click on Finish. The page you were creating or editing will now be refreshed and will render the Bulleted List based on your selections.

4.4.2.2.7 Submitting Content

The Bulleted List wizard displays ghosted text that prompts you for submitting content. Simply click on the grayed text, pictured below, or click on the Edit Item icon to open the editing window.

- Click here to define the list item
Notice at the bottom of the rich-text editing box the option Add another bulleted item. This is a short cut for adding numerous bulleted items to a list.

When the box is checked, you will continue to be prompted with a new editing window each time you click on Finish. When you have finished creating the last bullet, uncheck the box. Each bullet item and its content will render collectively on the page. If need be, you can go back and edit the entries individually by clicking on the text directly or the Edit Item icon.

This short cut will save you considerable time when creating a bulleted list with multiple items. With the box unchecked, each time you enter the content for a bullet you are returned to the Web page. The Web page is then refreshed displaying the recent addition and new “Click here to enter a bullet item” text is presented. You begin the process of entering content all over again by clicking on either the text specifically or by clicking on the Edit Item icon. Multiple headers may be added as well, above or below the existing header, through the Edit Header icon, adjacent to the header text.

From the Edit Item icon, you may also move the specified bullet up, down, to the top of the list or to the bottom of the list. This capability is available for headers as well, if multiple headers exist within the element.

4.4.2.2.8 Creating the Link

You have created a Bulleted List with the layout and style you desire. The next step is to define what each bulleted item will link to. You can link to either an existing Web page or document (file), a new Web page to be created, a new document or file to be uploaded, an image, an e-mail, a scheduled element or you can choose not to link to anything at all.

It is important to note that only Bulleted Lists with individual list items can act as links. Bulleted List Layout options that include paragraphs, not list items, do not support linking. Therefore, when you click on Next in the Insert Bullet Item dialog, you are presented instead with the Bulleted List Style wizard and not the Insert Link wizard. The Bulleted List Style wizard allows you to select the style and type of bullets.

If you choose a layout option with a list item, when you click on Next in the Insert Bullet Item dialog, you will be presented with the Insert Link wizard where you can define the link.

Refer to the Common Link Wizard section detailed later in this chapter for more information on the various link options available.
4.4.2.3 Drop Down List of Links

The Drop Down List of Links is a drop down or collapsing/expanding list of links. It may be appropriate to use a drop down list of links where you want to provide quick access to content in a list format, but have minimal screen space.

4.4.2.3.1 Layout Properties

CommonSpot provides six different ways of rendering the drop down list. Select the layout that best fits your needs. Notice the three layout options in the top row represent variations on an expanding and collapsing list. The bottom three (3) layout options offer a list box with the list fully expanded.

Alignment within the cell refers to the positioning of the element within the cell. If you wish to sort the list alphabetically, check as appropriate.

4.4.2.3.2 Creating the Link

Once you have chosen the layout you desire, the next step is to create the links. Click on the element’s ghosted text “Click here to define the list.” In the example below, the layout option reflects that of the list box.
The Specify LinkList Entries that tracks all of the links that will be displayed in the LinkList element. To add a link, “Click here to add a new entry”.

The resulting Specify Link List Entries wizard prompts you to add your entries through the LinkList Entry dialog. Each time you click on Finish, the wizard will bring you back to the Specify LinkList Entries window. To add another entry, click on “Click here to add new entry.”

Clicking on Next forwards you to the Insert Link wizard where you can define the type of link for the list item. Make your selection as appropriate.

When you have completed submitting all the entries for the Drop Down List of Links and have defined the links, Close the wizard.

The element will be refreshed on the page and several Work In Progress icons will have been added.

If you toggle on Preview mode, you can see the element with all the link icons.

For more information on creating links, refer to the Common Link Wizard section detailed later in this chapter.
4.4.2.3.3 Submit Element for Publication

The next step is to submit the element for publication. You may wish to submit each entry individually, which is possible. Click the **Work In Progress** icon to bring up **Subitem Details** for the list of entries.

![Work In Progress icon](image)

Note that the **Work In Progress** icon belongs to the header “Features at a Glance.” Selecting **Subitem Details** from the menu opens the **Specify LinkList Entries** wizard, found on the previous page.

Each item in the **Specify LinkList Entries** wizard can be submitted separately for publication by clicking on the corresponding **Work in Progress** icon.

4.4.2.4 Link

The simple link is an all-purpose, stand-alone link. The link may either link to an internal or external Web page, a page or file such as a Word document or PDF file or not link at all.

4.4.2.4.1 Layout Properties

There are three basic layout options available for a link - left, centered or right aligned. Choose the layout option for the link that best fits your needs by clicking on the image.

![Link Layout Properties](image)

When ready, click on **Finish**. You will be returned to the Web page where the Link element will render in ghosted text.
4.4.2.4.2 Creating a Link

To create the link, click on the Link element’s ghosted text “Click here to define the link.”

![Link Header](image)

The resulting Link Header wizard prompts you to enter the name of the link.

Click on Next to open the Insert Link wizard. Select the type of link and continue to follow the prompts.

For more information on creating links, refer to the Common Link Wizard section detailed later in this chapter.

4.4.2.5 Link Bar

The Link Bar strings together a series of text-based links into a single horizontal unit. The Link Bar is often used as a navigational menu at the bottom of a page.

![Link Bar Properties](image)

4.4.2.5.1 Layout Properties

The Link Bar can be rendered either horizontally (top row) or vertically (bottom row) with the element left, centered or right aligned in the cell.
The separator symbols used at the beginning, middle and end of the string or before and after a label can be customized. Copy and paste the symbol you desire into the appropriate window.

4.4.2.5.2 Creating the Link

To create the Link Bar and submit content for each entry, click on the ghosted text “Click here to define the Link Bar”.

The resulting page is the Specify Link Bar Entries dialog. When the wizard is first presented it will be blank with only the “Click here to add new entry” displayed.

![Specify Link Bar Entries dialog]

The resulting wizard is the Link Bar Entry that prompts you to enter the header information for the link created.

When completed entering the header information, click on Next.

![Link Bar Entry dialog]

The resulting page is the Insert Link wizard. Select the type of link you prefer – existing page or file, new page from template, new uploaded file, image, e-mail or scheduled element.

For more information on creating links, refer to the Common Link Wizard section detailed later in this chapter.

4.4.2.5.3 Submit Element for Publication

When submitting the element for publication, it is possible to submit each sub-item individually.
Open the **Work in Progress** icon by clicking on it. Listed as one of the options off the **Work In Progress** menu is **Subitem Details**, which when selected will open the **Specify Link Bar Entries** dialog, displaying each of the subitems in the **Link Bar**.

Those with a **Work In Progress** icon can be submitted individually for publication by simply clicking on the corresponding icon.

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**4.4.2.6 Page Index**

The **Page Index** element is essentially a saved search that displays its results as set of links to pages that meet search criteria defined by the page **Author**. The results displayed within a Page Index element are dynamically updated, i.e. as pages are added to the CommonSpot site that fall within the element search criteria, the Page Index list is automatically updated. A popular use of the element is to dynamically render a list of page links.

For example, the page index element can be configured to display recent news stories authored within the past two days, a list of press releases about a specific product, or a **What’s New** listing of recently modified pages within a particular subsite. These are just a few examples of the many ways in which this element can be utilized.

The definition of returned pages and rendering format of the desired list are configuration options that can easily be set as part of the **Page Index** element.

The picture below illustrates a **Page Index** element having automatically generated links and teaser text to three pages meeting the specified filter criteria.
4.4.2.6.1 Layout Properties

The Page Index Layout sets the framework for the page, how the resulting list will be displayed and what other meta-data and descriptive tags will be shown.

The Filtering Properties wizard provides the content to be presented. It is in the Filtering Properties wizard where, the heading describing the list of pages (in some cases sub-headings when multiple categories are involved) and also the title that links the element with the appropriate page(s) are determined.

Font & Color Properties can be applied to each level of the content described above, including font, background color, etc.

4.4.2.6.2 Page Index Layout Properties

The Page Index Layout Properties wizard provides eight different layout properties, seven that are standard and one that allows further customization.
The first seven were designed to reflect those layouts that might be most commonly utilized. However, in the event that a particular layout is not already created, CommonSpot provides a Custom Layout option that allows the user to set the layout options from the list available.

Clicking on the Custom via parameters thumbnail option, displays the Page Index Rendering Properties dialog illustrated below.
The drop down list boxes provide additional rendering options for the Page Index text for the following categories: Title, Format Indicators, Site/Subsite Path, Owner, Date Created, Date of last modification, Date of last major modification, Date of publication, Description.

The user has the option to select different rendering displays for the Title, including Not Displayed, Render Linked (with 'new' indicator), Render not linked, Render not linked with 'new' indicator. The options allowing for a 'new' indicator, further asks for new duration information, new indicator alignment format, and new image if desired. If Not Displayed is selected, than most other Page Index properties will not display automatically, except for the description properties, where a selection is still required. See below for further information regarding the Description property.

Format Indicators may either not be displayed or rendered before or after the title. If a display option is selected, the user may choose to hide the category if it is displayed in a categorized column.

The Site/Subsite Path and Owner rendering options include Not Displayed, Render Normal, Render inside Parentheses, and Render Bold. If a display option is selected, the user may choose to hide the category if it is displayed in a categorized column.

Date Created, Date of last modification, Date of last major modification, and Date of publication all have 13 separate date formatting options to choose from along with the ability to not display the respective date.

Finally, the Description property contains the option to render linked or not linked, with or without 'more info' link. IE4+ users may also render as fly over text on title.

If the layout formats provided do not fulfill your exact look and feel a custom element render handler may be created for the Page Index element. The Custom Render Handlers
are simple ColdFusion modules that provide customized rendering for a particular element. For a more detailed discussion, refer to the Custom Element Render Handler section later in this chapter, and in the CommonSpot Administration Guide.

After selecting an appropriate layout, the user can determine the Spacing (the number of line breaks between list items) and set the Results Limit. If checked, only the specified number of items (or less) will be displayed.

The Advanced button in the lower left corner of the dialog offers additional layout/formatting options of the Page Index element through the Page Index Advanced Properties dialog.

NOTE: Different versions of this dialog will appear depending on if categorization for the Page Index results is selected or not.
When there are multiple categorization options selected the dialog will reflect the number of headers respectively. The Primary Header and Secondary Header indicate that two categorization options have been selected while the Title Column refers to the results page.

**Primary Header Expand/Collapse** – Choose between rendering the results page’s Primary Header initially collapsed or expanded and selecting the expand indicators including plus/minus icons, arrow icons, custom icons or no icons (click the header title to expand and collapse). Note that under Netscape columns will always render expanded.

**Primary Column Indentation** – Select, in number of pixels, the column indentation desired for the primary column header.

**Secondary Header Expand/Collapse** – Choose between rendering the results page’s Secondary Header initially collapsed or expanded and selecting the expand indicators including plus/minus icons, arrow icons, custom icons or no icons (click the header title to expand and collapse). Note that under Netscape columns will always render expanded.

**Secondary Column Indentation** – Select, in number of pixels, the column indentation desired for the secondary column header.

**Title Column Render Style** – A user has the ability to choose the display results style by selecting from Normal, Bulleted list (disks), Bulleted list (circles) or Bulleted list (squares) for the title column. The results will appear as a bulleted list if one of the bulleted formats is selected.

**Title Column Indentation** – Select, in number of pixels, the column indentation desired for the title column header.

**Element Caching** – Click enabled, to enable element caching otherwise select disabled. Disabling the cache will force the entire Page Index to be rendered on each request.

**Empty result sets message** – If a result set yields no output, a message is displayed indicating that no pages meet the criteria specified. The user may change the message displayed in this field for these cases as appropriate.

**Link Properties** – When checked, linked pages upon clicking will open in a new window. Once the desired properties have been set click OK to save and exit the dialog.

### 4.4.2.6.3 Font & Colors

Once the layout design is complete, the font and colors of the rendered list can be changed to enhance the presentation.

The user can access the Page Index Font & Colors Properties dialog through the Layout Properties window or by selecting Font & Colors from the Element Properties menu.

For more information regarding the general use of Font & Color Properties throughout CommonSpot refer to Chapter 11.
The **Font & Color Properties** window contains the specific **Font & Color Properties** of the Page Index items that can be altered through the dialog. The dialog automatically reflects up to three levels within the generated Page Index list (primary header, secondary header, title), thereby expanding and collapsing based upon the Categorized columns selected, if any.

This example utilizes all filtering criteria levels available and therefore they appear within the **Font & Color Properties** dialog for adjustment, if necessary.

The **Primary Header** is the header text and format associated with the first Categorization criteria. To change the background or font color, either select a color from the color palate by clicking the ▼ to access the **Color Palette** wizard, or type in the corresponding Hexadecimal RGB number. The font type as well as size can be changed through the drop down list boxes indicating Font and Size.

The **Ancillary Title** is the header text and format associated with the second sorting criteria header. To change the underlying font and color characteristics follow the Primary Header guidelines described above.

Likewise, the **Title** font and color properties, which pertain to the title of the generated page index, can be adjusted by following the Primary Header guidelines described above.
Finally, the user can toggle back to the Layout Properties window, click Cancel to not save any changes made or click Finish to view the changes made to the Font & Color Properties of the Page Index list.

### 4.4.2.6.4 Creating the Page Index

Upon clicking the ghosted text, "Click here to define the Page Index", the Page Index Filter Properties dialog will launch and you will be able to begin selecting the required filter options.
The selections above and in the advanced tab provide powerful flexibility for determining which results to display.

Results can be filtered based on Language, Subsite, Creation Date, Last Modified Date, Last Major Change Date, Publication Date, Page Category, Keywords, Owner, Format or Parent Templates.

Under Subsite, you can select **All Subsites**, **Current Subsite**, **Parent Subsite**, **Direct Children** and **Sibling subsites** (all subsites at the same level of hierarchy as the current site).
Additionally, you can limit the page types to display, restrict results based on who the user is, or when the user last logged in (Restrictions), and exclude pages with a publication date in the future.

Several filter options can render the Page Index element non-cacheable, and could therefore slow the page load time. When a selection is made that could impact page performance, a JavaScript dialog will appear as shown below to warn the author at design time.

Click on the Advanced Tab to view the Advanced Expression Builder, as displayed below. The Filtering Options include both standard and custom metadata information and more complex equations can be created to filter the results page.
In the Advanced options, the normal expression builder allows the author to select a field on the left-hand side of the equation and compare it to a fixed value on the right-hand side.

Alternatively, by selecting the small gray box on the right-hand side, the author can compare the field with the contents of a ColdFusion variable at page load time. An example is shown below.

Once clicked, the small gray box will invoke a dialog box asking for the ColdFusion variable to use in the expression. This value can be entered in as shown below. When the page containing the Page Index element is rendered, the expression will be evaluated using the current value of the ColdFusion variable.

In addition to the ability to filter results based on the above parameters, in the Advanced tab it is also possible to limit results to exclude the current page, exclude pages with a future publication date, display private pages, and limit results to only those pages with See–Also references.

Click on the Standard tab to return to the Standard view. Click OK to save your advanced filtering selections review the results of the filtering process, and click Restore to clear your selections.

Refer to the Page Finder section in Chapter 14, Knowledge and Discovery Tools to learn more about the individual Filtering and Categorization & Sorting options.

4.4.2.7 Tab Bar

The Tab Bar element renders a horizontal row of tabs. The element is commonly used to build a navigation bar at the top of a page.
4.4.2.7.1 Layout Properties

The Tab Bar Layout Properties offers three different tab designs. Choose the tab layout you prefer by clicking its image illustrated below.

![Tab Bar Layout Properties](image.png)

The first tab (left) is designed with round corners and a rectangular background.

The second tab (centered) has a line at the bottom that runs the entire length of the horizontal tab, and up three-quarters between each tab to create a shadowed effect.

The third tab (right) has a border or line that encloses each tab.

The options available through the Tab Bar Layout Properties wizard are those that are particular to layout or structure.

To change the color of the Tab Bar, its text and border, you will need to navigate to the Font & Color Properties window off the Element Properties menu.
Layout Alignment – Choose from first drop down list how you want the tab bar to align within the cell – left, center or right.

Minimum Tab Height – Specify the minimum Tab height in pixels.

Background Color – The first tab option displays a background color behind the tabs. To choose a different background color, open the color palette by clicking on the down arrow icon. If you know the Hexadecimal RGB number, you can enter it directly.

Spacing Around Tabs – Enter the amount of spacing around the individual tabs in pixels.

Spacing Prior – Enter the number of blank spaces to the left of the text.

Spacing After – Enter the number of blank spaces to the right of the text.

Note: The layout properties for the first Tab Bar option will differ slightly from the last two because of its design characteristics.

Tab Bar Colors and Font Properties

The Tab Bar Layout Properties options are specific to layout and design attributes versus those of color.

To change the color of the tab or text, when displayed, evoked or on rollover, it is necessary to navigate to the Font & Color Properties off the Tab Bar Element Properties menu.

Note: Font and color choices may vary between each of the different Tab Bar element layouts.

4.4.2.7.2 Tab Color

Choose the color for the tab. This will be the primary color that will render for the entire Tab Bar.
Text, Font, Size & Attributes

Choose from the drop down list the type of font preferred, as well as its size, alignment and if it is to be **Bolded** or **Italicized**.

**Text, Rollover, and Highlighted** colors can be changed by clicking on the ▼ to open the color palette. If you know the Hexadecimal RGB color number, you may enter it directly. Otherwise the Hexadecimal RGB number will be filled in once you select a color.

![Tab Bar Font Properties](image)

Note: Highlighting is only enabled if it has been specified for the link in the **Link Properties** dialog.

Once you have defined the Tab Bar’s layout and font properties, you may begin creating the tabs. Click on the element’s ghosted text “Click here to define tab bar” to bring up the **Specify Tab Bar Entries**, one of several editing wizards.

Creating Tab Bar

When the **Specify Tab Bar** Entries wizard first displays the dialog, it is blank with only the ghosted text “Click here to add a new entry” visible.

![Specify TabBar Entries](image)

Add a new entry by selecting the ghosted text “Click here to add a new entry.”
Your selection brings up the Tab Bar Entry wizard where you are prompted to enter the name of the header for the Tab Bar entry.

If you wish not to create a tab, click on Cancel.

The next step is to link the tab with a page or document.

Click on Next to bring up the Insert Link wizard where you can choose the type of link you prefer for the particular tab. Continue to follow the series of wizards to complete creating the link.

When you have completed making your link selections, click on Finish.

You will be returned to the Specify Tab Bar Entries wizard.

When you have listed all of the Tab Bar entries and defined all of the attributes and properties click on Close.

The Tab Bar will now be rendered on the Web page as it was defined.

To edit the Tab Bar entry, change the entry’s placement in the Tab Bar, edit the linking information, insert a new tab into the list or to delete an entry, click on the Edit Item icon and select the Edit Tab Bar text.

You are then presented with the Specify Tab Bar Entries wizard displaying all of the links in the Tab Bar element (the example has two entries.)
Click on the Edit Item icon to display the edit menu options for the Tab Bar element.

To edit the entry itself, change the name of the entry or to correct its spelling, click on Edit Link.

To change how the tab is linked, click on Link Properties.

To schedule the tab entry rendering based on Date in Time, Audience, Category or Site, click on Schedule/Personalize.

To add a new entry between several items in the Tab Bar, click on Insert new link above or below.

To change where the tab appears in the Tab Bar, move it up, down, to the top or bottom of the list as it is displayed within the wizard.

If you simply want to add a new tab to the end of the list (after the Support tab), click on the ghosted text “Click here to add a new entry.” To delete the tab altogether, click on Delete Link.

### 4.4.3 Image Elements

CommonSpot offers various different ways of handling images on the page from a Single Image to a Grid of Images to Text Around an Image.
4.4.3.1 Image Grid

The Image Grid displays a series of images in either a horizontal or vertical layout. The Image Grid element is commonly used to construct a navigational bar where a series of .gif files are placed together.

You may choose to use an Image Grid on an index or home page where the images will act as links to other pages within the site.

Each of the images in the series can be individually linked to an existing page or file, new page from template, new uploaded file, or e-mail link. The navigation bar on the previous page was constructed using the Image Grid element with each listing i.e. Products, Professional Serves, etc. as a separate image, with its own unique image properties and link type.

4.4.3.1.1 Layout Properties

The Image Grid can be laid out in six different ways.

In the top row the Image Grid is aligned horizontally with the options differentiated by the positioning within the cell – left, center or right. The same holds true for the bottom vertically aligned options.

Choose the option, which best suits your needs by clicking on the image and then select Finish.
It is important to remember that the **Image Grid** is a series of images and that each image has its own image properties. To specify the spacing between each of the images, you must do so from the **Image Properties** wizard, which is first presented when you specify each **Image Grid** entry.

### 4.4.3.1.2 Creating the Image Grid

After you have selected **Image Grid** from the **Element Gallery**, CommonSpot renders the element on the page. Now you are ready to begin adding the images.

Click on the ghosted text “Click here to define the image grid.”

The resulting page is the **Specify Image Grid Entries** wizard. When the wizard first opens, it will be blank since it contains no entries. Select “Click here to add new entry.”
The resulting page is the **Image Properties** wizard, which will guide you through each step in the process of submitting an image. This process is the same for an **Image Grid** as it is for a **Single Image** (with or without a header) or for a **Text Around an Image** element.

Once you have completed the **Image Properties** wizard and clicked on **Finish**, the entry is displayed in the **Specify Image Grid Entries** dialog. The **Specify Image Grid Entries** dialog displays the source image information as well as the URL link.

The order in which the images are listed, is the order in which they will appear when rendered on the page. In a horizontal Image Grid, the first entry renders beginning on the left. In a vertical Image Grid, the first entry is the top image.

To change the order in which the images appear or to move an entry up, down, to the top or bottom of the list, click on the **Edit Item** icon. Select from the menu the appropriate action, respectively.
If you wish to edit the image or the image's link properties, click on the Edit Item icon and select either Edit Image or Link Properties, whichever option is appropriate.

4.4.3.1.3 Link Properties

Link Properties refers to the highlighting treatment for the link (each image in the grid can be a link, thus when a user clicks on the image, it links to another page or document.)

4.4.3.1.4 Display as standard link

Display as standard link applies no special highlighting of the link given the current page. If you would like no highlighting to apply collectively to all the links in the image grid, then check Apply to all links.
Highlight link for the current page

**Highlight link for the current page** will render the image highlighted when the link URL matches the current page URL.

Or stated otherwise, if the image links to a URL and the current page is the same URL, then highlight the link. If the condition is the same for all links (images in the grid), then check **Apply to all links**.

Highlight link for group of pages

**Highlight link for group of pages** renders the image highlighted when the URL specified by the link matches any of the following pages. Click on the **Choose Pages** button to open a wizard that will allow you to create a group of pages.

The wizard displays on the left a list of CommonSpot pages and uploaded documents from which you can choose to create the **Group**.

First begin by selecting the **Category** where you will find the page organized and listed.

![Link Properties - Page Group](image)

Once you find the category in the list, click on it to highlight it and then click on the **Add** button at the bottom left of the page. This will move the selected page from the list on the left to the **Page Group** list on the right.

To remove an entry from the **Page Group** list, highlight it and click **Remove**. When you are finished, click **OK**.

A list of the pages that were defined in the group will be listed just below the **Choose Page** button. Review the list carefully before going forward.

Highlight link for specified page categories

**Highlight link for specified page categories** allows you to highlight the link when the current page is a member of the categorized group.
Highlight the category you wish to move from the **Categories** listing on the left to the **Selected Categories** on the right and click on **Add**.

Again, to remove an entry from the newly created list, simply select the link and click on **Remove**.

4.4.3.1.5 **Highlight link for specified site**

**Highlight link for specified site** allows you to highlight the image when the current page is a member of anyone of the specified sites.

Highlight link for sites matching a pattern

Highlight link for sites matching a pattern when the page’s URL contains a specified string. For example, highlight a link when the page’s URL contains the word ‘Company’. The text ‘Company’ within a menu item of an image grid, links to a company page and upon clicking would remain highlighted, thereby providing the user with a highlighted menu item corresponding to the current page.

4.4.3.2 **Single Image**

Renders a single image and associated caption text. Layout properties support the definition of width, height, fly-over image and status bar text, and associated hypertext link. Both the Single Image, with or without header, are the same element with the exception of the header. As such the layout properties described in the Single Image (without the header) apply to the Single Image Element as well.

**The Golden Gate**
4.4.3.3 Single Image (without header)

This element renders a single image without a header. Rendering properties support the definition of width, height, fly-over image and associated hypertext links.

4.4.3.3.1 Layout Properties

CommonSpot offers nine different options for laying out a single image. The top two rows address the Single Image with header while the bottom row offers three choices for a Single Image (without header.)

Select the option that you prefer by clicking on the corresponding image, and then click on Finish.

4.4.3.3.2 Image Properties

The Image Properties wizard for the Single Image, with and without a header, is the same. It is through this wizard interface that you will specify the image and define its properties.
4.4.3.3 Submit a New Image

To submit a new image, one that is not currently displayed anywhere on the Web site, and have it automatically be uploaded to the CommonSpot server, click on New.

Upload New Image wizard prompts you for information regarding the image or file you will need to upload to the server in order for it to appear on the page. The image file may be resident on your local hard drive or a shared directory.

Specify the local path of the new file (d:\Website\imagegrid\products.gif) or click on Browse to locate the file. CommonSpot will automatically upload and index the new image to the server. Note that spaces are not permitted in uploaded file names.
Enter a **Description** of the image and choose a **Category** in which to organize the image. If a category is not available in the drop down list, click on **New** to create a new **Category** (assuming appropriate permissions.)

Provide one or more **Keywords** (separate list with a comma) that define the image and can be used to enhance the **Search** results to create **Keyword Views**.

**Make Image Public** adds this image to the public gallery so that other contributors can have access to it.

Click **OK** when you have entered all of the relevant information.

This will bring you back to the **Image Properties** wizard.

If the image exists elsewhere on your Web site, on another internal site, or you know that it has been uploaded previously to the CommonSpot server, you can find the image by clicking on **Gallery**.

### 4.4.3.3.4 Image Gallery Search

Instead of searching through what may be hundreds of existing images up on your site (server), the **Image Gallery Search** provides several different means of narrowing the search, therefore providing users with a quick and effortless image search.

![Image Gallery Search](image)

**Public Images** are those accessible to everyone (with the appropriate permissions) and **Private Images** are those that are private to you.
Choose from the drop down lists the appropriate **Site, Category, Keyword** and **Owner** information. Click on the **Advanced** tab in order to include more complex query parameters.

Select from the drop down list how to **Order/Group** the image results – by the date in which the image was added to the gallery, image height, site, category, size or owner.

**Image Gallery Layout** allows you to select the number of images you want to layout on the page when it renders the results.

Click on **Show Images** when you have made all of your selections and you want to view the next group of images that meet the criteria.

The resulting **Image Gallery** page displays the images based on the options you selected. Based upon the options you selected in **Image Gallery Search**, the images are displayed accordingly.

![Image Gallery (My Images)](image)

### 4.4.3.3.5 Image Gallery

Depending upon your selection for laying out the images on the page (12, 24, 48, small or 8,16,24 large), the number of images found may take up several pages.

To advance to the next page of available images, click on the specific page number found at the bottom of the page (Result Pages in lower left corner.) The current page is indicated in black, previously viewed pages in gray and yet to be seen pages are in blue.

Click on the pencil icon to **Edit** the image, see a listing of **Referring Pages** (pages on which the image is displayed) or see the **Version History** for the Image.
Referring Pages provides a listing of all pages on which the selected image is displayed. It also enables the user to change the image the page(s) refer to.

If you have uploaded multiple versions of an image to the gallery, Version History displays all versions, enabling you to roll back to a prior version of an image if necessary.

Adding an image to the Image Gallery is easy. Simply click on the Add Image button at the bottom of the page or click on the ghosted text “Click here to add new image” at the top of the page.

See Chapter 10, Images for more details regarding adding images.

If you opt to import file formats such as a .bmp, you will also see the following warning display:

**WARNING:** Netscape will not display images that are not of type 'GIF' or 'JPEG'

4.4.3.3.6 Roll Over Image

You can choose to have a second image render when a viewer “rolls-over” the image with the mouse. Specify the image in the same manner as the primary image, by selecting an image from the Image Gallery or upload a new image file.
4.4.3.3.7 Image Size

The settings that are related to the sizing of the image are conveniently displayed in the wizard window, settings such as original size, scaled size, border size, vertical spacing and horizontal spacing around image. To edit any of these settings, click on the Edit button. Once you have made your edits, click OK to continue.

If you have uploaded an image using a version of CommonSpot prior to v3.1, it is also recommended that you click the Rescan Image Size button. This will ensure that the new version of your image is properly scanned for display. This step is not necessary if you are using CommonSpot 3.1 or above.

4.4.3.3.8 Alternate Image Text

Enter the copy that will be displayed when a user “flies” or “rolls–over” the image with the mouse. This is particularly useful for sites required to comply with Section 508 Accessibility standards.

4.4.3.3.9 Creating a Link

You have chosen the image for the Single Image as well as the roll over image, and submitted the fly over text, now it is time to create the link.

You can link the image, just like any other link (bullet item, text, etc.) to an existing Web page or document (file), a new Web page to be created, a new document or file to be uploaded, or you can choose to not link at all.
While still in the **Image Properties** wizard, click on the **Edit** button in the **Link Section**. This will open the **Insert Link Wizard** where you can select the appropriate link type – existing page or file, new page from template, new uploaded file, an image, e-mail link, scheduled element or no link.

Refer to the **Common Link Wizard** section detailed later in this chapter for more information on the various link options available.

### 4.4.3.4 Text Around an Image

The **Text Around an Image** element is one of the more common Web page elements. The element renders text wrapped around a single image with various options for flowing the text around the image. The use of a header is optional.

#### 4.4.3.4.1 Layout Properties

CommonSpot offers twelve different arrangements for the **Text Around an Image** element. Six of the options include a header (title) and are defined further by the wrapping of the text around the image – right, centered and left. Six more options offer similar layout options without a header.
Since the layout properties align the image, not the header, you must specify the **Header Alignment** (if applicable) from the drop-down box at the bottom of the page – left, center, or right aligned. This will determine how the header will render in relation to the image and the text.

Specify the **Text Alignment** for the Text Block that wraps the image – left, center or right. Click on **Finish** when you have completed all of your selections. To return to the current layout, click on **Cancel**.

The next step is to submit the content, both the text and the image. You can do so by clicking on the ghosted text “Click here to define the text around image header” or “Click here to define the text.”

The resulting page is the **Text Around Image** Rich Text Editor wizard.
The **Text Around Image** Rich Text Editor is the dialog through which you submit the header and Text Block content. You may copy and paste content into the editor from almost any application - Microsoft’s desktop applications or the Web.

For a further explanation of all of the rich text editing functionality offered through this and similar element wizards, refer to the Text Elements Formatted Text Block section later in this chapter. Click on the element’s framed image or the ghosted text "Click here to add image." The **Image Properties** wizard will open as a result.
The Image Properties wizard will walk you through the process of specifying the image, assigning the rendering properties and creating a link if so desired. Please note that image names cannot contain spaces.

The Image Properties wizard is the same wizard for all image elements – single image, image grid and text around an image. For more information regarding the Image Properties options, refer to Image Properties detailed for a Single Image element discussed earlier in this chapter or see Chapter 10, Images.

4.4.4 Layout Elements

These two elements, Multi-Section and Tabular Layout, provide much of the structural underpinning of Web pages that have multiple items of content.

4.4.4.1 Multi-Section

The Multi-Section element is one of CommonSpot’s most versatile elements. Its purpose is to accommodate potentially large blocks of content, possibly in different formats, within a common framework.

The design of the Multi-Section element calls for each section of content to have a header and a brief summary of its content in order to give the viewer a convenient frame of reference. You also have the option of creating a hyper linked index at the top of the entire multi-section block to give the viewer the opportunity to navigate or jump directly to a particular section.

4.4.4.1.1 Layout Properties

CommonSpot offers six options for laying out a Multi-Section element. Of the six options presented, the upper three include an index at the top. Select the option you prefer and click Next.
Choose the **Indent levels**, the number of succeeding sections that will be indented before the sequence begins again. Choose the **Section Break Width**, the width of the line that extends between each section. The width is measured as a percentage of the cell (the line will extend.)

If you want to **Allow multiple elements per section**, check the box. **Rich-text editing** is available through this dialog, similar to the bulleted list. Check the box and click on the advanced button to customize the tools to display in the **Rich Text block Editor**.

If you have selected an option that includes an index, you will be presented with a **Next** button. If you chose not to use an index, then the **Next** option is not available. Click on **Next** when you are ready to go to the **Multi-Section Index Properties** wizard that pertains only to the **index**.

### 4.4.4.1.2 Multi-Section Index Layout Properties

The **Multi-Section Index Properties** dialog list the desired parameters to control the look and structure of the element.
4.4.4.1.3 Layout

The Alignment is the horizontal placement of the index with respect to the cell boundaries. In the Float box, specify whether you want text to flow around the left or right of the table, otherwise select Default, if you do not want text to flow around the table.

The index is placed inside its own mini-table, for which you designate the Border Size (in pixels). For no border, set this field to zero (0). The Cell Padding is the minimum number of pixels of empty space between the index entries and the cell boundaries. The Cell Spacing is the number of pixels between the cells of the index table. You can also designate the Number of Columns in which to divide the index entries.

Minimum Size

The minimum size is the minimum width for the index table, with respect to the cell boundaries containing the Multi-Section element.

Custom Background

Select a background color for the index table by clicking ▼ to open the color palette.

Custom Colors
The **Border** color applies a flat border of a solid color whose width is the number of pixels set in **Border Size**, above. If the setting field is set to zero (0), no border will show up even if you select a color here. If you do not select a color, the default border color is black.

**Light Border** and **Dark Border** are used together to create a 3–dimensional border effect, so that the table looks as if it is on a raised platform or depressed into the surface. For the effect to be seen, it is suggested that the border size be set to two (2) pixels or higher.

For a raised effect, the light color appears on the upper and left borders, the dark color appears on the right and lower borders.

For a depressed effect, the dark color appears on the upper and left borders, the light color appears on the right and lower borders.

When you are done, click **Finish**. This brings you back to the Web page, with the **Multi-Section** element is formatted as designated. The next step is to define the **Title** and **Description** of the section. Click on either the ghosted text or the **Edit Item** icon to open the **Edit Section** editing wizard.
Here you are prompted to enter a **Title** and a brief summary of the contents of the section. The **Title** is also used as the linked text in the index, if appropriate. When you click on **Finish**, you are returned to the Web page with the new text filled in. To edit the entry, click on the **Edit Item** menu next to the section you wish to edit. The underlined “Benefits” in the box is the hyperlink. In **Author** mode the link is active and when evoked it will jump you to the proper section.

