OPENTEXT

# OpenText Web Site Management Server

## SmartEdit Guide

This documentation provides information about editing and releasing content with Management Server.

WSMSSE110201-UGD-EN-1

**OpenText Web Site Management Server**
**SmartEdit Guide**
WSMSSE110201-UGD-EN-1
Rev.: 2014-July-17

**This documentation has been created for software version 11.2.1.**
It is also valid for subsequent software versions as long as no new document version is shipped with the product or is published at https://knowledge.opentext.com.

**Open Text SA**

40 Avenue Monterey , Luxembourg, Luxembourg L-2163

Tel: 35 2 264566 1

**Open Text Corporation**

275 Frank Tompa Drive, Waterloo, Ontario, Canada, N2L 0A1

Tel: +1-519-888-7111
Toll Free Canada/USA: 1-800-499-6544 International: +800-4996-5440
Fax: +1-519-888-0677
Support: http://support.opentext.com
For more information, visit https://www.opentext.com

# Table of Contents

Chapter 1

# About OpenText Web Site Management Server

An Internet presence, or the use of an internal intranet, has become an integral part of daily life for almost all businesses. The Web server forms the information hub for both customers and staff. However, as the numbers of documents and HTML pages increase, so do the associated problems: the effort required for administering data and links increases exponentially with the expansion of the document base.

A content management system can help resolve these challenges.

OpenText Web Site Management Server is a Web-based content management and publishing system. It provides optimal coordination and cooperation of users actions. Management Server simplifies all workflows and provides an intuitive interface for Web site designers. It automates the publication of documents, ensuring that your online publications are always up-to-date.

Management Server offers the following additional benefits:

- Decentralized content administration
- Strict adherence to a predefined design
- Continual design and content control through page preview
- Automatic link consistency
- Quality control by means of release procedures
- Authorization maintenance
- Separation of content and layout
- Ongoing usability of content

Users create and administer content effortlessly with the intuitive technology that Management Server provides.

Management Server assists you in the administration of professional Web sites by integrating numerous functions that support the automated creation, control, and organization of content.

## 1.1 About this document

This documentation provides information about editing and releasing content with Management Server.

### Target readership

This documentation is aimed at Management Server users with the roles Administrator, Site Builder, Editor, and Author. The users contribute content and documents, revise, release and publish content of other contributors. They can localize or translate content.

Chapter 2

# Working with SmartEdit

You maintain the content of your *project pages* in SmartEdit. The following sections provide you with information about the SmartEdit user interface.

The higher-level Management Server menus are described in a separate section. For more information, see *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*.

How you use SmartEdit is described in a separate section called "First steps in SmartEdit" on page 19.

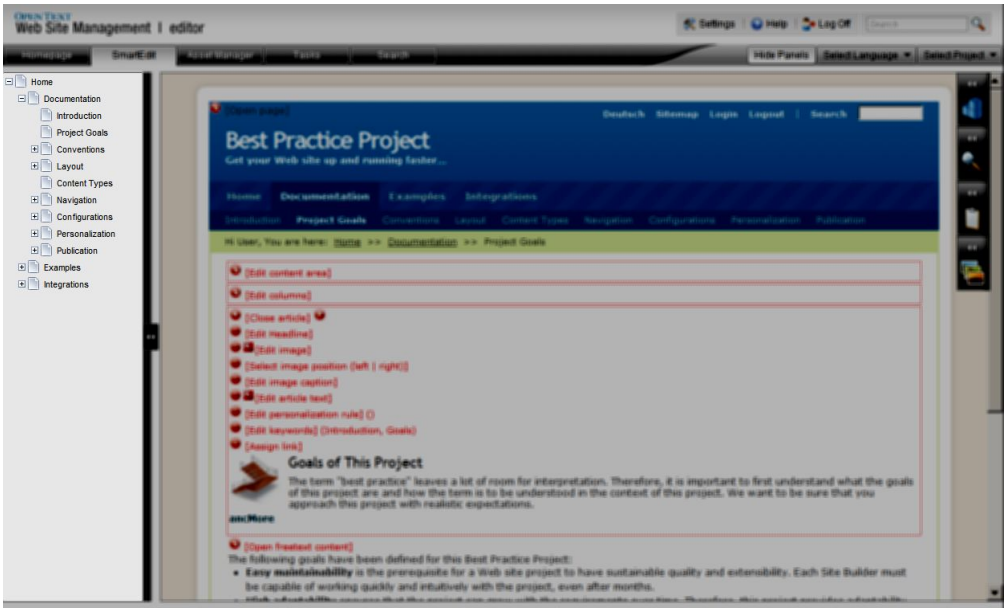
Detailed information about the individual actions and possible settings in each dialog window can be found in the "Using SmartEdit" on page 41 section.

## 2.1 User interface

SmartEdit consists of two areas for projects that use Navigation Manager. You can see the respective areas in the screenshots below.

### Structural area

The project's navigation structure is displayed in the structural area. The structural area is only available when you use Navigation Manager.



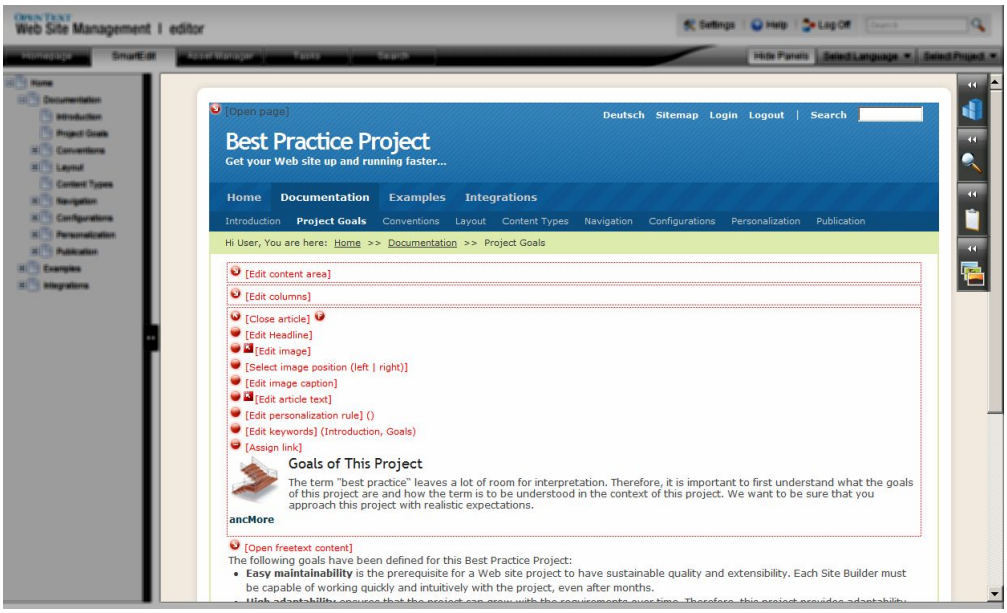
### Notes Displaying page information

In the structural area, you can also view information about every page. Place the mouse pointer over a page heading to see a tooltip that gives you the following information:

- Headline
- Page ID
- Page GUID
- Content class
- Main link
- Status
- Last changed by `<author>` on `<date/time>`

### Editing area

The project pages are displayed in the editing area where you can edit them.




In SmartEdit, you have the following editing options:

- **Editing area** - You edit project pages in this area.
  - **RedDot symbols** - You can use the *RedDots* to maintain the content elements and connect pages using *structural elements*. The options that the different RedDots provide are described in detail in a separate section.
  - **Project shortcut menu** - If you have not yet opened a page in SmartEdit by choosing *OpenPage RedDot*, you can access the project shortcut menu by

clicking the right mouse button in the editing area. With the corresponding *authorization*, you can use the following actions: **Create Unlinked Page**, **Edit Categories and Keywords**, and **Navigation Manager**.

- **Page shortcut menu** - If you have opened a page using the **OpenPage RedDot**, you can access the page shortcut menu by clicking the right mouse button in the editing area. All actions are available that you can execute for this page. The actions displayed are based on the status of the page currently open and your authorizations. A detailed description of the possible actions is provided in "Actions in the page shortcut menu" on page 52.

- **Panels** - In the area on the right of SmartEdit, the *panels* are available. Each of these panels provides different functionality: *Content Classes*, Page Search, *Clipboard* and Asset panel. These panels are also available in the editing areas of the *Tasks* and *Search* modules.

  **Note - Displaying panels**

  The Content Classes, Page Search, Clipboard and Asset panels are, by default, displayed on the right in the editing areas of the SmartEdit, Tasks, and Search modules. If you set the text direction in a *language variant* to from right to left, the panels are automatically displayed on the left. To change the alignment of the panels, you can use keyboard shortcuts in the open module. To align left, press CTRL+LEFT ARROW, and to align right, press CTRL+RIGHT ARROW.

  When using the form edit mode in the SmartEdit, Tasks, and Search modules, the panels and the *Hide Panels/Display Panels* button are automatically hidden.

  To completely hide the panels from the project, select the **Hide panels** check box in the general settings of the project. For more information, see section 3.1.1 "Editing settings" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*.

- **Structural area** - Displays the navigation structure of the project. When you select a page in the structural area, it is displayed in the editing area.

  - **Page shortcut menu** - Right-clicking in the structural area displays a shortcut menu from which you can move a page from the navigation structure to Clipboard.

**Note - Screen resolution**

To be able to work comfortably, you must have a screen resolution of at least 1024 x 768 pixels.

For more information on language variant settings, see section 3.3.2 "Editing language variants" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*.

For more information about Asset Panel and the Management Server user interface, see:

- Section 3 “Working with assets in Asset Panel” in *OpenText Web Site Management Server - Asset Manager Guide (WSMSAM-UGD)*
- Section 3 “Management Server user interface” in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*

For more information on the Content Classes, Page Search, and Clipboard panels, see:


- “Content Classes panel” on page 16
- “Page Search panel” on page 16
- “Clipboard panel” on page 17


### 2.1.1 RedDots at a glance

**Navigation path**

> SmartEdit

You open and close pages, elements, and links on the pages using RedDots. The contents of an opened page can be edited.

**Note - RedDots**

RedDots are integrated in page templates. Templates are created by administrators. They form the basis of a page. If you cannot see any RedDots, contact your administrator.

Here is an overview of all the available RedDots.

| With this RedDot ... | ... you trigger this action: |
|---|---|
| (OpenPage RedDot) | Click the **OpenPage RedDot** to open a page for editing. You then have access to all other elements on this page that you are authorized to edit in Management Server. You can set your project to highlight individual pages in frames when you place your pointer over the respective **OpenPage RedDot**. |
| (ClosePage RedDot) | The **ClosePage RedDot** is displayed instead of the **OpenPage RedDot** once a page has been opened for editing. You use it to close the editing mode of the page and at the same time save your changes. |
| (Edit RedDot) | Click the **Edit RedDot** to open an element in editing mode. Elements include images, media elements, and text. |
| (Link RedDot) | Click the **Link RedDot** to edit the link properties of an element. |

| With this RedDot ... | ... you trigger this action: |
|---|---|
| (MultiLink RedDot) | Click the **MultiLink RedDot** to edit the *multilink* properties of a Container or List element. Depending on your authorization, you can rearrange, add, or delete the pages of a container or list. You require multilink elements (containers and lists) to be able to link multiple pages. |
| (LockedPage RedDot) | The **LockedPage RedDot** is displayed if a page is being edited by another user. When you place your pointer over the**LockedPage RedDot**, a message is displayed with information about the user currently editing the page. The page is locked by the other user. The **LockedPage RedDot** also appears if the page has been saved as draft by another user. In this case, no user name is displayed. The **LockedPage RedDot** is also displayed if you are not authorized to edit a page. |
| (Mandatory RedDot) | The *Mandatory RedDot* is displayed next to elements that must be filled with content. You have to edit this element. |
| (AddPage RedDot/ AppendPage RedDot) | In containers with manual sorting, the **AddPage RedDot** allows you to quickly insert a new page before the existing page, and the **AppendPage RedDot** allows you to insert a page after the existing one. |
| (Release RedDot) | The **Release RedDot** is displayed on pages that are waiting to be released by an authorized user. |
| (Translate RedDot) | The *Translate RedDot* appears in pages that are waiting to be translated. It identifies elements whose content has been changed in an existing page and needs to be translated. |
| (Form RedDot) | The **Form RedDot** allows you to edit the content of all page elements in a common form. |
| (Keyword RedDot) | The **Keyword RedDot** opens the **Assign Keywords** dialog window. |
| (SaveElement RedDot) | The **SaveElement RedDot** appears if you have opened an element in DirectEdit mode. Depending on your user settings, you can use the mouse button or CTRL and mouse button to open elements for which DirectEdit is enabled. Click the **SaveElement RedDot** to save any changes that you have made in DirectEdit mode. |

Further symbols:

| This symbol ... | ... has the following function: |
|---|---|
| (Drop Zone Symbol) | When the drag-and-drop function has been enabled in SmartEdit, you can move documents stored in the Windows file system onto this **DropZone** symbol and insert them into your page. |

For more information about using RedDots, see "Using RedDots" on page 23.

### 2.1.2 Content Classes panel

Using the Content Classes panel, you can create a new page by dragging a content class or a page definition to the RedDot symbol of a structural element. A new page is then created based on the selected content class and connected to the structural element. If you have selected a page definition, multiple pages are created accordingly.

When displaying the content classes and page definitions in the panel, you have the following options:

- **Switch content class folder** - The panel displays only those content classes and page definitions that are in one content class folder. Using the drop-down list at the top of the panel, you can switch the content class folder.
- **Filter content classes** - Enter a term in the box and click the symbol. The panel now displays only those content classes or page definitions whose name contains the term entered. All other content classes and page definitions are hidden.
- **Delete filter** - Deletes the term entered in the box. All the content classes and page definitions of the selected content class folder are displayed again.
- **Content class information** - If a description or a preview symbol has been defined for a content class, this information is displayed when you place the pointer over the content class name.

### 2.1.3 Page Search panel

The Page Search panel lets you run saved searches that were defined in the Search module. The search result is then displayed in the panel. You can move the listed pages to the RedDot of a structural element using the drag-and-drop function. The page is then connected to the structural element. You can also jump directly to the pages in the search result.

You have the following options in the Page Search panel:

- **Select Saved Search** - In the drop-down list, select the folder where the search was saved and then select the desired search. The search is executed and the result is shown in the panel.
- **Open Page** - This symbol lets you open the respective page directly in SmartEdit.

### 2.1.4 Clipboard panel

Clipboard in SmartEdit lets you connect pages with structural elements using the drag-and-drop function. You can also jump directly to the pages in Clipboard. In contrast to *SmartTree* and *Server Manager*, Clipboard in SmartEdit only displays pages and does not display other objects such as elements.

You have the following options for displaying pages in Clipboard:

- **Filter** - Enter a term in the box and click the symbol. Only pages that contain the term that you entered here are displayed in Clipboard. All other pages are then hidden but are not permanently deleted from Clipboard.
- **Remove Filter** - Clears the term entered in the box. All pages in Clipboard are displayed again.
- **Refresh Clipboard** - Refreshes the Clipboard display. If, for example, you have changed the headlines of pages in Clipboard, the new headlines are displayed after you refresh Clipboard.
- **Select All** - Selects all pages in Clipboard.
- **Clear Selection** - Removes the page selection.
- **Remove Selected Entries** - Removes all of the selected pages from Clipboard.
- **Open Page** - Opens the respective page directly in SmartEdit.

**Notes Creating shortcuts in Clipboard**

You can create shortcuts in Clipboard for pages in other modules to be able to edit these pages in SmartEdit or SmartTree. Only pages are displayed in Clipboard in SmartEdit. If, for example, you move a structural element to Clipboard in SmartTree, it is not available for selection in SmartEdit.

To create a shortcut for a page in Clipboard, use the *Create Shortcut in Clipboard* action. This action is only available in the following modules:

- **SmartEdit** - In a page's shortcut menu or when you right-click the page in the structural area. If you have defined drop areas, you can also double-click the drag header. For more information about the drag header and drop areas, see "Drag-and-Drop functions for structural elements" on page 31.
- **SmartTree** - In a page's *Action Menu* (or double-click the page in the *project structure*)
- **Homepage** - In a page's shortcut menu in a tasks widget.
- **Search module** - In a page's shortcut menu in the list view.
- **Tasks module** - In a page's shortcut menu in the list view.

### 2.1.5 Asset panel

Asset Panel enables you to do the following:

- Search for images that are stored in Asset Manager folders.
- Drag images from Asset Panel to Image or Media elements in SmartEdit.
- Edit selected images in Asset Editor.

See *OpenText Web Site Management Server - Asset Manager Guide (WSMSAM-UGD)* for detailed information about Asset Panel.

Chapter 3

# First steps in SmartEdit

This section describes how to use SmartEdit. It explains only the main functions and shows the different options.

Detailed information about the individual actions and possible settings in each dialog window can be found in the "Using SmartEdit" on page 41 section.

For information about the Management Server user interface, see Section 3 "Management Server user interface" in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*. This documentation explains, for example, how to log on or off Management Server, switch a project or a language variant, or use the Help.

## 3.1 Opening the start page

When you click the *SmartEdit* button in the Main Menu, you open the start page of your current project. If no specific start page has been defined, the first page displayed in the tree structure of SmartTree is used as the start page for the project. If you have been assigned the Administrator or Site Builder role, you can define a start page in SmartTree. You can define a specific start page for every user.

## 3.2 Editing pages

A project in Management Server consists of pages that contain content elements and structural elements.

**Content Elements** - You can use content elements to maintain project content. There are different types of content elements that you can use to maintain the different content. For example, a page can contain *Text* elements, which you use to edit texts, or Image elements, which you use to insert images.

**Structural Elements** - Structural elements are used to interconnect the pages. You can use simple link elements to connect only one page and multilinks (lists and containers) to connect multiple pages. The content and structural elements that you can use in a page are defined in the content class on which the page is based. In SmartEdit, you edit the content and structural elements using the RedDots in the pages.

For more information about *Content Classes*, see *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*.

## 3.2.1 Opening pages

**Navigation path**

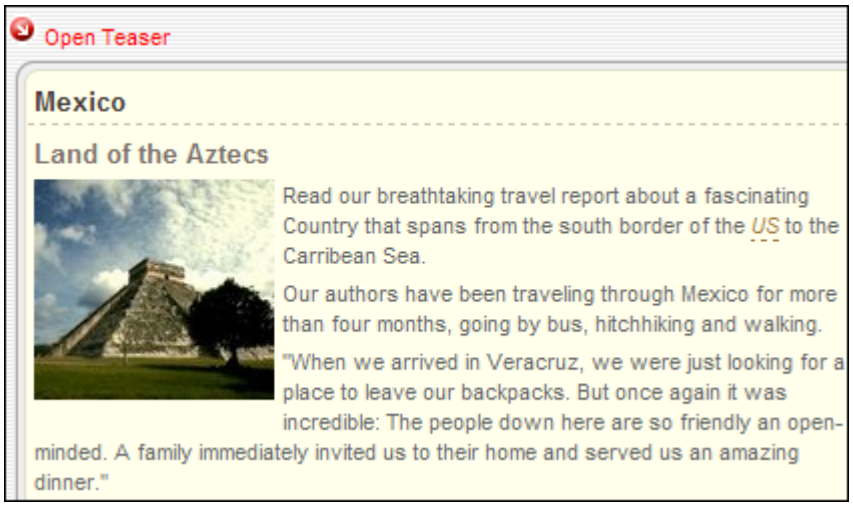
> SmartEdit

When you log on, you will see the start page of the project in the work area. In SmartEdit, you will see one or more **OpenPage RedDots**. For each **OpenPage RedDot**, there is one page that contains one or more elements. In turn, one page can contain several pages and thus several **OpenPage RedDots**.

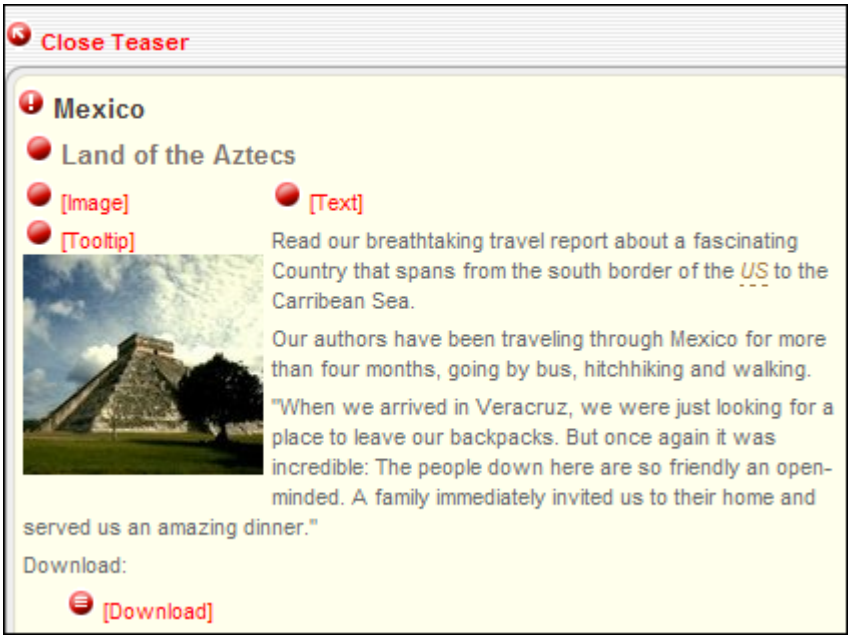
1. You may need to use links to navigate to the page that you want to edit.
2. Click an **OpenPage RedDot** and the page opens. The **OpenPage RedDot** is replaced by a *ClosePage RedDot*. There is now either an *Edit RedDot*, a *Link RedDot*, or a **MultiLink RedDot** next to each editable *element*. In the following example, the opened page contains six elements.

**Example 3-1: Opening pages**

Closed page:




Open page:




### CAUTION - Page status

The page status of a page is dealt with strictly in Management Server. Pages that are open for editing are locked for all other users. Users working in SmartEdit must close open pages, even when they have not edited them. Otherwise these pages are not available to other users.

For pages that are locked for editing, you can execute only those plug-ins available in the shortcut menu that view *page information* or open a *page preview*.

### Tip - Highlighting editable areas

Your project can be set to highlight pages with frames. When you place the pointer over the **OpenPage RedDots**, the corresponding page is shown in a frame. This shows you which **OpenPage RedDot** to click to edit a specific content item.

See also:


- "Using RedDots" on page 23
- "Closing pages" on page 22

## 3.2.2 Closing pages

**Navigation path**

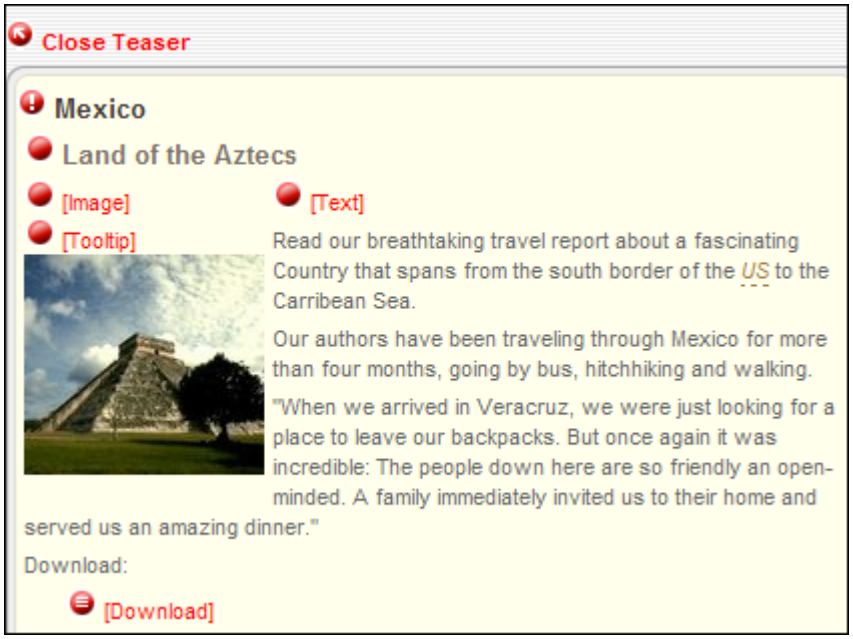
> SmartEdit > OpenPage RedDot

You have edited the elements of a page that you wanted to edit and now you want to close the page. You can close an open page by clicking the **ClosePage RedDot**.

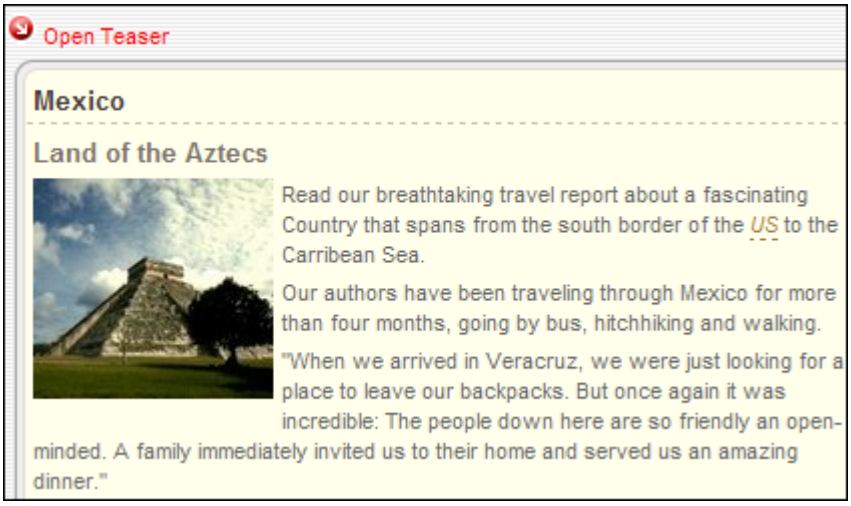
1. If necessary, edit the elements in the page.
2. Click the **ClosePage RedDot** and the page closes. The **ClosePage RedDot** is replaced by the **OpenPage RedDot**.

**Example 3-2: Closing pages**

Open page:




Closed page:




See also:

- "Using RedDots" on page 23
- "Opening pages" on page 20

### 3.2.3 Using RedDots

**Navigation path**

> SmartEdit > OpenPage RedDot

You can use RedDots to edit elements in the pages of your project. Elements consist of content elements, structural elements, and *meta elements*. You can edit the content and structural elements of an open page. The **Edit RedDot** opens content elements, the **Link RedDot** and **MultiLink RedDot** let you edit structural elements. Meta elements cannot be edited via RedDots in SmartEdit. You can use meta elements, for example, to display general page information and file information about files in a *file folder* or Asset Manager folder. You can edit all page elements in a form using the **Form RedDot**. Click the **Keyword RedDot** to open a dialog window that lets you assign categories and keywords to a page.

It is not possible to edit a page that is being edited by a different user. In such a case, each **Edit RedDot** has been replaced by a **LockedPage RedDot** . If you move the pointer over the *LockedPage RedDot*, you are given information about the current status of the page. The **LockedPage RedDot** is also displayed if you are not authorized to edit a page. Alternatively you can edit the project settings so that no RedDot is displayed in such a case.

If the page still has to be released by another user, it is also not possible to edit the page. This state is indicated by a **Release RedDot** . For technical reasons, Edit RedDots belonging to pages of a list are not given a **Release RedDot**. However, you cannot edit these pages as long as they are waiting for release. A dialog window gives you the information that the page is being locked and the reason for this.

You can use the *AddPage RedDot* and the *AppendPage RedDot* to quickly add new pages to a container with manual sorting. The **AddPage RedDot** adds the new page before the existing page, the **AppendPage RedDot** inserts the new page after the existing page. It is easy to differentiate between the two RedDots because the **AddPage RedDot** is always at the start of a page and the **AppendPage RedDot** is always at the end of a page.

You can save changes made in DirectEdit mode using the **SaveElement RedDot** .

**To edit a page:**

1. Click the **OpenPage RedDot** to open and edit the page. The **OpenPage RedDot** disappears. It is replaced by the **ClosePage RedDot** .
2. Click the **Edit RedDot** , **Link RedDot** , or the **MultiLink RedDot** of an element. This opens a dialog window in which you can edit the content of the relevant element or link.
3. Make your changes.
4. Close the dialog window.
5. Open, edit, and close any other elements as required.
6. When you have edited all elements, click the **ClosePage RedDot** to close the page. The **ClosePage RedDot** disappears and is replaced by the **OpenPage RedDot** . Your changes have been saved.

**Tip - Using RedDots in the Tasks and Search modules**

You can use RedDots in the respective editing areas of the Tasks and Search modules in the same way as described here. To do so, click a page in the list area. The page opens in the editing area and you will see the RedDots.

**Note - Edit element**

Depending on the element type, a different dialog window opens for you to edit the element or the link. You use the **Edit RedDot** to open all content elements. Which type of content element it is makes no difference. You can only tell the type by the content of the element to be edited. For instance, the **Edit RedDot** placed next to an image most likely opens an Image element, a longer text opens in a *text editor*, and a shorter text in a *Standard Field* element.

See also:


- "RedDots at a glance" on page 14
- "Editing elements via forms" on page 26
- "Working in DirectEdit mode" on page 25
- "Drag-and-Drop functions for content elements" on page 37


### 3.2.4 Working in DirectEdit mode

**Navigation path**

> SmartEdit > OpenPage RedDot

If DirectEdit mode is enabled, you can edit Standard Field and Text elements directly in SmartEdit without having to open the text editor. The settings required for DirectEdit mode are explained in the information box below.

The next section describes how to edit pages in DirectEdit mode.

**Notes Opening elements in DirectEdit mode**

In the **User Settings**, you can define how you want to open elements in DirectEdit mode. You have the following options:

- **Mouse button** - Click an element to open it in DirectEdit mode. CTRL + mouse click opens the default dialog for editing (for instance, the text editor for Text elements).
- **CTRL and mouse button** - Press CTRL and click an element to open it in DirectEdit mode. Clicking an element opens the default dialog for editing. This is the default setting, which is used in the process described below.