With the header and description in place, a **Work In Progress** icon appears, indicating that these entries need to be submitted for approval before being published. To add a new section below this one click the **Edit Item** icon to open the **Edit Item** menu and select **Insert new section below**.

The wizard will take you through the same steps as above for each new section you add. Here is the example after a second section has been added and formatted.

The next step in defining the sections of this **Multi-Section** element is to insert the elements that will provide the formatting for the content you want to place in the various sections. Click on the text “Click to insert new element.” The resulting page is the **Element Gallery**. Choose the element you wish to insert.

In this example, a **Text Block** element (no header) has been placed in the first section.
In the second section a Bulleted List element has been added (no header).

Published on the page, here is what the Multi-Section element looks like fully rendered.
4.4.4.2 Tabular Layout

The Tabular Layout element is analogous to a table, with rows and columns. The table provides an arrangement for laying out elements on the page. Elements are placed within the table's cell(s), defined by the rows and columns.

To begin constructing the table, click on icon to open the New Tabular Layout Properties.

The New Tabular Layout Element Properties wizard is opened the first time you select the icon to begin building the table. It is necessary to first build the table by selecting the number of rows and columns, at a minimum. Notice that when the wizard first opens it displays in the field for number of rows and columns, the number one (1). These are not to be mistaken as default settings.

If you wish to create a 1 x 1 table, then you need to do so by clicking on OK to accept the settings. The table will be rendered on the Web page as dictated by the settings. The only time you will see this particular wizard, is the first time you create a table.

The example shows a table constructed from 2 rows and 2 columns.

After the table has been created, you will want to assign the table and its properties certain attributes - change the border or background colors or set the width and height of the table.
To do so, click on the Tabular Layout Properties icon and select Layout Properties. It is important to note that any option you choose in the Tabular Layout Element Properties wizard that applies at the cell level is a default setting. These settings can be later overridden by settings applied at the cell level.
For more information on the Tabular Layout Element, refer to Chapter 5, The Architecting of a Page.

### 4.4.5 Miscellaneous Elements

These elements enable the Web site to convey information in forms other than HTML-coded documents. CommonSpot supports several elements that render content that is something other than HTML.

#### 4.4.5.1 Custom script

The Custom script element provides a simple, generic mechanism for including custom elements within a page or template. There are no limitations as to what these modules may do. The developers within your organization are empowered to develop ColdFusion-based applications, or integrate an existing off-the-shelf application, that can be dropped into any page.

**Note:** In order to include non-ColdFusion-based applications, you will need the Static Content Generator module, available separately. See Static Content Generation Guide Chapter 9.9.1.

The custom script modules are standard ColdFusion CFM files that are either stored within the ‘customcf’ directory of a particular site of subsite, or elsewhere accessible to ColdFusion through a logical mapping.

When adding a Custom ColdFusion module to a page, the user is prompted to select the appropriate ColdFusion module to render, and to choose the appropriate caching option for the element. This selection is accomplished through the following dialog, which is accessible through the edit indicator at any time.

**Note:** When adding a ColdFusion module, spaces are not permitted in the ColdFusion file name that you are referencing.
In this dialog there are two options for specifying a CFM module to be rendered. The first option, the **Existing Modules** list box contains all of the existing ColdFusion modules within the current subsite and all of its parents and grandparents. Only CFM modules within the ‘customcf’ directory are displayed. The second option is to specify an existing ColdFusion module through the **Explicit Module** edit controls. When explicitly specifying a module outside the current subsite scope, you must specify both the logical and physical paths for the ColdFusion module. The logical path is based on your ColdFusion or HTTP server mappings, while the physical path is the full path of the module on the server machine.

**Note:** For security reasons CommonSpot provides no means for uploading the ColdFusion scripts to the server. These scripts must be uploaded outside of CommonSpot.

The remaining option within this dialog specifies whether the content included within the custom ColdFusion module is static in nature or not. If it is static, CommonSpot can cache the output appropriately, thus optimizing the rendering of the content.

The **Parameters** tab enables you to enter field–value pairs. The dialog shown below allows you to enter the field–value pairs, one per line that will be passed to the Custom ColdFusion element. The values that are passed will be done so AS IS; if you include quotes around the values, the quotes will be passed along with the value. All parameters will be passed into your custom script using the `attributes` scope.
4.4.5.2 Datasheet

The Datasheet Element provides the non-technical user with easy access to the data organized and collected throughout the Web site and directly through the Forms Element and created pages. Through the Datasheet tool a custom SQL query can also be written to obtain the data desired. After selecting the data source and respective fields, the data can be sorted and filtered according to the user’s needs.

To create a datasheet, select Datasheet from the Miscellaneous Category of Elements found in the Element Gallery. The “Edit Datasheet” ghosted text is presented and is the gateway into designing the element.

Clicking “Edit Datasheet” prompts the Datasheet Views dialog to instruct the user to “Click here to create a new datasheet view”. The ‘Datasheet View’ Data Source dialog captures how and from what source the data will be retrieved.

Enter the Name of the Datasheet View and check the Private box if the view should not be shared. Check the Default View box to select this view as the default view for this datasheet element. The next step is to select the appropriate Data Source from one of the following...
options available, including Form Result Sheet, Page Result Sheet or Custom Query Result Sheet.

4.4.5.2.1 Form Results/Custom Element Sheet

Choose 'Form Results/Custom Element Sheet' and click on the Next button to develop a datasheet to display and manipulate the results of a specified form.

The Datasheet Source dialog then allows the user to select the specific form that contains the data to be analyzed. Highlight the form from the drop down list of available forms and click on the Next button to proceed to the following dialog. In the example below, the highlighted form 'Support Questions' has been selected.

The Datasheet Columns dialog presents the form’s available columns (or field names) to include within the datasheet. Highlight the column from the Available Columns list and simply click on the double arrow pointing to the right to move the field under the Selected Columns text. To remove columns from the Selected Columns list, highlight the appropriate column and click on the double arrow pointing to the left. If all columns are needed, click on the Select All button. To remove all the columns from the selected list, click on Remove All. The Up and Dn buttons let the user arrange the columns in any
order necessary. Highlight one of the selected columns and press the directional button, either Up or Dn depending on the intended order of the columns.

Press Finish to save the new datasheet view and return to the Datasheet Views dialog where the new view, 'Question Form', will be listed as illustrated below.

### Datasheet Views

The following views have been defined for this datasheet. To add a new view click the ghost text below. To edit, move, copy or delete a view use the appropriate icons to the right of each view. Note that if more than one view is specified the first view will be displayed as the default view.

<table>
<thead>
<tr>
<th>Name</th>
<th>Public/Private</th>
</tr>
</thead>
<tbody>
<tr>
<td>pages</td>
<td>Public</td>
</tr>
</tbody>
</table>

Click here to create a new datasheet view

### 4.4.5.2.2 The Page Result Sheet

The Page Result Sheet data source contains pages along with standard and/or custom metadata. Select Page Result Sheet and click on the Next button to reveal a list of metadata drawn from the page source.
The **Datasheet Columns** dialog works similar to the **Form Results Sheet**, only the underlying columns are different. Select the desired columns and proceed to the next dialog.

Once the columns have been chosen, the **Finish** button will forward the user to the **Datasheet Views** page, where the saved view, ‘Question Page’, is listed.
4.4.5.2.3 Custom Query Results Sheet

Finally, the **Custom Query Result Sheet** allows the user to create a custom SQL query to go against any database to capture data otherwise inaccessible to the user. Upon selection of the **Custom Query Result Sheet**, press the **Next** button to jump to the following dialog.

Type in the **Data Source Name** and the **Custom Query** formula in the space provided. Press the **Next** button to return to the **Datasheet Views** dialog listing the existing views.

4.4.5.2.4 Edit Datasheet Element Icon

Once the datasheet view is created the user can edit the **Datasheet**. Define/Edit the **Columns** or **Edit Filter** by clicking on the **Edit Item** icon, the **Edit Datasheet Element** icon and selecting the respective link. The **Edit Filter** option, however, is only accessible when a **Page Result Sheet** is the selected view.
To edit a datasheet, click on **Edit Datasheet** and the desired datasheet view. This link opens the initial set up screen for the view allowing the user to update any of the prior data entered.

If the user would like to **Define/Edit Columns**, click on the respective text to launch the **Datasheet View Column Properties** dialog to select the desired view.

After highlighting the desired view, press the **Edit** button again which will reveal the underlying columns and will also provide an opportunity to edit the corresponding column properties.

The **Column Properties** include the **Header**, the name of the column. The column **Alignment**, whether the column will be left, center or right aligned. To hide the column’s output, check the **Hidden** check box. This will pass the output to an **Action Column** module, but it will not be displayed on the page.

If styles are enabled, a column **Class** can be selected or entered. This class will override any specified in the standard style dialog.
If any **Render Handlers** are listed in the site's directory they would be listed here. The custom **Render Handlers** are simple ColdFusion modules that provide customized rendering for a particular element. You can define the **Click Action** to open a page or a row when the user clicks on an item, or simply have no Click Action. The **Format Mask** provides formatting options for the individual fields including None, Date/Time, URL, E-mail, or the CommonSpot User.

Finally, **Edit Filter** can be utilized to quickly access the necessary information by narrowing down the results based upon the criteria specified below:
Language – select from all languages, current subsite’s language, or English

Site – ability to limit results based upon a specific site or subsite

Creation Date – enter creation date by which to limit results page by

Last Modified Date – limits results to reflect pages based upon last modified date

Last Major Change Date – limits results to reflect pages based upon last major change date

Publication Date – enter publication date to reflect pages published on a certain date

Category – select from all categories or a specified category

Keywords – type in or select from the down arrow box an existing keyword

Owner – select from all owners or a specified owner to limit results page by

Format – choose from all formats, Microsoft Word or PDF Files

Parent Template – choose from the available list of templates

Restrict Results – no restrictions, only show pages readable by anonymous users and only show pages readable by page user
Page types to display – only display results from the selected page types

4.4.5.2.5 Datasheet Display on the Page

As the parameters that drive the underlying query change so does the output display. Additionally, there are a variety of options directly on the display that also help to quickly retrieve cuts of data to narrow down the view results.

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>T Green</td>
<td>1212 Main Street Chicago, IL 20200</td>
<td>512-785-8888</td>
</tr>
<tr>
<td>J Smith</td>
<td>1234 Harbor Lane Boston, MA 02108</td>
<td>617-555-1234</td>
</tr>
<tr>
<td>C Thomas</td>
<td>123 Bridge Street San Francisco, CA 78780</td>
<td>071-543-2121</td>
</tr>
</tbody>
</table>

Views drop down list box – The datasheet creator can toggle from one created view to another, as long as they have been previously set up through the Datasheet wizard. Upon selection of the new view, the results will automatically be reflected in the output beneath the Views drop down box.

Alphabet List – Filters those results with the same letter and beyond based upon the selected column. For example, in the output above, if the letter J was selected and the Name column was active, only J Smith and T Green’s data would appear in the results output.

Sort – Each column will automatically sort ascending to descending order (or vice versa) upon clicking the column header.

4.4.5.2.6 Layout Properties

The Datasheet View Layout Properties contains formatting options for the Datasheet View display including the following:

View Drop-Down List Alignments – view drop-down list may be aligned either left, center or right justified

Default Sorting – Select column for display to sort automatically. Click on specific headers for different sorts other than the default.

Results per page – provides the ability to limit the number of results displayed per page

Show Alphabet List for Filtering – ability to hide or reveal alphabet list on the display page

Show Record Count – displays the number of records in the datasheet

Show Column Headers – ability to display or hide column headers
Allow JavaScript data sorting – Note: this may result in reduced accessibility if selected

Datasheet View Layout Properties

Edit the Datasheet view layout properties.

View Drop Down List Alignment: Left

Default Sorting: Address Ascending

Results Per Page: All

✓ Show Alphabet Characters for Filtering

✓ Show Record Count (Note: Only applied when all records are shown on one page)

✓ Show Column Headers

✓ Allow JavaScript data sorting (Note: With this option selected, the data is rendered by JavaScript, which may result in reduced accessibility)

4.4.5.3 Flash

CommonSpot’s Flash element facilitates the addition of a Macromedia Flash movie and header within your page. This element has two components; a header and the Flash movie. The header is text entered by the contributor and the movie is an uploaded Flash Movie.

As is consistent with other elements the Flash element provides an indicator that allows access to editing both components as well as the Layout and Font & Color Properties.

Clicking the Edit Item icon will open the Edit Flash menu, as shown below. From here simply select the appropriate menu option. Alternatively, clicking the header will invoke the Edit Header dialog, and clicking the movie will edit the Edit Object dialog.
4.4.5.3.1 Flash Header

The element’s header is entered in the simple dialog depicted below. Specifying a header is optional. If one is not specified, no extra space will be taken when rendering the element.

As with most other elements, the text control allows for the insertion of HTML formatting tags, but this is not required. Standard layout, font and color options for the header are specified in the Layout and Font & Color Properties dialog accessible from the Element Properties icon.

4.4.5.3.2 Flash Object Attributes

Macromedia Flash movies have various attributes that determine how the embedded movie plays. These attributes along with the desired Flash movie file are specified in the Edit Objects dialog. This dialog allows the end user to upload a new or modified Flash object. For the specific meaning of the Flash attributes please consult Macromedia's Flash movie documentation.
To upload a brand new or modified version of a Flash element, click the **Flash Source File Edit** button. This will invoke a new dialog, shown below, allowing the user to upload a Flash movie.

![Flash Attributes](image)

**Flash Attributes**

<table>
<thead>
<tr>
<th>Flash Source File:</th>
<th>No source file specified</th>
<th>Edit...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Width:</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td>Height:</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td>Plugins Page:</td>
<td><a href="http://www.macromedia.com/enter">http://www.macromedia.com/enter</a> the URL of the Flash download page (Embed tag)</td>
<td></td>
</tr>
<tr>
<td>Code Base:</td>
<td><a href="http://download.macromedia/enter">http://download.macromedia/enter</a> the URL of the Flash download page (Object tag)</td>
<td></td>
</tr>
<tr>
<td>ClassID:</td>
<td>classid:027C665-4ECD-11d7-9</td>
<td></td>
</tr>
<tr>
<td>No Embed Image:</td>
<td>Select Image...</td>
<td>Specify the image to display if the browser does not support Flash objects</td>
</tr>
<tr>
<td>Play:</td>
<td>true</td>
<td></td>
</tr>
<tr>
<td>Loop:</td>
<td>true</td>
<td></td>
</tr>
<tr>
<td>Quality:</td>
<td>high</td>
<td></td>
</tr>
<tr>
<td>Scale:</td>
<td>showall</td>
<td></td>
</tr>
<tr>
<td>Menu:</td>
<td>true</td>
<td></td>
</tr>
<tr>
<td>Base:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alignment:</td>
<td>Left</td>
<td></td>
</tr>
</tbody>
</table>

![Insert Link](image)

**Insert Link**

**Link Action**

- **Mouseover Action**

Please choose which of the following link types you wish to insert:

- **Link to Existing Flash**
  - Link to an existing Flash file that is present either within this site or externally.

- **Link to new Uploaded Flash**
  - Upload a new Flash file to be viewed within the content of the page.
Selecting the first option allows the user to select from the gallery of existing Flash Movies while the second allows specification of an external (outside CommonSpot’s control, but may still be internal to the site). This dialog is common to many elements and thus operates in the same manner described previously. As with other linked elements, you also have the option of defining the associated Mouseover action, if desired, by clicking on the Mouseover tab.

Selecting the second option allows the user to upload a new Flash Movie. CommonSpot will then manage Uploaded Flash Movies allowing for easy retrieval via a gallery. The upload dialog is also common across all elements that render or link to uploaded files and is illustrated below.
4.4.5.3.3 Layout Properties

The Layout Properties for the Flash Element are similar to that of an Image element, in that various options are displayed allowing the user to determine the position of the header relative to the Flash movie, and the alignment of the element within its containing cell. The Flash Object’s Layout Properties dialog is shown below. Simply click the image depicting the desired layout and press the Finish button. Note that changes to the layout position are not versioned.
4.4.5.3.4 Font & Color Properties

Font and Color Properties for the header are specified in the Font & Color dialog. This dialog is common to numerous other element’s Font and Color dialog, and as such is not pictured here. Refer to the Image element to define the header’s font and color attributes.

4.4.5.4 HTML

CommonSpot’s HTML element allows any HTML document to render within a Text Block on the Web page.
After choosing the HTML element from the Element Gallery, the element will render in ghosted text on the Web page. Click on the ghosted text, "Click to upload a document to embed as HTML" to insert the HTML document.

The resulting dialog is the Select Document to Embed wizard. Enter the directory and file name (d:\...) in the field, or press Browse to locate the file on your local hard drive or shared directory server.

When the full path has been entered, click on Finish.
The HTML file will be uploaded to the CommonSpot server and rendered on the page.

There are no layout options associated with the HTML element, since the formatting and structure of the content is decided with the creation of the HTML document itself.

HTML elements can appear singularly on the page or it can be one of several elements. In the example above, the HTML element is the only element rendered on the page. The content was first created in Word, and then saved as HTML. To edit the document and its contents, click anywhere on the element (text), or click on the Edit Item icon. The resulting wizard presents three methods of editing the HTML element (document).

4.4.5.4.1 Edit Original Document

Edit Original Document wizard allows a user to edit the original HTML document, as it was uploaded to the CommonSpot server using a HTML editing application.
Microsoft Internet Explorer will open a second browser window displaying the HTML document. To edit the document, open the Internet Explorer’s Edit Menu and choose Page or click on the Edit button. The HTML editor application you use will be launched and you can then start editing the document.
This toggle mechanism enables the view to turn on/off the tag indicators within the Rich Text Editor, in order to see where the indicators are placed. Clicking on the paragraph icon allows for the quick removal of the automatic HTML first paragraph tag within the Rich Text Editor. Make your edits, save the changes and close the application. The page will be automatically updated to reflect the changes.

4.4.5.4.2 Edit Online

Edit Online allows a user to edit the document through an online HTML form. Select Edit Online and click on Next to open the wizard displaying the embedded HTML.
4.4.5.4.3 Upload Changes

Upload Changes provides an interface through which you can replace the current document with a new HTML document. This may be an appropriate course of action when the changes to the document are not just a few words, but are more significant with regards to the content and its presentation.
Upload Changes provides you access to the Select Document to Embed wizard where you can submit the file by either entering the directory and file name or browsing your local hard drive or shared directory server.

When you are ready to submit the change, click on Finish. The new document is automatically uploaded to the CommonSpot server and it replaces the current HTML document rendered in the element.

4.4.5.5 Label

The Label element renders a heading or label that either denotes a new section or can be used to create a "call-out" box.

4.4.5.5.1 Layout Properties

CommonSpot offers several different styles of labels.
Four of the labels are ideally suited as a header to begin a new section.

The other two label elements, Tab with square edges & table below and Tab with rounded edges & table below, render a border around a table to create a “call-out” box or container in which you can place other elements.

In the example on the previous page, the Label element on the right includes a table with two formatted Text Blocks. The table will accommodate any number of elements, with the border dynamically defined by the width and height of the table.

Choose the Label element that best suits the content requirements, by clicking on the image to highlight it.

Define the Label width (width of the label) in pixels by submitting a number in the form field. The width will be dynamically sized if it is left blank.

Choose the alignment for the Label element within the cell – left, center or right.

Click on Finish when you have completed defining the element’s layout properties.

Now you are ready to begin entering content. Click on the ghosted text “Click here to define the label element.”

The resulting Label wizard provides a form to enter the caption for text to appear in the label. When you have finished entering the caption for the label, click on Next.

The resulting dialog is the Insert Link wizard where you can select the link type, or choose not to link.
Make your selections, follow the wizard prompts and when you have completed defining the link, click on Finish. You will be returned to the Web page with the Label rendered on the page.

To select different colors for the Label, the text and rollover text, click on the Label Element Properties menu icon and select Font & Color Properties.
The resulting wizard is **Label Font & Color Properties** that presents various options for managing the **Label** colors and the font attributes.

Change the color by clicking on the default color displayed. Select the type **font**, **size**, and **alignment** within the **Label** for the text. Choose the text, rollover text, and line colors. Click on **Finish** to have the colors applied to the **Label** element. You are returned to the Web page, with the page refreshing to display the element with the color choices.

### 4.4.5.6 PowerPoint Presentations

CommonSpot’s **PowerPoint** element provides for the rendering of a Microsoft PowerPoint presentation within the context of a Web page like any other element. Instead of a user having to view a PowerPoint presentation in a separate window and in a separate application, they can view the slides from within the Web page and continue to have readied access to the Web site’s navigational elements.
A user can advance through the presentation simply by clicking on the forward arrow key. The PowerPoint presentation can be downloaded to view in its native format by clicking on the Download button.

Upon adding a Presentation Element to the page, a placeholder for the element will render on the Web page. If the layout option includes a header, it will render as shown below. If you did not pick a layout with a header, then just the image frame will render.

**Note:** This feature is not available on the Solaris platform.

### 4.4.5.6.1 Layout Properties

CommonSpot offers six different layout options for rendering a PowerPoint presentation. Three of the six have a header; otherwise the layout position is based on the element’s positioning within the cell – left, center or right aligned.
Choose the layout option that best meets your needs for the content and the page. When you have made your choice, click on Finish.

4.4.5.6.2 Editing the Presentation Element

To begin editing the Presentation element, click on the ghosted text "Click here to define presentation header." Select the source for the presentation, either an Existing Presentation which has already be uploaded and is being managed by CommonSpot, or a New Presentation that resides locally or on a network drive and is not currently being managed by CommonSpot.

The resulting wizard is the Select Presentation where you will add the file. If it is an Existing Presentation, and it currently resides in the CommonSpot repository, enter the exact title or click on Select Presentation to browse and locate the file.
A New Presentation will require that you upload the file by either entering its full local path in the edit control or press the Browse button to locate it on your local hard drive or share directory. When finished adding the presentation, click on Finish.

Continuing with the process of submitting a new presentation, the user is presented next with the Presentation Information wizard where the title and a description of the PowerPoint presentation are collected. The information entered here is valuable information that can be later referenced in Document Information, one of CommonSpot’s Knowledge Sharing and Discovery tools.

When the information has been entered completely, click on Next to begin converting the uploaded presentation. The elapsed time of the upload duration is reported below the processing alert.
It is possible to have only one element on a page and for that element to be a PowerPoint presentation (as shown in the example on the previous page.) However, the PowerPoint element can be one of several elements on the page.

When determining the size of the PowerPoint presentation, it is important to balance its size with possible other elements on the page.

Sizing the PowerPoint presentation is the same as that of an image. Refer to Chapter 10, Images, for detailed information on scaling, border size, and spacing.

Once you have defined the presentation attributes for the PowerPoint element, click on Finish.

The wizard will close and you will be returned to the Web page where the element is fully rendered on the page. The PowerPoint file is displayed in place.

To edit the entry before submitting it for approval or to update it, click on the Edit Item icon.

In selecting Edit Header, you will be taken back to the Edit Header wizard where you can change the name or spelling of the title of the PowerPoint presentation.

In selecting Edit Presentation, you will be taken back to the Select Presentation wizard where you can choose another from the existing presentations or upload a new presentation.

### 4.4.5.7 Microsoft Word

This element renders an uploaded Word document as HTML. CommonSpot automatically converts Word97 or Word2000 documents to HTML and renders the converted HTML as an element.

![Select Document to Embed](image)

**Note:** This feature is not available on the Solaris platform.

### 4.4.5.8 PDF

If you want to maintain the integrity of the document or you are concerned with possible software and platform incompatibilities that could destroy the look and feel of your document, you may want to consider presenting the content as an Adobe Portable Document
Format (PDF) document. The PDF element is an element that renders in place, within the context of the page, a PDF file.

To view and print the PDF document, users must have Adobe Acrobat Reader installed on their desktops. The software is free, and is freely distributable. To download Adobe Acrobat software visit Adobe’s Web site at www.adobe.com.

What is the difference between the PDF element and creating a hypertext link to a PDF document? As you can see in the screen shot below, the PDF element renders the PDF document within the content area of the CommonSpot Web page. The viewer has access to all the navigational and menu elements.

To open the PDF document full screen, the viewer simply clicks on the text “Click here to launch the PDF document full screen” directly below the element.

If you were to link to a PDF document instead, the Adobe Acrobat Reader application is launched and a separate window is opened presenting the document. The viewer is presented with the PDF document outside of the CommonSpot Web page. The viewer has lost all context of the Web page and must close the application to navigate back to the site. CommonSpot’s PDF element allows you to embed an Adobe PDF file directly in the page.

Select the PDF element from the Element Gallery and the Web page will render with the following ghosted text.
4.4.5.8.1 Select PDF

Click on the ghosted text “Click here to define the header” (pictured above) to enter the title of the PDF file. To include the PDF file, click on the framed image that will bring up the PDF Attributes dialog where you will specify the width and height of the file.

The PDF Attributes wizard prompts you to specify the size in width and height (pixels) you want the PDF element to render on the page. It is in this defined space that the PDF document will be displayed. If the PDF document is larger than the space provided, the user will need to scroll through the pages.

To add or update the PDF Source File, press the Edit button.

The resulting dialog prompts the user to select either to link to an existing PDF file or to upload a new PDF file.

4.4.5.8.2 Existing PDF

Select Link to Existing PDF, to link to an internal or external PDF file. To learn more about linking to an existing page, refer to the Common Link Wizard section detailed later in this chapter.
4.4.5.8.3 New PDF

If it is a new PDF file, then select Link to New Uploaded PDF and follow the steps outlined in the Common Link Wizard detailed later in this chapter to upload a new PDF file. When you have completed submitting all the information, click on Finish. The page below shows the PDF element as it is displayed in Author mode on the page.

To view the PDF file you will need to switch out of Author mode into either Preview mode or Read mode. Adobe Acrobat Reader will launch and the PDF document will be rendered in place.
4.4.5.9 Query–by–example Element

The Query–by–example element enhances the search capability that you can provide on your site. With this element, you can allow visitors to query existing simple forms, custom metadata, and custom elements, and display the results of the query to a page. With the Query–by–example feature, users can more easily locate information.

For example, you might allow visitors to search for:

- sporting events that are scheduled in the next two weeks
- documents dealing with neck surgery
- product information by price or category
- articles written in the past year by a specific author

### 4.4.5.9.1 Creating a Query–by–example element

To use the Query–by–example element, you will need to create an instance of the element on a page where a user can query the data, and also place an instance of the element on a results page, where the results of the query will be displayed. It is recommended that you first create the page on which you want the results to be displayed, and then author the page where the user will query the data. An example is helpful.

Let’s say that we want to create a page that allows users to query past sporting event data, in order to see which games have been won or lost, and against which teams.
First, create a page on which you want the results of the user’s query to be displayed. (You will later return to this page to add an instance of the Query–by-example sporting event in order to display the results). After you have created the page, navigate to the page on which you want the user to be able to query the sporting event element.

The **Query–by-example** element is accessible in the **Element Gallery** under **Miscellaneous Elements**. In author mode on the page where you want the user to query the data, place it on a page, and select the simple form, custom metadata or custom element data you want the user to be able to query.

Click on the ghosted text to select the Query–by-example source form, as shown below.

Select the appropriate simple form, custom metadata or custom element, and click **Next**. You will be prompted to select those fields that you want to allow the user to query.
For data that is entered using a drop-down list, you have the option of displaying only the values for which data exists, or displaying all drop down values. In the example above, there may be more sports in the selection list than there are actual values; you can decide whether to display all of the sports, or just the sports for which there are records.

### 4.4.5.9.2 Define Query-by-example form action

Once you have selected the form fields to display, click ‘Finish’. You will return to the page in Author mode. Click on the ghosted text, as shown below, in order to define the form action.

The dialog below prompts you to select the page on which to display the Query-by-example results.
Select the page from the Gallery that you had created earlier, on which you want the results of the query to display. After selecting the destination page for the Query-by-example element, click Finish, or Cancel to exit out of the dialog entirely. The Query-by-example element will now appear on the page.

4.4.5.9.3 Filtering Query-by-example Results

Next, you will need to navigate to the page on which you want the Query-by-example results to be displayed (which you just selected from the Gallery above). On this page you will need to place an instance of the element that is to be queried. In the example above, we queried the Sporting Event Custom Element, and will now add an instance of this element to the results page.
Once the element is on the page, click on the editing icon to Select Element Data.

Select the option ‘Display existing element data (content reuse)’ and select ‘Render results dynamically based on a filter, or display all records.’

Next, click on the filter tab in order to select the query–by–example results. Check the box to Apply Query–by–Example filter criteria.
You can also further refine the results returned by selecting 'Show subset of records' and including additional parameters. In this way, you can exclude records that you do not wish to publish (for example events in the future/past, items which are public/private, etc.).

Once you have made your changes, you can click on the Preview tab in order to see which records meet your filter criteria. This is the universe that users will be able to query. To remove any additional filters, click the Reset button. To modify the filter or apply additional filters, click the Update button. Once you have finalized your changes, click OK.
4.4.5.10 Schedule and Personalize Element

The Schedule and Personalize element, commonly referred to as the Scheduled element, allows for the dynamic rendering of content based on a specific date in time, audience, subsite, page category, variable value or browser type.

For those elements in particular that render multiple items as part of the element – Bulleted List, Drop Down List of Links, Link Bar, and Multi-Section – each individual sub-item may be scheduled or audience driven.

CommonSpot offers several scheduling options. Here are a few examples of how elements can be scheduled.

**Timeframe.** An on-line catalogue chooses to display images of models in their clothing that correspond to each season – winter, spring, summer and fall. A range of dates is defined for each of the image elements.

**Audience.** Human Resource's benefit information rendered in a Text Block element is displayed based on whether an employee is salaried or hourly.

**Page Categories.** A destination resort displays images based on the category of the page. An image of a chef in uniform is displayed on all pages that belong to the category cuisine, while an image of chocolates on a pillow is displayed for pages that belong to the category resort amenities.

**Subsites.** A company on its internal intranet site chooses to render a second level navigational bar specific to each of its many departments or subsites such as Human Resources, Research & Development, Finance, Sales & Marketing and Customer Service. The top-level tool bar is consistent across all sites while the secondary tool bar is displayed based on the subsite.

**Browser Type.** A company wishes to display certain navigational elements if the user has an Internet Explorer browser, and other navigational elements if the user has a Netscape browser. This feature can also be used to indicate whether an element should be included in a Verity search, or when printing the page.

4.4.5.10.1 Creating the Scheduled Element

The Scheduled element essentially acts as a container or placeholder in which the elements to be dynamically rendered are placed. To begin, you must create the Scheduled element.

Click on the ghosted text “Click here to define scheduled elements” which will bring up the Schedule Entries wizard.
The first time the wizard is opened it is blank since no elements have been created. Subsequently, when you navigate to this dialog, a list of all the elements contained within the Scheduled element will be listed.

Click on the ghosted text “Click here to add a new element” to bring up the Schedule Element Entry wizard.

Enter a unique Element Name for the element you are creating, and choose the Element Type from the drop down list. The drop down list lists all the elements available in the Element Gallery.

Once you have given the element a name and chosen the type, click on Finish. The wizard will be updated to reflect the entry.
To edit the scheduled element’s name, click on the **Edit Item** icon and select the first menu option.

The next step is to define the parameters for displaying the content, either by timeframe, audiences, subsite or category. Click on the Element Rendering Schedule bar at the bottom of Schedule Entries page to open the Specify Schedule Timeframes & Audiences wizard.
Specify Schedule Timeframes & Audiences displays the element’s name, as well as the default setting of “everybody” for the audience. Click on the Edit Item icon and select Edit Timeframe/Audience.

The resulting wizard presents the Scheduled Element Entry.
Choose the options for scheduling or targeting content. Simply click on the appropriate radio button. (Detailed descriptions of the scheduling options are provided in the following section). When you have finished making all the necessary entries, click OK.

The wizard presents a set of options including date range, audience, page categories, subsites, render options, subsite levels, weekdays, specific times, variable comparison and browser types.

Simply click on the appropriate radio button and depending on the selection a drop down list or expanding set of further settings will appear.

It is possible to have content rendered based on a number of options that are not mutually exclusive. For example you can schedule an element to render beginning June 1–August 30 for an audience of part-time summer help. When you are finished making all the necessary entries click OK.
4.4.5.10.2 Date Range

When scheduling an element to render based on date range, you are selecting a period of time in which you want the element to display.

If the content is to be displayed everyday with no variations, select All Dates. If the content is to be displayed for a certain day or period of time, choose Specific Date/Time by clicking the corresponding radio button. The option will expand displaying a form in which you can enter the specific begin and end date, as well as the time in a 24-hour format. The current day's date and the current time are displayed as the default. Enter the appropriate begin and end dates, as well as time.

4.4.5.10.3 Audience

An element can be scheduled to render based on a user's affiliation with a specific Audience or group.

If the element is to be viewed by all visitors, then select Everyone. If the content is to be targeted to a specific audience or group then select Specific Audience.

A drop down list will be presented from which you will choose the audience (or group) for which the element will be displayed. If at first you do not see the name of the audience you are looking for, click on the down arrow button to scroll through the list.
4.4.5.10.4 Page Categories

Elements can be scheduled to display based upon their categorization. Pages are categorized either initially when created in the Create Page dialog, or later via the Page Properties dialog.

The default setting is to display the element for all categories. To schedule the element to render for one or more categories, click on the radio button for Selected Categories that will open a drop down list of all the available categories. Select the appropriate category from the list by clicking on it.

4.4.5.10.5 SubSites

CommonSpot allows for the creation of multiple subsites within a site. An element can be scheduled to render based on which subsite the current page resides in. The default setting is to render the element irrespective of the current page's subsite.

To choose for what sites the element will render, click the subsite's radio button. The drop down list displays a list of all the subsites. Simply choose the sites for which the element will display.

To select subsites where the URL contains a specified string, select the ‘SubSites where the URL contains’ radio button. This option allows flexibility in specifying directories that have the same or similar name, but are in different parts of a site’s hierarchy.

Browsers and other Targets

To schedule by browser type, select the browser type for which the element is scheduled to appear. Using this feature, you can schedule certain elements to appear when a user
navigates to the page using an IE browser, while other elements would appear for users navigating using a Netscape browser.

4.4.5.10.6 Print and Verity Options

If you check “Include in Verity Index”, the content from the scheduled element will be included in the text sent to verity for the page. If you check “Include in printed output”, the content from the scheduled element will be included in the text for a page when “RenderForPrint” is set to 1.

4.4.5.10.7 Render Options

To schedule the rendering of specified elements based on the Render Options chosen for the current page, select the ‘Selected Options’ radio button under the Render Options section. Selecting this radio will display a list of available Rendering Options defined for this page’s base template.

The default setting is to display the element irrespective of any Rendering Options.