1. Click the **OpenPage RedDot** to open and edit the page. The **OpenPage RedDot** disappears. It is replaced by the **ClosePage RedDot**.
2. Press the CTRL key and click the **Edit RedDot** for an element (see also the information box above). The **SaveElement RedDot** appears. You can now edit the element. Any existing element content is shown in a frame.
3. Make your changes. You can use the editing functions listed below, provided they have been defined for the Text element and that you have the necessary authorizations.

| Keyboard shortcut | Function |
|---|---|
| CTRL + X | Cut selected text |
| CTRL + C | Copy selected text |
| CTRL + V | Paste text from the Windows Clipboard |

| Keyboard shortcut | Function |
|---|---|
| CTRL + B | Make the selected text bold (in Text elements only) |
| CTRL + I | Apply italic formatting to the selected text (in Text elements only) |
| CTRL + U | Underline the selected text (in Text elements only) |
| CTRL + Z | Undo changes |
| CTRL + Y | Redo changes |
| CTRL + K | Opens a window for entering an external reference target |
| CTRL + F | Opens the search window |
| CTRL + A | Selects all element content |
| CTRL + left mouse click | Selects a paragraph |

4. Click the **SaveElement RedDot** to save your changes, or press the ESC key to discard them.
5. Open, edit, and close any other elements as required.
6. When you have edited all elements, click the **ClosePage RedDot** to close the page. The **ClosePage RedDot** disappears and is replaced by the **OpenPage RedDot**. Your changes have been saved.

**Notes DirectEdit requirements**

To be able to work in DirectEdit mode, you have to make the following settings. You may need to contact your administrator.

- *Template Editor* > *Select Text Placeholder* > *Edit Element*: You must select the **Activate DirectEdit** option for the element.

See also:

- "Drag-and-Drop functions for content elements" on page 37

## 3.2.5 Editing elements via forms

**Navigation path**

> SmartEdit > OpenPage RedDot > Editing Mode: Form Mode *or*

> SmartEdit > OpenPage RedDot > Form RedDot *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select structural element) > Select page > Edit Elements via Form *or*

> SmartTree > Start > Administer Project Structure > Project > Select page > Elements > Edit Elements via Form

As an alternative to editing using RedDots in SmartEdit or the Action Menu in SmartTree, you can edit the content elements of a page in forms as well. The form displays only those elements for which you have authorization. Elements with content in multiple language variants are displayed in the main language variant only.

When you have a page open, you can use the **Form Mode** in SmartEdit to edit the elements in a form. If the **Edit via form** *placeholder* has been inserted for the page, you can edit the page content in SmartEdit using the **Form RedDot**.

For more information about different editing modes, see *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*.
For more information about placeholders, see *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*.

The editing options for all available content element types are described below.

In the **Edit Elements via Form** dialog window, element names correspond to those element names or descriptions that were specified in the element properties.

1. The following elements can be edited using the form, provided that they are offered for the page opened:

   - **Background** - You assign the page an image as a background. It is inserted in the page as a background image. You have the following options:

     - - Click this symbol to remove the file assignment without further prompting.
     - - Click this symbol to select a file. The assigned folder or Asset Manager folder opens. For more information, see the *Selecting Files* or *Editing Asset Manager Folders* section.
     - - Click this symbol to edit attributes of the assigned file. This option is subject to authorization and is available only if attributes have been defined for the assigned Asset Manager folder or external application folder.
     - **ALT attribute** - Enter an alternative text for the image.
   - **Database Content** - Enter an SQL statement. With the help of a database connection, you can automatically create pages that are based on database content. After you have selected a template, specify the criteria to be applied when creating the page. If database content is updated frequently, the administrator can set a time interval for page publication. For every publication, a database query is made to fill the page with the latest content.
   - **Image** - Assign an image file to an Image element. You have the same editing options as for the *Background* element.
   - **List Entry** - The List Entry element lets you automatically add a section of a text file that is marked with *tags* to a list as a link. This link is used to call the

following page. The part of the text file that is not to appear as a list entry is marked with different tags. The tags are assigned in the page template. The text editor opens in *ASCII* mode.

- **Media** - You can assign files to this element that require a plug-in for viewing (for example, PDF, Shockwave or Real Media, Real Video). The type of file format is defined in the page template. You have basically the same editing options as for the *Background* element. However, you cannot define an *ALT* attribute for a Media element.
- **Option List** - Select an option from the drop-down list.
- **Standard Field** - Different restrictions apply for the **Standard Field** element. You have the following options:
  - **Text** - Enter a text of up to 256 characters.
  - **Time** - Enter the time in the format **hh:mm:ss**.
  - **Date** - Click ... to select a date in the *Set Date* dialog window.
  - **Numeric** - Enter numbers, such as **2.456**, **2,098**, or **56**. The entry is checked.
  - **Email** - Enter an email address.
  - **URL** - Enter a *URL*.
  - **User-defined** - Enter a character string that matches the format defined in the content class.
- **Text** - Depending on your project settings, the text editor that you have selected is open, or you can open it with the symbol. Edit the text. When editing text using the RedDot Text Editor form, you cannot switch to source code mode. To do that, you have to open the Text element with the **Edit RedDot** in SmartEdit or use the **Edit Element Content** action in SmartTree.
- **Transfer** - Lets you enter a text of up to 256 characters.

2. Confirm with **OK** or click **Save** if you are in form edit mode. You can then use the **Edit RedDot** to return to editing mode.

**Tip - Using the form edit mode in the Tasks and Search modules**

You can use the form edit mode in the respective editing areas in the Tasks and Search modules. To do this, select a page from the list and switch to the form edit mode on the lower right using the **Form RedDot**.

**Note - Element order**

You can edit the order in which the elements appear in the **Edit Elements via Form** dialog window. For more information, see Section 5.1.2 “Editing element order” in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*.

For more information, see:

- Section 3.5 “Editing modes” in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*
- Section 7.3.2 “Editing element content (overview)” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*
- “Selecting files” on page 99
- “Editing Asset Manager folders” on page 102

## 3.3 Creating pages

You can create pages in SmartEdit in different ways.

**Creating an unlinked page** - When no page is open in SmartEdit, you can create a page by choosing *Create Unlinked Page* in the shortcut menu. This page is initially not linked within the project structure. Pages are placed in Clipboard after they have been created. From there, you can drag the page to a structural element to connect the two.

**Content Classes panel** - Using the Content Classes panel, you can create a new page by dragging a content class or a page definition to the RedDot symbol of a structural element. A new page is then created based on the selected content class or page definition and connected to the structural element.

**Creating and connecting a page** - You can open the **Edit Link Element** dialog window by clicking the RedDot of a structural element. Using the *Create and Connect Page* action, you can create a new page and connect it directly with the structural element that you used to open the dialog window.

For more information, see:

- “Creating unlinked pages” on page 43
- “Content Classes panel” on page 16
- “Creating and connecting pages (content class selection)” on page 179

## 3.4 Connecting pages

You have different options in SmartEdit for connecting existing pages with a structural element.

**Clipboard or Page Search panel** - Using the Clipboard or Page Search panels, you can drag a page to the RedDot of a structural element. The page is then connected to the structural element.

**Connecting an existing page** - You can open the **Edit Link Element** dialog window by clicking the RedDot symbol of a structural element. Using the *Connect Existing Page* action, you can connect a page with the structural element that you used to open the dialog window.

You can connect pages with a structural element also using categories and keywords. To find out how, read the separate section.

For more information, see:

- "Working with categories and keywords" on page 44

## 3.5 Using the Drag-and-Drop function

The drag-and-drop function in Management Server enables you to edit and structure content and *workflows* in the following areas:

- On your Homepage, you can change the position of the widgets within the configured layout.
- In the SmartEdit, Tasks, and Search modules' editing areas, you can create, link, move, and edit the content of pages.
- In the Search module, you can move saved searches from one personal folder to another.
- In Workflow Designer, you can insert and arrange elements in the work area.
- In Navigation Manager, you can assign content classes to navigation areas and change the navigation structure.

For further information see the following sections:

- Section 4.2 "Editing widgets" in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*
- Section 5.3 "Editing searches" in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*
- Section 4.9.4 "Editing workflows (Workflow Designer)" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*
- Section 6.1.1 "Working with Navigation Manager" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*
- Section 3.1 "The Navigation Manager dialog boxes" in *OpenText Web Site Management Server - Navigation Manager Guide (WSMSNM-AGD)*

The following sections explain the use of drag-and-drop operations in the SmartEdit module.

## 3.5.1 Drag-and-Drop functions for structural elements

**Navigation path**

> SmartEdit > OpenPage RedDot

To create, link, and sort pages in SmartEdit, you click a structural element's **MultiLink RedDot** or **Link RedDot** and select the corresponding command in the Action menu. With the drag-and-drop function for structural elements, you can use the panels for creating and linking pages.

Extended drag-and-drop functions allow you to sort and move the pages that are linked with the structural elements. To be able to use the extended drag-and-drop functions, you have to define drop areas for structural elements. To be able to sort pages that are linked with structural elements, you have to edit the structural elements' sort order settings in SmartTree.

**Notes**

- The available drag-and-drop functions depend on the authorization settings.
- The authorizations that have been defined for the structural elements determine which elements you can edit.
- To define drop areas, you must have editing authorization for templates of content classes.
- To edit the sort order settings, you must have access to the SmartTree module.

The following sections explain how to use the available drag-and-drop functions for structural elements and how to define drop areas and edit the sort order settings.

### Using the Drag-and-Drop function for structural elements

In an open SmartEdit page, the available drop areas are highlighted with a border as soon as you move the pointer over the defined area, over one of the headers of a linked page, or over a content class or page in the panels. If you have a structural element without linked pages, its drop area is empty. Empty drop areas are highlighted when you move the pointer over a **MultiLink RedDot** symbol or a **Link RedDot** symbol.

**Note:** You can specify the visual characteristics of the drop areas in SmartTree. For more information, see Section 3.1.5 “Configuring drop areas” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*.

The following drag-and-drop functions are available:

- **Creating Pages** - Using the Content Classes panel, you can create a new page by dragging a content class or a page definition to the RedDot symbol of a structural

element. A new page is then created based on the selected content class or page definition and is connected to the structural element.

If the structural element has a defined drop area, you can drag the content class or page definition to this area. If you have set the sort mode in the structural element's sort order settings to *Manual*, you can move the created page to a designated position within this area.

**To create a page:**

**Navigation path**

> SmartEdit > OpenPage RedDot

1. Click the **Content Classes** panel.
2. Choose the content class that you want to use for your page.
3. Click the content class and drag it to the drop area of the structural element.
4. Enter a headline for the page.
5. Click **OK**.

- **Linking Pages** - Using the Clipboard or Page Search panels, you can drag a page to the RedDot symbol of a structural element. The page is then connected to the structural element.

  If the structural element has a defined drop area, you can drag the page to this area. If you have set the sort mode in the structural element's sort order settings to *Manual*, you can move the page to a designated position within this area.

  **To link a page:**

  **Navigation path**

  > SmartEdit > OpenPage RedDot

  1. Click the **Page Search** or **Clipboard** panel.
  2. Choose the page that you want to link with the structural element.
  3. Click the page and drag it to the drop area of the structural element.

- **Sorting Pages** - If the structural element has a defined drop area and the sort mode in the structural element's sort order settings has been set to *Manual*, you can sort the pages that are linked with the structural element. Each page that is linked with a structural element has its own page header which is indicated by the **Drag Header** tooltip. You can click the drag header and drag the page to another position within the same drop area.

**To sort a page:**

**Navigation path**

> SmartEdit > OpenPage RedDot

1. In the structural element, choose the page that you want to move to another position.
2. Click the drag header of the page and drag it to another position within the drop area of the same structural element.

- **Moving Pages** - If the structural element has a defined drop area, you can move a page to the drop area of another structural element on the same SmartEdit page. Each page that is linked with a structural element has its own page header which is indicated by the **Drag Header** tooltip. You can click the drag header and drag the page to another structural element.

**To move a page:**

**Navigation path**

> SmartEdit > OpenPage RedDot

1. In the structural element, choose the page that you want to move to another structural element.
2. Click the drag header of the page and drag it to another position within the drop area of the other structural element.
3. Click **Yes**.

**Using the drag header to create shortcuts in Clipboard**

Double-click the drag header to create a shortcut to a page in Clipboard.

**Note:** You can press ESC to cancel the drag action.

### Disconnecting pages from structural elements

You can disconnect pages from structural elements without using the shortcut menu.

**To disconnect a page:**

**Navigation path**

> SmartEdit > OpenPage RedDot

1. In the structural element, choose the page that you want to disconnect.
2. Click to disconnect the page from the structural element.

3. Click **Yes**.

### For site builders: Defining drop areas

A drop area that is defined for a structural element facilitates creating and linking of pages with structural elements. It also provides the possibility to sort or move pages that are linked with the structural elements. In an open SmartEdit page, the available drop areas are highlighted with a border as soon as you move the pointer over the defined area, over one of the headers of a linked page, or over a content class or page in the panels. If you have a structural element without linked pages, its drop area is empty. Empty drop areas are highlighted when you move the pointer over a **MultiLink RedDot** symbol or a **Link RedDot** symbol.

You can define drop areas for the following structural elements:

- Containers (including dynamic elements and target containers)
- Lists (including dynamic lists)
- Anchors (including dynamic anchors)

The drop areas are added to the structural elements as **Drag-and-Drop** *block marks* in the template of a content class. These block marks have an `<!IoRangeDragDrop>` start and end tag.

**Important - Limitations**

Before you start defining drop areas, read the following important information. Make sure that you take these limitations into account. Otherwise, you can only use the limited drag-and-drop functions without drop areas.

- Only one structural element placeholder may be used within the **Drag-and-Drop** block mark.
- Block marks that are in use must be complete and cannot be nested.
- **Drag-and-Drop** block marks must always enclose the structural elements and their respective block marks. **Dynamic** block marks must be placed outside the **Drag-and-Drop** block marks.
- **Drag-and-Drop** block marks may only contain *HTML* source code when the code is inserted between **List** or **Dynamic** block marks. You can also insert HTML code for *Anchor elements*, for example `<a href="<%anchor %>">Anchor</a>`. See Example 3-3, “Drag-and-Drop block marks and anchors” on page 35.

  If you use HTML source code combined with block marks, make sure that the resulting published HTML source code is valid.
- Make sure that you use only well-formed HTML code. When you insert a **Drag-and-Drop** block mark, this creates a `<DIV>` tag in the published Web page. Therefore, be careful when you use tables in combination with block marks. See also Example 3-7, “Drag-and-Drop block marks and

well-formed HTML" on page 36 and Example 3-8, "Drag-and-Drop block marks and tables" on page 37.

- Every structural element for which you define a drop area must have exactly one *RedDot placeholder*.
- A RedDot placeholder must always be placed outside the **Drag-and-Drop** block mark. If you use **Dynamic** block marks, make sure that these envelop the **Drag-and-Drop** block mark and the RedDot placeholder.

**To define a drop area:**

**Navigation path**

> SmartEdit > OpenPage RedDot > Shortcut menu: Content Classes > Edit Template *or*

> SmartTree > Select page > Edit Template

1. Choose a structural element (container, list, or anchor) and mark its section without the RedDot placeholder.
2. In the **Block Marks** list, click **Drag-and-Drop**.
3. Click **OK**.

**Example 3-3: Drag-and-Drop block marks and anchors**

The following example shows how to use **Drag-and-Drop** block marks with anchors:

```
<!IoRangeRedDotEditOnly>
<!IoRedDot_anchor>Anchor<br />
<!/IoRangeRedDotEditOnly>
<!IoRangeDragDrop>
<a href="<%anchor%>"Anchor</a>
<!/IoRangeDragDrop>
```

**Example 3-4: Drag-and-Drop block marks and dynamic anchors**

The following example shows how to use **Drag-and-Drop** block marks with dynamic anchors:

```
<!IoRangeDynLink>
<!IoRangeRedDotEditOnly>
<!IoRedDot_dyn_anchor>Dynamic Anchor<br />
<!/IoRangeRedDotEditOnly>
<!IoRangeDragDrop>
<%dyn_anchor%>
<!/IoRangeDragDrop>
<!/IoRangeDynLink>
```

**Example 3-5: Drag-and-Drop block marks and containers**

The following example shows how to use **Drag-and-Drop** block marks with containers:

```
<!IoRangeRedDotEditOnly>
<!IoRedDot_container>Container<br />
<!/IoRangeRedDotEditOnly>
<!IoRangeDragDrop>
<%container%>
<!/IoRangeDragDrop>
```

**Example 3-6: Drag-and-Drop block marks and lists**

The following example shows how to use **Drag-and-Drop** block marks with lists:

```
<!IoRangeRedDotEditOnly>
<!IoRedDot_list>List<br />
<!/IoRangeRedDotEditOnly>
<!IoRangeDragDrop>
<!IoRangeList><%list%><!/IoRangeList>
<!/IoRangeDragDrop>
```

**Example 3-7: Drag-and-Drop block marks and well-formed HTML**

The following example shows how to use **Drag-and-Drop** block marks combined with well-formed HTML:

```
<!IoRangeRedDotEditOnly>
<!IoRedDot_extended_list>Extended List<br />
<!/IoRangeRedDotEditOnly>
<ul>
<!IoRangeDragDrop>
<!IoRangeList>
<li><%extended_list%></li>
<!/IoRangeList>
<!/IoRangeDragDrop>
</ul>
```

**Example 3-8: Drag-and-Drop block marks and tables**

The following example shows how to use **Drag-and-Drop** block marks combined with tables:

```
<table>
<tr>
<td>
<!IoRangeDragDrop>
<!IoRangeList>
<div><%extended_list%></div>
<!/IoRangeList>
<!/IoRangeDragDrop>
</tr>
</td>
</table>
```

**For site builders: Editing the sort order settings**

To be able to sort pages within a drop area of a structural element, you have to edit the structural elements' sort order settings in SmartTree.

To edit the sort order settings, see Section 7.7.16 “Editing sort order settings” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*.

## 3.5.2 Drag-and-Drop functions for content elements

**Navigation path**

> SmartEdit > OpenPage RedDot

In SmartEdit, you can use drag-and-drop functions for content elements. The following drag-and-drop functions are available:

- Dragging assets from Asset Panel to the **Edit RedDot** symbol of an Image or Media element. For more information on Asset Panel, see Section 3 “Working with assets in Asset Panel” in *OpenText Web Site Management Server - Asset Manager Guide (WSMSAM-UGD)*.
- Dragging content to a content element with the drag-and-drop control. For more information, see “Using the Drag-and-Drop control” on page 38.

**Note:** Inserting content into elements using the drag-and-drop function replaces existing content.

**To edit content elements using Asset Panel:**

1. Click **OpenPage RedDot** to open and edit the SmartEdit page.

2. Drag content from Asset Panel to an **Edit RedDot** symbol that is assigned to an Image or Media element.

3. Edit other elements as required.

4. When you have edited all elements, click **ClosePage RedDot** to close the page. The changes are saved to the page.

### Using the Drag-and-Drop control

The drag-and-drop control is a drag-and-drop function that allows you to check whether you can drag content to content elements in SmartEdit. If the drag-and-drop functionality is available, the **Drop Zone** symbol appears beside the **Edit RedDot** symbol when you activate the drag-and-drop control for a content element. You can also use the **Drop Zone** symbol to insert contents into the content elements.

**Note:** The **Drop Zone** symbol is only available in Microsoft Internet Explorer.

The following sources can be dragged to the **Drop Zone**:

- Text or media files from the Windows file directory
- Media files from a browser page
- Marked text sections from a text file or a browser page

**Notes**

- You may insert entire documents or text sections from file types with the following extensions: *doc*, *docm*, *docx*, *htm*, *html*, *rtf*, *txt*, *xls*, *xlsb*, *xlsm*, and *xlsx*. Note that only the text content from the documents is inserted.
- The file types that you may insert for Image or Media elements depends on the eligible suffixes specified in the element settings.

To use the drag-and-drop control, you have to specify the following settings. You may need to contact your Administrator.

- *Server Manager > Start > Administer Application Servers > Application Servers > Select Application Server > Action: Edit Settings > Edit Application Server Settings.*

  Select the **Permit ActiveX controls** option to display the **Drop Zone** symbol.

- Enable **ActiveX controls** in your browser settings to display the **Drop Zone** symbol.

- *Template Editor > Select Element Placeholder > Edit Element.*

  Select the following check boxes for the respective content element: **Activate DirectEdit** and **Activate drag-and-drop control**.

**To edit content elements using the drag-and-drop control:**

1. Click **OpenPage RedDot** to open and edit the SmartEdit page.
2. Drag content to the **Drop Zone** symbol.

   When the symbol turns green, drop the content on the symbol. If the symbol turns yellow, it means that ActiveX Control is processing the insertion of your document. Depending on the file size, this process can take some time to complete.

   - For Standard Field and Text elements, the respective area switches automatically to DirectEdit mode. The **SaveElement RedDot** symbol appears. You can now edit the content that you just inserted in DirectEdit mode. Click **SaveElement RedDot** to save your changes, or press ESC to discard them.
   - When content is added to Image, Background, and Media elements, it is inserted directly into the respective element and can only be deleted by reopening the element using **Edit RedDot**.
3. Edit other elements as required.
4. When you have edited all elements, click **ClosePage RedDot** to close the page. The changes are saved to the page.

Chapter 4

# Using SmartEdit

The following section contains detailed information about the individual actions and possible settings in each dialog window in SmartEdit. In addition to the notes on the search function and tasks, it also presents the various actions that you can perform via the project and page shortcut menus. It also explains how you can edit content and structural elements in your project.

How you use SmartEdit is described in a separate section that explains the main functions and shows the different options.

See:

- "First steps in SmartEdit" on page 19

## 4.1 Using the search function

In SmartEdit, you have different options for finding pages and using search results for your work in SmartEdit.

**Quick search** - The global menu contains the quick search function, which you can use to search for terms in page headlines or for page IDs.

- **Searching for a term** - When you enter a search term in the quick search box, the view switches to the Search module. From there, a search for the *Headline* search criterion is carried out automatically. The list area displays all pages that contain the search term in the headline. You can now edit the page you were looking for either directly in the editing area of the Search module or move the page to Clipboard via the shortcut menu, so that you can access it directly in SmartEdit.
- **Searching for a page ID** - You can also use the quick search to find a page ID; enter *ID:* followed by the page ID that you want to find (for example, *ID:51*). The page you are looking for is opened directly in SmartEdit.

**Page Search panel** - In the Page Search panel, you can use saved searches that you previously created in the Search module. When you select a saved search from the drop-down list, it is carried out directly in the panel and the search result is displayed. For the pages in the search result, you can open a shortcut menu from which you can open the respective page directly in SmartEdit.

For more information about the Search module, see:

- Section 5 "Working with the search" in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*

## 4.2 Editing tasks

Pending tasks are listed in the Tasks module, which you can access in the main menu. When the light bulb symbol in the status bar lights up, you have tasks pending. For more information about the editing options in the Tasks module, see Section 6 “Working with tasks” in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*.

**Notes**

- **My pages in workflow**

  If pages are only contained under the *My Pages in Workflow* item in the Tasks module tree view, the light bulb symbol will not light up. The pages are then submitted to another user for release and there are therefore no tasks for you to edit.

- **Tasks on project tree items**

  Users with the administrator role can view and edit the tasks of all users in the SmartTree project tree items.

## 4.3 Editing projects

If you have not opened a page in SmartEdit, various actions are available in the shortcut menu. Using the available actions, you can define the project settings or create an unlinked page.

### 4.3.1 Actions in the project shortcut menu

**Navigation path**

> SmartEdit > Right-click: Shortcut Menu

You can execute actions for the project via the shortcut menu. You can open the shortcut menu by right-clicking in the editing area when no page is open. The editing options available in the shortcut menu depend on authorizations and your user role. This means that only some of the actions described in the following section may be displayed.

The following actions are available in the project shortcut menu:

- **Create Unlinked Page** - Use this action to create a new page that is not yet linked to a structural element.
- **Edit Categories and Keywords** - Use this action to edit categories and keywords for the project.
- **Navigation Manager** - Use this action to make changes to the navigation structure in Navigation Manager.

**Note - Editing pages in different browsers**

The menu items for editing content classes and navigation (with Navigation Manager) are only available in Internet Explorer.

## 4.3.2 Creating unlinked pages

**Navigation path**

> SmartEdit > Right-click: Create Unlinked Page *or*

> SmartTree > Start > Administer Project Structure > Project > Create Unlinked Page

You can create a page based on a content class. Pages that are not connected to a structural element are called unlinked pages. You can create these using the *Create Unlinked Pages* action on the project tree item in SmartTree and in SmartEdit via the project shortcut menu.

A new unlinked page is placed in Clipboard in SmartTree and SmartEdit. In SmartEdit, the page is also opened directly for editing.

1. In the **Content Class Groups** section, select the content class folder containing the content class you require. The **List of Content Classes** lists all content classes available for selection. A description and a preview symbol are displayed if this information was saved for the content class. Depending on the action you used to open this dialog window, the page definitions for the content classes may also be listed. Use the symbol to access a template preview. This uses the template that is assigned to the *project variant* that is used as the display format. The sample texts, images, or default entries for the content elements in the template are displayed. The template preview is only available for content classes and not for page definitions. For more information, see the *Template Preview* section.

2. Select a content class from the **List of Content Classes**.
   The **Edit Headline** dialog window opens.

See also:

- "Template preview" on page 181
- "Editing headlines" on page 179

**Note - Creating new pages**

It is possible that no content classes are available for selection in the **Content Class Groups** dialog window. Only those content classes that have been defined in SmartTree will be displayed in this dialog window. The **Available via the shortcut menu in SmartEdit** check box is selected for these content classes in the content class *Settings*. Only users with the *Template Editor* role can make this setting.

### 4.3.3 Working with categories and keywords

Categories and keywords let you group pages by topics. You can use categories and keywords in your project for the following tasks:

- **Automating links** - Using categories and keywords, pages are automatically connected to lists and containers (multilinks).
- **Providing metadata** - Categories and keywords are used as metadata in other modules or external systems.

To set up and edit categories and keywords, different roles are needed:

- **Administrators and site builders** - Set up categories and keywords using the *Edit Categories and Keywords* action. This is available in the Action Menu for project tree items in SmartTree and in the shortcut menu for the project in SmartEdit. In addition, they connect categories and keywords to multilinks in SmartTree or SmartEdit and assign them to pages that they have created.
- **Authors and editors** - Assign categories and keywords to multilinks in SmartEdit and assign them to pages that they have created.

Pages are automatically connected to multilinks that have been assigned the same *keyword* or *category* in SmartTree or SmartEdit. Default setting: If a multilink has been assigned several categories and keywords, pages are connected using an OR operator. Consequently, all pages with at least one combination of category and keyword (*category / [category]* or *category / keyword*) that matches the multilink are connected to the multilink.

To use an AND operator, select the **All keyword assignments required** check box in the **Edit Keyword Assignment** dialog window. In this case, only pages matching all categories and keywords assigned to the multilink are connected to the multilink.

**Example 4-1: News lists for economy and politics**

You have, for example, a Web site with different news lists for the topics *Economy* and *Politics*. To list some news item pages under more than one topic, set up categories. For your news lists, create multilinks (in this case, lists), to which you assign the *Economy* and *Politics* categories respectively. You can then assign all news item pages that you want to list under multiple topics to the relevant categories. Matching categories are identified and the pages are automatically connected to the relevant lists.

For a more detailed classification, you can set up keywords for each category. For instance, your category *Economy* has the keywords *National Trade* and *Politics*; your category *Politics* the keywords *National* and *Economy*. To assign these keywords to lists and pages, select a category and choose a keyword from the list.

You can set up categories and keywords using the **Edit Categories and Keywords** action in SmartEdit or SmartTree. You assign these categories and

keywords to the lists in SmartTree using the **Edit Keyword Assignment** Action Menu item or in SmartEdit using the MultiLink RedDot. To assign news item pages to categories and keywords, choose *Assign Keywords* in the Action Menu in SmartTree, or use the shortcut menu of the open page in SmartEdit.

You can use the same labels for the categories and keywords in our example. A news item page with the topic Economic Policy can be assigned the category *Economy*/keyword *Politics*, and the category *Politics*/keyword *Economy*. It will be listed under both topics.

You can also assign multiple keywords within one category, or multiple categories and keywords to a list, for example, the keywords *Economy* and *National Trade*. In this case, an OR operator connects all pages to the list that have been assigned either the keyword *Economy* or the keyword *National Trade*. Thus you only need to assign one of the keywords to a page. When using an AND operator, you have to assign both keywords to all pages you want to list.

### Preassigning keywords

You can automatically preassign categories and keywords to newly created pages. To do this, you preassign categories and keywords to content classes. All pages based on the respective content class are then automatically preassigned this category or keyword.

You can preassign categories and keywords to multilinks within a content class, too. The multilink of a newly created page is then automatically preassigned the categories and keywords.

To preassign categories and keywords to multilink elements or content classes, choose the **Administer Content Classes** tree item. You need the **Template Editor** role to do this.

For example, you want to assign a new page the *Economy* category automatically and not individually. To do this, you can assign the *Economy* category to the content class on which the new page is to be based. The new page will then automatically be linked to lists or containers that also have the *Economy* category assigned to them. If you want to assign a list of a new page the *Economy* category then the list of the content class has to be assigned the *Economy* category.

For more information, see Section 5.5.28 “Preassigning keywords (content class)” in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*.

### Releasing keyword assignments (optional)

Automatic assignments have a great impact on the project structure. It is therefore desirable in some projects to control these using a workflow. A keyword assignment

will then only take effect if it has been released by an authorized user. This means that a new page is only assigned once the assignment has been released.