4.4.5.10.8 SubSite Levels

Elements can be scheduled to display based upon a selected subsite level, 1 – 10 or by all subsite levels.
4.4.5.10.9 Weekdays

Elements can be scheduled to display every day or on selected weekdays (highlight the selected day(s) desired).

Weekdays:  
- Every day
- Selected weekdays

4.4.5.10.10 Specific Times

Elements can be scheduled to display all day or for just a portion of the day. Enter the specific From – To times if the element should not display all day.

Specific times:  
- All Day
- Specific Times

Variable Comparison

When a variable name is entered in the “Variable” field, CommonSpot will compare the variable value to the data specified in the “Comparison data” field using the selected operator. If the equation evaluates to “true”, the scheduled criteria has been met. For example, to select a schedule that would only be visible to users with ‘paperthin.com’ in their email address, you would enter the following data:

Variable: request.user.emailaddress
Operator: contains
Comparison data: paperthin.com

When you have completed making all selections for a particular element, click on OK. You are then returned to the Specify Schedule Timeframes & Audiences wizard listing the schedule selection details for the specific element.
Continue this process for each and every scheduled element. When all entries have been included, click on Close. You are returned to the Web page.

4.4.5.10.11 Viewing the Scheduled Element within the Web Page

When in author mode the schedule element renders a rectangular box with a colored bar surrounding the contained scheduled element. This provides a visual indication to the area that is scheduled.

By default the then current element, if any, will be displayed based on the specified rendering schedule within the surrounding rectangle. Elements that are current will be rendered in a purple banner with a caption of ‘Current Element’.

If an entry is not scheduled to display, you may render it on the Web page so it can be edited by clicking on the View mode icon within the Scheduled Elements dialog. To invoke the Scheduled Elements dialog press the edit icon and select the first menu option, Edit Elements..., or simply click the caption bar of the surrounding rectangle.
After clicking on the View mode icon, the entry will be displayed within the Scheduled element container where you can view and edit the specific entry in Author mode. Notice the banner reads "Viewing Element" and the rectangle is now tan in color.

Pressing the box in the upper right corner of the surrounding rectangles caption bar will display the current element based on the defined rendering schedule.

### 4.4.5.10.12 Dynamically Linking to Scheduled Elements

When you link to a Scheduled element you will create a link that will trigger the dynamic display of a Scheduled element on the current page. To link to a dynamic scheduled element, first insert a scheduled element on the desired page and then define one or more contained elements. Be sure to define the contained element as dynamic elements within the Schedule Layout Properties dialog off the Scheduled Element Properties menu. See the Layout Properties section below for a more detailed description.

The Show/Hide Elements Dynamically check box, when checked, allows for the dynamic rendering of a page.
Next, follow the steps detailed above in the Creating a Scheduled Element section. Because the entries are dynamically generated on the page, there is no need to set scheduling parameters.

Once the scheduled elements are set up, they are ready to be dynamically linked to other elements. Select an element you wish to link to the newly created schedule elements. In the example below, a Link Bar element is dynamically linked to a Text Around an Image scheduled element. So that when one entry on the Link Bar is selected it dynamically displays the associated Text Around an Image element.

### 4.4.5.10.13 Layout Properties

The layout properties for the Scheduled element consist of enabling or disabling the dynamic display of scheduled sub-elements on the page. When the user checks the respective box within the Schedule Layout Properties dialog and then selects a configured link, the corresponding scheduled element will dynamically display on the page.

For example in the illustration below, clicking on the Tennis tab will dynamically display the associated tennis story. Likewise, selecting the Formula One tab will dynamically display the Formula One story. The Tab Bar element entries, Tennis and Formula One are both individually linked to scheduled elements, in this case, Text around an Image elements containing the Tennis and Formula One stories respectively.
For a more detailed discussion of the Link to Scheduled Element in the Insert Link dialog, refer to the Common Link Wizard, Link to Scheduled Element section.

4.4.5.11 Simple Form

The Simple Form element greatly facilitates creating a form within your site to easily gather user information and share the data with the appropriate individuals. The creator of the form needs only to insert the form name, add the list of e-mail recipients who will be sent the data gathered, and determine what message or page the user will see upon submission of the data. All that remains is the actual creation of the form that is facilitated by following the form wizard to insert the specific fields a user will be asked or required to fill in within the form.

4.4.5.11.1 Supplemental Documentation

Please refer the following for additional information about using Simple Forms.

5.9.3.5 Defining Form Fields
5.9.3.6 Field Level Security
5.9.3.7 Field Groupings (Tabs)
13.13 Expression Builder
13.12 Advanced Form Fields

4.4.5.11.2 Creating a Simple Form

To create a form, just select Simple Form from the Miscellaneous Category of Elements found in the Element Gallery. Once added, you will see the element ghost text appear in the appropriate page area as shown below.
You then are presented with the option to create a new form or to insert a pre-defined one. These forms can be other Simple Forms, or those forms created as part of the Custom Element process.

At this point, you can either create a new simple form, or place an instance of an existing simple form or custom element on the page. Choose Select Simple Form/Custom Element in order to place an instance of an existing simple form on the page. You will be presented with the dialog below to choose from an existing form or custom element. Select the desired form, and click Finish. The form will be added to the page.

If you choose to create a new Simple Form, you will be prompted with the form properties dialog. Enter the name of the form you wish to create in the respective field. List any e-mail addresses of those individuals that should receive the information supplied via the form. For multiple recipients, separate each address with a comma. The sender’s email address is customizable. You can default the field to the current user, by checking “Use Current User’s Email Address” which, will only work if the user submitting the form is logged in. You can specify an alternative “Anonymous” Sender’s Email which, will be used if the user is not logged in to CommonSpot when they submit the form. Additionally you can add an “Email” field to the form and check the box “Sender’s Email” which will override the two settings in this dialog and present a field for the user to fill in when they submit the form.
Finally, determine the desired outcome of the form data by selecting either Display Textblock on Submission or Submit to Page. If Display Textblock on Submission is chosen than click on the Specify Results Text button, which launches the formatted text block displayed below. Type in the message that will appear on the page after the user has submitted the information. Typically, this message indicates the successful completion of the form.
If the desired action is to forward the user to another page upon completion of the form, than check the Submit to Page radio button which will reveal the Page Gallery button. Click on the Page Gallery tab to choose the document where the user will be forwarded after successfully completing the form.
The Page Gallery tab is linked to the Document Gallery dialog box where documents/pages can be selected. Documents are organized by Site and Category making locating the appropriate document quick and easy. Highlight the desired document (page) and click the OK button to save the selected document.
Within the **New Simple Form Element** dialog, the ‘CommonSpot Fundamentals Training’ document is visible adjacent to the Page Gallery tab, illustrated above. Once the **Form Action** has been specified proceed to the next dialogue, **Edit Simple Form Element**, by clicking the Next tab. Press **Cancel** to exit without saving the form. The next dialogue instructs the user to add fields, new or existing into the form.

### 4.4.5.11.3 Add a New Field to a Form

Initially a single tab is created, with the name of the form as the name of the first tab. Depending on how many fields of data you will be including in your form, you may wish to
separate the data into multiple tabs. To add a new tab, click on the Add New Tab hyperlink in the upper right hand corner of the screen.

Note that a simple form with multiple tabs will not render properly in Netscape Navigator:

To rename the tab, click on the pencil icon.

To add a new form field, click on the link, Add New Field, and the New Field dialog box will launch. You will need to complete the information in each of the three tabs (Standard Parameters, Other Parameters, and Security).

The example below represents the fields to complete when the Type Text is selected. A complete listing of all parameter fields and when they will appear in the dialog is detailed below this dialog.

Note: See Supplemental Documentation Section at the top of this section for more information about: Field Types, Field Security, Field Groupings and Add an Existing Field to a Form.
To add an existing field to the form, click on the ‘Add Existing Form Field’ to launch the **Add Existing Form Field** dialog.

In the dialog below, the form field ‘Address’ already exists and is available for this form’s use. Highlight ‘Address’ and click the Add button to include the field into the current form. Repeat the steps until the necessary fields have been added.

![Add Existing Form Field dialog](image)

In our example, the new ‘Name’, ‘Email’, ‘Phone’ fields and existing ‘Address’ field will be displayed in the **Registration Information** tab in the form. Use the icons in order to edit, move up or down in list, delete, or move the field to a different tab, respectively.

![Edit Simple Form Fields](image)

When you have added all of the desired fields, click **Close**. The simple form will now appear on the page.

![Simple Form](image)

### 4.4.5.11.4 Layout Properties

The **Simple Form Layout Properties** dialog provides flexible capabilities for controlling the format structure for the form layout, to meet the needs of the page and content. The form creator has the option of changing the following format characteristics when designing the form.
4.4.5.11.5 Default Layout

**Form** – Determines the width of the form on the page either in percentage of available space, or in pixels. Cell padding can also be set.

**Label** – Label Column Width may be specified in pixels or in percentage of form size. However, if pixels are selected for sizing than the **Input Column Width** field must also use the same measure, in this case pixels.

**Input** – Input Column Width may be specified in pixels or in percentage of form size. However, if pixels are selected for sizing than the **Label Column Width** field must also use the same measure, in this case pixels.

**Submit Button** – Select either the standard form button, or an image. Click on **Select Image** to select an image from the Image Gallery, or upload a new image.

**Reset Button** – Select either the standard form button, or an image. Click on **Select Image** to select an image from the Image Gallery, or upload a new image.

4.4.5.11.6 Options

There are two additional options available to customize the layout of your form. First, you have the option of creating a **Multi-Page Form**, with each tab that you created earlier corresponding to a separate page on your site. If this box is not checked, then all of the fields in the tabs will be presented on a single page.

If you select **Multi-Page Form**, you can also customize the navigation between pages, by defining the Next and Previous button layouts.
Additionally, you have the ability to create a **Summary Page**, which will display all of the values entered by the user, and provide an opportunity to review and edit the content, if necessary. As with the navigation on the multi-page form, you can define the layout of the Edit buttons, and either utilize the standard form button, or insert an image. You can also specify the text that is displayed at the top of the summary page using the “Message” field.

![Simple Form Layout Properties](image)

### 4.4.5.11.7 Custom Layout

Once you have created your simple form, you can either accept the default layout, or customize the way in which the data appears on the page. CommonSpot provides extensive flexibility in the way your form is rendered on the page, allowing you to modify the display layout for simple form fields beyond what is provided out of the box on the page and/or on the summary page. Similar to the process used to create Display Masks for Custom Elements, you can define fonts, colors, styles and placement of fields, using the Rich Text Editor.

To customize the layout of simple form fields, click on the ![icon](image) icon, and select **Layout Properties**. You can customize both the data entry screen for each tab, and the way that the data for that tab is presented on the summary layout. Click on the **Custom Layout** tab, and select the Custom for the selected Tab. Click **Edit** to edit the layout for the selected Tab.
When you select Edit, the **Rich Text Editor** is invoked.

Click on the **Insert Field icon** in the Rich Text Editor in order to access the newly created simple form fields.
Once you have added all of the fields to the layout, click Finish. You will need to go through the same process for each Tab of data.
When you have customized all of the Tabs to the extent desired, click Finish in the Layout Form Properties dialog. Your edits will appear on the page, as in the example below.

The ability to modify the Layout Properties for a Simple Form provides tremendous flexibility and control, allowing end users to create sophisticated, intuitive and attractive forms.

**Notes & Considerations:** Two simple form elements that occupy the same page cannot contain a field of type: “Formatted Text Block”.
When fields are added, edited or deleted from the simple form, there is no need to approve these changes; they will automatically appear on the “Read Mode” version of the page.

If you “Copy” a simple form element using the “Copy Element” option in the Element properties dialog, you will create a ‘link’ to the original simple form and any changes to the fields preformed on the “Copy”, are also displayed in the original.

4.4.5.12 Task List

The Task List element gives a user the ability to create tasks and manage their progress right on the Web site. This element provides hierarchical task management functionality. Top-level task categories can be defined under which tasks and notes are tracked. Tasks can have sub-tasks and associated notes. Tasks can be assigned or hidden from specific individuals or groups, e-mail notifications can be sent to alert individuals of new tasks, and completion status and dates can be tracked. This handy element again leverages the diversified power of the Web giving users easy access to the information they need to be more efficient.

4.4.5.12.1 Task List Management: Categories and Views

A task list can contain several task categories containing the underlying tasks associated with each. For example, Publishing Tasks might be a top-level category, while create content, update content, etc. might all be sub-level categories of Publishing Tasks, also containing tasks.

To create a task list, select Task List from the Miscellaneous Category of Elements found in the Element Gallery. The Task List Element will load on the form. To design the task list, click on the ghosted text, “Click here to define the Task List”, as displayed below.

![Click here to define the Task List]

The ghosted text will launch the Edit Task List Categories dialog, where the task list creator can select among the existing top-level categories or create or edit an existing task category. The tasks are organized within Top-Level and Sub-Level Categories.
In the dialog above, either highlight an existing category listed in the Top-Level Categories box and click on Finish or click on the ghosted text “Create or edit a task category” to create a new category or update the properties of an existing category.

4.4.5.12.2 Existing Task Category

If an existing category is selected the Task Element will load on the page and views, tasks, notes and other filters can be added. Proceed to the Task List element section detailed below for further discussion on editing the resulting element.

4.4.5.12.3 Add or Edit Existing Task Category

For a new category, click on the ghosted text “Create or edit a task category”. Within the New Task Category dialog, enter the desired name and a short description explaining the new task category in the space provided, as illustrated below.

By pressing the Assign button the page creator can assign a task to a specified user.

Security is set at the category level for the Task Element. Click on the Next button to proceed to the following dialog, Task Category Security or Close to exit without saving the new task category.
The **Task Category Security** dialog prompts the user to set permissions for the respective category and the default permissions for all categories, tasks, and notes that are created under the category. The security at the category level allows the page creator to limit access to tasks only to those users and groups that are specified within the **Task Element** security. Refer to Chapter 13, Security and Administration later in this guide for a more detailed discussion on how to assign group and user permissions.

The security options available include Read, Author, Edit and Admin. Groups and Users are listed alphabetically with their associated permissions. The type of the permission is indicated by the display:

**Read (normal text)** – allows user or group to view the content

**Author (normal text)** – allows the user or group to create new content and modify content owned by the user/group

**Edit (normal text)** – allows the user or group to modify content created/owned by any user/group

**Admin (normal text)** – allows the user or group to grant or revoke permissions and perform other administrative tasks for the page

Once the task category security has been set up the top-level category will appear in the drop down list box within the Edit Task Management Categories dialog.

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**4.4.5.12.4 Views**

Views drive the look and feel of the **Task Element** display on the Web page. There are three different types of View formats to choose from, including **Standard Hierarchical View**, **Custom Hierarchical View** and **Table View**. The first view available, the **Standard Hierarchical View**, is the default task view, organized by category using a folder-style display. The second view available similar to the **Standard Hierarchical View**, the **Custom Hierarchical View**, is organized in an author specified category hierarchy using a folder style display. Finally, the third style, the **Table View** is organized in an author specified category hierarchy using a columnar display.
To add a view to the drop down list box, click on the Edit Item icon above the View drop down list box (illustrated below) and select Task Views to launch the Task Views dialog.

![Task Views dialog](image)

At this point, an existing view can be edited or a new view can be added. To add a new view, click on the ghosted text "Click here to create a new task view".

![Task View dialog](image)

The next dialog then prompts the user to name the new view and choose from the list of three view types including Standard Hierarchical View, Custom Hierarchical View and Table View.

4.4.5.12.5 Standard Hierarchical View

To set the filter parameters for this view click on the Standard Hierarchical View radio button and press the Next button. The Task View Filter dialog box then guides the user to select the Field, Operator and Value for the corresponding view. Note that more than
one criterion can be specified along with the desired logical operators and parenthesis can be used to determine filter order.

Once the criteria have been entered, choose the Finish button to proceed to the next dialog. The Task Views dialog now is updated to reflect the new view.

Upon closing the dialog box, the Standard Hierarchical View is active and as pictured below, the user then can add sub-categories or edit or delete the existing category. Adding Tasks and Notes work similarly across all views and are described in detail later in this chapter.

4.4.5.12.6 Custom Hierarchical View

To set the filter parameters of the Custom Hierarchical View, click on the Custom Hierarchical View radio button. Press the Next button to proceed to the Custom Hierarchical View Categorization dialog.
The **Custom Hierarchical View Categorization** dialog then guides the user to select up to three properties to categorize the tasks under.

The **Next** button opens the same **Task View Filter** dialog present within the **Standard Hierarchical View**. As in the **Standard Hierarchical View**, the **Task View Filter** dialog box guides the user to select the Field, Operator and Value for the corresponding view. Note that more than one criterion can be specified along with the desired logical operators and parenthesis can be used to determine the filter order.
Once the criteria have been entered, choose the Finish button to proceed to the next dialog. The Task Views dialog now is updated to reflect the new view, Custom View.

4.4.5.12.7 Table Hierarchical View

To set the filter parameters of the Table Hierarchical View, click on the Table View radio button and press the Next button to load the filtering properties.
The Available Properties to filter are located on the left hand side of the dialog box, as illustrated below. To select a property, highlight the desired property and click on the double arrow pointing to the right to move the property to the Select Properties column. To remove the property from the selected list, highlight the property and click on the double arrow pointing to the left. If you wish to filter on all properties, click on the Select All button. To remove all the properties from the selected list, click on Remove All. The Up and Dn buttons move a highlighted property up or down the list depending on the preferred filter order.

Once the desired properties have been selected, the Next button launches the Task View Filter dialog where the filtering criteria can be specified.

An example of the ‘Table View’ is presented in the illustration below.
4.4.5.12.8 Edit Task List Element

The core of the control, the Task List Element, contains the display views, formatting and filtering options and the ability to add tasks and notes. To edit the Task List Element, highlight the desired category in the Edit Task Categories dialog and press the Finish button to add tasks, notes, and filters. The resulting Task List Element, displayed below has a variety of options to achieve the task list desired including the setting Views, adding Tasks, adding Notes and utilizing Filters.

4.4.5.12.9 Add Tasks

The addition of tasks to the Task element follows the creation of categories and determining the initial view. Tasks can be added to any categories, tasks and notes. At the task level, descriptions, status, assignment, priority, begin and end dates, private, etc. can be tracked for individual or for group use.

To enter a task, the user, in Read mode must click on the Edit Item icon adjacent to the category name and select Add Task to launch the New Task dialog. This dialog contains all of the task related properties that will enable the user to manage the task. Complete the following fields before saving the new task:

- **Title** – enter name of the task
- **Category** – Displays the current category. Press Change to switch the underlying category.
- **Assign To** – designates responsibility of task to an individual or group
- **Description** – enter detail of the task
- **Status** – Tracks progress of task. Select from Not started, In progress, Completed, On hold, Deferred.
- **Priority** – Indicates importance of project. Select from Low, Normal, High or Immediate.
- **Completed** – Designates percentage of project completed. Percentage completion automatically updates the status field.
- **Start Date** – enter actual start date of task
- **Due Date** – enter current due date of task
- **Private** – if checked, task will not be shared
- **Reload on submission** – if selected, automatically reloads the results based upon any parameter change.
Press **Save** to save task under designated category and return to the task element. Press **Save & New Task** to save under designated category and re-launch the **New Task Dialog** to enter another new task. Press **Cancel** to close without saving any changes.

### 4.4.5.12.10 Add Notes

A user can also add a note corresponding to a top-level category, sub-category, task or an existing note. To enter a note, in **Read mode** click on the **Edit Item** icon adjacent to one of the above item’s name and select **Add Note** to launch the **Edit Note** text block.

Complete the following criteria before exiting the text block:

- **Title** – enter the title of the note
- **Category** – Provides the ability to move the note to and from the top-level category and its sub-categories. The user may either **Change** the category or **Move** the note to a different category depending on whether the user edits or creates a note, respectively. Likewise, the text on the button would reflect the action required.
- **Private** – keeps note confidential from other users
Reload on submission – if selected, automatically reloads the list after each submission.

4.4.5.12.11 Sub-note

Adding a sub-note works the same way as adding a note. Refer to the Add Notes section above for more information.

4.4.5.12.12 Delete Note

To delete a note, click on the Edit Item icon and select the Delete Note... text. The subsequent dialog requests confirmation for the deletion action.

Selecting OK immediately deletes the note from the listing. Cancel exits the dialog without committing to the deletion of the note.
4.4.5.12.13 Quick Task List

The task list can also be viewed outside of the Task element. Authorized users may access the task list directly from the My Tasks menu item within the Page and Template Management menu, illustrated below.

The My Tasks link opens a tree control with a listing of the existing categories as well as underlying tasks, completion percentages and assignees. The user may also select from any already existing views from the view drop down list box. As in the standard Tasks dialog, completed tasks may be filtered out and the user may elect to view the assigned to name. Select the parameters desired and press Go to view the tasks that meet the criteria directly in the dialog box.
4.4.5.12.14 Layout Properties

Through layout properties a user can define how the Task List Element components will display on the page. The Task List may need to occupy the whole window space or a limited portion. The Task Display Width field controls the width of the task list element on the page, measured in pixels or percentage of window. Other properties can be hidden or displayed based on the user’s preference or needs.

The Task Display Layout Properties dialog resides in the Task List Element Properties menu. The dialog contains the following parameters that can be altered to change the task list display, including: Task Display Width (in pixels or percentage of window space), Show View List, Show Filter Completed, Show Assigned to Name, Expand First Level.

Task Display Width – Enlarges or diminishes the span of the task element. Enter the desired size either by number of pixels or percentage of window size.

Show View List – Check box if the View List should appear on the display providing the ability to change views to other already created views.

Show Filter Completed – Limits display of tasks to those yet to be completed.

Show Assigned to Name – Check box to display the individual or group responsible for completing the task.

Expand First Level – Expand list to include sub–level categories as well as tasks and notes.

![Task Display Layout Properties dialog](image)

Select the Finish button to save the Layout Properties elected or Cancel to exit the dialog without saving.

4.4.5.13 Video

CommonSpot Video element allows you to insert a video on to a Web page, just like any other element.
4.4.5.13.1 Layout Properties

The layout properties for the Video element are very similar to that of a single image. There are nine different layout options – six with a header above or below, and three without a header. The options are further defined by its placement within the cell – left, centered or right aligned.

Choose the layout option that fits your requirements and click on Finish.

4.4.5.13.2 Adding Video Clip

To add a Video Clip, click on the text, “Click here to add an object”.

The resulting Video Attributes dialog illustrated below, names the video source file and sets the width and height in pixels of the video object. If there is no source file specified, click on the Edit button where you will either choose the video from a list of those already uploaded to the server and possibly included elsewhere on the site, or have the new video uploaded automatically from your local hard drive or shared directory.
If the video exists in the site’s video repository and you know the URL, then select Link to Existing Video. If it is a new video, it will need to be uploaded to the server. For more information on inserting an existing video or uploading a new video refer to the Common Link Wizard section detailed later in this chapter. Click Finish and the video will be automatically inserted into the page.

In Author mode the video will not play. What you will see is a gray rectangle, which renders the size of the actual video.

Toggle out of Author Mode into Read mode to see the actual video. In Read mode you can view and listen to the video, as it plays.
The user is presented a simple set of controls to play and stop the video.

Press play, ▶️ to view the video. Press stop, ▶️ to stop playing the video.

4.4.5.14 Web Process

The Web Process element allows the user to include within a designated region of the page, other Web pages or scripts that are written in CGI, ASP or non-ColdFusion applications.

The Web Process element automatically strips out the <head></head> section of the page and grabs the contents within the <body></body> tags. If a background image or color is specified for the page, it is converted to the background image/color for the table cell in which the element is rendered.

4.4.5.14.1 Element Properties

The element properties for the Web Process element include the Page/Process URL, UserID, Password and Proxy Server and the Update Schedule. It may or may not be necessary to enter the UserID, Password or Proxy Server, depending on whether the page to be accessed requires those items.
Enter the corresponding **Page/Process** URL along with the accompanying **UserID**, **Password** and **Proxy Server** information if required.

Finally, select from the **Update Schedule Options** drop down list, that will determine when the process will be automatically updated. There are several updating choices including, **Update on first access only**, **Update on every request**, or **Update on a per minute schedule**.

Click **Finish** to view and add the resulting **Web Process**.

### 4.4.6 Page Set Elements

Not all content fits nicely within the context of one page. Often the content itself dictates that it be presented over the course of several pages. The subject matter necessitates that the related pages be grouped and managed collectively as a whole.

CommonSpot allows for the management of related pages as a **Page Set**. Pages within the **Page Set** are organized in a logical sequence, and can be reordered at any time. New pages can be added or deleted to the set, with the navigation between and amongst the various pages kept up-to-date, automatically.

Before you can create the **Page Set** it is necessary to create all the pages that will belong to the **Page Set**. To understand how to create a page, refer to Chapter 6 Managing and Creating Pages, Page Creation section.

Once you have created all the pages to be managed within the page set, it is time to create the **Page Set**. Click on **Create Page Set** off the **Page & Template Management** menu.
4.4.6.1 Creating a Page Set

The first step in creating the Page Set is to choose what subsite the Page Set will reside in. The Create Page Set dialog offers a drop down list from which you can select the appropriate subsite by its name. Click on the name to choose a subsite.

Once you have made your selection, click on Next.

This will advance you to the next dialog, Create New Page Set. The Create New Page Set prompts you to enter the Category, Page Set Name, Title, Description and Keywords, indicate if the Page Set can be indexed or not, and to enter a date if the Page Set is to be published at a future date. This process is similar to the one for creating a new page. For a more detail explanation of various fields and the information required, refer to Chapter 6 Managing and Creating Pages, the Page Creation section.
Once you have completed the **Create New Page** form and verified that the information is correct, click on **Next**.

### 4.4.6.2 Page Set Members

The next step is to add the pages for the **Page Set**. To begin, click on the ghosted text “Click here to add a new Page Set member.” This will bring up the **Document Gallery**.
You can easily find the specific Web page or uploaded files (Word, PDF, Excel) by targeting your search. Select the appropriate site/subsite and category, and click on Go. A list of pages that reside within that subsite and belong to the selected category will be displayed below.

To add the page to the Page Set, simply select it from the list. It will be automatically added to the list of Page Set Members. Continue until you have defined all the pages in the Page Set.

The arrangement of the pages in the list is how the pages are ordered – first page, second page, etc. In this example, “Discrimination Policies” is the first page in the Page Set, “Maternity Leave” the second. To add a new page either above or below a page, click on the Edit Item icon for the particular page. This will bring up a menu, and from the menu select the appropriate action.

At any time you can change the order in which a page appears in the Page Set. Click on the Edit Item icon to bring up the menu from which you can select the appropriate action. You can move the page up or down, top to bottom.

To delete a page from the Page Set, click on the Edit Item icon and select Delete Page Set Member.

4.4.6.3 Page Set Properties

To access and manage Page Set Properties and Keywords, you must have Author rights for the Page Set. If you do not have the appropriate rights, the links are hidden from your view.

Page Set properties include URL, Title, Description, Confidentiality and Indexing. To modify any one of these properties, click on the Page Set Properties link.

Note that the URL for the Page Set is addressable. In order for a user to access the Page Set, a link to the URL must be created. This can be accomplished through various navigational
(navigation bar or hierarchical menu) or hyperlink elements (link bar, hypertext link, image grid, bulleted list, etc.).

### 4.4.6.4 Keywords

To submit or change the **Author Assigned Keywords** for the Page Set, click on **Keywords**.

If you have been granted rights to create new **Keywords**, you will be presented with a text field where you can enter the **Keyword**. If not, you must choose the **Keyword(s)** from the drop down list presented by clicking on **Select Keywords**.

![Page Set Keywords](image)

**4.4.6.5 Page Set Security**

Those who have been assigned administrative permissions for the **Page Set** will be able to access **Page Set Security**. As **Administrator**, you can in turn assign permissions to other users or groups.

**Author** and **Administrator** are the only two permissions that apply and can be assigned at the **Page Set** level. Those with **Author** rights will be able to add or delete page members from the **Page Set**, manage the **Page Set Properties** and assign **Keywords**. Those with **Administrator** rights can give other permission to author or administer the **Page Set**.

To give a user or group either **Author** or **Administrator** rights, click on **Page Set Security**.

This will open the **Page Set Security** dialog. You can edit the permissions of a user or group by clicking on the **Edit Item** ![Edit Item](image) icon or delete an entry by clicking on the **Delete Item** ![Delete Item](image) icon.

You can add a new user or group by clicking on the ghosted text “**Click here to add ...**” As mentioned previously, only **Author** and **Administrator** permissions are assignable for the **Page Set**. For complete details on CommonSpot’s security permission and the options that are available, refer to Chapter 13, Security and Distributed Administration.

**Approval** rights as well as **Design**, **Edit**, **Author**, and **Administrator** permissions can be assigned at the individual page member level.
Once a Page Set has been created, you can manage its properties, keywords or security by navigating to Manage Page Set off the Page and Template Management Menu.

In the Manage Page Set you will see a collapsed list of all the pages sets organized by subsite. Click on the plus icon to expand the view, the minus icon to collapse. Continue to expand the views until you find the Page Set looking for. To open the Page Set, click either on the Edit item icon or click directly on the name of the Page Set.

This will bring up the Page Set Members. Follow the instructions for managing Page Set Properties, Keywords and Page Set Security as outlined in the paragraphs above.
4.4.6.6 Page Set Elements

Now that the Page Set is built and all the members or pages of the set included, you need to consider how viewers will navigate the Page Set. CommonSpot offers a dynamic Table of Contents, Page Index and Navigation elements to address this issue specifically.
4.4.6.7 Page Set Contents

The Page Set Contents element renders a list of all the members or pages of the Page Set by title.

It may be appropriate for the Page Set Contents to appear on the first page of the Page Set, or you may choose to display the Page Set Contents on each page in the Page Set. If the later is your preference, you will want to include the Page Set Contents element in the template from which all pages in the Page Set derive.

To create the table of contents for the Page Set from a page or template, simply click on the ghosted text “Click here to insert new element.” This will bring up the Element Gallery. Navigate to the category Page Set and choose Page Set Contents from the list.

The text “Click here to define the Page Set Table of Contents” will appear on the page. Click on the text to define the table of contents.

The next dialog prompts you to identify and select the Page Set from which it will build the table of contents.

Select the first option, Current Page Set, if the page in which the table of contents is a member of a Page Set, and you want to build a table of contents for that Page Set.

Select the second option, Selected Page Set, if the current page does not belong to a Page Set or if you prefer the table of contents be built from a different Page Set. Upon selection, a drop down list will appear. The Page Set(s) displayed in the drop down list are the Page Sets that have been defined for the subsite, which the page belongs to.
To see a list of all Page Sets, regardless of what subsite they reside in, then check Show Page Sets from all subsites. The drop down list will refresh and show a list of all Page Sets.

### 4.4.6.8 Page Set Index

The Page Set Index is identical to the Page Index element except that instead of rendering a list of pages based on certain metadata filter criteria, it renders a list of related Page Sets. For more information on Page Set Index, see Page Index element, discussed earlier in this chapter.

In addition to these three (3) elements, Page Set Contents, Page Set Navigation Link and Page Set Index, other elements such as the Page Index element and Search Results can recognize, filter and render appropriately Page Set titles.
CommonSpot’s Page Set Navigation element provides a direct navigation link to the pages within the Page Set. Navigation amongst the pages is automatically updated each time a member page is added or deleted from the Page Set.

**Page Set Navigation** elements can be placed within the context of the **Page Set Member** page or within a template. If the **Page Set Navigation** element is to appear on every page in the Page Set, you will want to implement at the template level.

Click on “Click here to insert new element” to bring up the **Element Gallery** dialog. Choose the **Page Set Navigational Link** element from the list of **Page Set** elements.

If the **Navigation Link** is to appear in a template, after selecting the **Navigation Link** element from the **Element Gallery**, the following ghosted text will appear on the page.

The next step is to choose how the element will layout or render on the page. CommonSpot offers an array of **Page Set Navigational Links** to suit your design requirements. Click on the **Properties** icon and click on **Layout** to see the number of options available.
Choose from the list of six layout options the one that best suits your needs. You can select how the element will align within the cell, either left, center or right. When you have made the selection, click on Finish.

**Custom Properties** lets you choose how you want to layout or display the **Page Set Navigational Link**. You have the choice of three options – None, Text or Image. If you choose None, the specific item will not render. **Text** allows you to specify the actual text to appear for that item. In the memo field next to the drop down list, enter the appropriate text.

If the design calls for the use of an object that is unique, you can create the item as an image and have it render in place. To do so, choose Image from the list. To upload the image from your local computer or to choose an image from the **Public Image Gallery**, click on the button labeled Image. This will invoke the **Image Properties** dialog. For more information on Image Properties, refer to Chapter 10, Images.
When you have made all your selections, click on Finish. The Page Set Navigation Link element will render accordingly, once the pages created from the template become members of a Page Set.

If the Navigation Link is to appear on an individual page, it renders similarly as if it were a template. Follow the steps above to select the desired layout properties. Once the page becomes a member of a Page Set, the Navigational Element will render appropriately on the page.

4.4.7 Search Elements

4.4.7.1 Search Form

The Search Form element renders an HTML form with a search edit field, a search button and other specified options such as a list of subsite, number of results per page, etc. This element allows site designers to provide to the end-users a full text search interface. This element has various options that allow the element author to determine the look and feel, complexity and scope of the search form. The Search Form element may be used in conjunction with the Search Results element, however only one Search Form element should appear on the same page.

To insert a Search Form element, select the Search Form element from the element gallery. Once inserted onto the page the following ghost will be displayed for the element.

![Click here to define the search form]

The Search Form element has no content per se, and thus the only configurable properties are the Layout and Font & Color properties. While in Author mode click the search form directly, to invoke the Layout Properties menu or the Edit Item icon directly will invoke the layout Properties dialog. The Search Form element renders an HTML form; therefore it should not be inserted into a base template or Custom script element that also utilizes an HTML form.

4.4.7.1.1 Layout Properties

The layout properties dialog contains many options for configuring the search form. As depicted below, there are five predefined layouts styles and one custom layout style. The parameters presented below display the six layout options that further define the search form, allowing the author to specify attributes such as the search label, button text and others.
When the user clicks the **Finish** button, the form and its contents (both visible and hidden fields) are submitted to the specified Results Page URL. In most cases this URL will contain a Search Results element, which will render the results of the search. It is also common within the search results page to include another Search Form to allow the user to conveniently perform another search.

**Note:** **Search Field Default Text** can be defined, which essentially pre-populates the search field with default text, a feature required for compliance with the accessibility standards of Section 508 of the Rehabilitation Act.

Within the Search Form’s Layout Properties dialog it is also possible to specify which subsites should be included in the search results. This allows the site designer to setup the search to only search specific sections of a large site.