Keyword assignments are released within the global structural workflow. You can define *reactions* to the connection and disconnection of pages to a structural element (here: List element or container) using the structural workflow.

**Notes Keyword assignment at a glance**

Categories and keywords let you group pages that are automatically connected to lists and containers (multilinks). The following tasks are required:

- **Setting up** - Administrators or Site Builders set up categories and keywords using the **Edit Categories and Keywords** action.
- **Connecting** - Connect categories and keywords to multilinks.
- **Assigning** - Assign categories and keywords to individual pages or preassign them in content classes.
- **Releasing (optional)** - If a structural workflow has been set up, a keyword assignment only takes effect once it has been released by an authorized user.

See also:

- "Editing categories and keywords" on page 46
- "Editing keyword assignments" on page 191
- "Assigning keywords (edit page)" on page 70
- Section 5.5.28 "Preassigning keywords (content class)" in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*
- Section 4.9 "Workflows" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

## 4.3.4 Editing categories and keywords

**Navigation path**

> SmartEdit > Right-click: Edit Categories and Keywords *or*

> SmartTree > Start > Administer Project Structure > Project > Administer Categories and Keywords

You can create new categories and keywords and rename or delete existing categories and keywords. Your entries are automatically saved. Click **Close** to confirm your entries.

**To create a category:**

1. Enter a suitable name for the category in the **New category** box.
2. Click **Add** to create the category.

### To delete a category:

1. Select a category from the **Category** drop-down list.
2. Click **Delete**.
   - When you delete a category, it is deleted from the entire project. If the category is assigned to any pages or multilinks, the **Delete Category** prompt appears, listing existing assignments. This lets you decide whether you want to delete the category. To delete the category, enter your password and click **Yes** to confirm. To cancel, click **No**.
   - If the category is not assigned to any pages or links, no prompt appears.

### To rename a category:

1. Select a category from the **Category** drop-down list.
2. Click **Rename**. A second dialog opens, which allows you to rename the category.

### To create a keyword:

You can create any number of keywords within a category.

1. Select a category from the **Category** drop-down list.
2. Enter a name for the keyword in the **New keyword** box.
3. Click **Add** to create the keyword.

### To delete a keyword:

1. To delete a keyword, select the category containing the keyword from the **Category** drop-down list.
2. Select the keyword you want to delete from the list of keywords.
3. Click **Delete**.
   - When you delete a keyword, it is deleted from the entire project. If the keyword is assigned to any pages or multilinks, the **Delete Keyword** prompt appears, listing existing assignments. This lets you decide whether you want to delete the keyword. To delete the keyword, enter your password and click **Yes** to confirm. To cancel, click **No**.
   - If the keyword is not assigned to any pages or links, no prompt appears.

### To rename a keyword:

1. To rename a keyword, select the category containing the keyword from the list of categories.
2. Select the keyword you want to rename from the list of keywords.
3. Click **Rename**. A second dialog opens, which allows you to rename the keyword.

See also:

- "Working with categories and keywords" on page 44
- "Assigning keywords (edit page)" on page 70
- "Editing keyword assignments" on page 191
- "Renaming categories" on page 48
- "Renaming keywords" on page 48


### 4.3.5 Renaming categories

**Navigation path**

> SmartEdit > Right-click: Edit Categories and Keywords > Select category > Rename *or*

> SmartTree > Start > Administer Project Structure > Project
> Edit Categories and Keywords > Select category > Rename

When you rename a category, any keywords remain assigned to that category.

1. Enter a unique and meaningful name in the **Category** box.
2. Confirm with **OK**.

### 4.3.6 Renaming keywords

**Navigation path**

> SmartEdit > Right-click: Edit Categories and Keywords > Select keyword > Rename *or*

> SmartTree > Start > Administer Project Structure > Project
> Edit Categories and Keywords > Select keyword > Rename

You can rename a keyword. The existing category and page assignments remain intact.

1. Enter a meaningful name in the **Keyword** box.
2. Confirm with **OK**.

### 4.3.7 Navigation structure (Navigation Manager)

**Navigation path**

> SmartTree > Start > Browse Navigation > Project > Navigation Structure *or*

> SmartEdit > Right-click: Navigation Manager

The *Navigation Structure* dialog window lets you view the structure for the pages that are called directly by the navigation menu. To edit the navigation structure in the Navigation Manager, you need to have the appropriate authorization.

The *Navigation Structure* dialog window is split into two areas:

- **Navigation structure** - In this area, you create the pages with navigation-related content.
- **Navigation structure (auxiliary tree)** - This area contains an auxiliary tree, which displays either pages connected to the navigation structure or disconnected pages. Click the vertical bar to display or hide the area. To change the display, right-click in this area and use the shortcut menu.

**Notes Displaying page information**

In the *Navigation Structure* dialog box, you can view information about every page. Place the pointer over a page heading to see a tooltip that gives you the following information:

- Headline
- Page ID
- Page GUID
- Content class
- Main link
- Status
- Last changed by `<author>` on `<date/time>`

**To create a new navigation structure:**

1. Right-click in the work area on the left (Navigation structure) to open the menu.
2. Select the **Create Main Page** menu item. The **Create Page** dialog box opens. Select a content class for your new page. For more information, see the appropriate section. The main page is the first navigation level of the project.
3. Select the main page and right-click to open the shortcut menu again. Choose **Create Page** to create a page for the next navigation level in the same way.
4. Repeat these steps for all pages that form the navigation structure.
5. Click **Close**.

In the section on the left of the dialog, click right to perform the following actions:

- **Create Main Page/Page** - Lets you create additional pages as described above.
- **Edit Properties** - Opens the *Edit Properties* dialog box for a page of the navigation structure. For more information, see the appropriate section.
- **Delete Page** - Lets you delete a page from the navigation structure. The current language variant of the page is removed from the navigation and project structures and moved to the Recycle Bin.
- **Remove from Navigation** - Lets you remove a page from the navigation structure. The page is not deleted in the project but remains in the project

structure. In the *Navigation Structure* dialog box, you can display the page in the section on the right as a **disconnected page**.

- **Reload Selected Nodes** - Reloads the page you have selected and all its following pages. Use this action if you have created new pages in the project structure that are not yet shown in the navigation structure.
- **Expand Selected Nodes** - Expands all navigation levels that appear below the page you have selected.

Use the arrow keys between the two sections of the dialog to move pages within the navigation structure. Moving pages affects the display in SmartEdit, the page preview, and the published pages in all language variants. The order of the pages in the navigation structure does not depend on the order of the pages in the project structure in SmartTree.

- - Click to move a page to the top within a navigation level.
- - Click to move a page to the next higher position within a navigation level.
- - Click to move a page to the next lower position within a navigation level.
- - Click to move a page to the bottom within a navigation level.

In the section on the right of the dialog, a shortcut menu lets you perform the following actions:

- Right-click the section on the right:
  - **Display Connected Pages/Disconnected Pages** - Lets you choose whether to display connected or disconnected pages in the section on the right of the dialog. Displaying connected pages helps you move pages within a complex navigation structure. Use the drag-and-drop function to move pages from the section on the right to the section on the left. Displaying disconnected pages helps you identify pages that are not yet connected to the navigation structure, for example, because you have created them using the **Create Unlinked Page** action. You can use the drag-and-drop function to move disconnected pages to the required position in the navigation structure.
  - **Reload Tree** - Refreshes the display in the section on the right. When the connected pages are shown, the navigation structure is reloaded. When disconnected pages are displayed, Management Server checks the project for pages that are not connected to the navigation structure.
  - **Import Pages** - Lets you import pages from the project structure to the navigation structure in the **Disconnected Pages** view. The content classes that these pages are based on must be defined as master pages.
  - **Connect to first level** - In the **Disconnected Pages** view, you can move selected pages or the entire structure (for example, after the navigation structure has been reset) to the first navigation level in the section on the left. Alternatively, you can use the drag-and-drop function to move individual pages from the section on the right to the section on the left.

See also:

- Section 6.1.1 “Working with Navigation Manager” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*
- Section 6.1.2 “Notes and recommendations for working with Navigation Manager” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*
- “Creating the main page/new pages” on page 51
- “Editing properties” on page 52

### 4.3.8 Creating the main page/new pages

**Navigation path**

> SmartTree > Start > Browse Navigation > Project > Navigation Structure
> Right-click: Create Main Page *or*

> SmartTree > Start > Browse Navigation > Project > Navigation Structure
> Click Page > Right-click: Create Page *or*

> SmartEdit > Right-click: Navigation Manager > Right-click: Create Main Page *or*

> SmartEdit > Right-click: Navigation Manager > Click Page
> Right-click: Create Page

To build a navigational structure, create pages with content that is accessible directly from the navigation menu.

1. In the **Available content classes** section, choose a content class or a page definition. Only content classes and the respective page definitions that you have defined as master pages are listed.
2. In the **Headline** field, enter a page headline.
3. Optionally select the **Do not display in navigation** check box to hide the page in the navigation structure. This option is only available for navigation end pages.
4. Click **OK**.

See also:

- “Navigation structure (Navigation Manager)” on page 48

### 4.3.9 Editing properties

**Navigation path**

> SmartTree > Start > Browse Navigation > Project > Navigation Structure > Click Page or Main Page > Right-click: Edit Properties *or*

> SmartEdit > Right-click: Navigation Manager > Click Page or Main Page > Right-click: Edit Properties

You can edit the properties of a page or main page in the navigation structure.

1. You see the information below and have the following options:
   - **Headline** - Lets you change the page headline shown.
   - **Do not display in navigation** - Hides the page in the navigation structure. This option is only available for navigation end pages.
2. Click **OK**.

See also:

- "Navigation structure (Navigation Manager)" on page 48

## 4.4 Editing pages

If you have opened a page in SmartEdit by clicking the **OpenPage RedDot**, various actions are available in the shortcut menu. Each of the actions offered only affects the page that is currently open.

### 4.4.1 Actions in the page shortcut menu

**Navigation path**

> SmartEdit > OpenPage RedDot > Right-click: Shortcut Menu

You can execute actions for a page via the shortcut menu. The actions are available when you first open the page that you want to edit and right-click in the editing area. The editing options in the shortcut menu depend on authorizations and your user role. This means that only some of the actions described in the following section may be displayed.

**Note - Editing pages in different browsers**

The menu items for editing content classes and navigation (with Navigation Manager) are only available in Internet Explorer.

The following actions are available in the page shortcut menu:

- **Assign Keywords** - Use this action to assign categories and keywords to a page.

- **Create Shortcut in Clipboard** - Use this action to reference a page to Clipboard. The page is then available in Clipboard in SmartEdit and SmartTree.
- **Delete Page** - Use this action to move the current page to the Recycle Bin.
- **Edit Linking** - Use this action to edit the page linking.
- **Edit Navigation Order** - Use this action to change the order of pages relevant to the navigation.
- **Edit Notes** - Use this action to edit the page notes. The notes can be used, for example, to provide comments on page corrections.
- **Edit Properties** - Use this action to edit the page headline or the name of the published file.
- **Publish Page** - Use this action to publish the current page.
- **Reject Page** - Use this action to send the page back to an editor for correction.
- **Release Page** - Use this action to release the page. The last released version of the page is always published.
- **Reset Page to Draft Status** - Use this action to reset the current page to draft status. You can edit the page again in SmartEdit or SmartTree. When you have completed your changes, re-submit the page to the workflow.
- **Show Page Information** - Use this action to display the page information. Such information can include the content class used, the page status and workflow, or authorizations and publication settings.
- **Show Versions** - Use this action to view different versions of the current page.
- **Submit for Translation** - Use this action to submit the page for translation in other language variants.
- **Submit to Workflow** - Use this action to submit the page to the workflow.
- **Undo Changes** - Use this action to undo the changes that you made to the current page.
- **Undo Page** - Use this action to delete a page that has not yet been released.
- **Preview**
  - **Page Preview** - Use this action to view a preview of the current page.
  - **Page Preview by Date** - Use this action to view a preview of the current page for a specific date/time.
  - **Mobile Preview** - Use this action to view a preview of the current page for a different device or screen size.
  - **Device Preview** - Use this action to get an access token to create a connection between Management Server and the device preview for the current user. The device preview is a synchronized page preview on different browsers and devices while browsing in SmartEdit or SmartTree.
  - **Permanent Page Preview** - Use this action to open the Permanent Page Preview.

  - **Delivery Server Page Preview** - Use this action to see what your project pages will look like after publication and import to Delivery Server.
- **Validation**
  - **Check URLs** - Use this action to check whether the URLs of connected external links are still valid.
  - **Check Spelling** - Select this action to check the spelling of words. This action checks the spelling for the entire page as it would be published. You can specify the language variants that will be checked under SmartTree/ Administer Project Settings/Language Variants.
  - **Check Spelling (Permanent)** - Select this action to have the spelling check result permanently opened and updated.
  - **Validate Page** - Select this action to check the current page against the project variant settings for accessibility and conformity.
  - **Validate Page (Permanent)** - Select this action to have the validation result permanently opened and updated.
- **Content classes**
  - **Edit Template** - Use this action to edit the template on which this page is based. Changes that you have made to the template affect all pages that are based on this template. This menu item is only available if you have been assigned the *Template Editor* role. When you click this link, the Template Editor opens. For more information, see Section 2.1.4 “Templates” in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*.
  - **Open Template as Read-only** - Use this action to open the template in read-only mode. The template cannot be edited. You can open templates for viewing purposes without having been assigned editing rights; you can also open templates for viewing that are currently being edited by another user.
  - **Release Template** - Use this action to release the template.
  - **Replace Content Class** - Use this action if you want to assign a different content class to the current page.
  - **Submit to Workflow** - Use this action to submit the template to the workflow.

    **Note - Page shortcut menu actions**

    The *Submit to Workflow* menu item is only available if the page currently open has been saved as draft.
  - **Undo Changes** - Use this action to undo the changes that you made to the template.
- **Plug-ins**
  - **Plug-in** - Select any one of the listed plug-ins to execute it. If no plug-ins are listed, no plug-ins have been defined for editing this page. Contact your plug-in administrator for more information.

**Notes**

- **Additional menu items**

  The plug-in function lets you add additional menu items to dialog windows and to the shortcut menu. These menu items will not be described here. For more information, contact your administrator.

- **Refreshing the basic page after calling a plug-in in SmartEdit**

  You can trigger a refresh of the open basic page from plug-ins called in SmartEdit using the shortcut menu. To do so, call the following method in the plug-in:

  `top.frames.ioMain.opener.ReloadEditedPage()`

  **Example:**

```
<html>
  <body>
   <form name="test">
    <input type=button name="Action"

       value="Refresh And Close"

       onclick="top.opener.ReloadEditedPage();
       top.frames.ioMain.close()">
   </form>
  </body>
</html>
```

## 4.4.2 Undoing changes (pages)

**Navigation path**

> SmartTree > Start > Administer Project Structure
> Project ( `Select page` *or* `Select Link element` ) > Select page > Undo Changes
*or*

> SmartEdit > OpenPage RedDot > Right-click: Undo Changes

You can undo changes made to a page.