Choosing the Advanced Search Option will display a pre-formatted layout showing the search label, search field, and search button along with a selection box allowing the user to choose how the results are ordered, and a drop down list of subsites. An example of which is shown below.
When Custom via Parameters layout is selected the following dialog prompts you to specify the layout of the Search form element, as displayed below:

```
4.4.7.1.2 Font & Color Properties

The Font and Color Properties dialog is similar to those properties used in most other elements. Please refer to Chapter 11, Font and Color Properties for instructions on setting the element’s font and color properties.

4.4.7.2 Search Results

The Search Results element is used to display the results of a full text search. CommonSpot integrates with the Verity search engine bundled with ColdFusion to perform a full text search across the entire site or selected subsites. CommonSpot’s search interface has also been updated to search in the appropriate language based upon the language specified during page creation in the page’s properties. Therefore, the search results will only include same language pages.
The image above shows a page in Author mode that contains both a Search Form element (the first element) and a Search Results element (the last element). When in author mode the Search Results element shows a representation of what the search results may look like. The represented data is not actual search results data.

4.4.7.2.1 Layout Properties

Similar to the Search Form, the Search Results elements does not have any element data, and as such clicking the Edit Item icon will invoke the Layout Properties dialog. The Layout Properties dialog can also be opened by choosing the Layout Properties menu option after clicking the Element Properties icon, or by clicking anywhere within the represented data.

The Layout Properties dialog is as follows:
The dialog presents thumbnail representations of seven predefined layouts for the results set and several additional options for controlling the results order, count and spacing. The last thumbnail icon designates custom rendering options. Clicking this icon will invoke the following pop-up dialog:
By choosing the custom layout option the page author has greater control over how the search results are formatted. Such options include whether results are numbered, whether an icon representing the document’s format is displayed, whether the document’s summary description is displayed, as well as the last modification date, owner name and subsite name. Finally, the layout can also include the Breadcrumb trail that leads to surrounding information that may be relevant.

Remember that the Search Form is where the specific subsites to search are specified, along with the search string.

At the bottom of the Layout Properties dialog, Prompt String labels display the Default Prompt label names adjacent to the Current Prompt label names, which can be updated to reflect the user’s preference or needs.

<table>
<thead>
<tr>
<th>Default prompt</th>
<th>Current Prompt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search For:</td>
<td>Search For:</td>
</tr>
<tr>
<td>Documents:</td>
<td>Documents:</td>
</tr>
<tr>
<td>Total Matches:</td>
<td>Total Matches:</td>
</tr>
<tr>
<td>Total Searched:</td>
<td>Total Searched:</td>
</tr>
<tr>
<td>Result Pages:</td>
<td>Result Pages:</td>
</tr>
<tr>
<td>No Matches Found!</td>
<td>No Matches Found!</td>
</tr>
<tr>
<td>Next</td>
<td>Next</td>
</tr>
<tr>
<td>Prev</td>
<td>Prev</td>
</tr>
</tbody>
</table>

These Prompt names below appear with the search results once the executed search is complete:

```
Search For: sample Documents: 1 - 2 Total Matches: 2 Total Searched: 100
```

### 4.4.8 Text Elements

#### 4.4.8.1 Bulleted List of Text Blocks

The Bullet List of Text Blocks is essentially the same as the Bulleted List element; the difference is the ability of the item to render a lengthy paragraph or Text Block, instead of a single list item.

**Bulleted List of Text Blocks**
4.4.8.1.1 Layout Properties

The Bulleted List of Text Blocks element is very similar to the Bulleted List element, except the Bulleted List of Text Blocks renders for the item a paragraph and not a single line item.

The Layout Properties wizard for a Bulleted List of Text Blocks therefore is the same as for all bulleted lists.

When the Bulleted List of Text Blocks is first rendered on the page, the highlighted option is the default option.
The layout wizard presents several different bulleted lists that support paragraphs – options that either render a single header for the list, multiple headers – one for each Text Block, or no header.

The **Rich Text Editor** control permits rich text editing capabilities that allow enhanced flexibility in the presentation of the bulleted list. The user can control the presentation of lists, by selecting an item in the list and then clicking on the list properties icon. The user can modify the presentation of the entire list, or just the presentation of a specific item within a list. Bulleted and numbered lists are supported. To edit the style and numbering of the entire list, click on the List tab. To edit the style and numbering of a selected item, click on the Item tab.

The advanced button within the **Bulleted List Layout Properties** links to the Rich Textblock **Advanced Options** dialog detailing the toolbar options available to include within the text block editor. For a more detailed discussion of the **Advanced** option, refer to the Bulleted List section earlier within this chapter.
4.4.8.2 Date/Time

There are many dates that may be meaningful to include on your page. CommonSpot provides the ability to easily insert a date/time directly within the page.

The date you wish to insert can come from a variety of available sources: Current date/time; Manual Input; Date document created; Date of last major revision; Date last modified; Date document published; Date of Last User Login.

To insert and display the date/time on your page, simply click on the Date/Time element from the drop down list of elements within the Miscellaneous Category of the Element Gallery. Next, click on the ghosted text ‘Click to edit the Date element’. This will open the Edit Date Text Dialog allowing you to choose the desired date Input Source. Select from the input sources contained in the drop down list displayed below.

Note that all the date/time options included above are system generated except for the Manual Input source, which if selected the dialog will prompt you to enter the date desired, illustrated below:

4.4.8.2.1 Layout Properties

Upon selecting the source of the date desired, click on the Date Layout Properties icon and then the Layout Properties menu item to manipulate the layout of the label and date/time source on the page.
4.4.8.2.2 Label

The Label Layout can either not display or be above, before, or after the date/time within the cell by clicking on the corresponding label layout button within the Date Layout Properties dialog displayed below. The label can also be right, center, or left aligned within the cell. Choose the desired alignment from the drop down list box below the label layout selections.

4.4.8.2.3 Date and Time Format

The date and time can also be displayed in a variety of different formats presented below. Click on the radio button adjacent to the desired selection for the Date and Time Formats, respectively.

![Date Layout Properties](image)

Click Finish to display the formatted label (if applicable) and date/time on the page in the layout preferred.
4.4.8.3 Formatted Text Block

The Formatted Text Block renders blocks of rich text in a paragraph format.

Buckle Up

It is a fast life.

Something extraordinary is happening to human society and how we communicate with one another. Missed contact is now the rare exception.

We are simultaneously entering the Information Age and the Age of Distraction.

With voice mail, e-mail, pagers, cell phones, fax machines and FedEx, people who want to reach us know just how to find us. In the article Information and the Revolution, the author talks about how we are overloaded by all this stimuli and we needed to strive for discipline. See

Informax, December 2000

The Formatted Text Block rich-text editing wizard allows authors to control the type, size and color of fonts, apply bold, italics and underline treatments, include hypertext links, align text, embed hypertext links, indent text and choose background colors. The rich text-editing wizard makes it easy to create presentation rich content offering familiar Microsoft Word like tools.

To learn more about the layout properties of the Formatted Text Block, refer to the Formatted Text Block (without header) Layout Properties section below.

4.4.8.4 Formatted Text Block (without header)

The Formatted Text Block (without header) renders a richly formatted Text Block without a top-level title or header. Other than the header, the two elements are the same.

What is the difference between a Formatted Text Block and a Simple Text Block? The Simple Text Block renders plain text. Authors are not able to richly format the text and only a user with design permissions can change the font’s attributes. This may be an appropriate option if you wish to limit the user’s ability to control the “look and feel” of the page.
4.4.8.4.1 Layout Properties

The Text Block Layout Properties wizard offers eleven (11) different ways in which to present a Textblock.

![Text Block Layout Properties](image)
The top row provides a Text Block with a header with various alignment choices. The middle row includes a header that is also a hypertext link. The bottom row presents three layout options – left, center and right aligned without a header.

To edit within the rich-text editor, it is important to check Permit rich-text editing at the bottom of the wizard. When checked, the button labeled Advanced is present and when pressed launches the Rich Textblock Advanced Options containing the toolbar options available to include within the text block editor. Check those options that should be visible on the Rich Text Editor toolbar within the Edit Bulleted List dialog.

If you do not want the user to have access to rich-text editing, uncheck the box and a Simple Text Block editor will be presented whenever a user edits the header or Text Block. A Simple Text Block editor is shown below.

When you have selected from the Text Block Layout Properties wizard with the layout option you prefer, click on Finish. This will return you to the Web page where the element will be inserted onto the page.

The Formatted Text Block element is rendered on the Web page in ghosted text. The text explicitly prompts the user to Click here to begin defining the Text Block and its header. Click on the ghosted text.

The resulting page is the Formatted Text Block's Rich Text Editor.

To submit content you can copy content directly from Microsoft Word, a Web page or other documents and maintain the content’s formatting attributes. Or, you can type content into the text field directly and use the controls to format the information. Displayed is the rich text editing tool bar with a brief explanation of each of the tools.

**Note:** More information about Using the Rich Text Editor can be found in Chapter 7 of this guide.
Choose the font you wish to use from the drop down list. The choice of fonts is set by the Administrator in the Administrator module.

**Bold, italicize or underline** for emphasis

Choose your font color from a rich palette of colors. **Background color is an option as well.**

Edit the content using these cut and paste tools.

Launch the **Image Gallery** to insert an image.

Make any word or phrase a hypertext link.

Left, right or center align the text within the cell.

Create bulleted lists, either numeric or symbolic.

Manage list properties easily.

Indent sections of the text within the paragraph.

Insert a table, and manage all table properties.

Insert special characters such as copyright, trademarks, etc.

Show or hide HTML tag indicators when editing.

Easily remove the first paragraph tag in HTML.

Toggle table borders on or off on the page.

Insert bookmark within the context of a page

Insert a field onto the page

Insert an HTML code snippet

After adding the content, if the layout for the **Formatted Text Block** includes a hypertext link, it is necessary to create the link. Highlight the desired link text and click on the **Link**.
The **Insert Link** dialog appears, illustrated below, where you will define the link type – internal or external URL, new page created from template, uploaded file, image, e-mail, scheduled element or no link. From here you can also indicate a desired **Mouseover Action**, if appropriate.

<table>
<thead>
<tr>
<th>Insert Link</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Link Action</strong></td>
</tr>
<tr>
<td>Please choose which of the following link types you wish to insert:</td>
</tr>
<tr>
<td>☐ No Link</td>
</tr>
<tr>
<td>☐ Link to Existing Page or File</td>
</tr>
<tr>
<td>• Link to an existing page or previously uploaded file that is present either within this site or externally.</td>
</tr>
<tr>
<td>☐ Link to New Page From Template</td>
</tr>
<tr>
<td>• Create a new Web page (by selecting an appropriate template from the template gallery) and link to the new page.</td>
</tr>
<tr>
<td>☐ Link to New Uploaded File</td>
</tr>
<tr>
<td>• Upload a new file (i.e. Word, PowerPoint, Excel, Visio) and create a link to the newly uploaded file. Users following the link will download and view the file in its native format.</td>
</tr>
<tr>
<td>☐ Link to Image</td>
</tr>
<tr>
<td>• Create a link to an image. Images can be uploaded or selected from the Image Gallery.</td>
</tr>
<tr>
<td>☐ E-Mail Link</td>
</tr>
<tr>
<td>• Create a link for sending e-mail.</td>
</tr>
<tr>
<td>☐ Link to Scheduled Element</td>
</tr>
<tr>
<td>• Create a link that will trigger the display of a scheduled element on the current page.</td>
</tr>
<tr>
<td>☐ Link to Pop-Up Menu</td>
</tr>
<tr>
<td>• Create a link that will trigger the display of a pop-up menu.</td>
</tr>
<tr>
<td><strong>Link Displays</strong>: Normal Link</td>
</tr>
<tr>
<td>☐ Open link in a new window</td>
</tr>
</tbody>
</table>

Detailed information regarding the Insert Link wizard and all of the various options are available in **Common Link Wizard** section, discussed later in this chapter. When you have selected the link type, click on **Next** to return to the text block editor. From there, click **Finish** to submit the content. Once again, you are returned to the Web page with the newly created content displayed.

### 4.4.8.5 Simple Text Block

The Simple Text Block element allows a user to create a Text Block, which may include one word or numerous paragraphs of text. The Simple Text Block wizard provides no rich text editing tools. If it is necessary to restrict a user to only submitting straight text and for that user to be unable to manipulate the text, then a simple text block element is appropriate.
Attributes such as bold, italics, underline, hypertext linking and such can be applied by inserting HTML tags into the editor.

4.4.8.5.1 Layout Properties

The layout properties for the Simple Text Block are the same for all Text Blocks.

Choose the layout option preferred and click on Finish. If you have chosen a Text Block with a hyperlink header, Highlight the desired link text and click on the Link icon. The Insert Link dialog appears, where you will define the link type – internal or external URL, new page created from template, uploaded file, image, e-mail, scheduled element or no link.

Detailed information regarding the Insert Link wizard and all of the various options are available in Common Link Wizard section, discussed in the next section.
4.4.8.6 Simple Text Block (without Header)

The Simple Text Block without Header element is the same element as the Simple Text-block except initially the element’s header is suppressed, just allowing the user to enter the text block body.

Please refer to the Simple Text Block element above for specifics of editing, layout, font and color properties.

4.5 Common Link Wizard

CommonSpot provides a Common Link Wizard that facilitates linking elements to other pages and elements and uses consistent dialogs to guide the user to insert the desired link. The Link Actions section handles the type of hyperlink you are associating with an element, and the Mouseover Action tab control the type of actions, if any, CommonSpot will take if the cursor is placed over the link. You can link to either an existing Web page or document (file), a new Web page to be created, a new document or file to be uploaded, an image, an e-mail, a scheduled element or you can choose not to link to anything at all. All of these options are facilitated through the Insert Link dialog.

Mouseover Action is most frequently associated with the use of Pop–Up windows, and is defined in Section 4.5, Pop–Up Menus.

4.5.1 No Link

Not every Bulleted List needs to be linked to another page or document. If you wish to create a simple text only Bulleted List, select No Link from the list of link types in the Insert Link wizard. The bulleted items simply appear as text.

4.5.2 Existing Page or File

Existing Page or File allows you to link to an existing internal or external Web page (URL) or an already uploaded file (e.g. Word document) that is internal to the site. If this is the preferred choice, click on Existing Page or File.

Upon selecting Existing Page or File, notice the addition of the check box and the option Open link in a new window. When evoked, the page or file you are linking to will be opened in a second browser window, while the current page remains open and in view.
Click on Next to advance you to the Edit Link to Existing Page wizard where you will identify the internal or external page or document you want to create a link to. Internal page or document option allows you to create a link to an existing Microsoft Word, PowerPoint, Excel or Adobe Acrobat PDF document. To more easily locate an internal page or document, you can use the Page Finder to locate the page. Click on the Page Finder link to bring up a dialog to search for a page. Alternatively, you can click on the Gallery button to be presented with a complete categorized list of the site’s collection of documents.

External page or document, or an Internal relative URL option allows you to link to a Web page outside your site, or to one within. Enter the full URL for an external page, document or internal relative URL to which you wish to link.

Be sure to specify the URL as “http://....”
4.5.3 New Page from Template

If you have created the link and now you wish to create a new the page in which to link to, select New Page from Template.

![Insert Link]

This will open the Create Page dialog where you will be prompted to select the destination site for the new page you are about to create.

![Create Page]

Click on the Next button to open the Template Gallery.
Choose from the Template Gallery the template you prefer, so you can begin creating the new page from the template.

4.5.4 New Uploaded File

It is easy to link to a Word, PowerPoint or PDF document. Simply choose the New Uploaded File option.

The resulting Insert Link to New Page wizard prompts you for information regarding the file.
If you know the local full path filename, enter it or click on **Browse** to select the document you wish to upload from your local hard drive or shared directory.

Choose a **Category** for classifying the document. This is important as CommonSpot organizes and stores all uploaded files in a directory. This categorized list is presented whenever you choose to link to an **Existing Page or File**.

Additionally, providing a brief **Description** of the document can serve as a reminder of the page’s intention or a brief summary of the document’s contents. From the **Indexing** drop down list box the user may select either to include in indexes or exclude from all indexes, the new uploaded page.

It is important to know that documents that are excluded from indexing are not included as part of the full-text search index, and are not visible to others besides the owner within the **Page Finder** dialog, the **Page Gallery** dialog, or any **Page Index** elements.

New keywords may be entered or existing keywords may be added to the corresponding textbox. To choose an existing keyword, press the **Select Keyword** button to view the list of keywords.

Finally, a scheduled page **release date** and time can be set authorizing publication of the page at a certain point in time.
Once you have completed the form, click on Finish and CommonSpot will automatically upload the file directly to the server from your local or shared directory.

When a user navigates to the link and selects it, the document’s application (Microsoft Word for example) will launch in a separate window, the file will be downloaded to the desktop and the user will be able to view and interact with the document in its native file format.

### 4.5.5 Link to Image

The user may wish to link to an image. CommonSpot easily facilitates this link through the Edit Link dialog. Images can be uploaded or selected from the Image Gallery that is accessed through the Image Properties dialog launched upon clicking the Next button.

Refer to Chapter 10, Images for more information on including images within elements.

#### Insert Link

<table>
<thead>
<tr>
<th>Link Action</th>
<th>Mouseover Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link to Existing Page or File</td>
<td>Link to an existing page or previously uploaded file that is present either within this site or externally.</td>
</tr>
<tr>
<td>Link to New Page From Template</td>
<td>Create a new web page by selecting an appropriate template from the template gallery and link to the new page.</td>
</tr>
<tr>
<td>Link to New Uploaded File</td>
<td>Upload a new file (e.g. Word, PowerPoint, Excel, PDF) and create a link to the newly uploaded file. Users following the link will download and view the file in its native format.</td>
</tr>
<tr>
<td>Link to Image</td>
<td>Create a link to an image. Images can be uploaded or selected from the Image Gallery.</td>
</tr>
<tr>
<td>E-Mail Link</td>
<td>Create a link for sending e-mail.</td>
</tr>
<tr>
<td>Link to Scheduled Element</td>
<td>Create a link that will trigger the display of a scheduled element on the current page.</td>
</tr>
<tr>
<td>Link to Pop-Up Menu</td>
<td>Create a link that will trigger the display of a pop-up menu.</td>
</tr>
</tbody>
</table>

#### 4.5.6 E-Mail Link

Increasingly there is a need to embed an e-mail link within the context of information, specifically if there is a call to action. CommonSpot’s E-Mail Link allows you to do just that.
Click on Next to bring up the Insert E-Mail Link wizard. Through the E-Mail Link wizard enter the e-mail address to which you wish to link. If you are unsure of the e-mail address, you may select the recipient from the gallery of registered users. Select Finish when the entry is complete.

4.5.7 Link to Scheduled Element

When you link to a Scheduled element you will create a link that will trigger the dynamic display of a Scheduled element on the current page. To link to a dynamic scheduled element, first insert a scheduled element on the desired page and then define one or more contained elements. Be sure to define the contained element as dynamic elements within the Schedule Layout Properties dialog off the Scheduled Element Properties Menu. When you are ready to insert the link to the scheduled element, select the Link to Scheduled Element radio button and click on the Next button.
If there are no defined Scheduled Elements or the Scheduled Elements Layout Properties of the particular Scheduled Element does not reflect the dynamic linking capability, the Insert Scheduled Element Link will remind the user to set up the appropriate elements and layout properties.

The Insert Scheduled Element Link dialog will launch if the Scheduled Elements and Layout Properties reflect the dynamic capability. From this dialog, select the element to dynamically display upon selecting the link. Click Finish, to save the link to the Scheduled element. In the Link Bar example below, the Scheduled element, ‘Tennis Story’ is dynamically linked to the Link Bar entry, ‘Tennis’.

Copyright 1998–2004 PaperThin, Inc. All rights reserved.
The **Link Bar** entry, labeled as 'Tennis', will launch the 'Tennis Story', **Text Around an Image** element, illustrated below.

### 4.5.8 Link to a Pop-up Menu

Before you can link to a Pop-Up Menu, you must first create the Pop-Up Menu. Refer to section 4.5 for details on creating a Pop-Up Menu. Once the menu has been created, you may associate the link to the menu.
To associate a predefined Pop-up Menu with a link, you select the **Link to Pop-up Menu** option, which will display a list of the defined top-level menus available. Select which menu you want to appear when the link is selected.

**Note:** If Link to Pop-Up Menu is selected, the user will need to physically click on the hyperlink to see the pop-up menu; the link itself will not jump the browser to a new page.

In most instances, you will select the usual “Link to an existing page or file” option, and also select a Mouseover event, so that the user sees the pop-up menu when the cursor is placed over the link.

### 4.5.9 Link to Discussion Forum, Category or Thread

CommonSpot integrates with the FuseTalk™ discussion board from FuseTalk, Inc. (www.fusetalk.com). As part of this integration, CommonSpot allows you to create a link to a discussion forum, category, or thread. This can be done via the Common Link Dialog for any hyperlink element type. When creating a link, you are presented with a set of radio buttons under the Link Actions tab heading. At the bottom of this list is an option to link to a discussion forum. An example of this is shown below.
After selecting this radio button and clicking the Next button, you are presented with a dialog that allows you to select from the available discussion forums in a tree-like format. Discussion threads are shown under their appropriate category, and each category under the appropriate forum.

Clicking on the desired forum, category or thread will select it. Clicking the Finish button will complete the link creation. If a user clicks on the created link, they will be brought to the selected forum, displaying the item you selected from the dialog.

A best practice would be to open this discussion link in a new window. This will provide the user with easy access to both the discussion and the main site.

4.5.10 Mouseover Action

A Mouseover event is the most common method of invoking a Pop-up Menu. To add this behavior to your link, click the “Mouseover Action” tab at the top of the Link dialog. You should see a dialog similar to the one below.
Upon moving the cursor over a link, you have three options.

**Show Status Bar Text** – Displays the text of your choice in the browser status bar, providing no other functionality has removed the visibility if the status bar.

**Show a Scheduled Element** – Allows you to force the display of a particular scheduled element component when the cursor is over the link.

**Show Pop-up Menu** – Allows you to select which pre-defined top-level menu you want to display when the cursor is on the link.

Once you have made your selection, you can click next to define the rest of the link parameters. Once the new link had been published and approved, you can test the pop-up.

Note: Pop-up menus are only visible in Read mode; they are suppressed in Author mode.

Once in read mode, you should be able to hover over the link without clicking it, and the pop-up will appear.

### 4.5.11 Link to Same Page in Different Language

In sites where multiple languages are used, the Common Link Dialog provides the author with the ability to link to the same page, but in an alternate language. This allows for easy switching by the page viewer between the various language–specific versions of content.

The drop-down list of languages will only show those languages that have been setup for the site.
4.6 Creating Pop-up Menus

The pop-up menus function within CommonSpot allows for the creation of JavaScript “pop-up” style DHTML menus. These menus will become visible under certain conditions, such as the cursor passing over a link or image.

These menus are bound to a CommonSpot page or template. As such, the most popular use of pop-up menus is in the creation of CommonSpot navigation templates. These items can be included in a parent template, and appear on all pages that derive from the template. Once defined, a pop-up menu can be activated by any hyperlink element, such as a Simple Link element or an Image.

4.6.1 Creating a Pop-Up Menu

To create a new pop-up menu, the user must have Author rights for the page or template that will contain the pop-up menu. Once in Author mode, you can maintain the menus by selecting the “Manage Pop-Up Menus...” option from the Page and Template Management page indicator menu.

Once activated, you will see the main Pop-Up Management dialog. From here you can maintain new top-level items, sub-items, and the properties for each. You can also access the page level properties that control parameters like colors, timing, and positioning of the menus.
The top-level menu items (and their child components) are bound to a hyperlink element. To add a new top-level item, simply click the “Start a new Menu” link at the top of the dialog.

In this dialog, you provide the following information for the new menu:

**Menu name**
The logical name of this particular pop-up menu tree. This is the name that will be later used to refer to this menu within the Common Link Dialog.

**Menu width**
The width of the menu in pixels.

**Position relative to link**
This option allows you to select where the pop-up menu will appear in relation to the hyperlink element it is associated with. Selecting an option from this list will negate the **Left position** and **Top position** selections below.

**Left position**
This allows you to select the position of the pop-up menu either relative to the cursor position or absolute from the left hand side of the page (in pixels). Selecting an option from the Position relative to link list above will gray-out this option.

**Top position**
This allows you to select the position of the pop-up menu either relative to the cursor position or absolute from the top of the page (in pixels). Selecting an option from the Position relative to link list above will gray-out this option.

**Display sub-menus indicator image**
This allows you to control the display of the image indicating a pop-up menu item had sub-items beneath it.

NOTE: Pop-up menu position relative to the underlying hyperlink element operates correctly under Microsoft Internet Explorer, but for Netscape will default to positioning relative to the cursor.
User page level properties
In this dialog you can also opt to either accept or over-ride page level properties for the menu.

Once you complete the form above and click Finish, and the Manage Pop up Menus  dialog will refresh, showing your new item.

4.6.2 Add a New Item to Pop-Up Menu

You can add a new item to the menu by clicking the pencil icon next to the new item, and selecting the “Add New Item...” link as shown below.

** Note the Work In Progress indicator next to the new menu item below. Changes to the pop-up menu must adhere to approval rules just like any other page element.

The Edit Menu Item dialog allows you to give the menu items a name, specify the page or URL to link the menu item to, and other item properties. Once defined, clicking “Finish” will save your changes.
4.6.3 Add a Sub-Menu Item

To add a sub-menu item, click the pencil icon of the menu item you wish to add a sub-item to, and select the “Add Sub-Menu Item...” link as shown below.

You define the sub-item using the same dialog box as you did for the main item. The menu item options also allow you to move the item within the menu and add Personalization, or Schedule the menu item to appear based on certain criteria such as date or other criteria.

You can continue with this process until you have developed your complete set of menus. Once complete, you are ready to bind the menus to hyperlink elements within the page.
Note: The menus will not be visible from a user interface perspective until you have bound them to a hyperlink-type element.

4.6.4 Pop–Up Menu Inheritance

It is considered a best practice to manage Pop–Up Menus on a template which ensures the continuity of the menus throughout your site. In order, to enforce restrictions preventing users from overriding pre-defined Pop–Up Menus on a page you should enable “Inheritance Security” by clicking the icon on the main menu item in the Manage Pop Up dialog from the template. You will receive a dialog similar to Template Inheritance Security and receive the following options:

Click the “Change” button to change the Restrictions for this Pop–Up Menu. You will then be presented with a dialog offering the following options:

Author – restricts users from gaining access to the pop-up menu on pages derived from the template

Edit – allows users into the pop-up menu but restricts them from changing any of the links or items.

Design – restricts users from changing any of the layout parameters like colors and fonts

It is also considered good practice to “lock down” Pop–Up menus on the template by using these settings.
4.6.5 Restore Menu Content/Properties

If for any reason (you did not lock-down a pop-up menu) and inheritance has been broken for a particular menu item, you can use the “Restore Menu Content/Properties” option from any menu item to force the page to revert back to the original content/properties defined at the template level.

4.7 Custom Elements

A Custom Element is a powerful and flexible tool for displaying and easily reusing content within a site. There are two types of custom elements, Global and Local elements. Custom elements are created in the Administrator, but once created can be easily implemented by non-technical users. Full details about how to create custom elements can be found in the Administrator Guide.

By themselves, custom elements do not specify any display format (aside from built-in label/value “dump” format). The rendered output for a custom element is defined in one or more Element Templates associated with the Custom Element. Authors can select what Display Template they wish to use for rendering the data contained within a Custom Element instance.

The Display Templates not only contain formatting HTML, but also the data associated with the Custom Element instance. The output formatting of these data field values – the way in which the data is displayed – is controlled by Field Render Masks. These small ColdFusion scripts can be given the data from the field, and generate output HTML suitable for inclusion in the entire Display Template output. Once or more Field Render Mask can be defined for a given field.

This combination of Custom Element, Display Template, and Field Masks creates a powerful toolkit for developers looking for extend CommonSpot, as well as provide an easy to use interface for site content contributors.

4.7.1 Custom Element Types

There are two types of Custom Elements, Local and Global.

- **Global Editing**: element data can be viewed and edited on multiple pages. Data is not versioned.
- **Local Editing**: data can be viewed on multiple pages but editing restricted to original page. Data is versioned.

Local elements behave much like other standard elements in CommonSpot. A unique instance is inserted into a page, and it becomes bound to the page, adhering to the security and approval rules that have been defined for that page. The content of a Local element has its content indexed along with the page content, as with any other CommonSpot element.
Global elements are inserted into a page, but are not logically bound to it. When a Global element is placed on a page, the author either adds a new data record, or selects from an existing data record to display on the page.

The changes to a Global element instance are not versioned like standard page element or Local Custom Elements. Global elements can optionally have their content included in the full-text index for the site.

4.7.2 When to use Global vs. Local Custom Elements

Each type has its advantages and disadvantages. While there are no clear-cut rules to fit all scenarios, here are some general guidelines:

Use Global Templates when...

You want to control the data for an element in one source, essentially reusing content throughout a site.

You want authors to be able to select from existing “records” or instances of the data for an element.

Use Local Elements when...

You want changes to the element version-controlled like all other elements on a page

You simply want to capture specific structured data (field-value pairs) and render them out using your own Element Display Templates, but don’t care about multiple instances of the data.

Note: Custom Elements are created in the CommonSpot Administrator. Refer to the CommonSpot Administrator Guide for details on creating custom elements.

Once a custom element has been created, it can be placed on any CommonSpot page. To add a custom element to a page, select the desired element from Custom Elements section of the Element Gallery. In the example below, we have created several custom elements that are available for use on the PaperThin web site.
Select the custom element you wish to display on the page.

### 4.7.3 Creating Custom Element Data

Once you have placed the element on the page, you can either add data to the element, or select data that has been added to the element previously. To add new data, click on the ghosted text, as shown below, or click on the pencil icon and select **New Element Data**. Refer to the next section to select existing data.

You will then be presented with the data entry screen for the custom element. Depending on the amount of data that is included in the custom element, it may make sense to separate the fields into tabs to make it easier to use. In our example below, we have created multiple tabs, organizing the fields of content logically.
Click on each tab in order to add the associated content for the record. Once you have added all of the content for the record, click Finish.

4.7.4 Selecting Custom Element Data

Once you have created the custom element data, you can select the data that you wish to appear on your page. You can select certain records to appear on one page, and other records to appear on a different page, based on criteria you define. This is particularly useful, as you may want to display certain records or portions of records on one page, but different records on other pages. Examples might include:

Sporting events – display the full details of a sporting event (event type, location, opposing team, game time, etc) on one page, and abbreviated details (location, date) on another page

Product Information – display full details about a product (title, category, multiple images, full description, price, size, etc.) on one page, and summary details (product name, thumbnail image) on another page

The options are as flexible as you want them to be. To determine which records will appear on your page, click on the pencil icon and choose Select Rendering Mode:
You will be presented with two options. If you simply wish to display the most recently entered data, and have the ability to edit that data, choose the first option.

Alternatively, you may wish to select previously entered data and apply filter criteria to limit the display results. When you select the section option, **Display existing element data (content reuse)**, you will notice that two additional tabs are displayed, and you are presented with the option to either select results based on filter criteria or display all records, or manually select the data you wish to render.

If you wish to manually select the records, click on the **Select Data** tab to select the desired records.

You will see all of the records that have been created, and by checking the box next to the desired records, you can manually select those you wish to display. With proper permissions, you may also see icons shown below for editing, deleting, or added element data. To add new data, select the gray text at the bottom on the dialog. To delete a record, simply click the X icon in the record row. To edit a record, just click the pencil icon in the record row. Clicking the column header will
re-sort the data displayed. If more records are defined than can display on one page, the dialog will paginate the data automatically.

Additionally, custom element instances can be added, edited and deleted from the “Select Data” and “Preview” tabs. To add an instance click “Click here to add new element data”. The same dialog that appears when you click “New Element Data” as described above. The data is added and the above main window will refresh and show the new data. Clicking on the “pencil” icon in the column for a Custom Element Instance will open the “Edit” window and allow you to edit that instances data. Finally, to delete an instance simply click on the “x” icon next to the instance you would like to delete.

If the Custom Element data displayed is a “Local Custom” element, clicking on the “pencil” icon will produce the following dialog:

Clicking “Save Settings and go to page” will save the current filter settings from the “Select Rendering Mode” dialog and then open the page where the local custom element resides in the main window. Clicking on “Go to page” will simply close the “Select Rendering Dialog” WITHOUT saving the changes made in the current session and open the page where the local custom element resides in the main window.

If you would rather display results based on specific parameters, select the Filter tab. The filter allows you to build a query expression to determine which records will be displayed. In the example below, we are selecting all records where the sport equals basketball and the event date is less than today, and have opted to sort the results by event date, descending. The filter option
is a powerful feature, and allows you to precisely define which records appear for the instance of the custom element.

You can choose to either display all records, or select a subset of records. If you select ‘Show subset of records’ you can build a query to narrow your results, as shown above (ex: all basketball games in the past 6 months). To view a preview of the records returned by the filter, click the Update button and the Preview tab will be updated to display those records.

If you are using the Query-by-Example element, you can also choose to apply the filter criteria defined for the element.

You can view all records by clicking Reset, or by changing your filter parameters. When you have finished defining your Filter parameters for the page, click OK.

### 4.7.5 Using a Display Template

Display templates allow you to define which fields and which records will display, and define the layout, color, font and style properties for the custom element.

Once the data has been selected, a display template for the element can be selected. Selecting the Layout Properties for the custom element allows the page author to choose from the pre-defined display templates for the element. Click on the icon, and select Layout Properties. The default template for the element will be pre-selected the first time the element is inserted.

Detailed instructions for creating display templates can be found in the Administrator Guide.

In the Layout Properties, select the desired display template from the available list of templates, as shown below.
By clicking on the Results Output tab, you can opt to limit the number of results that display, and/or randomly display results from the set. This option is useful if you have lots of data, but a limited space in which to display it. For example, you may have several press releases, but want to display only the 3 most recent releases. Or you might have several images, but only want to display one at a time on a particular page, randomly.

Once the data has been selected and a display template chosen, the custom element will render the data into the selected display template, displaying the results on the page as shown below.

## 4.8 Custom Element Render Handlers

The Custom Render Handlers are simple ColdFusion modules that provide customized rendering for a particular element. Rather than relying on the standard output for an element provided by CommonSpot, a developer can create their own module that combines their own HTML and the data saved in the CommonSpot element. The handlers are managed from within the consolidated Element
management section of the CommonSpot Administrator. See the CommonSpot Administration Guide for details on creating Custom Render Handlers.

Within the Element Management Dialog, a custom render handler can be registered for an element type. Once a handler is registered, each supported element provides a new menu option off of its Properties icon allowing the content author to specify either the standard output or one of the registered Custom Handlers. This option is provided for the following elements: Formatted Text block, Simple Text block, Link, Link Bar, Breadcrumb, Page Set Navigation, Page Index Element, Page Set Index, Page Set Table of Contents, and the Search Results element.

The example below depicts the Custom Render Handlers option, accessed via the Page Index Properties icon for the Page Index element.

Upon clicking the corresponding menu item, the following dialog presents an example of a list of Custom Rendering Handlers. From there, simply select the desired rendering format by clicking on the radio button adjacent to the desired option. Each option provides a different, predetermined way in which to render, in this case, the Page Index element on the page.
Click **OK** to view the resulting **Site Map Page Index** option, presented below.

- **news**
  - PC Magazine features MotorCycleWorld.com
  - PC Magazine Review
  - ASP Partnership with CFHosting
  - Version 2.5 Announcement
  - Look at some of our recent new customers.
Chapter 5  Architecting of a Page

Before you can begin creating pages or templates, it is important to understand the basic architecture of a page. Chapter 5 discusses the Tabular Layout element and how to create a foundation from which you can begin to insert elements to create the page and layout you desire.

5.1 Contents

- Overview
- Tabular Layout Element
- Cell Properties
- Multiple Elements Per Cell
- Inserting, Moving and Deleting Rows and Columns
5.2 Overview

It is advisable to give some thought to the architecture or layout requirements of your intended page and content before plunging ahead, as it is one of the most important first steps. The architecture of the page begins with the most fundamental and basic of elements, the table. The Tabular Layout element provides the basic underlying page structure (cells) in which elements are placed, and is included in each and every template and page.

5.3 Tabular Layout Element

The Tabular Layout Element is a construct of rows and columns, a table that contains cells. It is into these cells that elements are placed to create the layout of the page. The Tabular Layout element can also be used to create a table within a table (or cell).

To begin constructing the table, click on the Tabular Layout icon to open the New Tabular Layout Properties.

The New Tabular Layout Element Properties wizard is opened the first time you select the Tabular Layout icon. The New Tabular Layout Element Properties wizard is presented this first time because it is necessary to have a starting point from which to build the table, even if at a minimum you build a one cell table (1x1).

Notice the wizard displays the number of rows and columns as equal to 1. These are not default settings. If you wish to create a 1 x 1 table, then you need to do so by clicking on OK to accept the settings.
On the page you are “authoring” the resulting table will be rendered as dictated by the settings. The first time you create a table, is the only time you will see this particular wizard.

After the table has been created, you can change any of its properties by clicking on the Tabular Layout Properties icon and selecting Layout Properties.

Tabular Layout Element Properties wizard allows you to apply a border, set the width and height of the table, assign background and border colors if so desired. To add more rows and columns, it is necessary to do so from the Cell Properties menu. The next several sections discuss the Tabular Layout Properties dialog below.

In order to create and edit Tables using the Rich Text Editor, click on the icon to insert a new table.
Once the table is created, the list of table management tools is accessible and table, row and cell properties can be managed. These features are inaccessible (grayed out) until a table has been created/selected.

### 5.3.1

### 5.3.2 Layout Properties

Through the Layout Properties wizard you will choose options that will dictate how the page will be built. It is important to note that any option you choose will become the default setting which can be later overridden at the cell level.
5.3.2.1 Description (Summary)

Provides a summary text description of the table contents. This is required for compliance with accessibility standards in Section 508 of the Rehabilitation Act.

5.3.2.2 Size

Select the number of columns and rows for your table.

5.3.2.3 Layout

Select from the drop-down box the alignment of the table on the page– left, center or right.

Float controls vertical placement of the table on the page.

Border Size is the width of the border, measured in pixels. If you want to place a border around the table or any of its cells, this field must be set above zero (0).
If the setting is zero (0), you will not be able to create borders either in the Table Element Properties wizard or in the Cell Properties dialog. In this example, it is set to one (1) pixel.

**Cell Padding** is the minimum number of pixels to leave between the cell’s content and the cell boundary.

**Cell Spacing** is the number of pixels of empty space to leave between cells.

### 5.3.2.4 Minimum Size

The minimum width is the minimum screen width you want the table to occupy. Setting this field to 100% ensures that the table will occupy the maximum available space.

The minimum height is the minimum screen height the table should occupy. Setting this field to zero (0) automatically adjusts the table to the height of whatever content it contains.

### 5.3.2.5 Custom Colors

Choose a color for the background and border by clicking on the \(\downarrow\) down arrow symbol to open the available color palette. Select a color by clicking on it. The color’s identity code is displayed in the box to the right of the color.

It is important to note that the settings chosen create table-wide defaults. These defaults can be overridden at the cell level, through the Cell Properties dialog.

The **Background** color fills in the entire table. The default Background color is white.

The **Border** color applies to a flat border of a solid color whose width is the number of pixels set in Border Size. If the setting is zero (0), no border will show up even if you select a color. If you do not select a color, the default border color is black.

**Light Border** and **Dark Border** are used together to create a 3-dimensional border effect, so that the table looks as if it is on a raised platform or depressed into the surface.

For a raised effect, the light color appears on the upper and left borders, the dark color on the right and lower borders.

For a depressed effect, the dark color appears on the upper and left borders, the light color on the right and lower borders.

If no color is selected for either the Light/Dark Border or for the Border color, and the Border Size is set to zero (0), the default is a raised black/gray border. If a border is set for the table, a one-pixel border will be applied to each cell as well.

### 5.3.2.6 Background Image

You can also dress up the table with a background image. Press the Select Image button that will provide the tools for altering the background image.
5.3.2.7 Miscellaneous

If you check the box to Allow insertion of multiple elements per cell you will be able to place more than one structural element in any of the cells of the table.

If the box is unchecked, each cell will be restricted to a single layout or formatting element.

Otherwise, click Finish to return to the table. The Tabular Layout or table is rendered as defined by its settings on the Web page. The table below consists of 2 rows and 2 columns. The border size is equal to one (1) and the minimum width of the table is set to 600 pixels.

Once you have created your table you can begin inserting elements into each of the cells, or you may prefer to modify the table by adding more rows and columns.

In the Rich Text Editor, use the Toggle Border icon to turn on or off borders on tables within a page. This is a global page setting, applied to all tables on the page (i.e., borders are turned on for all tables, or turned off for all pages).

5.4 Cell Properties

Each cell has its own properties. Access to an individual cell’s properties is accomplished through the Cell Properties icon. Click on the icon to open the menu and select Cell Properties. You will be presented with the Cell Layout Properties wizard.
5.4.1 Cell Layout Properties

The Cell Properties wizard contains many of the same settings found in the Table Properties wizard, but here they apply to the individual cell only. Settings at the table level govern all the cells in a table by default. Settings at the cell level override the defaults for that cell. The components that make up the Layout Cell Properties dialog are pictured and described below:

5.4.1.1 Layout

Specify the Horizontal Alignment (right, centered, left) of the cell’s content with respect to the cell boundaries.

Specify the Vertical Alignment of the content within the cell.

Enter the Vertical Space Between Elements from 0 – 10. Check No wrap to keep the text inside the cell from wrapping. If this option is not selected, the text in the cell might be wrapped.

To Hide Cell Contents, check the box accordingly.
5.4.1.2 Custom Colors

To set a custom color, click ▼ to open the color palette and select a color by clicking on it. The color's identity code is displayed in the box to the right of the color.

Note: a setting here overrides the table default settings for this cell.

The **Background** color fills in the entire cell.

The **Border** color sets a solid color border one pixel wide for this cell. The default is black.

Note: if the **Border Size** setting in the **Table Properties** dialog is 0 pixels, no border will appear even if you select a color here.

**Light Border** and **Dark Border** are used together to create a 3-dimensional border effect, so that the cell looks as if it is on a raised platform or depressed into the surface.

For a raised effect, the light color appears on the upper and left borders, the dark color on the right and lower borders.

For a depressed effect, the dark color appears on the upper and left borders, the light color on the right and lower borders.

5.4.1.3 Background Image

You can also dress up the cell with a background image. Click the **Select Background Image** button to bring up the **Image Properties** wizard to add the background image from the image gallery. Otherwise, click **Finish**.

5.4.2 Cell Width, Height and Span Properties

The **Cell Width, Height & Span Properties** wizard allows you to set the minimum width and height of the cell and enter the number of rows and columns the cell should span across.

5.4.2.1 Minimum Size

To set a minimum width and height for a cell, select **Cell Width, Height & Span Properties** from the **Cell Properties** menu.

Type in the **Minimum Width** in pixels or in percent, you want this cell to occupy in the table. Note that it has been set to 50% of the table width.
Type in the **Minimum Height** in pixels or in percent, the cell should occupy. Setting this field to zero causes the cell to adjust to the height requirements of its contents.

<table>
<thead>
<tr>
<th>Cell Width, Height &amp; Span Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Minimum Size</strong></td>
</tr>
<tr>
<td>Minimum Width: [ ] in pixels  [ ] in percent</td>
</tr>
<tr>
<td>Minimum Height: [ ] in pixels  [ ] in percent</td>
</tr>
<tr>
<td><strong>Cell Span</strong></td>
</tr>
<tr>
<td>Number of Rows Spanned: [ ]</td>
</tr>
<tr>
<td>Number of Columns Spanned: [ ]</td>
</tr>
<tr>
<td>[Cancel]</td>
</tr>
<tr>
<td>[Finish]</td>
</tr>
</tbody>
</table>

Unless it is specified, the width and height will be determined by the content requirements and will render at 100%.

### 5.4.2.2 Cell Span

Enter the number of **Rows** the cell is to span across.

Enter the number of **Columns** the cell is to span across.

Set these settings higher than one if you want to expand the current cell to span across neighboring rows or columns.

Here are the results of the cell spanning across one row and one column. Note that in the illustration below the **Tabular Layout Element Properties’ Border Size** is set at two pixels in order to view the borders around the cell.

### 5.4.3 Cell Style

If style sheets are implemented on the current page, another option will appear that allows an author to select a style class to assign to the current cell.

Once selected, a dialog will appear like the one shown below. It will allow the author to select the class name from the list to apply to the `<TD>` tag for the cell. There are options provides to...
repeat the <TD> class for all cells in a column or row. The classes available in the dropdown list are defined in the Site Administration section of the Admin module.

5.4.4 Row Style

This option will only appear when style sheets are in effect for the current page or template, and functions similar to the Cell Style option described above.

When selected, a dialog appears allowing the author to select an available class to apply to the <TR> tag for the table row. This dialog also provides an option to repeat the class assignment for all <TR> tags in the current table. The classes available in the dropdown list are defined in the Site Administration section of the Admin module.

5.5 Multiple Elements Per Cell

Whether you choose to use a separate cell for each element or to have multiple elements appear in the same cell, depends on how you plan to layout the page. In CommonSpot, a cell can accommodate more than one element if the “Allow insertion of multiple elements within a cell” is checked in the Tabular Layout Properties dialog, accessible off Tabular Layout menu.

Several important points to consider are that multiple elements in a cell stack vertically. If you want to place elements side by side on the page, separate cells are necessary. If you need to dictate and control the spacing around the element, you may wish to place a single element per cell.
If the box **Allow insertion of multiple elements per cell** is checked, you will be able to place more than one structural element in any of the cells of the table.

If the box is unchecked, each cell will be restricted to a single layout or formatting element.

### 5.6 Inserting, Moving and Deleting Rows and Columns

#### 5.6.1 Inserting Columns and Rows

Suppose you want to place a Text Around an Image element on the left side of the page and a Bulleted List emphasizing the main points on the right side of the page. These are two different kinds of formatting functions, and CommonSpot has an element designed specifically for each.

Since you will be using two different elements, you may want to put them into separate cells. The sample table above has only one empty cell. To add more cells, you can add either rows or columns. Since you want a side-by-side arrangement for your two elements, it makes sense to add a column. This action is done from the Cell Properties menu.

Click on the Cell Properties icon at the top of the cell and select *Insert/ Copy Column(s)* from the menu.

The result is the Tabular Layout Element – Insert Column wizard where you will be able to designate the number of columns to insert and if you want to copy the contents of the column.
5.6.2 Moving Columns and Rows

From the Cell Properties icon, to move a column or a row, select one of the following menu items: Move Column or Move Row.

In this example, move column, is selected and depending on where the column resides, one of the following two Layout Move Column dialog appears.
The user is instructed to either move the column to the left or the right–most position on the table or to move the current column by one column to the left or right.

The user may choose to adjust the number of columns to move to the right or left by changing the Number of columns to move left or right indicator, again depending on the column’s position within the page.

When complete, click Finish to move the column.

To move a row, click on the move row(s) menu item and the Layout Move row dialog will appear guiding the user through similar steps as for moving a column but with dialog tailored to a row as illustrated below.

### 5.6.3 Deleting Columns and Rows

To delete a column(s) or a row(s) go to the Cell Properties icon and select one of the following menu items: Delete Column or Delete Row. Upon selection, a dialog will prompt the user to confirm whether the selected action is appropriate.
Click OK to proceed with the deletion or Cancel to abort the deletion. If the row or column that you are slating for deletion contains data, bear in mind that the data in those rows/columns will also be deleted along with the deleted row or column.
Chapter 6 Managing and Creating Pages

Chapter 6 incorporates the fundamental template and element infrastructure to build and manage pages within a site. In this chapter, we will focus on page creation and page attributes that allow the user to manage pages effectively, including the following.

6.1 Contents

- Page Creation
- Standard Metadata
- Custom Metadata
- Cascading Style Sheet Support
- Activating and Inactivating a Page
- Scheduling Publication of a Page
- Multi-Language Support
- Copy/Move/Rename/Delete Pages
- Page Properties
- Page Render Options
- Page Margins, Colors & More
- Page Security
- Content Expiration & Freshness Reminders
- Version History
- Upload New Document
- External Pages
- My Pages
- Work Requests
- Link Management
- Clear & Update Page Cache
6.2 Page Creation

A page’s structure relies on the underlying template to drive the layout characteristics of the page. To create a page, select “Create New Page” from the Page & Template Management menu icon or navigate to createpage.cfm in the desired site.

6.2.1 Creating a Page

Create New Page menu option is accessible in both Read and Author mode (shown above in Read mode.)

Upon selecting the Create New Page menu option, a dialog containing a list of subsites is displayed. Only those sites or subsites in which you have site-level Page Creation permissions will be displayed. If you do not have Page Creation rights within the subsite you wish to create a new page, contact your Site Administrator to have the appropriate permissions assigned.

Once you decide upon the respective subsite for your new page, click Next, to proceed to the subsequent dialog in the Page Creation wizard. Of course, you can always click Cancel, to abort from creating a new page.
The next dialog in the page creation chain is the Template Gallery dialog. This dialog, pictured above, contains descriptions and thumbnail illustrations of the standard CommonSpot templates plus a categorized listing of other custom templates. The list of available templates may be different for each user based upon his/her security permissions. For example, a user within marketing may see the standard templates plus the marketing templates while an engineer may see the same standard templates and only the engineering specific templates.

Refer to Chapter 13, Security and Distributed Administration within this guide for more information regarding the restriction of template use.

6.3 Standard Meta Data

After choosing the appropriate template, the next dialog is the Create New Page dialog. This dialog prompts the page author to complete a number of standard meta-data fields for the page. The screen shot below shows the Create New Page dialog.

The Create New Page dialog encompasses two tabs as shown in the following example. Note that the layout of the Create New Page dialog is fully customizable, and can be modified by your site Administrator. Many of the fields in the dialog can be required or optional, and may display on the Main or Other tab. The example below shows a layout for the Create New Page with just two required
fields on the **Main** tab, and the optional fields on the **Other** tab. Your organization may opt to include all of the fields on the Main tab and not use the Other tab, or you may wish to place some fields on the Main tab, and the remainder on the Other tab – the choice is yours.

**Note:** Refer to the CommonSpot Administrator Guide for details on configuring page creation properties.

The **Name** provided will be used to generate the page’s URL. Each page within CommonSpot has a separate distinct and addressable URL, allowing for easy bookmarking and direct user navigation. Spaces and other punctuations will be converted to underscores when generating the full URL name. Pages within CommonSpot have a .cfm extension. The administrator may set a maximum length for this field, and require the name to be entered in only lowercase letters. The **Title** is the title of the page. The administrator may determine a maximum length for this field. The **Title Bar Caption** is the title that will appear in the browser’s caption bar.

| NOTE: | If you are using CommonSpot’s Static Site Generation feature, then the Dynamic Content field may also appear. The Static Site Generation module is designed to further extend CommonSpot’s scalability, performance and total cost of ownership. By separating the process for handling dynamic and static content, a more scalable, reliable and higher performance site can be realized. In looking at most sites, the majority of the content can be classified as ‘semi–static’ in nature, meaning that once a piece of content is published it does not change until it is edited and republished at a later time. Under the Static Site Generation model those pages that are semi–static in nature, and have no other dynamic components, will be generated into straight HTML at publish time. These static files can then be served more cost effectively at a high performance from one or more straight HTTP servers. Generally the auto–detect setting will be appropriate for your page. However, it is recommended that you refer to your Site Administrator and the CommonSpot Administrator Guide for further details on this feature. |

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The **Description** provides a brief summary of what is included in the page. If enabled, the author can assign the page to an existing **Category**, or create a new Category. If the user has subsite level permissions to create page categories, then the user will have the ability to add **New** categories, otherwise these can be added by your site Administrator.

If targeted audiences have been defined in the CommonSpot Administrator, an Audience selection box will be displayed allowing the page creator to choose the appropriate audience. Typically, ‘all users’ will be selected within the **Audience** drop down list box, however, if the user wishes to target a specific audience, then the appropriate audience should be selected at this time. If the particular audience does not appear within the drop down list, then contact the administrator of the site to create the audience in the administration module. To learn more about **Targeting** a specific audience, refer to Chapter 9, Personalization.

**Keywords** can be identified to help future users leverage information found in this page and to enhance search results. CommonSpot automatically generates meta–tags for the **Keywords** and **Descriptions**, which are utilized by both CommonSpot’s internal search engine as well as Internet search engines. For additional information, see Chapter 14, **Keywords in the Knowledge Sharing and Discovery Tools**. It is advisable that unless trained accordingly, that page authors are limited to selecting from existing keywords using the button on the form. This will prevent the generation of several variations of the same keyword(s) that might prove confusion.

Selecting a **Publication Date** allows authors to schedule the release of a page at a future date and time. Click on the Javascript pop–up menu to select the publication and expiration dates. The javascript pop–up calendar is found throughout CommonSpot in dialogs wherever you are able to select a
date. Examples include setting a future publication or content expiration date, specifying date ranges in a page index element or custom element parameters, setting date ranges for display of a scheduled element, and in many other CommonSpot dialogs.

Use the arrows to select the appropriate date, and use the drop-down boxes to set the time. The > and < arrows advance by month, and the >> and << arrows advance by year. Click on the date to select it. Click on the – button in order to view a display of the calendar with Saturday/Sunday next to each other. Once you have selected the appropriate date and time, click the X to close the window.

Additionally, the author of the page has the ability to designate whether the page should appear in the various index mechanisms or not. If pages are excluded from all indexed the page will not show up in the page gallery, Page Index element or in the CommonSpot’s search engine.

The Confidentiality section displays a drop down list of user definable options indicating the confidentiality of the page. This information is typically more useful for corporate intranet sites, as apposed to Internet sites.

The Render Options section will only be displayed if the base template designer has defined Render Options. Render Options provide for flexibility in how the base template renders, allowing different styles to be defined for the same template. For more information regarding Render Options, refer to the Page Rendering Options section described later in this chapter.

The Expiration allows the author to indicate whether the content does not expire, or expires on a specific date. The Freshness Reminders allow the author set a reminder date to review the content.

The page creator may or may not have administrator rights for the newly created page, whether the Page Owner receives or by default receives Administrator privileges is controlled at the default page level security options for the designated site within the CommonSpot Administrator.
6.4 Custom Metadata

There may be occasions where the standard metadata obtained does not include specific information preferred or necessary. Custom metadata fields can be added through the CommonSpot Administrator to capture this vital information, and this metadata can be used to determine which content is displayed on a page. If custom metadata has been created, then the appropriate metadata fields will display in the Custom Page Information dialog, prompting the page creator to enter the information requested. In addition to the ability to bind custom metadata to subsites, templates and page categories, it is also possible to bind metadata to document types, render handlers, image files and external URLs, extending the ways in which you can reuse content. Metadata fields can be grouped for easier entry, fields can be set to have default values, and can be joined so that values from an existing field can be reused.

If custom metadata has been bound to external URLs or image files, for example, then the author will see additional dialogs prompting the entry of these fields upon upload of the external URL or image file. There are a great many ways in which custom metadata can be employed in order to efficiently reuse and personalize content.

Note: Full details about how to create and bind custom metadata and can be found in the CommonSpot Administrator Guide.

The example below demonstrates how custom metadata can be associated with the creation of a page. In this example, there are two tabs of custom metadata associated with the page that is being created. The first tab presents the custom metadata field, “Include in Site Map?” which if checked will automatically cause the page to be included in the site map.

On the second tab, custom metadata associated with the template from which the page is created is presented. In this case, the template is a news template, and several pieces of metadata can be set by the author. This metadata can be used by page index elements to determine whether the news story should be included on the home page of the site, or in the newsletter. In addition, the audience(s) for the news item can be defined here, as can the type of new story (customer news, partner news, announcement, etc.). Finally, in this example the author can also create an alternate title for the news item and an abbreviated summary, for display on a page where space is limited.
To view the newly created page, click on the Finish button. The submit button, Prev, returns the user to the standard metadata form, while the Cancel button, exits the dialog box without saving.

The page index element below shows how the metadata associated with the news template above is utilized to determine which data to present:

6.5 Cascading Style Sheet Support

Use of cascading style sheets helps to ensure a consistent look and feel throughout a site. Changes to style, fonts, sizes, etc. can be made in one place and incorporated automatically throughout all pages that utilize the style sheet. A working knowledge of how to create and use style sheets is assumed.
In order to use style sheets, they must first be registered in the CommonSpot Administrator. Please refer to the Administrator Guide for details on registering style sheets. Once style sheets have been registered, users can apply then sheets to pages and/or templates. (For additional general information on cascading style sheets, refer to Macromedia’s HTML reference.)

6.5.1 Applying Styles to an Element

In order to apply styles to an element, style sets must be created and the appropriate style sheets assigned to them. Style Sheets are accessed on the Page and Template Management menu, when the user is in Author mode.

Once you select ‘Use Style Sheet’ in the dialog above, the following screen will allow you to create the Style Sheet. Click on the grayed text to add a new Style Sheet Set.
Provide a name and description for each style sheet set created. This information will be used to display the available style sheets once created.

Click on the pencil icon to **Edit Style Sheet** (change name or description), and add a new Style Sheet to the selected set. (If the number of style sheet sets you have created becomes large, you can also use the **Insert, Move and Delete** utilities in this menu to better organize them for use.)

Click on the grayed text to **add a new style sheet** to the selected CSS set.
You may select style sheets that have been registered, or select an explicit file, by giving the full path name of the style sheet file. Click Finish to save, or Cancel to exit. The style sheet you selected will now be displayed.

Once style sheets are activated and selected for a given template, they can be applied to individual elements. By selecting the icon on a given element, there will be the option of “style” where font properties used to be for all elements that have a class registered.

By selecting the desired style class, the properties of that class as defined in the style sheet will be applied to the element or subcomponent:
The class “red” as defined in the style sheet (color:#FF0000; font-size:large; text-decoration:none;) will now be applied to the text block header, as shown below.

6.5.2 Scheduling Styles

The application of style sheets to a template can also be scheduled and personalized on the same criteria that other CommonSpot elements can be scheduled. By navigating to the style menu for the template and choosing to edit the style sheet set, scheduling can be chosen as an option:

Choosing the Schedule/Personalize option will display the scheduling wizard and allow parameters to be set for the style sheet set. For example, a style sheet set on a base template...
could be scheduled to appear by subsite, thus allowing a developer to control the styles used on each subsite.

**NOTE:** The order in which the style sheets appear within a set, and the order of the sets within a page are very important for scheduling style sheets. When specific schedules are in place, CommonSpot will look down the list of entries from top to bottom, looking for a match between the current environment and the items schedule parameters. Therefore, it will select the first item in the list that matches. As a best practice, it is suggested that the more specific or restrictive scheduled items be placed at the top, and then adding the more general items as you move down the list.

### 6.6 Activating and Inactivating a Page

Upon creating a new page, the page will automatically be in the inactive state. This status insures that a new page presumably under design and development will not be listed within the Page Gallery, Page Finder or Page Index options within CommonSpot. The green banner pictured below is presented across the top of any page that is inactive. The user has the option of activating the page at any time by clicking the **Activate Page Now** button at the top right of the page, or the page will automatically become active when the page is published if the ‘Activate when Approved’ box is checked.
While the page remains inactive, any user trying to access the respective page will receive the following dialog indicating that the page is currently inactive.

An active page can be made inactive through the Document Info dialog. If the status is listed as Active, selecting the Inactive Now button will inactivate the page thereby restricting the access to all but authors, owners and administrators. Document Info is described in more detail within the Knowledge Sharing and Discovery Tools section within this guide.

6.7 Scheduled Publication of a Page

Instead of activating the page and releasing it for publication through the Activate Page Now button, this feature allows authors to schedule a pages’ release for publication at a future date and time. Within the Page Creation dialog, authors may predefine the specific date and time they wish to publish the page by setting the Publication Date.
The newly created page, if a **Publication Date** was defined, will have a blue banner spanning across the top of the page identifying the **Schedule For Release** date and time, as displayed below:

![Scheduled For Release Banner](image)

At the designated date the page will automatically be published.

To change the **Publication Date**, before or after the preset publication date, in **Author mode** go to the **Document Info** dialog where the **Publication Date** can be modified by clicking the **Change** button and entering the updated date and time.

### 6.8 Multi-Language Support

The **Multi-Language Support** feature facilitates the creation, association and management of multi-language sites.

The core facilities for this feature allow multiple languages to be registered, and associations made between the matching subsites and pages across the different languages. While in **Author mode** a new language toolbar will show and link corresponding language pages and will allow for easy copying and creation of other language pages.

CommonSpot’s search interface has also been updated to search in the appropriate language. Therefore, the search results will only include same language pages.

Once multi-language capabilities have been set up in the CommonSpot Administrator, including selecting which languages will be supported within the site and the creating associations between the languages on a site level, the Multi-language Support tool bar will automatically load on top of the new page upon page creation, as illustrated below.

The Multi-language Support tool bar contains three main functions including **Create/Copy**, **Language Mapping** and **Mapped Pages**. The **Create/Copy** function produces an associated page in a specified
language, while the Language Mapping function manages the link between the pages. Finally, the Mapped Pages count updates after each created or copied page.

### 6.8.1 Create/Copy

The Create/Copy menu located on the Multi-language Support tool bar is the first step in creating multi-language associations within the site. It allows the user to create or copy pages to the specified language site. The orange arrow, when clicked reveals a drop down list box that contains all of the potential language associations. Only one language association for a page can be set up. Therefore, once the page set up for a particular language occurs, the Create new and Copy current page text for that language no longer exists. The Create/Copy menu does not appear on the tool bar after all of the associations have been made.