1. Click **Yes** at the prompt. The changes to the page are discarded. The most recently released version of each page is restored.

### 4.4.3 Undoing pages

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select Page > Select Link Element) > Select Page > Undo Page *or*

> SmartEdit > OpenPage RedDot > Right-click: Undo Page

You can undo newly created pages as long as they have not yet been submitted to the workflow. The page is then permanently deleted and cannot be restored.

1. Click **Yes** at the prompt. The page is undone.

### 4.4.4 Submitting to workflow

**Navigation path**

> SmartEdit > OpenPage RedDot > Right-click: Submit to Workflow

The **Submit to Workflow** menu item is only available if the page currently open has just been created or edited.

In SmartEdit, this option lets you submit pages to the workflow. As long as the page is not submitted to the workflow, it remains in draft form. Pages saved in draft form are only visible to the last editor. All other users will only see the last released status of the page.

The *Submit to Workflow* menu item provides the following options:

- If a page is submitted to the workflow and no workflow is defined (or a defined workflow has no corresponding release reaction), and the submitting user is authorized to release the page, the page is released automatically.
- If a page is submitted to the workflow and a workflow with a corresponding release reaction (**Release Necessary**) is defined, the page will be submitted for release.
- If a translated page is submitted to the workflow, the **Page Translated** action is triggered in the workflow. If the **Release Necessary** reaction has been connected to the **Page Translated** action, the page is submitted for release. If the **Release Necessary** reaction has not been defined, the page is released automatically.

If the page contains an empty element for which content is still required, the page is not submitted to the workflow. Instead, the **Incomplete Pages** dialog window opens. For more information, see "Incomplete pages" on page 57.

### 4.4.5 Submitting pages for translation

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link element) > Select page > Submit for Translation *or*

> SmartEdit > OpenPage RedDot > Right-click: Submit for Translation

You can submit the content of a page for translation in other language variants. The translator receives the page for editing via Tasks. This function is only available if the respective user has been assigned the *Translation Editor* license for the current project. The user must be assigned as translator for the respective language variant in the current project via SmartTree.

**Note - Submitting pages for translation**

If the page is linked to other pages, these pages can be accessed via the respective links. This means that a page containing links to other pages is not displayed for translation as a solitary page.

1. Select the check boxes of the language variants in which the page should be submitted for translation.
2. Select the **Submit all following pages** check box if you want to submit the pages connected to the current page via links for translation as well. This does not apply to referenced pages.
3. Click **OK** to confirm.

See also:

- Section 3.3.3 “Defining translators” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

### 4.4.6 Incomplete pages

**Navigation path**

> Tasks > My Pages > Pages Saved as Draft > Select language variant > Select Page > Right-click: Submit to Workflow *or*

> SmartEdit > OpenPage RedDot > Right-click: Submit to Workflow *or*

> SmartTree > Start > Administer Project Structure > Project > Pages Saved as Draft > Submit to Workflow *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link > ) Select page > Submit to Workflow

The **Incomplete Pages** dialog window shows pages with at least one mandatory element that still requires content or pages that require a keyword.

The **Incomplete Pages** dialog lists all pages for which mandatory processing steps have not been completed. Such mandatory processing steps could be:

- At least one element has the **Editing mandatory** property
- The content class has the **Keyword required from category** property

All elements with the **Editing mandatory** property must be filled with content before they can be submitted to the workflow. Once content has been added to these elements, the pages can be submitted to the workflow. You can define this property in SmartTree using the element properties for the respective element.

Pages based on a content class that has the **Keyword required from category ...** property can only be submitted to the workflow when they have been assigned a keyword from the specified category.

The following information is provided:

- The **page headline** is shown as a link. The page symbol precedes it.
- For elements with the **Editing mandatory** property
  - **Element name** - The element name is not a link. Each element is preceded by the symbol for its respective type.
- For the **Keyword required from category.** property
  A message appears informing you of the category from which you must assign a keyword. If no category is specified, enter a keyword of your choice.

The following actions are available:

- Click a page headline to edit the page again. Perform the necessary steps for editing. Elements for which editing is mandatory are identified in SmartEdit by the **Mandatory RedDot** .
- Click **Cancel** to edit the page at a later point.

Users with the *Administrator* role can assign incomplete pages to a different editor, who will then be able to edit the pages.

For more information, see:

- Section 7.2.35 “Assigning users” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

### 4.4.7 Releasing pages

**Navigation path**

> SmartEdit > OpenPage RedDot > Right-click: Release Page

You can release a page using the shortcut menu. After a page has been released, it is no longer in the *Saved as draft* mode. When publishing, it is always the last released status that is published. You can only release a page if you have this authorization.

Pages waiting for release are only displayed in SmartEdit if the **Unreleased pages** option is activated in the display settings. This also applies for users who are to release these pages.

Pages waiting for release can be viewed by users who have created or edited the page, even if the *Unreleased pages* option is deactivated in the display settings. Thus, users who are not able to edit the display settings can always view their own alterations.

**Note - Page information**

Through the Page Menu item **Page Information** you can check the status of the page.

See also:

- Section 3.3.2 “Display settings” in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*
- “Showing page information” on page 72

### 4.4.8 Rejecting pages

**Navigation path**

> SmartEdit > OpenPage RedDot
> Right-click: Reject Page (*if necessary*: Edit Notes)

You can reject a page that, for example, needs to be revised. The page is sent to the appropriate user for correction with the Tasks module. If it has been defined in the workflow for the page, you can select a release level to which the page is sent.

You can use the **Reject Page** item in the Action Menu to send the current page back for correction without further prompting. If a note has been defined for the content class, the **Edit Notes** dialog window opens. This lets you, for example, create *notes* concerning the required corrections.

See also:

- “Editing notes” on page 69

### 4.4.9 Rejection to release level

**Navigation path**

> Tasks > Releases > Pages Waiting for Release > Select Language Variant > Select page > Right-click: Reject Page *or*

> SmartEdit > OpenPage RedDot > Right-click: Reject Page *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link) > Select page > Reject Page *or*

> SmartTree > Start > Administer Project Structure > Project > Pages Waiting for Release > Reject Page

If you select the **Selection of release level by rejecting user** option for a release level (located in the workflow under **Type of rejection**), you can select the release level that the page will be sent back to. You can also send the page back to the user who edited the page last. This user is known as the Last Editor. If this option is not selected, the **Rejection to Release Level** dialog box is not displayed and the page is sent back to the last editor, to a specific release level, or to any one of the release levels. These settings are also defined for the release level in the workflow.

The **Rejection to Release Level** dialog box contains a list of all the workflow release level names. OpenText recommends that you number the names of the release levels. For example: Release level 1, release level 2, release level 3.

1. Select the option for the release level to which the page should be sent back. The following release levels are available:
   - **To last editor**: The page is sent back to the last editor of the page.
   - More release levels are listed under their names in the workflow.
2. Click **OK**.

### 4.4.10 Publishing pages

**Navigation path**

> SmartTree > Start > Browse Navigation > Project > Select Link > Publish Page *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link) > Select page > Publish Pages *or*

> SmartTree > Start > Administer Project Structure > Project > Select page > Select Link > Publish Pages *or*

> SmartEdit > OpenPage RedDot > Right-click: Publish Page

To start publication manually from SmartTree or SmartEdit, use the **Publish Pages** menu item.

In SmartTree, you can start publication with **Administer Project Structure** or **Browse Navigation**. In SmartEdit, you can start publication using the shortcut menu of a page.

You cannot publish pages from a container individually. In this case, all pages of that container and the container page itself will be published.

1. Define publication settings. You have the following options:
   - **Publish all following pages** - Select the check box if you want to publish all of the pages following the link. This allows you to publish a tree segment without having to select the pages individually. This is the case if you have made many alterations to the pages or to their templates in the tree segment.
   - **Publish related pages** - Select the check box if you want to publish pages that serve to supply elements to the published pages.
   - **Send email after publication to** - Select the check box if you want to be notified via email as soon as publication has been completed. Select an email address from the drop-down list.
   - **Publication on server** - Using the drop-down list, select the name of the *application server* where you want the publication to be carried out. The only servers to be displayed are those that are active and permit asynchronous processes.
   - **Publish according to** - Click ... to select the page publication deadline. You can select a future date or one that lies in the past. You need this function for test purposes. If on 29.01 you publish for the deadline 01.02, you will publish pages that will first become valid on 01.02. This allows you to preview your project environment to see how the pages planned for 01.02 are incorporated in your current project structure. If no date is provided, the time when the publication actually starts will act as the publication deadline. The publication will then contain only those pages that are currently valid and that have been released. Also keep in mind your linking and appearance schedule settings.
   - **Publish on** - Click ... to select a date to start the publication. The publication will include only those pages whose linking and appearance schedules are valid for this date. If no date is provided, the publication will start immediately.
2. **Language variants available for publication** - Select a check box to publish the pages of the corresponding language variant.
3. **Project variants available for publication** - Select a check box to publish the pages of the corresponding project variant. For test purposes, you can also publish draft versions.
4. Click **OK** to confirm.

**Notes**

- **Authorization to publish pages**

You can only publish pages if your Administrator has assigned you with the corresponding authorization.

- **Considering release status**

  When pages are published, their release status is taken into account. Therefore,

  - if a page has been created but not yet released, it is not published.
  - if a page is still being edited, but has been released previously, the last released status of the page is published.

  If the start page of a publishing job has not been released, publication stops immediately and a message appears. You can change this setting for individual project variants. In SmartTree, go to the **Edit Project Variants** dialog window and select the **Publish unreleased pages** check box.

- **Application server performance**

  If you select the **Publish all following pages** and/or **Publish related pages** check boxes, the application server performance may suffer during publication. For the publication of related pages, the server has to check for dependencies.

  For publications that are workflow-controlled, related pages are published only when changes made to a page affect higher-level related pages. This means, for example, that only higher-level pages with lists and dynamic links are published. The following applies:

  - The child pages pass on the content to the parent pages.
  - The content classes of parent pages contain content elements with the same names as the child pages. The content elements do not, however, need to be passed on from the child pages to the parent pages.

  **Related pages** are not published if you cleared the **Related pages** check box while editing the Start Publication workflow reaction.

See also:

- Section 5 “Administering publication” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

## 4.4.11 Setting date and time

**Navigation path**

> SmartEdit > OpenPage RedDot > Right-click: Publish Page
> Publication according to: *or*
> Publish on

You can set a date and time for publishing.

1. Configure the settings you require.
   - **Year** - Specify a year.
   - **Month** - Choose a month from the drop-down list.
   - **Calendar** - To set a day, select the option for that day in the calendar.
     - **Today** - Click to use the current date (according to the local setting of your computer).
   - **Time** - If required, enter a time, separating hours and minutes with a colon (00:00).
2. Click **OK** to confirm.

See also:

- "Publishing pages" on page 60
- "Appearance schedules" on page 78

## 4.4.12 Deleting pages

**Navigation path**

> SmartEdit > OpenPage RedDot > Right-click: Delete Page

You can delete individual pages in the project structure. These pages are moved to the **Edit Special Pages/Recycle Bin** tree item in SmartTree. You can restore, permanently delete, or archive pages there.

When you delete all language variants of a page, any following pages are disconnected from the structural elements on that page. These following pages are not automatically reconnected when the page is restored.

You have the following options:

- **Yes** - The page is deleted in the project structure. If you are assigned the *Translation Editor* role and if you are a translator of the project, and if the page is used in several language variants, the **Define Language Variants** dialog window opens next.

- **Show Details** - The **Delete Page: Details** dialog window opens. The dialog window provides information about where the pages or elements are referenced (for example, through references or connections). You can inform other users about the deletion by sending email notification; you do not have to delete the page immediately. This button is available if the page is linked in the project structure.
- **No** - Deletion is aborted.

**Note - Deleting pages in several language variants**

Users with the *Translation Editor* role who are assigned to the project as translator can delete pages in several language variants simultaneously. If you want to allow other users to be able to delete pages in the language variants for which they are authorized, you can change the system behavior in the general settings for the project.

For more information, see:


- "Deleting pages: Showing details" on page 65
- "Defining language variants" on page 64


## 4.4.13 Defining language variants

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link element) > Select page > Delete Page > Yes *or*

> SmartEdit > OpenPage RedDot > Right-click: Delete Page > Yes

You can define which language variants of a page are deleted.

The **Define Language Variants** dialog window only opens if all of the following apply:

- You want to delete a page.
- You are assigned the *Translation Editor* role.
- You are the assigned translator for the project.

**To define the language variants:**

1. Select the check boxes for the language variants of a page that you wish to delete. The **Select all language variants** option lets you select the check boxes for all language variants.
2. Click **OK**.
   The language variants you have selected of the page are moved to the **Recycle bin** tree item.

**Note:** In the general settings of the project, you can determine whether you want all language variants or just the current language variant to be preselected.

- Section 3.1.1 "Editing settings" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*
- "Deleting pages" on page 63

### 4.4.14 Deleting pages: Showing details

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select Page > Select Link Element) > Select Page > Delete Page > Show Details *or*

> SmartEdit > OpenPage RedDot > Right-click: Delete Page > Show Details

The dialog window provides information about where the pages or elements are referenced that you are about to delete (for example, through references or connections). You can inform other users about the deletion by sending email notification.

1. You have the following options:
   - **Language for deleting and/or notification** - Select the check boxes for the language variants in which you want to delete the page or for which you want email notification to be sent. This option is available when the settings for your user or the general system settings have been configured accordingly. For more information, see the information box below.
   - **Referencing pages** - Gives you a list of all the pages to which the page that is to be deleted or its elements refer. Select the check box of those pages that you want to include in the message with the `%Pages%` placeholder. If there are more than 20 pages, the pages are no longer shown in the dialog window, and the total number is shown instead. To get a full list of the affected pages, enter your email address in the **Also notify** box and send email notification by clicking the **Notify** button. The email notification lists all the referenced pages.
   - **Email notification** - You can send out email notification to inform about the deletion. To do this, configure the following settings:
     - **Last editor** - Select this check box to send email notification to the last editors of the pages selected above.
     - **Original author** - Select this check box to send email notification to the original authors of the pages selected above.
     - **Also notify** - Select this check box and enter one or more email addresses of people who should also be notified. Use a semicolon to separate email addresses.

- **Subject** - Change the predefined subject line.
- **Message** - Change the predefined message. The predefined message text uses placeholders that are replaced automatically when the email is sent:
  - **%UserName%** - Is replaced by the user name of the current user.
  - **%UserEmail%** - Is replaced by the current user's email address.
  - **%Pages%** - Is replaced by the pages selected above. When you select **Last editor** or **Original author** as email recipient, only those pages that affect the respective recipient are listed. All of the selected pages are included in the message text for the users who you added using the **Also notify** box.

2. End this operation with one of the following buttons:
   - **Delete** - The page is deleted and no email notification is sent. At least one language variant must have been selected.
   - **Delete with Notification** - Email notification is sent according to your settings, and the page is deleted. At least one language variant, one referencing page, and one recipient must have been defined or selected.
   - **Notify** - Email notification is sent according to your settings but the page is not deleted. At least one language variant, one referencing page, and one recipient must have been defined or selected.
   - **Cancel** - Closes the dialog window without starting any action.