#### 6.8.1.1 Create New Page in Another Supported Language

To create a new page for a specified language from the Create/Copy drop down list, click on the Create new text with the desired language inserted in the text. In the example below, the option selected, Create new French page will launch the page creation wizard that walks the user through creating a new page for the supported language. See the Page Creation section earlier within this chapter for more information regarding the Page Creation Wizard. The resulting page is now available to be mapped through the Language Mapping function. See Language Mapping section detailed below for further information.

#### 6.8.1.2 Copy Current Page in Another Supported Language

To create a copy of the page for a specified language, from the Create/Copy drop down list box click on the Copy current page to text with the desired language inserted in the text. The resulting dialog box (Copy Existing Page dialog), upon completion of the parameters, will reproduce the current page within the specified language’s site. See the Copying and Deleting Pages section detailed later within this chapter for more information on the Copy
Page Wizard. In the example below a copy of the current page will be created as a German page.

![Create new German page]

![Copy current page to German page]

Note that the Multi-language Support tool bar is available on this page to create the appropriate mappings.

### 6.8.2 Language Mapping

The Language Mapping Function automatically maps after a page is created or copied in the specified language site. To view the current mapping, click on the Language Mapping’s orange arrow icon to launch the Multi-Page Association dialog. The existing mapping, including Title and URL will appear adjacent to the Gallery button for each supported language.

![Multi-language Page Association]

To update an existing mapping, press the Gallery button to launch the Document Gallery dialog. Use the filtering capabilities at the Site and Category level to easily find the document to map to.
6.8.3 Multi-Language Spell Checking and Date Formats

CommonSpot allows you to define the appropriate lexicons (dictionaries) to use in spell checking text that is entered through the Rich Text Editor and other CommonSpot dialogs. Site administrators can upload and assign the appropriate lexicons at a subsite level in the CommonSpot Administrator. Administrators can also define the way in which dates are presented at a subsite level. These settings are defined in the CommonSpot Administrator. Refer to the CommonSpot Administrator Guide for full details on setting these subsite properties.

6.8.3.1 Mapped Pages

The Mapped Pages function provides a drop down list box accessed through the orange arrow icon displaying the language and name of each mapped page. The user can jump quickly to the other language pages by clicking on the name of the page. A count of the number of mapped pages, directly on the Multi-language Support tool bar next to the Mapped Pages function, automatically updates when pages are created or copied.

6.9 Managing Pages

6.9.1 Copying and Moving Pages

In order to copy or move a page in CommonSpot, you must have Page Creation rights within both the source and destination subsites. To copy or move a page, select Copy/Move Page from the Page & Template Management menu.
The resulting **Copy/Move Page** wizard will first prompt the user for the destination subsite of the page. The destination subsite can be the same as the source (in which case the name of the page must be different). The list of possible subsites displayed in this dialog is based on the subsites for which the current user has been granted **Page Creation** rights.

![Copy/Move Page dialog](image)

Upon choosing the destination subsite and pressing the **Next** button, the **Copy Existing Page** dialog is presented.

![Copy Existing Page dialog](image)

The fields in this dialog are the same as those within the **Create New Page** dialog. Please review the **Page Creation** section above for further information on these fields.

Check the **Edit New Page** box at the bottom of the dialogue box if you wish to immediately begin editing the page that you have moved/copied.

**To move multiple pages at once**, select **My Pages** from the **Page and Template Management** Menu. Then, click on the box next to the name of the page(s) that you wish to Move.
Indicate where within the site you wish to move the selected pages by selecting the Destination from the drop down list in the dialog box.

By clicking OK, the selected pages will be moved to the new Destination within the site.

### 6.9.2 Renaming Pages

In order to rename a page in CommonSpot, you must have administrative rights for the page. To rename a page, navigate to the page you wish to rename, and select Rename a Page from the Page and Template Management menu.
The fields will be populated with the current name, title and title bar caption of the page. You may overwrite these for the newly renamed page. Once you click OK, the page will be renamed using the information provided in the Title Bar Caption.

**Old Name:** http://paperthin/Services/Training-Overview.cfm  
**New Name:** http://paperthin/Services/Training-Products.cfm

When you rename a page, all links to this page are automatically updated to refer to the newly renamed page as well.

### 6.9.3 Deleting Pages

In order to delete a page in CommonSpot, you must have administrative rights for the page. To delete a page, select **Delete Page** from the **Page & Template Management** menu.
Upon selection, a warning dialog validates the request for page deletion. Clicking the Delete button implements the page deletion process. Clicking the Cancel button aborts the deletion process. **Note that once the page deletion process occurs it cannot be undone.**

![](image)

**Confirmation of Page Delete**

**WARNING:** Page deletion cannot be undone.  Are you sure you wish to delete this page?

[Delete] [Cancel]

*Warning!* The selected page is linked to the following pages. Deleting this page will result in these links being broken. Click on the page name below to visit the referring page.

[Base Template (/template-BASE-Template.dfm)]

If other pages link to the page selected for deletion, those pages will be displayed in the dialog box, along with a warning. Review these links to be sure that you do in fact want to delete the page. To **delete multiple pages at once**, select **My Pages** from the **Page and Template Management** Menu.
Click on the check box next to the name of the page(s) that you wish to Delete. A confirmation box will ask whether you wish to delete the selected pages. Clicking OK will permanently delete the pages selected. Clicking Cancel cancels the action.

6.10 Page Properties

The Page & Template Management menu icon invokes a dynamic menu providing access to various page and template functions depending on the current users permissions and their current role (read, author, approve). If the user has Author permissions on the current page the following menu is displayed. The first menu option Page Properties allows editing of the page's standard metadata properties.
The data displayed in this dialog is the same information entered originally by the creator of the page in the Create New Page dialog.
For more information on the meaning of each field, please refer to the Page Creation section at the beginning of this chapter and the Page Render Options section directly below. Note that determination of whether a field displays in the Page Properties is set by the site Administrator. Once the desired changes have been made, click Next to view the custom metadata field’s properties.

Return to the Page Properties dialog by pressing Prev or click Finish to update the page’s properties. Click Cancel to exit the form without making any changes.

6.11 Page Render Options

CommonSpot’s Page Render Options adds flexibility in laying out a page and its contents. The Page Render Options feature lets developers implement within a base template numerous different “look and feels.” Content authors or content template designers can then choose a Page Render Option based on the design they are trying to achieve for the page.

For example, a Web site design may include a right side narrow column where certain news or items of interest may be listed. For content rich pages found deep within the navigation hierarchy, it might be desirable to not show the left side column at all.
The page above is displayed using a full width Render Option. The page below is displayed using a 3 column grid layout, with a right hand column.

Webmasters or developers can build into the base template as many Page Render Options as necessary. Page Render Options require conditional coding within the base template. The specified Render Options are user definable and are added via a new section in the CommonSpot Administrator.
When creating a page, choose the **Page Render Option** that best suits your content presentation requirements. To open a listing of available options, click on **Select Render Options** at the bottom of the **Create New Page** dialog. (Note: As with all page creation fields, Page Render Options is set in the CommonSpot Administrator to either display on the Main or Other tab, or to be hidden altogether.)

![Create New Page dialog](image)

This will bring up a list of available **Page Render Options**. Click on the check box to the left of the option you prefer. The new page will render based on the option selected. At any time you can change the **Page Render Options** for a given page, unless the **Page Render Option** is part of the template. If this is the case, the **Page Render Option** that currently renders is listed in red type. The following is a list of the **Page Render Options** PaperThin's developers created for its Internet site:

Below is an example of several Render Options that have been created for the PaperThin site, and are available for the author to select from during the page creation process.
Choose the option preferred and click on OK. The new page will then render based upon the option chosen.

At any time you can change the Render Options for the page or template. Simply click on the Page & Template Management menu and select Page Properties. At the bottom of the dialog the Render Option is listed, and there is a button to select if you wish to change the Render Options for the page. Upon selection the page will be refreshed and the change effective.
Here is an example of two pages, same content, just different Page Render Options.

### 6.12 Page Margins, Colors & More

With appropriate **Author** rights for the page, these features allow you to enter the desired parameters of the page to control its look. By accessing the **Page & Template Management** menu icon, select the **Page Margins, Colors & More** from the menu.
The resulting page is the Page Margins, Colors and Background Properties wizard.

### 6.12.1 Page Margins

The **Margins** section defines the page’s top and left margins.

The **Top** margin is the number of pixels between the top of the Web page and the top of the screen.

The **Left** margin is the number of pixels between the left edge of the Web page and the left edge of the screen.
6.12.2 Colors

The Colors section defines the various color properties of the page; background, text, hyperlink, visited hyperlink and active hyperlink.

The **Background** color is the color used to fill the entire page area.

The **Text** color is the default color for the page's text, unless it is otherwise specifically specified.

The **Hyperlink** color is the color of text links that have not been visited.

The **Visited Hyperlink** color marks links that have been visited.

The **Active Hyperlink** color designates the color of the link when it is clicked (activated).

Note that for each of the above properties, colors can be either selected through the color palate, accessed by clicking on the ▼ down arrow or by typing the appropriate color code into the adjacent Text Block.

Once the color choices have been identified, determine whether a background image is appropriate for the page. If you wish to select an image, review the Background Image section next. Otherwise, select **Finish** to save your changes and update the current page.

Select **Cancel** to return you to the current page without saving any changes.

6.12.3 Background Images

Through the **Select Image** button and corresponding dialog, choose an image to serve as the background for the entire page from the Image Gallery. The image can be one that already exists in the Web site's Image Gallery, or one that you upload to become part of the Image Gallery.

The **Background Image** you select will be tiled (repeated over and over) so that it covers the entire editable area of the page. By default, the tiled image becomes part of the page; when you scroll the page, the background image moves with it.

If you have made an image selection, click **Finish**. The new Background Image will appear on the page.

**Note**: In a Rich Text Editor, if 'Insert Image' is disabled, a background image for the table is not allowed.

The full procedure of specifying the source of an image, either through the existing Gallery of Images or through uploading your own image is detailed in Chapter 10, Images.
6.13 Page Security

In some cases, permissions assigned for a subsite are either too general or too restrictive for a page or template. For these cases, CommonSpot permits page administrators to customize permissions to suit the specific requirements for a page or template. Permissions assigned for a page or for a template supercede those assigned for a site.

6.13.1 Page Permissions

To customize permissions for a page, enter Author mode for the page, select the Page Security menu item from the Page & Template management menu, displayed below:

Upon selecting Page Security, the following dialog appears:
The first section indicates if any custom permissions were defined for the page, again these permissions would override those created at the site level unless they were enforced.

Groups and Users are listed alphabetically with their associated permissions. The type of the permission is indicated by the display:

**Read (normal text)** – User or Group has Read permission and this permission can be modified for this page.

**Read (red italic)** – User or Group has Read permission enforced for either the site or one or more of the templates the page is based on. This permission cannot be overridden.

If permissions for the page have been customized, a section titled ‘Restore Default Permissions’ is displayed within the Page Security dialog, pictured above. To remove the customizations and use the standard permissions defined for the site, click the ‘Restore Default Security’ button.

To edit permissions for an existing user or group, click on the name of the user or group, or the **Edit Item** icon. The Edit Page Permissions dialog allows permissions, including Read, History, Comment, Author, Edit, Design, and Admin, to be set. Check the boxes to the left of the desired permissions. Gray checkboxes indicate permissions that are enforced at the site or template and cannot be modified.

The level of approval may also be indicated through the drop-down list box. The selections may include legal, department head, etc. reflecting the type of approver.

Select appropriate permissions and click **OK**. **Cancel** exits the dialog without saving.
To grant permissions for a new user or group, click the text ‘Click here to add a new group’ or ‘Click here to add a new user’. The Add a Group or User dialog will prompt you to select the respective Group or User.

Once a User or Group has been selected the Edit Page Permissions dialog is launched. Follow the same procedures to Edit the permissions as with an existing User or Group, detailed above.

To delete all permissions for a user or group, click the Delete icon. Note that the deleted user or group may still have some permissions through membership in other groups. Also note that deleting all of the users and groups from the list has the same effect as clicking the ‘Restore Default Security’ button. (If you are deleting the last user or group, the confirmation message will indicate that default security will be restored).
6.14 Content Expiration & Freshness Reminders

Ensuring that content stays fresh, is one of the most important and difficult tasks for site content providers. **Content Expiration** can be set during the page creation process, or after a page has been created, by accessing the **Page Properties** for the page from the **Page & Template Management** menu.

### 6.14.1 Content Expiration

**Content Expiration** alerts users to the currency of a given page. In the **Create New Page** dialog, the author has the ability to set expiration parameters around the specific content of the page.

If applicable, the author may indicate the expiration date as well as the type of action desired once the page has expired. Click on the calendar icon to select the date on which you wish to either expire content, or be reminded to check the content freshness.

These actions include Warn of Expiration; Deny Access to General Public; Deny Access to All; Redirect to Another Page/URL or No Action.

The arrival of the expiration date triggers the preset action requested. If the **Warn of Expiration** action was chosen, a dialog box would appear prior to the launch of the page, indicating that the page had expired.

If the action **Deny Access to General Public** or **Deny Access to All** was set, those groups, respectively would be precluded from accessing the page upon its expiration. However, a user would be forwarded to a more current page, upon page expiration, if **Redirect to Another Page/URL** were selected.

Finally, the author may not wish to trigger an action at all when a page has expired and therefore would select **No Action**. These actions proactively inform the user of data that may not be relevant or current.
6.14.2 Content Freshness

Content Expiration is geared towards informing the user of the currency of the content within the active page. Content Freshness, however, serves as a tickler to the page author that the content may require some maintenance. The page author has the ability to set a freshness reminder, either to remind him/her of a specific date, a specified number of days before content expiration or after content last changed, that some maintenance with the content may be necessary. No reminder is also an option for content that does not require proactive management.

Once this reminder has been set and one of the above scenarios has been selected and met, a message is delivered to the Author via the Pending User Actions dialog under the Content Freshness Reminder category.

The message displayed serves as a notice to the author to check the Content Freshness for the pages listed. Pending User Actions can also be accessed through the Page & Template Management menu icon. Click on the Pending User Actions link to view the Content Freshness reminders, as illustrated below.

Content Freshness Reminders can also be set upon creation of a new page. Please refer to Section 6.2 for further details.

![Pending Actions](image)

### 6.15 Version History

Through a single interface, those that have the History permission preset within CommonSpot's Security, have access to a complete listing of previous versions, detailing what has changed and the recorded comments within the specific page. A version is created each time content is published to a page. Publishing occurs when ‘changes are submitted for publication’ or the ‘entire page is submitted for publication’ with no approvers required or upon appropriate approval when approvers are required.

In the View Mode menu icon, the user can access prior versions of the page by selecting Version History from the menu list.
The user is presented with a list of versions and associated data, including page description, date and time stamp and author name, to choose from. Note that the version checked is the version currently loaded on the page. To view another version, click on its name and the version page selected will load to view. A revert content icon will be present by any element that has changed from the current version (any change that required resubmission at the element level). Click the icon to revert this version’s element content and/or format to the current state. A dialog will confirm the conversion request; select OK to proceed and Cancel to abort the change. If updated, the current version will load, a work-in-progress icon will appear next to the update and the change must be submitted for publication.

Once Version History has been accessed, the Version History Banner appears at the top of the page to make accessing the features easier. At any time to quickly return to the ‘Current Version’ click on the Current Version button at the top right hand corner of the page.

A complete listing of available versions is accessible by clicking on the down arrow.

6.16 Upload New Document

CommonSpot provides a very simple interface for uploading new documents, and for uploading new versions of existing documents. The interface is very similar to the Create New Page feature. The Upload New Document item off the Page & Template Management menu provides the ability to upload a variety of document types. First, select the select the destination of the uploaded document.
Next, provide the standard metadata in the Main and Other tabs, similar to what would be defined during the page creation process.
If custom metadata has been created for your documents, you can also assign metadata to the document. For example on the PaperThin Web site we have create the custom metadata fields below, for documents that are posted in the Document Library.

Click ‘Finish’ to complete the upload of the document.

Often, there is a need to upload a new version of an existing document. This can be accomplished by accessing the Page Finder in the Knowledge Sharing & Discovery menu. Check the box ‘Show Properties if Owner or Admin’, and the pencil icon will display next to the list of pages displayed. By clicking on the pencil icon, you are now able to upload a new version, modify the page security, document information, keywords and referring pages.

6.17 External Pages

External pages are those not created by CommonSpot. The Register External Page item off the Page & Template Management menu provides the ability to organize and classify these external URL pages. A user can assign each of these pages standard and custom metadata that then appear in the
Page Index and page gallery functions. However, it is important to note that these pages will not come up in a full text search.

If Register External Page is selected, then the Register External Page dialog prompts the user to choose the destination site of the new external page from the drop down list provided.

Similar to the page creation form, the Register External Page dialog below requires the user to complete the standard metadata for the external page, using the tabbed interface. As in the page creation process, it is also possible to schedule the document for publication on a future date, as well as automatically expire the page as of a certain date. Freshness reminders can be set as well.
If custom metadata fields have been defined for external pages, then the user will be prompted to update these fields after clicking 'Next'.

The custom metadata fields desired can be added through the CommonSpot Administrator and presented to the user while registering the external URL. Once added, the appropriate fields would display in the Custom Page Information dialog prompting the page creator to enter the information requested. In the example below, check the custom metadata field, “Include in Site Map?” if the page created should be included in the site map.

Often, link references for external pages change, or a page that you are linking to now suddenly no longer exists. Once you have registered an external page, you can also easily change link references to the page. To do so, select My External Documents from the My Pages option in the Page and Template Management menu. Click on the pencil icon, and select Page Properties from the list.

The Page Properties dialog box shows details about the page, as well as a summary of pages that link to the external page. To update these links with a new link, check the box next to the link that needs to be modified, and follow the wizard prompts.
My Pages is a handy means by which the current user can quickly see all pages, templates and uploaded files for which he/she is the owner. The pages within the My Pages dialog can be grouped and sorted according to the user's needs allowing quick access to any page or document.

To access My Pages, go to the Page & Template Management menu and click on the My Pages menu item. The My Pages dialog opens displaying a criteria section and five categories where the current users' pages, documents and templates are organized.

To view pages for which you are the owner, specify the desired filtering and ordering criteria including what subsite levels to include and how to group and order the resulting pages. Each criteria field presents the user with several selection options to choose from. The Sub Site Scope comprises the following three subsite views: All sub sites, Current Subsite only, or Current Subsite and below. The user can Group By Type, Sub Site, State or Page Category to display the pages. Finally, select one of the Order By options including Date of Last Modification, Date of Last Major Modification, Date Published or Title. Selecting any of these criteria automatically retrieves the respective results.

To view the results click on the plus sign to expand the list of pages, documents and templates.
Notice the icons preceding the My Pages’ page names. These icons tie back to the page’s status during the Page Creation (Scheduled for Release 📣, Inactive 🛑) and the Content Approval process (Work in Progress 🏷, Pending Approval 🚫). For example, the ‘Company–english’ page is preceded by the Work in Progress 🏷 icon, which signifies that there is newly created or modified content that is “in progress” and not ready for public distribution. For more information regarding the status levels, refer to the Page Creation and Content Approval sections within this guide, respectively.

The Edit Item 📖 icon adjacent to each page will invoke a popup menu allowing the owner quick access to various page specific functions such as changing the page or page security properties, setting keywords or viewing document information.

For Uploaded documents only, the Edit Item 📖 icon will display the Version History, displaying a list of all the prior document versions. Version rollback is also available for uploaded documents.

The My Pages dialog box also provides a way to move or delete pages. Just check the box corresponding to the page to be deleted and press on the Delete Selected Pages submission button at the bottom of the dialog box. The next dialog will confirm the requested action and upon confirmation will delete the page(s). To move pages, click the Move Selected Pages button, and you will be prompted to indicate the new location for the pages. Finally, because all names of pages are in hyperlink text, by clicking the link, the user can open the corresponding page URL.
The **My Pages** dialog box provides an easy means for managing external links as well. By clicking on the pencil icon next to a page listed in the **My External Documents** section of **My Pages**, you can easily see which pages reference that link, and easily change the reference should the referring page change using the Page Properties option. Refer to section 6.15, External Pages for more details on this feature.

![My Pages dialog box](image)

### 6.19 Work Requests

Work Requests enable authors to initiate requests for work to be done in the development or maintenance of a particular page or element to the appropriate Web designers, content creators or developers. By selecting the **Page & Template Management** menu icon and the **Submit Work Request** item, the **Work Request** dialog prompts the user to choose the type of work required from the drop down list box. The Administrator through the CommonSpot Administrator creates and manages the **Work Types** available for selection.

![Submit Work Request dialog](image)

Once a type is selected than an individual or a group can be assigned to respond to the work request. Again, the Administrator module manages the individuals or groups that are available for selection. Select the desired name or group from the drop down list. Complete the remaining data required including **Due Date**, **Urgency** (High, Medium, Low) and **Notes** that describe the work. These notifications can either be delivered via e-mail to the selected individual or group and/or they will appear in the users’ pending action dialog as a work request. To activate e-mail notification, check the corresponding box. The pending action dialog will be updated in either case. To exit without...
forwarding Work Request, click Cancel. To return to the prior menu, click Prev; otherwise click Finish to submit to process the work request.

6.20 Link Management

CommonSpot provides a number of ways to manage and keep track of links throughout the site, including link validation, referring pages and facilities to easily repair broken links. Note: there are some prerequisite actions required of the Site Administrator prior to the Validate Links and Referring Pages functions to be active. Please refer to the CommonSpot Administrator Guide for details.

6.20.1 Validate Links

It is often difficult to keep track of all of the links to other internal or external pages, PDFs, images, and other elements. To make this process easier, CommonSpot allows you to validate all of the links on a page when the page is created, or at any other time. When validating links as part of the publication process, you can be sure that the links are active and working before a new page is published. If web proxy settings were defined in the Server Configuration section of the CommonSpot Administration Module, the link validation routines will use the proxy when checking the page link references.

When you are submitting content for publication, simply check “Validate External Links” in the dialog box above. This will force the page links to be validated as part of the page publishing process.
To check the validity of links at any other time, select **Validate Links** from the **Knowledge Sharing and Discovery Menu**.

After you have made the selection, a process will run to check all of the links on the page, and present a summary of the results in a tabbed dialog.

By clicking on the tabs for **Links**, **Images** and **Other**, you can see the detail for all of the links on the page. Any broken links will be listed in these dialogs, making it easy to detect and repair link errors.
6.20.2 Broken Links

On an ongoing basis, CommonSpot runs a scheduled process to review all of the links throughout the site, and will present a summary of Broken Links through the **Pending Actions** dialogue when the user logs in. (For more on the scheduled process, refer to **Scheduled Jobs** in the Administrator Guide). Upon login, you will see the category ‘**Broken Links**’ appear as one of the Pending Actions. By clicking on the Broken Links selection, a list of Broken Links will appear. You can then navigate to the page on which the broken link appears, and redirect or remove the link.

Additionally, if you opt to delete a page that has active links from other places in your site, you will see the following dialog box with a warning message, alerting you that those links will be broken when you **delete** the selected pages:
6.20.3 Referring Pages

Referring pages provides a mechanism to easily see all pages within the site that have links to the current page. Referring Pages is accessible from the Knowledge Sharing and Discovery menu.

When you select Referring Pages, a dialog box will indicate all of the pages that link to the current page.
Through the **Referring Pages** dialogue, above, or through the **My Pages** option under **Page and Template Management**, the user can change link references if necessary, to direct the link to another page, element, image or object. Additionally, through the **Image Gallery**, a user can easily see by clicking on the icon all pages on which the image is displayed.

**Changing Link References**

To change link references for a particular page, click on the “**Change Link References**” button in the **Referring Pages** dialog box. Select the Link that you want to change.

The **Insert Link** dialog will appear. Indicate whether you wish to remove the link (no link), change the link to point to a new page, or create an email link.

Once you have selected the appropriate change action, and completed the additional steps through the link wizard to reference the new link, you must confirm the change by selecting **SAVE**. You will be prompted with an additional dialog, to confirm the changes. Click ‘**OK**’ to save your changes. The redirection will be effective immediately.
Links can also be viewed from My Pages in the Page and Template Management menu. Simply click on the pencil icon next to a page listed under My Pages or My External Documents, and selecting Referring Pages. To change the links, select Page Properties.

6.21 Clear and Update Page Cache

Invoking the Clear and Update Cache menu item deletes all of the page and element level caches for the current page and reloads the page. Upon reloading, the page and element caches will be regenerated. This menu option should not need to be invoked often but is useful when programmatic changes are being made to the base template or custom scripts pertaining to the page. Note that this only deletes cache items for the current page. To delete an entire site’s cache please refer to the CommonSpot Administrator guide. From the Page & Template Management menu icon, select ‘Clear and Update Page Cache’. A dialog will confirm the user’s intention to clear the cache for the designated page. Choose OK, to clear the cache, Cancel to return to the page without any action.
Chapter 7 Contributing Content

Chapter 7 shows you how to begin contributing content. CommonSpot empowers you to do so all from within the context of the Web page and without having to know HTML. Intuitive and interactive wizards and dialog guide you through the entire creation and publishing process.

7.1 Contents

- Overview
- Authoring Content
- Rich Text Editing Tools
- Editing Content
- Navigating While Authoring
- Source File Uploading
7.2 Overview

All of CommonSpot’s content is edited and published within the context of the Web page. No client software besides the browser is required, nor is it necessary to navigate to a separate application or URL to manage content. Participants, from developers to content contributors, are provided with a series of intuitive and dynamic User Interface components and menus that allow them to participate in the creation and management of the site, all within the context of the page.

CommonSpot displays the appropriate User Interface components based on the user’s role, access permissions, the current View mode (read, author, or approve) and the appropriate content attributes of the element or page. There are no separate applications, production or work centers a user must navigate to and all the activities are facilitated through the browser.

7.3 Authoring Content

To author content in CommonSpot, you must first have Author rights. Permissions granted at either the page or element level would determine further your authoring capabilities.

If a user is creating a page, has chosen a template and is contributing content for the first time, each element on the page displays ghosted text prompting the user to Click here. Upon clicking on the ghosted text, an authoring window is opened and you can begin to enter content.
To author content you must be in Author mode. Then you can either click directly on the text itself to launch the authoring window or click on the Edit Item icon to display your authoring options.

Authoring is simply a matter of either typing in text directly into the dialog or copying and pasting it from any common desktop application.

7.4 Rich Text Editing Tools

The Rich Text Editor allows you to add richly formatted content directly using CommonSpot from a standard browser. Using an interface similar to Microsoft Word, authors can quickly add textual content to a page, and modify its format for presentation in a browser. In addition to manually creating material, content that is copied from Microsoft Word retains all of its formatting attributes, automatically converting them to HTML equivalents. This dramatically increases the speed of page creation.

7.4.1 Navigating the Interface

The rich-text editor is made up of a central content area bordered at the top by a toolbar and the bottom by three tabs. The Rich Text Editor tool provides word processing type controls for font, style, alignment, indentation and bullets. These can be accessed from the top toolbar similar to Microsoft Word.
The three tabs at the bottom of the dialog control the three views for the content. The Normal view is used for content entry and is the primary screen used by authors. The HTML view provides a window into the HTML that is used behind-the-scenes to generate the viewable output. An author skilled in HTML development can make adjustments to the content in this window. Switch back to Normal view will display the results of the change. The Warnings/Errors tab provides a window for the author to see messages generated by the internal CommonSpot cleanup utilities. These tools assist in cleaning up HTML for presentation with a browser. This is most helpful when cutting/pasting content from Microsoft Word or another web site. In many cases, the HTML code that is pasted contains codes or formatting that is either inconsistent with the page you are creating, or violates certain structural rules of HTML. The cleanup utilities will assist in pointing out errors and actually modifying code. Please see the section HTML Cleanup Tools later in this section.

7.4.2 Insert Horizontal Line

Clicking on the icon enables the insertion of a horizontal rule from within the Rich Text Editor, and allows the user to define the alignment, size, shading and color of the rule.
7.4.3 Insert Special Character

Clicking on the special character icon enables the insertion of characters such as registration, copyright, trademark or other symbols, within the Rich Text Editor. This list of special characters is provided as part of CommonSpot. If a different special character set is desired, the special character set can be replaced by the Site Administrator.
7.4.4 Insert Code Snippet

Clicking on the special character icon enables the insertion of HTML code snippets. To insert a code snippet, click on the snippet icon and select from the drop down list. (This drop down list is populated from files contained in the /rte-snippets directory off the root of the site. Refer to the Administrator Guide for more details). Selecting an item and clicking “Finish” will insert that code into the Rich Text Editor at the current location of the cursor.

In the example below, the code snippet called ‘divider’ was inserted into a text block, displaying a blue dotted line.
7.4.5 Bookmark Properties

Clicking on the icon enables the insertion of an HTML page anchor or bookmark within the Rich Text Editor. This allows the author to use this bookmark name within their own hyperlinks. To insert the bookmark, simple place the cursor where you would like to insert the anchor tag, or highlight the text you wish to associate with the anchor, and press the bookmark toolbar button. A dialog will appear as shown below. Enter the name to assign to this bookmark, and click Finish to save.

To use the bookmark, you can simply use the name of the bookmark as the manually entered link reference for a hyperlinks element anywhere on the page. In the example below, we first create the bookmark in the rich-text block, then we add a simple Link Element to the page, and fill out the URL reference as shown.
Often you will want to add dynamic content to a page. One way to do this is using the ‘Insert a Field’, which enables the insertion of dynamic fields through the Rich Text Editor, making it very easy for content contributors to add fielded data to a page. This feature is also utilized in the creation of a custom element. See the Creating Custom Elements section for more details.
Let’s say you want to welcome a user back to the site, by displaying a personalized greeting on the page. The example below shows how this is accomplished.

To insert a field from within the Rich Text Editor, begin by placing your cursor in the text block where you wish to insert a field value. Clicking on the Insert Field icon brings up the following dialog. The values are grouped by functional area. Clicking on a top-level folder name will open up the list if fields under that category.

Once you have selected a Field Mask, if any are available, click Finish. The field will be inserted into the rich text block, and is visible by its name, as the example below shows. The field value will be rendered dynamically at page display time. This is an easy and powerful feature to use.
7.4.7 Spell Checking

Spell checking is available throughout the product. The dialog for misspelled words is very intuitive, as it is similar to most spell check dialogs.

Words that are not recognized by the spell checker are highlighted in red. The current highlighted word is also underlined, and suggestions for appropriate replacements are presented in the window below the text. You can choose to replace the word, ignore the suggestions, or add the
Adding a word to your dictionary is helpful if you use a proper name frequently, as in the example above for CommonSpot. To bypass spell checking altogether on a page, the author can uncheck the ‘Check Spelling’ radio button, which is checked by default.

The main settings for Spell Check are located in the CommonSpot Site Administrator. Refer to the Administrator Guide for more details on these settings.

### 7.4.8 HTML Cleanup Tools

In many cases, the content you wish to include in a page comes from an outside source like a Microsoft Word document or another page site. Cutting and pasting content from those sources into the Rich Text Editor is possible, but can cause formatting problems. The internal HTML (or other code) inside the document may not be visible, but may still cause the pasted page content to display in an unpredictable fashion.

The Rich Text Editor provides several internal tools for cleaning up HTML code. This is done to ensure the content can be presented properly in a wide variety of browsers. The Warning/Errors tab at the bottom of the editor tool will allow the author to see messages generated from the cleanup tools. An example of this is shown below.

The settings for how and when the cleanup utilities are run are controlled through the CommonSpot Administration module. Please refer to the CommonSpot Administration Guide for details.

![Example output in the Warnings/Errors window](image)
7.5 Editing Content

Because content and form are stored separately, they are also edited separately.

To edit the content of an element, either click on the text or the Edit Item icon.

CommonSpot knows what type of content the element contains and presents the appropriate menu. This example above illustrates the menu for a Text Block element. You have the option of editing the header and Text Block.
The menu choices take you through the same wizards used originally to enter the content.

7.6 Navigating While Authoring

In Read mode, you are able to navigate around a site by clicking on hyperlinks. In Author mode, however, clicking on a link means you want to edit that link as a component of the current page. Thus instead of going to the new URL, CommonSpot presents the User Interface components for editing the link.

To navigate from page to page while in Author mode, you have two choices.

Switch to Read mode and click the link.

Remain in Author mode but click the link while holding down the Shift key. Shift-click overrides the default and switches to the new URL instead of invoking the editing control.

It is important to distinguish between normal Web browsing and the View modes offered by CommonSpot. The View modes are only applicable when a user is carrying out one of the functions requiring Author mode or Approve mode — which applies broadly to adding and editing content, designing pages, and administering the site.

7.7 Source File Uploading

Each subsite contains an URL, upload.cfm that allows files to be uploaded beneath the underlying directory. Typical files uploaded are custom ColdFusion modules as well as custom render handlers.
To upload the desired file, navigate to upload.cfm in the desired directory that launches the **Upload File** dialog and click on the **Upload File** button.

Choose the desired file by either entering the full path (directory and filename) in the field below, or press the **Browse** button to locate the file to be sent to CommonSpot. Additionally, choose the destination directory of the file, organized by type.

Within the general subsite security of the CommonSpot Administrator, the administrator may limit the ability to upload files by selecting one of the following access levels: **Restricted**, **Unrestricted** or **Denied**. **Restricted** access regulates the type of files that may be uploaded. **Unrestricted** and **Denied**, either imposes no limits on the uploading of files or does not allow any files to be uploaded, respectively.

Before any file can be uploaded, CommonSpot screens the file to insure that it does not contain any malicious tags, such as `<cffile>` or `<cfdirectory>`. For additional information on file upload security, please see the CommonSpot Administration Guide.
Chapter 8 Approval Process

CommonSpot maximizes corporate-wide participation in Web site development by enabling any business user to become a Web author and publisher. With so many newly empowered Web contributors unleashed, quality control and organizational security inevitably become concerns. Chapter 8 discusses CommonSpot's revision and approval process, a system of checks and balances that ensures the quality and reliability of all information on the Web site.

8.1 Contents

- Approval Overview
- Assigning Approval Rights
- Work in Progress
- Work In Progress and Approval Icons
- Pending Actions
- Submitting a Change for Publication
- Pending Approval
- Approving Revisions
8.2 Approval Overview

A workflow approval process that can be defined, implemented and automated is key to maintaining quality content and to speeding up the overall approval process. CommonSpot’s flexible multi-level workflow approval process lets you establish a consistent process for the review, approval and publishing of content, one that is in line with your organization’s requirements. Content-approval rights can be granted for the entire page or for a specific element. Element-level rights override the page-level settings.

In CommonSpot it is easy to establish a workflow process that is supportive of the business and workflow processes, ranging from “publish now” (no approvers are assigned, or the author is the only approver) to a lengthy, more formalized (many approvers at different levels must sign-off) process. With CommonSpot, there are no practical limitations to the number of levels within the workflow process. For example, content that is submitted for publication might be routed first to the copy editor for initial review, if accepted it might then require approval by the design group for presentation review and then finally, routed to the legal department for final approval before it is ultimately published.

It is also possible to bypass a certain level or multiple levels of approvals. Time sensitive information may need to be published immediately, yet to submit the content change through the entire process would take several hours or even days, which means a missed opportunity. At any one of the approval levels specified, specific approvers can be granted the authority to bypass lower levels of approval.

8.3 Assigning Approval Rights

The right to approve content changes, along with all other rights, can be assigned at the template, page, or element level. If you are the administrator for the page or template, you have the ability to assign approval rights for the page as well as for any element.

Approval permissions can be assigned to a group or individual user, and can be assigned at either the site, subsite, page, element or template level.

Approval rights that are assigned at the site/subsite level and set as “enforced” will be applied to the entire collection of pages for that site, and thus cannot be overridden by an administrator.

If alternatively approval rights are assigned at the site/subsite level and set as “default,” then an administrator for the page can override the approval assignment for the page, or for any element on the page.
The example above shows permissions assigned for this particular content contributor at the page level. Approval rights can be assigned at the template level with all pages created from the template inheriting the approval workflow assignments.

The procedure for assigning approval rights is essentially the same as assigning design, author, and edit rights. Refer to Chapter 13 on Security for information on assigning rights and permissions for a page and/or element.

### 8.4 Work in Progress

There are three states in which content can exist within CommonSpot – **Published**, **Work In Progress** and **Pending Approval**.

**Published** content is content that has been approved and is generally available for viewing by an anonymous or authenticated audience.

**Work In Progress** is any newly created or modified content that is “in progress” and not ready for public distribution. Only individuals with the right permissions including design, author or edit may view **Work In Progress** content; otherwise it is not accessible.

**Pending Approval** is **Work In Progress** content awaiting approval.

CommonSpot manages all content in a database repository, including **Work In Progress** content, and manages separately the state of each individual element. Therefore it is possible to submit one element and its content for approval, but not others. CommonSpot displays different icons for the various **Work In Progress** phases, to enable users to better manage the content creation and publication process. Clicking on each of the icons brings up an applicable menu option.
It is important to remember that only one user can edit a page at a time. If you have Work In Progress on a page, no one else will be able to edit content on that page until your revisions are resolved — either approved and published or rejected.

A listing of your Work In Progress pages may be quickly and easily accessed through your Pending Actions.

### 8.5 Work In Progress and Approval Icons

CommonSpot makes use of a number of different icons to represent the various Work In Progress possibilities. Each Work In Progress icon has its counterpart to display the Pending Approval and Needs Approval states as well. Here is a complete list of these icons and their meanings.

<table>
<thead>
<tr>
<th>Work In Progress</th>
<th>Pending Approval</th>
<th>Needs Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>New content added for first time</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td>Existing content changed</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td>Existing content deleted</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td>Existing content moved</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td>New content added, existing content moved</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td>Existing content changed and moved</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td>Content deleted, existing content moved</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td>Sub-item details changed</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td>Some details still Work In Progress, others Pending Approval</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td>Already approved; awaiting approval of other items on the page before published</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
</tbody>
</table>
8.6 Pending Actions

You can review a convenient hyper linked list of all the revisions requiring your attention either as an editor or as an approver by selecting Pending Actions from the Page & Template Management menu. The Pending Actions dialog can remain open while you navigate to each link.

Pending Actions tracks, lists and hypertext links to content and pages including the following approval related content, detailed below: Work in Progress, Changes Referred Back and Pending Approvals. Pending Actions also displays the following information: Subscription Notification, Content Freshness Reminders, Work Requests and Publishing Tasks. The Pending Actions category name will only display within the dialog if there are underlying active actions.

8.6.1 Work In Progress

Work in Progress is a list of all the pages where you have added, modified, or deleted content. These items have not yet been submitted for approval.
## Pending Actions

### Work In Progress

You have made one or more changes to the following pages that need to be submitted for publication, or discarded. By keeping these items in the work-in-progress state you may be prohibiting other users from adding content.

<table>
<thead>
<tr>
<th>Base Template (Root Site)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live Template</td>
</tr>
<tr>
<td>contact</td>
</tr>
<tr>
<td>Information on contacting PaperThin including phone, address and email</td>
</tr>
<tr>
<td>Services Home Page (Products)</td>
</tr>
<tr>
<td>Plan, design, and install your new web site, and get training from our experts.</td>
</tr>
<tr>
<td>Partners Template (Partners)</td>
</tr>
<tr>
<td>This template is to be used for all pages created within the partner section. It contains a narrow column listing all the additional partner resource links</td>
</tr>
<tr>
<td>Partner (Partners)</td>
</tr>
<tr>
<td>The Partner Program: Making customers and partners more relevant</td>
</tr>
<tr>
<td>Live CommonSpot Demo (Products)</td>
</tr>
<tr>
<td>Live CommonSpot Demo</td>
</tr>
<tr>
<td>PaperThin Profile (Company)</td>
</tr>
<tr>
<td>Information regarding PaperThin, the company</td>
</tr>
<tr>
<td>Architecture (Products)</td>
</tr>
<tr>
<td>Architecture</td>
</tr>
<tr>
<td>Pricing (Products)</td>
</tr>
<tr>
<td>Standard Edition Pricing (Products)</td>
</tr>
<tr>
<td>CommonSpot Common Content Standard Edition Pricing</td>
</tr>
<tr>
<td>Partner Resources (Partners/Resources)</td>
</tr>
<tr>
<td>For partners only. A listing of information and resources for PaperThin Resources</td>
</tr>
<tr>
<td>CommonSpot Home Page (Products)</td>
</tr>
<tr>
<td>CommonSpot Home Page</td>
</tr>
<tr>
<td>Training Feedback (Services)</td>
</tr>
<tr>
<td>Training Feedback</td>
</tr>
<tr>
<td>text product page three (Products)</td>
</tr>
<tr>
<td>text product page three</td>
</tr>
<tr>
<td>text product page four (Products)</td>
</tr>
<tr>
<td>text product page four</td>
</tr>
</tbody>
</table>

## Approvals (Approver)

You are responsible for approving the following content changes. The timely publishing of this information may depend on your approval.

| Become a Partner (Partners) |
| Find out more about becoming a PaperThin premier partner |
| text product page one (Products) |
| text product page one |

## Content Freshness Reminder

You have been asked to recheck the content freshness for the following pages:

| Name Index (Remind on 7/18/2008) |
| Have a look at our products and business |

## Broken Links

An URL in the following page(s) could not be resolved:

<table>
<thead>
<tr>
<th>Base Template (Root Site)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live Template</td>
</tr>
<tr>
<td>Partners Template (Partners)</td>
</tr>
<tr>
<td>This template is to be used for all pages created within the partner section. It contains a narrow column listing all the additional partner resource links</td>
</tr>
<tr>
<td>tech manual (Root Site)</td>
</tr>
<tr>
<td>Partners (Partners)</td>
</tr>
<tr>
<td>PaperThin's e-business experts</td>
</tr>
<tr>
<td>Education (Divisions)</td>
</tr>
<tr>
<td>Train your future CommonSpot users in just a few days</td>
</tr>
<tr>
<td>CommonSpot Home Page (Products)</td>
</tr>
<tr>
<td>CommonSpot Home Page</td>
</tr>
</tbody>
</table>

## Publishing Tasks

You can or have been assigned the following pending publishing tasks:

| Tasks Created: 1 |
| Tasks Assigned: 0 |
| Done Publishing Tasks |
8.6.2 Changes Referred Back
These are items you submitted for approval. They have been sent back to you for further action, and they are once again considered Work In Progress, to be resubmitted for approval after further editing or discarded. You will receive e-mailed comments from the approvers who referred the items back.

8.6.3 Pending Approvals
If you have approval rights, this is a list of any pages containing revisions that have been submitted for your approval and on which you have not yet taken any action.

8.6.4 Changes Rejected
If the Reject option has been activated by your site Administrator, and the Approver has decided to reject the content, then this option will appear for content that has been rejected by the Approver.

8.7 Submitting a Change for Publication
Before content can be published, it must first be submitted through an approval process. Even if you have approval rights for the content you are editing, you still have to put your revisions through the approval process.

Click on the Work In Progress icon to bring up the list of options for submitting content.

Depending on whether an element has one or more items (i.e. a Text Block versus a bulleted list), the menu will reflect the appropriate options for the specific items submitted. For multiple item elements, the user may submit changes either for an individual item or the entire element or the entire page. Submission of individual items within a multi element is done from the sub-item detail dialog, which lists each sub-item and a Work In Progress indicator. The following depicts the three different menus a user might see, depending on the type of content to be submitted:

Single Item Element (page level)
Multiple Item Elements (page level)

Submit Change for Publication applies to the individual item or element.

Submit Entire Element for Publication includes the entire element and all of its associated items.

Submit Entire Page for Publication provides the option of submitting all the changes on the page at once.

Discard Change cancels changes specific to the element.

Discard All Changes cancels changes made to each of the element’s multiple items (bulleted list).

Visual Difference allows you to compare the current version to the prior published version.

To simply edit your change, click on the Edit Item icon.

### 8.7.1 Visual Difference

The visual difference feature is an easy way to see exactly what has changed when an author makes edits to existing content on a page. This feature is particularly useful for approvers or anyone who needs to sign off on changes made by an author. When an author makes changes, they can be viewed by clicking on the Work in Progress icons.
There are two options for viewing the edits that have been made by the author, WYSIWYG and Compare. The WYSIWYG tab shows the added and deleted text.

The Compare option shows a side by side comparison of the published and work in progress versions. Options are provided within this tab to change the frame size for easier viewing of the two versions, as well as the ability to scroll both of the windows at the same time (requires page reload).
8.7.2 No Approval Required

If no approvers are assigned at any level, or if default assignments at the template level are removed at the page or element level, then no approval is required and content changes will be published at the author’s discretion and as soon as you click OK.
Upon approving the content, you are prompted for a Description of the change. The description is valuable information that can be referenced later if you decide to roll back to a previous version. It is recommended that you also validate external links on the page as part of the publishing process. Any broken links will be displayed, and you will be able to correct these links using the Link Validation tools. Refer to the Link Validation section in Chapter 6 for more details.

Checking Reload page in read mode will publish the change and reload the page in read mode. Checking Notify user community via What’s New signifies that the newly added content or modification is significant enough to warrant notifying the user community of the change. The page and the description will be listed in the What’s New view. Press OK to publish your new content or change. To exit without publishing your changes, click Cancel.

### 8.7.3 Approval Required

If the content requires approval from one or several persons at different levels, the dialog below is presented listing all required approvers, along with their phone numbers and e-mail addresses (if
available). CommonSpot also provides the ability to bypass lower level approvers in the event that content requires immediate publishing.

Approve Changes
Upon submitting changes for publication, the Submit Change for Publication dialog presents the list of approvers in the approve change section. As an approver, you are instructed to approve one or more items you are submitting. To approve changes immediately, check the box adjacent to your name or group name and click OK to submit the approval. If you wish to have other group members review and approve the change, leave the box unchecked. Upon clicking OK to submit the change, an e-mail notification will be delivered to all approvers among the first approval level notifying them to review and approve the change. Only one member of the group is required to approve the change for any given level. Once the first level of approval has been granted, the next level of approvers will be notified via e-mail and through the Pending Actions list, that changes require their approval. This process continues until all levels have signed off on the changes.

<table>
<thead>
<tr>
<th>Approve Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>You are an approver for one or more items you are submitting. Check the box(es) below to approve the change(s) immediately. Leave box(es) unchecked if another group member should review the change(s) before publication.</td>
</tr>
<tr>
<td>☑ Paperthin Individuals (Copy Editor)</td>
</tr>
<tr>
<td>☑ admin_commonspot (Department Head)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bypass Approvals</th>
</tr>
</thead>
<tbody>
<tr>
<td>You may bypass the following approvers to expedite publication of the selected content. Check the box(es) beside the approvers you wish to bypass at this time. Leave box(es) unchecked to require review by these users/groups before publication.</td>
</tr>
<tr>
<td>☑ Frank Banks (Copy Editor)</td>
</tr>
<tr>
<td>☑ Frank Angellari (Legal)</td>
</tr>
</tbody>
</table>

Please enter any appropriate comments for this approval.

☐ Approval Notification
When this change is approved, send e-mail notifications to the following people (enter a comma delimited list of email addresses):

pachurc@paperthin.com

☑ Notify approvers via email of new content.

Press OK to publish your changes, press Cancel to exit without any action.

OK  Cancel

Bypass Changes
Often it is necessary for a group or specific individual to be able to bypass a certain level or multiple levels of approvals. Time sensitive information may need to be published immediately, yet to submit the content change through the entire process would take several hours or even days, which could mean a missed opportunity.

At any one of the approval levels specified, specific approvers can be granted the authority through the CommonSpot Administrator to bypass certain lower levels of approval.
In the example above, you have the authority to bypass approval for those individuals/groups listed under the **Bypass Approvals** section within the dialog. Check the box beside the approvers name or group name that you wish to bypass at this time. Leave the box unchecked to require review by these users/groups before publication.

**Comments and Notification**
Before submitting the change for other approval, provide a description of the changes in the space provided for future reference. Check the **Approval Notification** box and enter a comma-delimited list of e-mail addresses you wish to forward notification of changes to. Also, **notify approvers via e-mail of new content** by checking the corresponding box.

When you are ready to submit, click **OK**. To exit the dialog without submitting your changes, click **Cancel**.

### 8.8 Pending Approval

Once you have submitted the new content or the changes for approval, the **Pending Approval** icon replaces the **Work In Progress** icon next to the content in question.

Selected **Approvers** can be notified of the need for their approval by e-mail and/or through their **Pending Actions** off the **Page & Template Management** menu. The **Submitted Change for Approval** dialog allows you to designate how an approver is notified.

**Pending Actions** provides a user with a list of all the pages with content awaiting approval, with each entry hyper-linked directly to the page.

**Approvers** can accept the changes, reject them, or refer them back to you for further revision. If the changes are accepted, the **Pending Approval** icon disappears and the updated page, with its approved changes, is published to the Web. If the submitted changes are referred back for further revision, the **Pending Approval** icon reverts to the **Work In Progress** icon.

### 8.9 Approving Revisions

Navigate to the page containing the revision, and toggle on **Approve** mode from the **View Mode** menu icon. The **View Mode** menu icon will change to and the word [ Approve ] appears above the icons.

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In **Approve** mode, you will see the proposed changes that require your attention. The **Needs Approval** menu icon will accompany each item of content that has been submitted for approval, and for which you have approval rights.

Click on the icon to open the **Needs Approval** menu. From this menu you can approve the item or the entire page of submissions; you can refer it back to the author/editor for further revision; or you can reject it. The menu also gives you access to useful information about the change, and about the action other approvers have taken.

You can review the status of all revisions, by clicking on the **Pending Approval** icon displayed and selecting **Approval Status** from the menu.

To view the currently approved content, switch to **Read** mode.

### 8.9.1 To Approve

If you are the only approver assigned to this content, or if all other approvers have already approved it, you will see the **Approve Change** dialog.
Click **OK** to publish the change, or **Cancel** to keep the approval pending.

If at least one other approver has not yet approved the change, the **Approve Change** dialog lists all the authorized approvers for this item, along with the action, if any, each has taken. Each approver’s e-mail address is provided as a hyperlink, so you can easily communicate about the item.

Click **OK** to approve, or **Cancel** to exit without taking action.

### 8.9.2 Refer Back

If you want to refer the change back to the author or editor for further revisions, the following dialog results. You are warned that if you refer the change back, all approvals by other approvers will be void and lost. The Author will have to resubmit any further revisions to all assigned approvers.

The **Refer Back** dialog provides a comment area where you can explain your objections and suggest improvements. You must enter a comment, which will be passed on to the author by e-mail.

### 8.9.3 Reject

The **Reject** dialog warns you that this action will cause the submitted change to be removed from the **Work In Progress** state, so the author will no longer have it to work on. This could cause a loss of valuable effort. If you are in any doubt, consider referring back rather than rejecting. Once again, there is a common area to post comments. **Note that the Reject option can be disabled in the CommonSpot Administrator, if desired, so that this option is not available to approvers.**
Chapter 9  Personalization

CommonSpot makes personalization easy by offering several powerful techniques to customize content either based on the interests of a particular audience and/or the scheduled time and date.

Chapter 9 details the options and the supporting tools that the author has at his/her fingertips through CommonSpot to add more value by personalizing the content delivered.

9.1 Contents

- Scheduled Content (Element Level)
- Security ‘Read’ Restrictions (Element Level)
- Targeted Audience (Page Level)
9.2 Scheduled Content (Element Level)

The **Scheduled & Personalized Content** element allows content and its presentation to be adapted and displayed based on a specific date in time and/or on the profile of its audience. **Scheduled & Personalized Content** is an element that essentially acts as a container or placeholder. Elements placed within are scheduled to dynamically display or hide their contents, based on a period of time and/or the authenticated user’s membership.

For those elements in particular that render multiple items as part of the element – **Bulleted List, Drop Down List of Links, Link Bar, Multi-Section Text Block** – each individual sub item may be scheduled according to time or personalized based on the user’s group memberships. These elements can be linked to the **Schedule/Personalize** element through the Insert Link dialog option within the bulleted list item menu.

The first screenshot below illustrates the criteria necessary to schedule elements appropriately; the resulting summary schedule indicates the author’s selections.
For further information on creating a scheduled element within the Schedule/Personalize menu item or within an existing element, refer to the Schedule/Personalize section within Chapter 4, The Essential Building Blocks – Elements.
9.3 Security ‘Read’ Restrictions

CommonSpot allows individuals with page creation rights to administer the page and to assign rights to a page or various elements on the page.

One such right is **Read**. Users who are assigned **Read** rights will be displayed with the content. By denying **Read** access to an element, content can easily be restricted or hidden from unauthorized users.

If a user navigates to a page where **Read** access is denied for a certain element, then the user will not be able to view that element. All other content, except that element is displayed. To learn more about security **Read** restrictions, refer to Chapter 13, Security and Administration.

9.4 Targeted Audience

CommonSpot allows authors to create different versions or customized views of the same page (URL), each tailored to the distinct interests of different target audiences.

When an authenticated user navigates to the URL of a targeted audience page, CommonSpot dynamically serves the right version of the page for the specific audience without redirection. This ability is very powerful in that it can allow for consistent site navigation for all users, yet the content is tailored and personalized based on the audience.

Through the **Administrator Module**, targeted audiences are defined and the members, either individual or group are assigned programmatically or administratively to the appropriate audience. Refer to the
Administrator Guide for more information regarding how to establish targeted audiences within the Administrator Module.

CommonSpot creates a virtual page for each targeted audience at page creation time when an audience category is specified. Therefore, the creation, management and security of each of the virtual pages can be assigned to multiple contributors. This feature is evident when in Read or Author mode, and displays a link to each of the Targeted Audience created pages. The links appear directly above the Read and Author menu items, as pictured above to the right. It is assumed that each version of the page is different in its layout and content.

To create a page with a targeted audience, a user must have page creation rights. The first step is to select Create a New Page from the Page & Template Management menu icon to set-up multiple pages within the same URL. Refer to the Chapter 6, Managing and Creating Pages for more information regarding the creation of a page.

After choosing the appropriate template, the wizard will instruct you to complete the base level information for the page. It is within this form where the appropriate audience can be selected. If the particular audience does not exist, contact the administrator of the site for creation. By selecting a particular audience, CommonSpot knows that multiple pages are required and sets up the pages accordingly based upon specific groups identified and added to the Administration module.
Continue through the information form and click on Finish when complete.

To view one of the audience views created, select its name from the options above the Read menu item found in the View Modes menu & icon.

If you are the owner or the page administrator you can easily see all of the groups and toggle to and from each. The groups will only see the specific content and will only have the ability to contribute to the page that is associated with their name. Although the URL will be the same; the content and presentation will vary depending on the needs of the participating groups.
Chapter 10 Images

This chapter discusses how to use images in the creation of content, including rollovers and hypertext linking of the image to other content pages. It will also address the uploading of images to the server and managing the images.

10.1 Contents

- Use of Images
- Image Gallery
- Use of Rollover
- Image Size
- Alternate Image Text (Flyover Text)
- Image as Link
- Rescan Image Size
10.2 Use of Images

Inserting an image is as easy as inserting text.

Click on the placeholder image to invoke the Image Properties wizard or click on the Edit Item icon and select Edit Image.

10.3 Image Gallery

Instead of searching through what may be hundreds of existing images up on your site (server), the Image Gallery Search provides several different means of narrowing the search to allow a user to quickly and easily find the images needed. You can access the Image Gallery through the Image Properties dialog. If the image exists elsewhere on your Web site, on another internal site, or you know that it has been uploaded previously to the CommonSpot server, you can find the image by clicking on Gallery. You can also access the Image Gallery through the Knowledge Sharing and Discovery menu.

To search for an image in the Image Gallery, you can choose from the drop down lists the appropriate Site, Category, Keyword and Owner information. Select Private, Public or All Images in the Image Type field.
Click on the Advanced tab in order to perform a more complex query in order to locate an image. In this tab, you can query on several metadata fields. In the example below, we are searching form images in the current subsite that have been created in the past 60 days.

Select from the drop down list how to Order/Group the image results – by date added to the gallery, image height, site, category, size or owner. Image Gallery Layout allows you to select the number of images you want to layout on the page when it renders the results.

Click on Show Images when you have made all your selections and you want to view next all the images that meet the criteria.
The resulting page displays the images based on the options you selected. Depending on your selection for laying out images on the page (12, 24, 48, small or 8, 16, 24 large), the number of images found may take up several pages.

To advance to the next page, click on the specific page number found at the bottom of the page (Result Pages in lower left corner.) The current page is indicated in black, previously viewed pages in gray and yet to be seen pages are in blue.

You can also choose to advance through the various pages by clicking on Next (located in the far right corner), which will forward you to the next page. Last jumps you to the last page in the series.

When you are on the last page, notice that the options will change to display First Prev. First will take you to the first page in the series, while Prev will take you to the previous page.

When you have located the image you wish to use, you may also click on the Edit Item icon in order to Edit the image, see a list of Referring Pages or roll back to a prior Version of the image. Additionally, you can access the Image Details by clicking on Image Details.
Adding an image to the Gallery is easy. Simply click on the Add Image button at the bottom of the page or click on the ghosted text “Click here to add new image” at the top of the page.

The Upload New Image wizard will open prompting you to specify the file and enter descriptive information.

10.3.1 New Image

Select New if the desired image is not on the server, but on your local computer. CommonSpot will automatically upload the file and store it in the image repository categorized as you direct.
The resulting Upload New Image wizard prompts you for information regarding the image or file you will need to upload to the server in order for it to appear on the page. The image file may be resident on your local hard drive or a shared directory.

Specify the local path of the new file (d:\Website\imagegrid\products.gif) or click on Browser to locate the file otherwise. CommonSpot will automatically Upload the new image to the server.

Enter a Description of the image and choose a Category in which to organize the image.

If you opt to import file formats such as a .bmp, you will also see the following warning display:

```
WARNING: Netscape will not display images that are not of type 'GIF' or 'JPEG'
```

In the case of a new image, once you have uploaded the image for use on your Web page, it becomes part of the site’s image repository and can be made available to other Authors.

If you do not want the image to be available to other Web authors, place it in the My Images category.

If you want the image to be generally available, place it in the appropriate Category from the drop-down list. To create a new Category, click on New and follow the wizard prompts.

Provide one or more Keywords (separate list with a comma) that define the image and can be used to create Keyword Views and enhance the Search results.

Make Image Public adds this image to the public gallery so other contributors can have access to it.

Click OK when you have entered all the relevant information. If you know the full path name of the image on your computer, type it in the text area.

If not, click the Browse button, which will launch a standard Windows browse of your local directories. When you select an image from your hard drive, CommonSpot will load its full path name here.

Note: It is possible for the Site Administrator to place a restriction on the size limit for an uploaded image. After you upload the image you may see a dialog like this:

```
Microsoft Internet Explorer

There is a maximum upload limit for the 'gif' format of 1000 bytes. If the file you are uploading is below that limit click 'OK'.
```

Clicking OK will only upload the image if it is smaller than the restricted size. If you click OK and the image is not smaller than the restricted size, an error message similar to the following will be displayed and, the image will not be uploaded.
"cp-cffile UPLOAD failed (C:/web/cfusion/newsite/images/)
Images of type "gif" need to be under 1K"

Image Metadata

Images can also have metadata forms associated with them. After adding an image you may be presented with a metadata form dialog. Adding metadata for images can assist in the classification of images and make it easier to search using the “Advanced” tab in the Image Gallery.
10.4 Use Rollover Image

After having designated a primary image, you can also specify a second one to use as a “rollover” image, which will appear whenever the viewer runs the mouse cursor over the primary image on the screen. To specify a rollover image, check this box. If the box is checked, the wizard will take you through a second round of image selection.

When you have entered an image file name, click Next to go on to the Image Size dialog, where you specify the size the image will appear on the Web page.

10.5 Image Size

The image’s statistics are displayed to make it easy for you to access the information concerning the image’s parameters or correct settings.

To choose the image size, border size and vertical/horizontal spacing or to modify any of the information, click on the Edit Item button.

Original Size renders the image in the size as it was originally uploaded to the server.

The Scaled option renders the image to the size you specify.
If you check *Scale proportionally*, it is necessary to only enter a width or a height. As soon as you enter one measurement and click in the other box, CommonSpot will automatically calculate the proportional dimension. If you do not check *Scale proportionally*, you will have to enter both dimensions manually.

### 10.5.1 Border Size

If you want a border around the image, specify in this field how many pixels wide it should be. If you do not want a border, set this field to zero (0).

### 10.5.2 Spacing Around Images

Enter the number of pixels of “padding” to leave between the image and the text or cell boundaries.

### 10.6 Alternate Image Text (Flyover Text)

To add *Alternate Image Text*, enter the desired text into the Text Block titled *Alternate Image Text*. Text that you enter here will appear in a box when the viewer runs a mouse cursor over the image on the screen. You can leave this blank or enter short descriptive text. This feature is particularly useful for sites that must adhere to Section 508 Accessibility standards.

### 10.7 Image as Link

The final step is to specify whether your image will also function as a hypertext link, and whether you want to include a mouseover action.

You can have your image link either to a Web page or to a file in another format (such as a Word or Excel document). In the latter case, CommonSpot will display the file in its native format.
If you choose to have the image link, click on the **Edit** button on the right. This will bring up the **Insert Link** wizard, where you can also define **Mouseover** behavior. Please refer to Chapter 4 for more details on using the Mouseover feature.

Choose the type that is appropriate and click on **Next**. Follow the instructions and prompts for each subsequent dialog. When complete, click on **Finish**. At any time you can go back to the previous dialog by clicking on **Prev**.

Refer to Chapter 4, The Essential Building Blocks – Elements, Common Link Wizard section for more information regarding the individual link types.

Click **Finish** to complete creation of the **Link**. You will be returned to the Image Properties wizard where the URL information for the link is displayed.

### 10.8 Rescan Image Size

If you are modifying an image that was uploaded to your Web site using a version of CommonSpot prior to CommonSpot 3.1, clicking on the Rescan Image Size button will ensure that the size of the image is properly scanned for display. If you are using CommonSpot 3.1 or above, this step is not necessary. Upon completion, click **Finish** to return to the Web page.
Chapter 11  Font & Color Properties

CommonSpot offers designers, page creators and administrators rich presentation choices, which include most all fonts and almost any color. In Chapter 11, we introduce you to the Font & Color Properties wizard, which is applicable to just about every element. For information about using Cascading Style Sheets (CSS), refer to Chapter 6.

11.1 Contents

- Font Properties
- Color Properties
- Links, Colors and Types
11.2 Font Properties

Most CommonSpot elements have font and color properties.

Fonts are managed in the CommonSpot Server Administrator Module. Administrators determine the default font settings and may choose what other font types are to be used as well. Site-level font selections are displayed in the Font & Color Properties wizards.

Font properties can be defined at a template-level. If you wish to “lock” down or preserve certain font styles and colors, you can do so through Page Inheritance Security by restricting Design rights. All pages that inherit from the template will inherit the security attributes, and thus will be restricted from changing the font attributes.

To access font attributes you must have either Design or Administrator rights for either the template, if you are in a template or the page or element if you are on a page. Authors and Editors are precluded from changing a font’s properties.

The Font & Color Properties wizard for an element can be found off the Element Properties menu. The wizard interface and the options presented will differ for each element.

```
Font, Size & Attributes:  Font: Default Font  Size: x-small
 Bold    Italic
```

For most elements, the Font Properties wizard offers the following choices: Font type, Size of the font, Bold and Italic.

To choose a different font other than the default Font, click on the drop down list to display all the fonts that are available.

```
Font, Size & Attributes:  Font: Default Font  Size: x-small
 Bold    Italic
 Arial  Default Font
 Times Roman
```

Next choose the size of the font and if it is to be Bold or Italicized.