**Note - Deleting pages in several language variants**

Users with the *Translation Editor* role who are assigned to the project as translator can delete pages in several language variants simultaneously. If you want to allow other users to be able to delete pages in the language variants for which they are authorized, you can change the system behavior in the general settings for the project.

## 4.4.15 Editing properties

**Navigation path**

> SmartEdit > OpenPage RedDot > Right-click: Edit Properties *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link) > Select page > Edit Properties *or*

> SmartTree > Start > Administer Content Classes > Select content class folder > Select content class > Instances > Select instance > Edit Properties

You can edit the page headline and other properties. If you have opened the dialog window from SmartEdit, some of the properties listed below will not be available.

**Notes Page headlines and published pages**

The page headline serves for the internal administration of the project. It does not appear on the published page.

Exceptions:

- The **Headline** element that is required for display is used in the template of the content class the page is based on.
- This page is connected to the structural element **List**. The page headline appears in a list on the published page.

1. You have the following options:
   - **Headline** - Enter a headline text in this box. This text is used as page name and as content for the *Headline element*. Note that you will receive a warning message if you try to change the headline of an already released page if you have the option *Generate file names according to Default SEO-friendly file name* in [xref to non-existent element "ms604"] selected and no file name specified.
   - **File name** - Enter a file name in this box. The file name should be entered without the file name extension. For more information on file name extensions, see the info box below.
   - **Generate file name according to Default SEO-friendly file name** - This option is only available if you have selected the **Default SEO-friendly file name** option in the project settings. If you click the link, the file name is calculated based on the headline by using all words of the headline text separated by hyphens. Note that you will receive a warning message if you try to apply the option to file names of pages that have already been released. For more information, see [xref to non-existent element "ms256"].
   - **Site map name** - This option is only available if the current dialog window is open in SmartTree. Enter a text for the site map name in this box. If the page is intended for display in a site map, this text is used as a page name in the site map instead of the page headline.
   - **Define as breadcrumb starting point** - This option is only available if the current dialog window is open in SmartTree. Select the check box if you wish to use this page as a starting point for a breadcrumb navigation.
   - **Do not use for breadcrumb** - This option is only available if the current dialog window is open in SmartTree. Select the check box if you do not wish to use this page as a starting point for a breadcrumb navigation.
2. Click **OK** to confirm.

**Notes**

- **Related pages and administrative changes**

  When searching for related pages or running the **Clean up live server** action, all editorial tasks are taken into account (such as content changes, new or deleted pages, changed links). Administrative changes to file names,

*publishing targets*, or the publication structure are not always taken into account because the implications of such changes may be quite complex. OpenText therefore recommends publishing the relevant sections of the project structure again after you have made these types of changes.

- **File name extensions for published pages**

  You can define file name extensions for published pages in several places in SmartTree: under **Administer Project Structure**, under **Administer Content Classes**, under **Administer Project Settings** and under **Administer Publication**. The file name extensions thus assigned are considered during publication as follows:

  1. **File name extension for a page** - First, the file name extension will be considered that was assigned to the page from the Action Menu item **Edit Properties** in the project tree. The following settings are only considered if no file name or a file name without an extension has been entered for the page.**Note:** To publish a file without a file name extension, enter a period after the file name (for example, *test.*). The period is then left out and the file is published without a file name extension (the file *test* is published in this example).
  2. **File name extension for a template** - If no file name extension was assigned to a page in the project structure, the file name extension will be used that was assigned to the template, depending on the published project variant. You edit this type of file name extension below the **Administer Content Classes** tree item. Select the **Templates** tree item in a content class and then select the template to which the project variant you want to publish is assigned. The Action Menu item **Edit Properties** lets you edit the file name extension.
  3. **File name extension for a project variant** - If no file name extension was assigned to the template of the project variant to be published, the file name extension that was assigned to the project variant using the Action Menu item **Edit Project Variant** will be used. To open this dialog for a project variant, select the **Administer Project Settings** tree item and choose the Action Menu item **Edit Project Variant**.
  4. **File name extension for project publication** - If no file name extension was assigned for the project variant to be published, the file name extension that was assigned using the Action Menu item **General Settings** will be used. To open this dialog for a project variant, go to *Administer Publication > Project > Edit General Settings*.
  5. If you have not defined a file name extension in any of the dialog windows mentioned, the page will be published with the file name extension *.htm*.

You can use the **Edit Properties** item in the Action Menu to restore a deleted page. The page must still exist in at least one other language variant.

See also:

- Section 7.2.43 “Deleting pages” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

## 4.4.16 Editing notes

**Navigation path**

> Tasks > Releases > Pages Waiting for Release > Select Language Variant > Select page > Right-click: Reject Page *or*

> SmartEdit > OpenPage RedDot > Right-click: Reject Page *or*

> SmartEdit > OpenPage RedDot > Right-click: Edit Notes *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link) > Select page > Edit Notes *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link) > Select page > Reject Page *or*

> SmartTree > Start > Administer Project Structure > Project > Pages Waiting for Release > Reject Page

This dialog box is only displayed if the content class that the page is based on and that you want to send back for further editing contains a note. You can make comments concerning a page in the note.

**To edit a note:**

1. Type your notes into the box.
2. Click **OK**.

**Example 4-2: Using notes**

If a workflow has been assigned to the page, the note can be used, for instance, to enter the reason for rejection. The content of the note will then be displayed in the *Pages Waiting for Correction* dialog box and is visible to the user who receives the page for correction.

**Creating notes**

For more information on creating and editing notes, see Section 5.10.3 “Editing notes” in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*.

### 4.4.17 Assigning keywords (edit page)

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link element) > Select page > Assign Keywords *or*

> SmartEdit > OpenPage RedDot > Right-click: Assign Keywords

In the *Assign Keywords* dialog window, you can

- assign categories and/or keywords to a page
- remove keyword assignments from a page

Any pages that you assign categories and keywords are automatically linked to the multilinks (lists or containers) that have been assigned the same categories and keywords. This type of connection is called *keyword assignment*. You can assign keywords from categories to a page or just the category alone without keywords.

The global structural workflow lets you determine whether keyword assignments have to be released. For more information, see "Assigning keywords (edit page)" on page 70.

You can preassign categories and keywords to a content class. Any new pages that are based on this content class are automatically assigned the preassigned categories and keywords.

For more information, see "Working with categories and keywords" on page 44. For more information about *preassigning keywords*, see Section 5.5.28 "Preassigning keywords (content class)" in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*.

1. Edit the assigned keywords. You can view existing keyword assignments and their **Status** under **Category** and **Keyword**: Released keyword assignment, new / deleted keyword assignment waiting for release (if a structural workflow has been set up). You have the following options:
   - Click **Add** to assign the page to a category or keyword. It is also possible to assign the page just to a category. The *Select Keyword* dialog window opens.
   - Click **Delete** to delete an existing keyword assignment.
2. Click **OK** to confirm.

You can find information about working with keywords and categories in another part of this documentation.

See also:

- "Working with categories and keywords" on page 44

- "Editing categories and keywords" on page 46
- "Editing keyword assignments" on page 191
- "Selecting keywords" on page 71
- Section 4.9 "Workflows" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

### 4.4.18 Selecting keywords

This dialog window lists all the categories and keywords that have been created in the project. You can select a category and a keyword, or a category without a keyword.

You can create categories with and without keywords.

1. Select a **category** from the drop-down list.
2. You have the following options:
   - Select a **keyword** from the drop-down list to assign it. All keywords of the selected category are displayed.
   - To assign a category only, select **[Category]** in the keyword list. By default, the **[Category]** item is added to the keyword list when you create a category.
3. Click **OK** to confirm.

**Note - Selecting categories and keywords**

If no category is offered in the drop-down list **Category**, or if the list under **Keywords** is empty, this means that for this project there has not been created a category or a keyword for a category. In this case, categories and keywords must first be created, as is the case if you do not find appropriate keywords.

For more information about working with keywords and categories, see:

- "Working with categories and keywords" on page 44
- Section 5.5.28 "Preassigning keywords (content class)" in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*

## 4.4.19 Showing page information

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link element) > Select page > Show Page Information *or*

> SmartEdit > OpenPage RedDot > Right-click: Show Page Information

Use this page information to find out the page status and when the page was created or edited and by which editor.

1. The following information is shown:

   - **General Page Information**

     - **Headline** - The headline that was assigned for the internal administration of the page. If the page contains a headline element, the content of the element is shown here.
     - **Page ID** - Each page in the project is assigned an internal page ID that identifies it for Management Server. Page IDs are assigned automatically.
     - **Page GUID** - Each page in the project is assigned an internal page GUID that identifies it for Management Server. Page GUIDs are assigned automatically.
     - **Content class** - Specifies the content class and the content class folder used to create the page. Click the link to find the position of the content class in the tree. This function is only available if you opened the Page Information in SmartTree.
     - **Main link** - If a page is linked to several pages, one page is defined as the main link. You define the main link in the **Edit Linking/Appearance Schedule** dialog window. Click the link to view the position of the main link in the tree. This function is only available if you opened the Page Information in SmartTree.

   - **Page Status and Workflow** - Displays the workflow in effect for this page. If a page is connected to several links for which different workflows are defined, the main link workflow is applied. A page status is displayed for each language variant.

     - **Name of the language variant**

       Displays the page status of the page in the respective language variant. The following statuses are possible:

       - **Released** - The page is released.
       - **Waiting for release** - Editing is complete, the page has been submitted to the workflow, and the page is now waiting for release by a person authorized to release the page.

    - **Waiting for correction** - The page has been returned to an editor for revision.
    - **Saved as draft** - The page is currently being edited.
    - **Waiting to be translated** - The page was submitted for translation. This could have been done through the workflow or by using the *Submit for translation* action.
    - **Translation saved as draft** - The page is currently being translated.
  - **Workflow** - Shows the name of the workflow that is in effect for this page. If no name is displayed, it means that no workflow has been defined.
  - **Release level** - Displays the current release level of the page.
  - **Last release by** - Displays the name of the user who last released the page. It also displays the date that the page was last released.
- **Page Lock** - Displays who locked the page and when. If the page is currently in a workflow of another user, this is left blank.
  - **Edited by** - Displays the name of the user who is currently editing the page.
  - **Edited since** - Displays the date and time when editing began.
- **Created and Changed** - Displays who created or changed the page and when. The last editor is the user who made the last changes to the page even if the changed page has not been released yet.
  - **Created by** - User name of the user who created the page.
  - **Last changed by** - Displays the user name of the user who last changed the page (last editor).
  - **Created on** - The date and time that the page was created.
  - **Last changed on** - Displays the date and time the page was last edited.
- **Authorization Information** - Displays the authorization and detailed *authorization packages* that are defined for this page.
  - **Authorization package** - Displays the name of the authorization package. If no name is displayed, it means that no authorization package has been defined for this page.
  - **Detailed authorization package** - Displays the name of the detailed authorization package. If no name is displayed, it means that no detailed authorization package has been defined for this page.
- **Project Variants and Assigned Templates** - Displays which templates have been assigned to the project variants for this page. The project variant that is defined as the display format is identified by the word **(Selected)** in green. It also shows in which project variant the page is published. In the **Assign Project Variants** dialog window, you define the project variants in which a page is published.

- **Language Variants and Character Sets** - Displays which character sets are used for the individual language variants. The current display format is identified by the word **(Selected)** in green.
- **Publication Settings of Main Link** - Displays which combination of variants (language variant/project variant) of this page will be published where. To the right of the variant combination, you will also see the specified publishing target. The folders of the publication structure are listed underneath. Subfolders are not included in the list.

2. Click **Close**.

## 4.4.20 Linking/appearance schedules

**Navigation path**

> SmartEdit > OpenPage RedDot > Right-click: Edit Linking *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select structural element) > Select page > Linking/Appearance Schedule

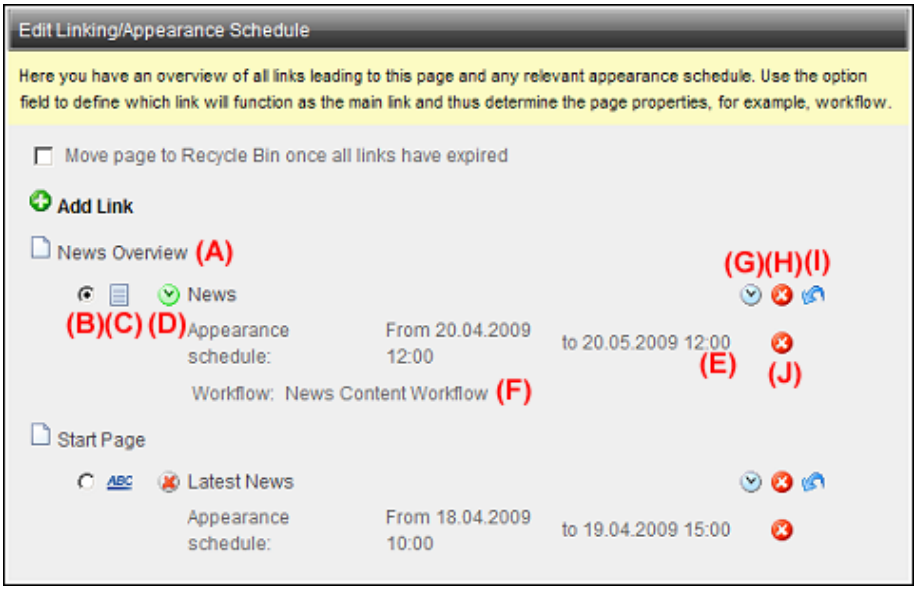
All structural elements connected to the selected page are listed in the *Edit Linking/ Appearance Schedule* dialog window. For each structural element, the page containing this structural element is given.

You can define an appearance schedule for each link. The appearance schedule determines whether a page is published at a specific time. If a page is connected to more than one structural element, you can change the main link.

Links can be released through a structural workflow. The page link then only takes effect once it has been released by an authorized user. The **Edit Linking/Appearance Schedule** dialog window shows all links that have been released and those waiting for release.

**Example 4-3: Edit linking/appearance schedule dialog window view**

The following image displays possible entries and some available options:




The following section explains the options in the Edit Linking/Appearance Schedule dialog box.

- **(A)** - Displays the name of the page that contains the structural element to which the current page is connected.
- **(B)** - Allows you to define the structural element as the main link. If a page is linked several times, the main link will control the page behavior in situations where several reactions are possible, such as due to multilinking, in a workflow or for the page preview. Only administrators and site builders can change the main link of a page. Also, a page must not be in the workflow, for example, waiting for release.
- **(C)** - Symbol for the structural element that is connected to the page. This symbol shows you if the link has been released or if it is waiting for release.

  The following examples show the different status of containers:

  - : Connection is released.
  - : Connection is waiting for release.
  - : Disconnection is waiting for release.
- **(D)** - Shows you the link status for each structural element. The following symbols are possible:

  - **Unlimited appearance schedule** - The page will be published. No appearance schedule has been specified.