```
Font, Size & Attributes:  Font: Default Font  Size: x-small
 Bold    Italic
 xx-small
 small  medium
 large  xx-large
```

11.3 Color Properties

Click on the color displayed or the down arrow symbol to bring up the Color Palette.
The palette may present the following color tabs: **Browser Safe Palette, Named Colors and Custom Colors.** The available tabs are defined within the CommonSpot Administrator interface. When you fly over a color in the **Named Colors** palette, the actual name of the color is displayed. Select the preferred color by clicking on it or enter the name if available otherwise enter the RGB corresponding number.

The **Safe Palette** contains those colors that will appear consistently regardless of the browser. The **Custom Colors** tab presents those colors that have been predefined by the CommonSpot Administrator.

### 11.4 Links, Colors and Types

For any element with hypertext linking capabilities – a Bulleted List, Image Grid, Text Around an Image, Link, you have the option of assigning the link color to be used and the link type.
The default link colors are blue and brown. If you check the Use link color box, then the link will render blue before it has been evoked and brown once the link is engaged.

If Use link color is unchecked, then you are free to choose the Item (link) Color.

### 11.4.1 Link Type Options

If the text associated with an element can be hypertext linked – Bulleted List, Drop Down List of Links, Link, etc. – you are presented with an option for defining the link type.
Normal

If you choose **Normal**, the text is underlined to indicate it is a link.

This is a link.

No Underline

If you choose **No underline**, the underlining is removed and the link is presented as straight text.

This is a link.

Underline on mouse over

If you choose **Underline on mouse over**, the text will be underlined only when the user’s cursor flies over the link.
Chapter 12  Roles, Permissions, and Views

CommonSpot allows an organization to distribute responsibility for creating, publishing, and maintaining Web content to those most knowledgeable and responsible, such as departmental workgroups. Thus many people in an organization may be given the right to add, modify, or delete Web content, or even to design and create new pages. CommonSpot empowers each participant by providing the appropriate tools based on a user’s role and permissions.

12.1 Contents

- Overview
- Roles
- Permissions
- Role-based Views
12.2 Overview

The development of a Web site includes many people, all of which are responsible for contributing to the site in a different manner, each at a different skill level. Users of CommonSpot may include members of a corporate Intranet Web team who contribute content; managers who have the right to approve content prior to its publication on the Web site; designers who create templates and design the “look and feel” of a page; developers who are involved with the site’s architecture, building navigational components; and others who administer the site and coordinate the roles and permissions of all the participants. Some users may have a high level of permissions and multiple responsibilities, while some may have only one or two roles, with fewer permissions. CommonSpot provides tools specific to each user in his/her role in managing content.

The first step for any user who has the rights to alter the Web site is to login before gaining access to CommonSpot’s tools. By logging in, CommonSpot is able to personalize User Interface components, such as menus and icons, page by page, element by element, based on the user’s roles and permissions and the security restrictions that have been applied to a given page or section of a page. CommonSpot’s uniquely empowering team approach to Web publishing is enabled by an interlocking system of roles, permissions, and views.

12.3 Roles

Roles consist of various functions that individuals fulfill in the course of producing and presenting Web content — authoring (adding content), editing, approving content, designing the “look and feel” of the Web page, and administering the security requirements of pages and sections of pages. All these roles interact with existing Web pages and their component elements. They do not carry the permission of creating new pages or components. These roles are assigned at the page or element level, usually by the creators of pages or templates. A single user can have many different roles from one page to the next.

12.3.1 Reader

A Reader is an authenticated (logged-in) user who has been granted rights to view content. Readers are assigned rights to view entire pages or specific elements on the page.

Readers may be individuals or groups.

It is important not to confuse the role of Reader with Read mode on the View Mode menu, which is the default mode for viewing and navigating the Web site for any logged-in user.
12.3.2 Author

An Author is an authenticated (logged-in) user who has the right to add new content to an existing page or to an element on a page, and to edit the content he or she contributed. The role of Author is assigned at the template, page or an element level.

Authoring permission does not include creating new pages or adding elements to pages.

Through on-screen icons, Authors have access to three of CommonSpot’s feature menus: the Knowledge Map menu, View Mode menu and the Page & Template Management menu.

It is important not to confuse the role of Author with Author mode. The role of Author is someone who has the right to add content. Author mode, selected from the View Mode menu, designates a screen view that facilitates editing by making the editing controls visible.

12.3.3 Editor

An Editor is an authenticated (logged-in) user who has the right to revise any existing content, irrespective of the original author.

Editing permission does not include creating new pages or adding elements to pages. Editing permission is assigned at either the page or element level.

12.3.4 Approver

An Approver is an authenticated (logged-in) user who has the right to approve content before it is published on the corporate Intranet site.

Approval permission may extend to an entire page or be restricted to a single element. Content may be published based on the approval of a single person, or publication may be contingent upon the approval of many people.

12.3.5 Designer

A Designer is an authenticated (logged-in) user who has the right to add, modify, or delete elements on a page, and to determine the format and layout characteristics of a page or element. Designers control the “look and feel” of elements, pages, and templates.

12.3.6 Administrator

An Administrator is an authenticated (logged-in) user who has the right to create templates and pages and assign permissions and roles for a particular site.
Administrative rights on a page include the ability to assign permissions for that page, as well as author and edit content on the page. Administrative rights are included in page-creation permissions.

12.4 Permissions

Permissions, or rights, may overlap with roles, but they are not the same. Permissions carry the right to alter not just the content and layout of Web pages but their form as well, by creating new templates, elements, and pages. Permissions are granted by site-level administrators and include permissions to function in certain roles. For instance, a user with page-creation rights may act in the role of author, editor, designer, approver, and administrator for any page he or she creates. Permissions may be departmental-wide or system-wide, but they do not vary from page to page.

Permissions are assigned at the site. Users will typically fulfill several different roles as they exercise these permissions. For example, a Page Creator may be an Author at one point and a Designer at another, in the course of creating a page.

12.4.1 Template Creator

A Template Creator is an authenticated (logged-in) user who has the right to create templates for a particular site. Template-creation permissions are granted at the site level.

Template-creation rights may be “personal,” meaning that the templates you create will be available only to you or your immediate department, or “global,” meaning your templates will be available to all departments with Intranet access.

12.4.2 Page Creator

A Page Creator is an authenticated (logged-in) user who has the right to create pages. Page-creation rights include Administrator rights for the page being created, as well as Author, Editor, and Design rights. Page-creation permissions are granted at the site level.

12.4.3 Element Creator

An Element Creator is an authenticated (logged-in) user who has the right to create elements for a particular site. Elements are CommonSpot’s basic building blocks; creating them requires specialized programming knowledge.

12.4.4 Comment

Comment permissions enable a user to take part in Shared Comments, discussion threads about published content. Selecting the Shared Comments option from the Knowledge Map menu
produces a dialog in which the user can review other contributor’s comments and enter his or her own.

12.5 Role-Based Views

All the tools that empower users to create, publish, manage content, and control permissions are accessible through a set of intuitive User Interface components and menu options presented within the context of the page. There are no separate applications or production centers to navigate to before you can participate in the development of the Intranet site. All interactions with CommonSpot are facilitated through the browser.

Pages created and published with CommonSpot are viewable by anyone using any common Web browser. Participants in the creation and management of content must login to CommonSpot before they are able to access its powerful features.

CommonSpot displays the appropriate view and authoring options based on the user’s role, permissions and the security attributes of the page and its elements. Role-Based Views refer to the various working modes available, each providing access to different functionality. Read mode allows for viewing the site without access to any publishing tools; Author mode consists of an enhanced User Interface that presents menus and wizards consistent with the role and permissions of the user; Preview mode lets you see what proposed changes will look like when they are published; Approve mode presents the specialized tools needed for approving changes in content.

Each of CommonSpot’s role–based views presents its own set of intuitive User Interface components that guide the user through the various functions of authoring, editing content, creating pages and templates, assigning security rights, approving content and administering/managing the site and its pages.

The View mode is accessible by authenticated users only by clicking on the View mode menu icon. The menu options presented are tailored to the user’s security permissions and are specific to the current page.

12.5.1 Read Mode

Read mode is not the same as the role of Reader. A Reader is simply an authenticated user who has been granted rights to view pages on the corporate Intranet. Readers will normally have access to any page on the Web site that is available to an anonymous visitor, but they may also be given rights to view pages of restricted material. This capability allows designers to target certain content to specific individuals or audiences.

Read mode is the default–viewing mode for logged–in users, whether they are Readers, Authors, Designers, or any other role. Read mode makes the Web page look just as it does to the anonymous visitor. Read mode is used for site navigation when users are carrying out editing, design, or administrative functions.
12.5.2 Author Mode

Author mode is not the same as the role of Author.

The role of Author refers to an authenticated user who has the right to add new content to an existing page or to some elements on the page, and to edit the content he or she contributed.

Author mode is a viewing mode available only to people with the right to alter the Web site in some way, including all these roles: Author, Editor, Approver, Designer, and Administrator. When Author mode is selected, CommonSpot intuitively displays the appropriate User Interface components based on the user’s permissions, his/her current role, and the security settings of the page and the elements on the page.

In Author mode the View Mode menu icon changes from to , and the word [Author] is added above the icon. Author mode presents additional icons that provide access to CommonSpot’s powerful authoring, editing, and design tools.

Author and Editor in Author Mode

If you navigate to a page where you have Author or Editor rights and then switch to Author mode, every element (as well as links in a bulleted list) to which your rights apply will acquire an Edit Item icon. The Edit Item menu offers the formatting and layout choices appropriate to the type of element it is associated with — for example, text around an image, hyperlink, bulleted list, etc.

If you have already made changes (in a previous work session) that have not yet been submitted for approval, a Work In Progress menu icon will appear next to the revised items.

To see your revisions, you must be in Author mode. To see the currently approved content, you must be in Read mode.

Designer Role in Author Mode

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If you have Design rights for any of the elements on the page or have inherited these rights with page-creation permissions, switching to Author mode produces these additional User Interface components:

- **Table Properties** menu icon, for formatting a Tabular Layout element, called a table for short. There is one icon for each table on the page; very often, however, there is only one table on the page, the one that creates the basic row–and–column underpinning of the page.

- **Cell Properties** menu icon, for formatting the individual cells created by the table, and for adding new rows and columns. There is one icon for each cell on the page.

- **Element Properties** menu icon, for formatting the content within the associated element. There is one icon for each element on the page.

### 12.5.3 Approve Mode

Approve mode will only appear as an option to those users who have approval rights to content on the current page. In Approve mode, the View Mode menu icon changes to [Approve] and the word [Approve] appears above the icon.

If you have approval rights to any of the content on the page, the View Mode menu will include the Approve option. Switching to Approve mode displays the proposed revisions awaiting your approval; to see the currently approved content, switch to Read mode.

All proposed revisions are marked with the Needs Approval menu icon (a white–on–orange version of the Work In Progress icon). Clicking the icon produces an appropriate Approval menu. The Approval menu allows you to approve the new content, reject it, or refer it back to the author or editor for further revision.

### 12.5.4 Restrictions

Only one Intranet user at a time is allowed to be in Author mode on a given page. Once one user claims Author mode for a page, others who attempt to switch to Author mode on that same page are informed that another user is editing the page.

If you remain in Author mode for 30 minutes without taking any action, you are automatically logged out of CommonSpot.
12.5.5 Preview Mode

Preview mode is available whenever you are engaged in any activity that will result in changes to the Web page. Whether you are adding content, editing, approving, or redesigning the page, you can always switch to Preview mode to see how your changes will look when published.
Chapter 13  Security and Distributed Administration

Chapter 13 discusses how CommonSpot allows organizations to distribute the management and administration of access and security rights. Department managers, workgroups, strategic business partners and others can now fully participate in the building and maintaining the site, without having to sacrifice control.

13.1 Contents

- Overview
- Site Security
- Content Security
- Customizing Security for a Page
- Customizing Security for an Element
- Assigning Overrides for a Template
13.2 Overview

CommonSpot provides a robust security framework that can be tailored to meet the needs of your organization. This framework permits either a distributed security model or one that is centrally controlled. Permissions can be assigned at granular levels (site/subsites, template, page or element), allowing for great flexibility in how you create and manage content.

**Explicit Security Overrides by Level.** The security model is based on defaults with explicit overrides. If rights are assigned at the subsite level all pages contained within that subsite will use those defined rights unless permissions are explicitly granted at the page level. Similarly, all elements within a page will use the permissions from the page unless permissions are explicitly granted for a particular element.

**User and Group Permissions.** The effective permissions for a user are the maximum of all permissions granted to that user regardless of whether the user was granted the permissions independently or within a group. Group permissions are determined in the same way – the effective permissions for a group are the maximum of all permissions granted to the group and any other group’s permissions that the particular group belongs to.

Wherever possible, permissions should be assigned to groups instead of individual users. If the server administrator chooses to use Windows NT authentication, CommonSpot will only allow permissions to be assigned to groups. By using groups, the administration process is greatly simplified when new users are added or deleted, or when responsibilities are reassigned.

**Group Management Summary.** Group management is discussed in more detail within the CommonSpot Administrator Guide.

**Default vs. Enforced.** Another important concept to understand is the differentiation between Default and Enforced security. Default security is the standard security and can be assigned at all levels. Enforced security can only be assigned for Content Security at the site/subsite level or within the Page Inheritance Security of a template. When security permissions are enforced that cannot be overridden at any level. For example, if a group called IT Administrators has been granted enforced admin permissions for the IT subsite, then each member of the group will have administrative permissions on each and every page and element within that subsite. These permissions may not be overridden at the page and element level.

**Template Security.** With regard to security, templates are handled in the same manner as pages, except that additional ‘Page Inheritance Security’ permissions may be defined. When in author mode, you will notice two security menu options; one applies to the template itself and the other applies to the security permissions of pages derived from the current template.

Permissions specified for a template (Template Security) are the same as those assigned to a page – reading or modifying a template requires the same permissions as reading or modifying a page. Any permission that may be assigned to a page may also be assigned to a template. This level of security can be used to deny access or set appropriate authoring permissions on the current template.
Inherited permissions (Page Inheritance Security) do not apply to the template directly but instead to pages or other templates that were created from the current template. For example, it is possible to insure that the Corporate Communications manager approves all press release pages. This is accomplished by granting enforced approval permissions within the Page Inheritance Security dialog to the corporate communication approvers group within the press release template.

Clarification on the use and meaning of “No Rights” permission. When assigning role–based permissions to an entity, there is the option of “No Rights” This option shows in both the Enforced and Default columns of the permissions dialog. Here are some issues related to specific groups and scenarios:

For the Anonymous users group, if the “No Rights” permission is Enforced at either the template or subsite, this permission will 'trump' all other permissions and the user ends up with no rights.

For Non–anonymous users, the “No Rights” setting 'trumps' NOTHING in the security calculations for the page, but it does prohibit the explicit setting for permissions for that user. For example, if user ‘Joe’ has an enforced “No Rights” for a subsite, no rights can be assigned explicitly for Joe for anything in that subsite. If ‘Joe’ has enforced ‘No Rights’ for a template, ‘Joe’ can’t be given explicit rights for any page derived from that template.

In the case where enforcement conflict between subsites and templates exists, who wins? For example, if page ‘mypage.cfm’ in subsite ‘foo’ is derived from template ‘mytemplate.cfm’, and ‘mytemplate’ enforces ‘admin’ rights and subsite ‘foo’ enforces ‘no rights’ for user ‘Joe’. In this case, the Admin rights would win because CommonSpot will look at the combined rights being assigned to a user and assign the maximum permissions (most unrestrictive) to the user or group.

13.3 Site Security

Security can be managed at multiple levels within CommonSpot: site, page, template and element. Site level-security dictates the page creation, template creation, element creation, admin, and other permissions for all users and groups at a site level and can be accessed through the CommonSpot Administrator. All other permissions, page, template and element are set within CommonSpot.

13.4 Content Security

Security as it pertains to content, manages the users or groups ability to Read, view History, Comment, Author, Edit, Design, Approve or Administrate. The default permissions are set through the CommonSpot Administrator, however, with the appropriate rights, these permissions may be overridden at the page, template or element level.

Permissions may be either ‘default’, which apply to content which does not have security explicitly defined, or ‘enforced’, which applies to all content within the site. Enforced permissions are set at the site or template level and cannot be revoked.
13.4.1 Content Security Permission Descriptions

**Read** – allows user or group to view the content

**History** – allows the user or group to view archived versions of content

**Comment** – allows the user to create publicly viewable annotations for the content

**Author** – allows the user or group to create new content and modify content owned by the user/group

**Edit** – allows the user or group to modify content created/owned by any user/group

**Design** – allows the user or group to modify page or element properties (such as colors and fonts) affecting the appearance of the page or element

**Approve** – the user (or one member of the group) must approve all content changes before they are made available to users other than the author and the approver(s)

**Admin** – allows the user or group to grant or revoke permissions and perform other administrative tasks for the page.

13.4.2 Default vs. Enforced

Two options are available for assigning content permissions for a site (within the Administrator) or for a template (accessible within CommonSpot):

**Default** – permissions assigned may be superseded for individual pages or elements by the page administrator.

**Enforced** – permissions assigned may not be superseded or revoked for individual pages, templates.

13.4.3 Permissions within Permissions

Some permissions automatically include other permissions – A Page Administrator automatically receives read, history, comment, author, edit and design permissions, for example. The following table outlines the ‘automatic’ permissions included with the assigned permission.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Automatic Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td>Read, History, Comment, Author, Edit, Design</td>
</tr>
<tr>
<td>Design</td>
<td>Read</td>
</tr>
<tr>
<td>Edit</td>
<td>Read, Author</td>
</tr>
<tr>
<td>Author</td>
<td>Read</td>
</tr>
</tbody>
</table>
13.4.4 Owner is Admin Flag

A site administrator may choose to automatically grant administrative permissions to page owners. Enabling this flag ensures that a page owner has administrative rights for all pages he creates, thus granting the owner the ability to assign other rights, change the pages design and update content. If this flag is not enabled the page owner’s permissions are determined by his/her permissions at the site level.

13.5 Customizing Security for a Page

In some cases, permissions assigned for a site are either too general or too restrictive for a page or template. For these cases, CommonSpot permits page administrators to customize permissions to suit the specific requirements for a page or template. Permissions assigned for a page or a template supersede those assigned for a site.

13.5.1 Page Permissions

To customize permissions for a page by adding permissions or deleting existing permissions, enter Author mode for the page, select the ‘Page Security’ menu item from the Page & Template management menu displayed below:

Upon selecting ‘Page Security’, the following dialog appears:
The first section indicates if any custom permissions are already defined for the page, again these permissions would override those created at the site level unless they were enforced. If this is the case, the opening dialog (as pictured above) states, “The following identifies the explicitly assigned permissions for this page”. Otherwise, if no custom permissions exist than the dialog states, “The following identifies the permissions for this page. These are the default permissions for this site.”

Groups and Users are listed alphabetically with their associated permissions. The type of the permission is indicated by the display:

Read (normal text) – User or Group has Read permission and this permission can be modified for this page

Read (red italic) – User or Group has Read permission enforced for either the site or one or more of the templates the page is based on. This permission cannot be overridden.

If permissions for the page have been customized, a section titled ‘Restore Default Permissions’ is displayed within the Page Security dialog, pictured above. To remove the customizations and use the standard permissions defined for the site, click the ‘Restore Default Security’ button.

Edit Permissions. To edit permissions for an existing user or group, click on the name of the user or group, or the Edit Item icon. The Edit Page Permissions dialog allows permissions, including Read, History, Comment, Author, Edit, Design, Style, Approve and Admin, to be set. Check the boxes to the left of the desired permissions. Gray checkboxes indicate permissions that are enforced at the site or template and cannot be modified.

Select appropriate permissions and click OK. Cancel exits the dialog without saving.
Grant Permissions. To grant permissions for a new user or group, click the text ‘Click here to add a new group’ or ‘Click here to add a new user’. The subsequent add a group or user dialogs will prompt you to select the respective Group or User.

Once a User or Group has been selected the Edit Page Permissions dialog is launched. Follow the same procedures to Edit the permissions as with an existing User or Group, detailed above.

Delete Permissions. To delete all permissions for a user or group, click the Delete icon. Note that the deleted user or group may still have some permissions through membership in other groups. Also note that deleting all of the users and groups from the list has the same effect as clicking the ‘Restore Default Security’ button. If you are deleting the last user or group, the confirmation message will indicate that default security will be restored.
13.6 Customizing Security for an Element

Unless otherwise specified for one or more elements, the permissions in effect for a page are effective for all elements on the page. Specific permissions can be assigned for elements that take precedence over the page-level permissions (but cannot remove any 'enforced' permissions from the site or any template the page inherits from).

13.6.1 Element Permissions

The process to customize permissions on the Element level is similar to that of the Page level. To customize permissions for an element by adding new permissions or deleting existing permissions, enter Author mode for the appropriate page. Select the ‘Element Security...’ menu item from the Element Properties menu icon.

Groups and Users are listed alphabetically (Users are not displayed if NT Authentication is in use).
Edit Permissions. To edit permissions for a user or group, click on the name of the user or group, or the Edit Item icon.

Grant Permissions. To grant permissions for a new user or group, click the text ‘Click here to add a new group’ or ‘Click here to add a new user’.

Delete Permissions. To delete all permissions for a user or group, click the Delete icon. Note that the deleted user or group may still have some permissions through membership in other groups.

The first section indicates if any custom permissions are defined for the element. In the Element Security dialog pictured above, no explicit permissions have been identified for the particular element.

Groups and Users are listed with their associated permissions. The type of the permission is indicated by the display:

Read (normal text) – User or Group has Read permission and this permission can be modified for this element

Read (red italic) – User or Group has Read permission enforced for either the site or one or more of the templates the element is based on. This permission cannot be overridden.

If permissions for the element have been customized, a section titled ‘Restore Default Permissions’ is displayed at the bottom of the Element Security dialog.

To remove the customizations and use the standard permissions defined for the site, click the ‘Restore Default Security’ button. Note that deleting all of the users and groups from the list has the same effect as clicking the ‘Restore Default Security’ button. If you are deleting the last user or group, the confirmation message will indicate that default security will be restored.

Check the boxes to the left of the desired permissions. Gray checkboxes indicate permissions that are enforced at the site or template and cannot be modified.
Select the appropriate permissions you wish to assign to the group, and click ‘OK’.

13.7 Assigning Overrides for a Template

Templates may also be used to simplify security administration for pages. For special-purpose templates, administrators may need to define permissions differently from the normal permissions for a site. These permissions are defined in ‘Page Inheritance Security’ (for pages) and ‘Element Inheritance Security’ for individual elements. These custom permissions (as with content permissions assigned at the site level) can be defined as ‘Default’ or ‘Enforced’.

13.7.1 Custom Template Permissions

**Default** – permissions assigned may be superseded or deleted for individual users or groups. Default permissions assigned for a template apply to all new pages created from the template. If default permissions are specified for a template, all new pages created from the template will be created with customized security settings.

**Enforced** – Permissions assigned may not be superseded or revoked for individual users or groups, although additional permissions may be assigned. Enforced permissions apply to all pages derived from the template, either directly or indirectly, and apply in addition to enforced permissions assigned for the site.

13.7.2 Restrictions

A template administrator may choose to restrict certain actions to a template. By restricting one or more permissions to a template, the appearance of (and/or permissions for) derived pages will be guaranteed to conform to the template.

For a page, the following restrictions may be selected:
**Design** – if selected, no appearance-related properties (background color, text color, font, etc) can be changed on derived pages

**Style** – if selected, the use of style sheets will be restricted

**Admin** – if selected, no permissions can be granted for any users of the page – only permissions granted for the site or for the template will apply

**Author/Edit** – if selected, no changes may be made to the element on any derived pages. Any changes that have been made to the element on any derived page before this restriction is applied will be lost.

### 13.7.3 Page Inheritance Security

To define custom permissions to be applied to all pages derived from a template, enter **Author** mode for the template and select ‘Page Inheritance Security’ ([Page & Template Management menu](#) icon.

To edit restrictions for the template, click the ‘Change...’ button in the ‘Restrictions’ section.

Select the appropriate **Restrictions**; notice that **Restrictions** at the Element Level include Author/Edit, Design, Style and Admin. At the Page level, Admin cannot be restricted and therefore is not included within the list or options. If restricting this was allowed, no one could administer the page.
13.7.4 Element Inheritance Security

To define custom permissions at the element level, enter Author mode for the template and select the ‘Element Inheritance Security’ from the Element Properties menu icon.

To edit restrictions for the template, click the ‘Change…’ button in the ‘Restrictions’ section.

Select the appropriate Restrictions; notice that Restrictions at the Element Level include Author/Edit, Design, Style and Admin. Selecting these options will restrict what interaction the user can have with that element on pages derived from this template.
13.7.1 Restore Inherited Content/Properties

Elements are inherited from templates. That is, you can define content for an element that resides on a template and all pages that are derived from that template will maintain the same content. You can prevent a page from breaking this inheritance by applying Template Inheritance Security on the element. In the event that inheritance is broken, you can use the “Restore Inherited Content/Properties” option by selecting the icon on a given element on the template.
The dialog contains options for:

**Content** – The information in the element

**Layout & Font/Color Properties** – layout properties defined for the element

**Style Properties** – any classes defined for specific parts of the Element

**Render Handlers** – any render handlers defined for the element

The basis of the dialog is to define which of the above settings has potentially been overridden on pages derived from this template. Essentially checking off any of the check boxes and clicking OK will restore the element rendered on each page derived from this template to the current state.

**Note:** Once the “Ok” button is clicked all data added at the page level for this element WILL BE DELETED and CANOT be retrieved. It is also a good idea after using this dialog, to implement Template Inheritance Security for this element to prevent this problem in the future.
13.7.2 Group and User Permissions

Groups and Users are listed alphabetically with their associated permissions. The type of the permission is indicated by the display. Permissions can either be displayed in normal text, bold text or italicized in red. Permissions presented in normal text, are the default permissions for new pages created from the underlying template. The administrator of the derived page can revoke the permission. Permissions appearing in bold text are enforced for all pages derived (directly/indirectly) from the underlying template. Page administrators cannot revoke these permissions. Finally, those permissions that are italicized in red are enforced for either the site or one or more of the templates the underlying template is based on and cannot be overridden.

To edit permissions for a User or Group, click on the name of the User or Group, or the Edit Item icon. To grant permissions for a new User or Group, click the text ‘Click here to add a new group’ or ‘Click here to add a new user’. To delete all permissions for a user or group, click the Delete icon. Note that the deleted User or Group may still have some permissions through membership in other groups.

The screen shot below depicts the Edit Inherited Page Permission dialog. The Element Permission dialog is exactly the same except for the title, Edit Inherited Element Permissions.

Permissions are listed in two columns of checkboxes. The left (gray) column lists ‘default’ (revocable) permissions. The right (red) column lists enforced (non-revocable) permissions.

Check the boxes for the desired default and enforced permissions and click OK.

To modify permissions for all pages derived from a template, use the ‘Delete Inherited Permissions’ and ‘Apply Default Permissions’ buttons.
Click the **Delete Inherited Permissions** button to remove previously assigned permissions for a user or group from all pages derived from the template.

![Delete Inherited Page Permissions](image)

Select the permissions to revoke and click OK. Permissions with a **gray checkbox** cannot be revoked from pages based on this template.

Use 'Apply Inherited Permissions' to apply new permissions for a user or group to all pages derived from the template.

![Apply Default Page Permissions](image)

Select the permissions to apply and click OK. Permissions with a **gray checkbox** are enforced and cannot be altered.
Chapter 14 Knowledge Sharing & Discovery Tools

CommonSpot's Knowledge Sharing & Discovery tools are redefining how people work with Web-based information. These powerful tools enable authors to value-add to the content they publish, and to begin to leverage all the collective knowledge of an organization. Users can now access the relevant and valuable information they need, when they need it, in a format that reflects how they work.

In Chapter 14, we will introduce you to all of CommonSpot’s unique Knowledge Sharing & Discovery tools.

14.1 Contents

- Overview
- Search
- Keyword Views
- What’s New
- Page Finder
- Image Gallery
- Document Information
- My Keywords
- Subscription
- Contacts and See-Also References
- Page Discussions
- My Notes
- Referring Pages
- Validate Links
14.2 Overview

Knowledge Sharing & Discovery tools are a collection of features and functionality that not only provide content owners a facility for sharing “collective” knowledge, they can greatly enhance a user’s access to information and they do so in a manner that is consistent across all types of content.

The Knowledge Discovery tools are accessible from the Knowledge Map menu.

Clicking on the icon opens the menu shown on the below. The information displayed pertains to the opened Web page.

The Knowledge Map menu icon may or may not be visible. If it is not exposed, your organization has chosen not to implement these Knowledge Sharing & Discovery Tools.

The items listed in your Knowledge Map menu may not match the complete list outlined in the following pages. Once again, your organization may have chosen to implement a select group of capabilities. Access to Shared Comments and My Notes is based on the permissions assigned to you.

14.3 Search

CommonSpot integrates with Verity’s search engine to provide advanced full text searching and search by keyword. Each time a page is approved for publication, the Web page or uploaded document (Word, PDF, and HTML) is indexed using Verity’s full text engine.

All author assigned keywords are stored as meta-information tags, which are automatically inserted into the HTML document.

To access Search, open the Knowledge Map menu and select Search.
You may find that access to Search has been implemented differently on your site. CommonSpot allows Search to be customized to fit with your page design and navigation requirements.

A link to Search may be provided in a top–level navigation bar.

Search may be located on a Web page through a separate panel.

To access CommonSpot’s advanced Search features, click on Search.

The resulting Search wizard is opened as illustrated below.

Through the Search wizard, CommonSpot offers users advanced search capabilities. Users can tailor the Search options and how the results are organized and displayed. Users can choose to search on the full text of a document or on keyword assignments. Results can be defined by server, site or subsites and displayed based on score, title, format, date last modified, and more.
14.3.1 Search Criteria

Enter the word or phrase you wish to search upon. For information on the search case sensitivity and multiple word searches, it is suggested that you reference Search Tips, available by clicking on ? . Search Tips are discussed later within this chapter as well.

14.3.2 Search Type

CommonSpot allows you to search on the full text of a page or document or on the meta-information that describes the page as in Keywords. Choose which type of search you prefer.

Searching by Full Text matches the search criteria with that of text found in CommonSpot managed Web pages and uploaded documents including Word, PDF and HTML. Searching by Keyword matches the search criteria against both Author and User defined Keywords.

14.3.3 Search Options – update illustrations

Search Options provides several different ways of ordering and displaying the search results.

Score

Score is the relevancy ranking that is given to a result. The score is influenced by a number of determinants that give weight to the result. A few of these factors are listed below in order of weighting importance.

Keyword meta-tag matches the search criteria.

Matches with text that appears in the title or section headings of a page or document.
Matches with text found at the beginning of a document versus the end.
Matches with text found numerous times in a document versus only a once.

Date Modified

**Date Modified** lists the results by order in which the page or document was last modified, starting with the most recent date.

Notice just above the list of results displayed in gray text, information about the search results.

**Documents**: The number of pages and documents listed on this page.

**Total Matches**: The total number of pages and documents that meet the search criteria.

**Total Searched**: The total number of pages and documents that were searched.

**Site**

It may be beneficial to display the search result by site, especially if the search is across multiple sites. **Sites** are listed alphabetically.

**Document Type**

Looking for a document by type can make finding the information that much simpler. **Search** results listed by **Document Type** include HTML, Microsoft Word, PowerPoint, Excel, PDF, etc.
Results per Page

Select the number of results you want to display on a single page. Choose 10, 20, 50 or 100.

Show Summary

Check Show Summary to display a description of the page along with the Document Title and Date Last Modified.

14.3.4 Search Scope

Search Scope pertains to the reach of the search. Choose the option that provides the greatest scope in which to conduct the research, but at the same time is specific enough to return results that are relevant.

Select the option that is appropriate. The default setting is the entire site.
14.3.5 Search Tips

CommonSpot provides advance searching which can help to make your searching more productive. Advanced searching tips are accessible by pressing ? for Search Tips.

When you have made all your selections for defining the search and displaying the results and you are ready to initiate the Search, click on Go!

<table>
<thead>
<tr>
<th>Search Tips</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Search Case Sensitivity</strong></td>
</tr>
<tr>
<td>If you pass a mixed case entry (mixed upper and lower case), case sensitivity is applied to the search. If you pass all upper or all lower case, case insensitivity is assumed.</td>
</tr>
<tr>
<td><strong>Search String</strong></td>
</tr>
<tr>
<td>hello</td>
</tr>
<tr>
<td>hello</td>
</tr>
<tr>
<td>HELLO</td>
</tr>
<tr>
<td><strong>Multiple Word Search</strong></td>
</tr>
<tr>
<td>Words separated by spaces behave as if they had a logical AND between them. Words separated by commas behave as if they had a logical OR between them.</td>
</tr>
<tr>
<td><strong>Search String</strong></td>
</tr>
<tr>
<td>hello, world</td>
</tr>
<tr>
<td>hello and world</td>
</tr>
<tr>
<td><strong>Wildcards</strong></td>
</tr>
<tr>
<td>Wildcards &quot;*&quot; and &quot;?&quot; will match 0 to n and one character respectively.</td>
</tr>
<tr>
<td><strong>Search String</strong></td>
</tr>
<tr>
<td>behavior*</td>
</tr>
<tr>
<td>behavior?</td>
</tr>
<tr>
<td>*ion</td>
</tr>
<tr>
<td>*ise</td>
</tr>
</tbody>
</table>

14.4 Keyword Views

CommonSpot's Keyword Views give users tremendous flexibility and speed to navigate to the information they need, in a manner that supports how they work and think.

A Keyword or phrase represents meta-information, information about information that can be leveraged to create a dynamic categorized view of content or used to enhance Verity’s search results. When creating a page, the author has an opportunity to assign Keywords, either by entering the Keywords or choosing them from an existing published list. See section 14.8 Keywords.

Users can then view an alphabetical listing of all the pages or uploaded documents assigned by a particular Keyword, either by the User, Author or Both.
Keyword View is accessible from the Knowledge Map menu icon.

Click on Keyword View to open the dialog displaying the list. Choose how you want to filter the results either by Personal, you as the User assigned, Author assigned or Both.

To view the list of pages or documents by a specific Keyword, simply click on the Keyword. A list of all the associated documents is displayed.

The page or document is represented by a hypertext link. Click on the link to navigate directly to the page.
14.5 What’s New

Web sites continue to evolve and grow as the demands of the business change. Increasingly, information is being shared in real-time, with new information available on the site nearly every minute of the day. Keeping abreast of changes to content that may hold a particular interest becomes increasingly difficult.

CommonSpot allows users to keep-up with the pace of change through its What’s New capabilities.

What’s New displays to users a listing of all the New Pages (Web) that have been added to the site, all of the Updated Pages (not included in New Pages) as well as all of the New Uploaded Documents (linked to documents).

First, choose the scope of the search for What’s New information, either the Current Site or Current Site and Below (subsites).

Second, choose the Time Period for which you want to view the new content. Select the Time Period by clicking on the image. Notice that directly below the image the number of changes recorded for that period is listed.
Third, choose how to **Order** or organize the list either by **Date Last Modified** (the date the document was last modified) or by **Title** of the document. Pull down the **Order By** list to select the option for organizing and displaying the **What’s New** list.

To navigate to the page or document listed; simply click on its name. You will be linked directly to the document. **Show details** displays the description for each page.

**Document Information** displays pertinent information about the document, such as description. It enables you to decipher if the information is valuable and worth taking a closer look at. For more information on what is provided with Document Information, see the Document Information section in this chapter.

### 14.6 Page Finder

The ability to quickly and easily locate documents having common characteristics is the driving force behind CommonSpot’s powerful **Page Finder** feature. **Page Finder** provides several filter options that can be used to generate a list of matching pages. From the list users can jump directly to the page by clicking on the hyper linked page title. This enormously useful tool allows for efficient content management by allowing the user to skip right to the content desired and to view all the changes and updates to the site through one easy interface.

The resulting pages can be site specific, created or modified on a certain date or with a certain range, part of an underlying category, have keywords in common, based on the owner of the document, formatted in a certain application, and/or belong to a specific template hierarchy. These main options can be set to include all of the sub-categories or defined as mentioned above.

The user also has the ability to categorize and sort the resulting pages through the **Categorization** and **Sort Order** mechanisms beneath the filtering options.

Click on **Page Finder** in the **Knowledge Maps** menu icon to launch the **Page Finder** form that identifies the filtering criteria. A series of drop down list boxes guide the user through the selection process.
Select a particular site or All Sites and then either All Dates or a specific Creation Date or a Last Modified Date. The Choose button further refines the Date filter to include either documents impacted within a certain number of days (Duration) or a particular Date Range. Next specify All Categories or the specific category, if desired.

Similar to the Search, when the Keywords field option is checked, only documents containing the Keyword (subject to the other criteria) will be displayed. The downward pointing arrow, next to the Text Block field provides a list of existing Keywords available for selection.

To focus the “finding” to a single owner’s pages, then choose Owner from the drop down list box provided. Alternatively or in conjunction with the selections above, a user can add application Formats and/or Parent Template connections to the filter.

The Page Finder feature then allows for the results to be sorted in a manner most useful for the user. Based on the options selected from the Categorization and Sort Order lists, the output will be presented accordingly. The Categorization List Box option appears in the picture below.

For example, if a user wants to see all documents created by a specific user, he/she would select only the appropriate Owner from the owner list. All other fields would not be defined, defaulting to ‘All’ with their corresponding sub-categories.

Another example might include a user who was interested in finding all documents created within the last week from a specific site. In this case, the appropriate Site would be selected and the Creation Date filter set to a specific date range.
**Date** would reflect a seven-day duration time frame. A user might want to then sort the resulting output by owner name to easily group pages by their rightful owner. The **Sort Order** drop down list would have sort by owner designated.

The **Advanced Page Filtering** option allows the user to input multiple search criteria, in order to more effectively limit the search results.

After pressing OK to submit the desired filter options the following results page is displayed.

Clicking any of the document links will open the corresponding page in the main browser window. To change the categorization or sort order choose the appropriate option from the two drop down lists at
the top of the dialog, then press the **Submit** button. To return to the dialog presenting the full filter options, press the **Filter Options** button.

The Page Finder utility is also helpful when linking to pages or uploaded documents from other CommonSpot pages. Authors have the option of selecting a CommonSpot page via the **Page Finder** when creating or editing links.

### 14.7 Image Gallery

CommonSpot provides a repository for images within each top-level site. This repository is broken up into two sections -- a public section for common images and a private section. Images within the repository can be classified by keywords & categories. CommonSpot’s **Image Gallery** provides access to both public and private images, allowing the user to filter images based on site, keyword, owner, and categorization. Click on the Advanced tab for more complex search parameters.

![Image Gallery Search](image)

For detailed information regarding the Image Gallery, see Chapter 10 Images.

### 14.8 Document Information

**Document Information** displays useful background information about the content on the page or the document to which the item is linked: document title, description, category, status, publication date, archived versions, date created, date last updated, creator, owner, locked by, other contributors, security and entry into **Usage Statistics**.

An author, editor, designer or administrator while in the **Author** mode, has the ability to lock others with like permissions from making any changes to the page. Only the person who locked the page has access to it. **This ability to lock a page is important when significant modifications are being made to the page that will take time.**
From within the **Document Info** dialog, in Author mode an author, editor, designer or administrator can **Activate** or **Inactivate** a page, change the number of days for which to retain the **Archived Version**, **Change** the ownership of the page, or **Lock** a page to prohibit another user from working on the page.

CommonSpot allows only one person to author a page at a time. However, when that person has logged out or the session has expired, other users with the appropriate permissions may modify the page. When a page is locked, only the person who locked it has **Author** mode access.

### 14.8.1 Usage Statistics

CommonSpot’s **Usage Statistics** help content owners assess whether the content they publish is of value. It is not meant to replace the common Web server usage statistics packages.

**Usage Statistics** show on a page–by–page basis what authenticated users have viewed the page during a specified time frame. It does not track anonymous usage, only that of authenticated users. **Usage Statistics** information can also be viewed for a particular subsite or the entire site.

Access to **Usage Statistics** is provided through **Document Information** located off the **Knowledge Map** menu icon. Click on **Document Information** to open the wizard dialog.

Click on the **Usage Statistics** bar located toward the bottom of the wizard.
The Usage Statistics dialog presented provides at-a-glance usage statistics for the current page, current site and subsites. Choose the scope in which to view the Usage Statistics information from the drop down list at the top of the page.

Then, choose the period in time for which you want to view the Usage Statistics information by clicking on the image. Time period options include: today, last two days, last week or last seven days, last two weeks or last month.

Displayed in parentheses ( ) below the time period image is the total number of users who viewed the document or page for that time period.
For each of the five time period options, a bar graph illustrates the usage for a particular date described within the chosen time period. Graphically you can see the usage patterns for the time period, and which days had greater usage than others. The bar automatically adjusts in relation to the total number of users who have viewed the page.

A list of the authenticated users who viewed the content is accessible by clicking on a specific date, found on the left-hand side of the window.

14.9 My Keywords

Typically, a Web site is organized and arranged in a single view. Learning a site’s structure takes time, and most often the most valuable information is buried under several higher-level pages. As more and more information is published, the structure of the site changes to accommodate the growth. Users are continually burdened with having to spend time to re-learn where important documents reside.

CommonSpot eliminates this problem with its ability to create dynamic Keyword Views. Keyword Views allows users to classify, search and retrieve, organize and navigate to information simply and easily, in a manner that enhances their knowledge discovery.

An author or user may assign a Keyword or multiple Keywords to any Web page or document via the Create New Page and Keyword dialogs. From these assigned keywords users can build dynamic views of the site’s content.

By selecting the My Keywords menu option off of the Knowledge Sharing & Discovery Tools, the My Document Keywords dialog is invoked. If the current user is the author of the page, he/she can assign keywords. The keywords are automatically added to the page as meta–tags. These meta–tags help both CommonSpot's internal search engine as well as external search engines such as Yahoo, Lycos, Alta Vista, Excite, etc., if applicable. My Keywords allow users to apply their own classification to the page. However, user–assigned keywords are not added to the page’s meta–tags. Keywords
assigned by authors can be used by any user to create a specific view. User-assigned Keywords are specific to each user and are not shared with other users.

If the current user has been granted the ability to “Create Keywords” (see the Site Security section of the Administrator Guide) and they have author permissions, they are able to type keywords directly into the Keywords edit control. If they have not been granted the ability to “Create Keywords” they must select keywords from the pre-established list of keywords. To display the Keyword list, click on the button Select Keywords.

The list of available Keywords is displayed; scroll to view the entire list.

Click on the Keyword to highlight it and click OK to add it to the list of Keywords.

14.10 Subscription

Users, who are interested in a specific subject or rely on certain content on a routine basis, may elect to be notified when the information has changed.

A user can receive notification either through e-mail message and/or Pending Actions.
To subscribe to receive notification of changes to a page by others, navigate to the page and choose
Subscriptions from the Knowledge Map menu 📚. Check either or both of the notification options
presented in the dialog. Click OK to save your preferences.

14.10.1 Manage Subscriptions

You may find that you want to unsubscribe to notifications for a particular page, or rather than receive
email notification, prefer to only be notified via Pending Actions. To edit your subscription
preferences, select Manage Subscriptions from any page. A list of the pages to which you have
subscribed for notification purposes will display.

Click on the pencil icon 🏻 next to any page to which you are currently subscribed to add or change a
notification preference. If you no longer wish to receive notifications for a particular page, click on the
delete icon 🗑️ to remove the page from your subscription list.

14.11 Contacts and See–Also References

Often there is information, explicit or tacit, that is relevant but is not included within the context of
the page. This missing information, which may be as important to the user as the document itself,
could include related reference documents, relevant subject matter experts, last-modified and
expiration dates, past versions, and more. This kind of knowledge is extremely valuable because it
helps put the content into context, enhancing the content’s relevance and improving the user’s ability to work productively.

Until now, authors or content owners have had limited means of capturing and sharing this valuable ancillary information (meta-data) except within the document or page itself. However, placing this information directly on the page may not be appropriate. Organizing information for ease of use means keeping it simple.

Many times the medium, format, layout, or audience requirements restrict the ability to fit contextual data within the page. Too much information can clutter a page, diminishing its readability and usefulness. All these issues make managing the ancillary information within the context of the Web page a difficult process. CommonSpot allows, through its Contacts and See-Also References, the ability for authors to provide users access to valuable information, without having to embed and maintain it on every page. Users can readily and consistently find the information, without having to search for it on a cluttered Web page.

14.11.1 Contacts

All of the relevant contacts associated with any CommonSpot page, and their direct e-mail links are available in one convenient location. Contacts may include the author, publisher, product manager, technical support, and other relevant subject-matter experts.

In Author mode you have the ability to add a new contact.

Click on the ghosted text 'Click here to add a new contact' in order to add another contact associated with the page.
14.11.2 See-Also References

Much of the information found on Web sites is in the form of documents that do not support the inclusion of hypertext links. Maintaining links on hundreds of Web pages can quickly become an arduous process, especially in an environment where information changes constantly.

See-Also References are other Web pages or documents that are related to the published content. They provide a way of putting the content in the context of related information without cluttering the Web page with citations or hypertext links.

References are listed with a brief description and, optionally, in Author mode (but not Read mode) you have the ability to add a new reference. As newly published related material becomes available, it can be referenced at any time.
When adding a new See–Also Reference, you will be presented with the Page Finder Dialog as shown on the following page. This allows you to narrow down the search criteria to quickly locate the reference page. Both the Standard and Advanced views are available for searching.

Once you have made your search criteria selection, you will be presented with a list of pages as shown below. This appears to be a Page Gallery Results page, but it provides a column of checkboxes to the left of each page title. To add a See–Also Reference, you simply select the checkboxes of the pages to add, and click the “Add Selected Pages” button. Once done, this dialog will close and you will be brought to the See–Also References dialog with your selected pages appearing in the list.
14.12 Page Discussions

CommonSpot integrates with FuseTalk discussion forums to provide users with the ability to participate in ongoing discussion threads about the published content. A discussion forum for Page Discussions may be created for any page or document, simply by choosing the Page Discussions option on the Knowledge Discovery menu.

Note: This feature requires the installation of FuseTalk discussion forums.

If a Page Discussions discussion thread has not been created, a dialog will ask if you wish to create a new discussion, as shown below.
If a **Page Discussions** discussion is in progress, a dialog is presented which displays the threads about the particular subject. An example is displayed below. If you wish to see the details for each of the responses, simply click on the link. By clicking on the **New Topic** link in the top menu bar, users may participate in the discussion by adding another thread in the category. For more information on the discussion thread, refer to the FuseTalk Users Guide.

### 14.13 My Notes

**My Notes**, accessed from the Knowledge Sharing & Discovery menu, is a feature that enables users to record, store, and view their own personal notes about published content. **My Notes** notations are private and are not seen by other users.

### 14.14 Referring Pages

Referring Pages, accessed from the Knowledge Sharing and Discovery menu, provides a convenient way to see all of the pages that have referring links to the current page. This can be particularly
helpful when you are considering moving or deleting a page. More information about Referring Pages can be found in Chapter 6, section 6.18.3.

14.15 Validate Links

Validate Links, accessed from the Knowledge Sharing and Discovery menu, provides a convenient way to check that all of the links on a particular page are valid. This feature is quite useful when pages are first created, as well as on an ongoing basis, to identify broken or outdated links. After the user selects Validate Links from the Knowledge Sharing and Discovery menu, the link validation process runs, and the dialog below is presented, summarizing the results of the link validation process. More information about Validate Links can be found in Chapter 6.
Chapter 15  PaperThin Resources

PaperThin and our partners offer a full range of professional services to help you further leverage your investment in CommonSpot. Whether it is architecting and designing your site, customizing CommonSpot's inherent capabilities, building specialized components, integrating critical business applications or helping you to install and train, PaperThin and our partners have the experience and knowledge to assist with your efforts. For more information, visit us at www.paperthin.com.

15.1  Contacting PaperThin

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15.2  Technical Support

Technical Support is available Monday through Friday 7:00 a.m. to 7:00 p.m. EST, except holidays.

15.3  Sales

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