- **Expired appearance schedule** - The page will not be published. The appearance schedule has expired.
- **Link Is Active** - The page will be published. The appearance schedule has not yet expired.
- **Link Is Not Yet Active** - The page will be published as scheduled.

- **(E)** - Shows the appearance schedule for the page that is connected to the structural element.
- **(F)** - Shows the name of the workflow that applies to the structural element.
- **(G)** - Sets or edits the specific appearance schedule for a page connected to a link.
- **(H)** - Removes the link with the relevant structural element. You can see the symbol only if you have the appropriate authorization. The symbol is not available for keyword assignments. To delete a keyword assignment, see "Assigning keywords (edit page)" on page 70.
- **(I)** - Lets you view the position of the link in the tree. This function is only available when you open the *Edit Linking/Appearance Schedule* dialog window from SmartTree.
- **(J)** - Cancels the appearance schedule.

**To edit the linking and appearance schedule:**

1. Select one of the following options:

   - **Move page to Recycle Bin once all links have expired** - Select this check box to move the page to the Recycle Bin once the appearance schedule for all structural elements connected to the page has expired. If you do not select this check box, the page remains in the project structure, but it is not published.
   - **Add link** - Lets you connect the page to a new structural element.
   - - Allows you to set or edit the specific appearance schedule for a page connected to a link.
   - - Removes the link with the relevant structural element. You can see this symbol only if you have the appropriate authorization. The symbol is not available for keyword assignments. To delete a keyword assignment, see "Assigning keywords (edit page)" on page 70.
   - - Lets you view the position of the link in the tree. This function is only available when you open the *Edit Linking/Appearance Schedule* dialog window from SmartTree.

- - Cancels the appearance schedule.

2. Click **OK**.

See also:

- "Adding links" on page 77
- "Appearance schedules" on page 78
- Section 7.10.7 "Recycle bin" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

**Notes**

- **SmartEdit view**

  Pages whose appearance schedule has either expired or not yet started are only displayed in SmartEdit if the **Ignore appearance schedule** option in the **Settings** of the global menu is selected. This is a user-specific setting.

- **Changing linking and appearance schedule settings**

  If the publication of related pages is active, changes in the linking and appearance schedule settings always result in a republication of all related pages to ensure that all the status of pages are current.

## 4.4.21 Adding links

**Navigation path**

> SmartEdit > OpenPage RedDot > Right-click: Edit Linking > Add Link *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link) > Select page > Linking/Appearance Schedule > Add

This dialog window displays a list of all the links that you as an individual user or as a user in a group are authorized to edit. You can select a link from this list and connect it to a page.

1. Use **Link Groups** to select the group that contains the desired link. Available links are displayed in the **Link List**.

2. Find the desired link in the **Link List** and click on it to add.

You define the links that are listed in the **Link List** via detailed authorizations packages.

- Section 4.1.3 "Personal links" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

## 4.4.22 Appearance schedules

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link element) > Select page > Linking/Appearance Schedule > *or*

> SmartEdit > OpenPage RedDot > Right-click: Edit Linking >

You can define an appearance schedule for a page.

You can manually start a publication that has been preset to start on a particular date.

See also:

- "Publishing pages" on page 60

1. To set a **Start date (time)** or an **End date (time)**, select the appropriate options. To leave one of these undefined, select **No start date (time)** or **No end date (time)**.
2. Enter a **Year** for the start/end date in the appropriate box or use the arrow symbols to specify a year.
3. Select a **Month** from the drop-down list.
4. In the **Time** box, enter a time of day.
5. In the calendar view, select a day.
6. Use the **Today** link to set the time settings to the current date.
7. Click **OK** to confirm.

**Example 4-4: Appearance schedule**

Possible applications: A page within a container should be displayed on the home page for one day, on the department page for one week, and on the archive page indefinitely.

If no time is defined the appearance schedule will be executed as follows:

- Valid starting on: 00:00 on the start date
- Valid until: 23:59 on the end date

Examples:

- Valid starting on 23.03.03 until 23.03.03 means that the page will be displayed on the home page on 23.03.03 from 12:00:00 AM to 11:59:00 PM.
- Valid starting on 01.01.03 until 31.12.03 means that the page will be displayed on the home page the entire year from 12:00:00 AM on 01.01.03 to 11:59:00 PM on 31.12.03.

## 4.4.23 Editing navigation order

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > Select Page > Select MultiLink > Edit Navigation Order *or*

> SmartEdit > OpenPage RedDot > Right-click: Edit Navigation Order

If you use the Navigation Manager in your project, you can define the order of the pages within a navigation level. You can only execute this action for a List element that has been defined in the master page settings of the content class for the navigation.

Changes that you make to the navigation order have an effect on the display in SmartEdit, the page preview, and the published pages, but not on the sort order in the project structure in SmartTree. The changes are made in all language variants.

1. Select the page that you want to move.
2. Use the symbols for changing the navigation order as follows:
   - - Moves the selected page to the top.
   - - Moves the selected page up one.
   - - Moves the selected page down one.
   - - Moves the selected page to the bottom.
3. Continue in this manner until all of the pages are in the desired order.
4. Confirm with **OK** to save your changes to the navigation order.

## 4.4.24 Showing versions

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link) > Select page > Show Versions *or*

> SmartTree > Start > Administer Project Structure > Project > Select page > Content Elements > Select content element > Show Versions *or*

> SmartEdit > OpenPage RedDot > Right-click: Show Versions

You can display versions of changed pages or content elements. Project versioning must be active to be able to display versions. You can activate and deactivate versioning in Server Manager. For more information, see Section 5.1.12 “Activating

versioning" in *OpenText Web Site Management Server - Server Manager Guide (WSMSSM-AGD)*.

You define the links that are listed in the Link List via detailed authorizations packages with the latest version at the top.

1. You have the following options:
   - **Start list on:** - Enter a date and time as the starting point for listing page versions in this box. You have the following options:
     - - Select this symbol to specify a time.
     - - Select this symbol to delete a specified time.
   - The following information is available for each version:
     - **Date/Time** - Specifies the creation time and date of this version.
     - **Author** - Specifies the name of the user who created the version.
     - **Headline/Content** - Specifies either the version's headline if it is a page or content fragment if it is a Content element.
     - **Actions** - Specifies actions that you can perform on this version. You have the following options:
       - - Select this symbol to view the version in the page preview.
       - - Select this symbol to restore the version.
     - **Compare versions** - Select the check boxes of two versions to compare differences in Redlining mode. For more information about Redlining, see Section 3.5.1 "Redlining mode" in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*.
2. Click **Close** to close the dialog window.

**Note - Deactivating versioning**

Once you have deactivated versioning in the Server Manager, the **Show Versions** Action Menu item is first displayed in SmartTree and in the shortcut menu of the project page in SmartEdit. This menu item is no longer displayed once you sign in to the project again.

## 4.4.25 (Permanent) page preview

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link element) > Select page > (Permanent) Page Preview *or*

> SmartEdit > OpenPage RedDot > Right-click: Preview/(Permanent) Page Preview

The preview shows what the page will look like after publication to the live server. You can access the page preview with the following actions:

- **Page Preview** - The preview of the current page is displayed.
- **Permanent Page Preview** - With the permanent page preview, the preview window remains open in the foreground when you switch to another page in SmartTree or SmartEdit. You always see the page preview of the current page.

You have the following options:

- To close the preview, press **ALT+F4** or click the cross in the top right-hand corner of the dialog window.
- 100% - + - (Permanent page preview only) The slider is located in the lower right-hand corner of the preview window. It allows you to zoom in and out, with zoom percentages ranging between 50 and 150. The display is only enlarged or reduced while the permanent preview is open. When you close the preview, this setting is not saved. To reset the zoom to 100%, double-click the slider.

See also:

- Section 7.7.7 “Creating and connecting pages” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

## 4.4.26 Page preview by date

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select Page > Select Link Element) > Select Page > Page Preview by Date *or*

> SmartEdit > OpenPage RedDot > Right-click: Preview/Page Preview by Date

This preview shows what the page will look like after publication to the live server, taking the appearance schedule into account. You can compare two statuses by opening a page link for two different dates in the two areas of the dialog window. Additionally, you can have the changes displayed in Redlining mode. When you click a link in the area on the left, the linked page is displayed in the area on the right. When calling external URLs, the area on the right is not synchronized.

You have the following options:

- - Click this symbol to define an appearance time in the next dialog.
- - Click this symbol to return to the page for which you opened the page preview by date.
- **Redlining mode** - Select this check box to allow Redlining to highlight the changes between the two appearance times.

**Example 4-5: Page preview by date for pages in lists or containers**

In the **Edit Linking/Appearance Schedule** dialog window, you can define when the linking of pages to structural elements should be active. A linking which is not active is not shown (for example, in SmartEdit or in the page preview.)

For example, when the linking of a page to a list is not active, the corresponding link to the page is not shown on the page on which the List element is located. Thus the page cannot be called in this part of the project and is not available.

For a page that is linked to a container, this means that the page content is not displayed in the frame page until the page has reached the start date/time of the appearance schedule. With the page preview by date, you can easily set different appearance times and view the content of the page in the container in the frame page without having to change the display settings.

You can find more information about display settings in the section about the global menu in the *Overview* documentation.

For more information, see:

- Section 3.3.2 “Display settings” in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*
- Section 3.5.1 “Redlining mode” in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*

## 4.4.27 Mobile preview

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select Page > Select Link Element) > Select Page > Mobile Preview *or*

> SmartEdit > OpenPage RedDot > Right-click: Preview/Mobile Preview

The mobile preview shows you what the published project page will look like on other devices or displayed with a different screen size. You can choose between different devices and desktop screen sizes.

You have the following options:

- Click on a device in the list to display the page in the dimensions of the selected device.
- Click **Rotate** to switch between landscape and portrait mode.
- You can scroll through the preview with the mouse wheel, or you can simulate swiping on a mobile device by dragging.
- To close the preview, press **ALT+F4** or click the cross in the top right-hand corner of the dialog window.

## 4.4.28 Device preview

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select Page > Select Link Element) > Select Page > Device Preview *or*

> SmartEdit > OpenPage RedDot > Right-click: Preview/Device Preview

**Note:** The function is only available if the **Device Preview** feature is installed.

The device preview is a Management Server module for web developers, designers, and testers who are working on mobile web projects. With the device preview they can preview their pages in different browsers and devices like mobile phones or tablets. All connected devices stay synchronized with the activity in SmartEdit and SmartTree. Changes to the layout are instantly displayed on other devices.

**Note:** In the device preview, the links are inactive.

When you click **Device Preview** in SmartEdit or SmartTree, an access token is displayed that you need to create a connection between the Management Server and the device preview for the current user.

**To open the device preview:**

1. In SmartEdit or SmartTree, click **Device Preview**.
2. Note the access token that is displayed.
3. On your device, enter the following URL to open the device preview:
   `https://<Management Server host name>/<port for device_preview website>/<device_preview application alias>`

   **Example:** `https://myhost:8443/devicepreview`
4. In the device preview dialog window, enter the access token to connect the device with your Management Server session.
5. Click **Connect**.

**Notes**

- If you connect multiple devices, you must create one token for each device.
- When using self-signed certificates, you need security exceptions for both required ports (default: 8443 and 10090). In the Firefox browser, the security exceptions must be added manually.
- Static files that are used in your project, like JavaScript and CSS, must be available in the IIS and the website that is used for the device preview.

**Logging for device preview**

Log entries for the device preview are written to the Management Server log file. To search for these log entries in the Log Viewer, select the **DevicePreview** component. For details, see Section 3.5 "Log files" in *OpenText Web Site Management Server - Server Manager Guide (WSMSSM-AGD)*.

In your *Settings*, you can display a list of all of your access tokens for the device preview. You can delete unused tokens and disconnect individual devices. For more information, see Section 3.3.6 "Device preview tokens" in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*.

## 4.4.29 Delivery Server page preview

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select Page > Select Link Element) > Select Page > Delivery Server Page Preview *or*

> SmartEdit > OpenPage RedDot
> Right-click: Preview/Delivery Server Page Preview

The Delivery Server page preview shows you what the project page will look like after publication and import to Delivery Server. Therefore, to have a correct Delivery

Server page preview, you must set up a Delivery Server integration that includes all settings for publishing to Delivery Server.

**To set up a Delivery Server integration:**

1. Configure the following settings in Delivery Server:

   a. Set up a *Management Server single sign-on connector*. The user is authenticated on Delivery Server through the connector. A connection to Delivery Server is established for the Delivery Server page preview without additional sign-in being required.

   b. In Delivery Server, set up the users that can call up the Delivery Server page preview in Management Server. The user names must match. Take note of case sensitivity.
   Users require the following role:

      - *Editor*

2. Configure the following settings in Management Server:

   a. In Server Manager, configure the following:

      - For the Delivery Server that is assigned to the Delivery Server publishing target for the preview, configure the settings for the *Management Server single sign-on connector*.
      - For the Delivery Server that is assigned to the Delivery Server publishing target for the preview, enter the **Delivery Server Web Services URL**.

   b. In SmartTree, define the following:

      - Delivery Server publishing target for the preview. For more information, see Section 3.6.7 “Using a Delivery Server publishing target for Delivery Server page preview” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*.
      - Delivery Server project variant for the preview. For more information, see Section 3.2.3 “Setting a project variant as the Delivery Server page preview format” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*.

**!** **Disabling cross-site request forgery (XSRF) protection for Delivery Server**

Management Server provides a mechanism to prevent cross-site request forgery (XSRF). To use the Delivery Server page preview and the Delivery Server elements in Management Server, you must disable the XSRF protection for requests from your Delivery Server by adding its hostname and port to a whitelist.

**To add your Delivery Server to a whitelist:**

1. Go to the `<Management Server installation directory>\ASP\` folder.
2. Open the `main.config` file in a text editor.
3. Go to the section:

```
<Security>
   <AntiCsrfModule>
       <Whitelist>
```

4. Add a `<TrustedReferrer>` element for your Delivery Server as a child of the `<Whitelist>` `<Referrer>` element.

   Example:

```
<TrustedReferrer>

   <Authority>myDeliveryServer:8080</Authority>

</TrustedReferrer>
```

**Notes Restrictions to the Delivery Server page preview**

Depending on the project, the following restrictions to the Delivery Server page preview are possible:

- External URLs can only be correctly executed in the Delivery Server page preview if they were entered as absolute and not relative to the application server.
- Links within a Web Component sometimes cannot be correctly executed if the following pages do not yet exist in Delivery Server.
- If the object cache has been deleted in Delivery Server, the content is sometimes not displayed, or not up-to-date, in the Delivery Server page preview. This restriction can be changed by logging on to Management Server again.

Basic knowledge about how to connect Management Server with Delivery Server is provided in *OpenText Web Site Management Server and Delivery Server integration - Configuration Guide (WSMSDS-CGD)*.

See also:

- Section 8 “Delivery Server integration” in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*
- Section 9.1.1 “Creating or editing Delivery Server connections” in *OpenText Web Site Management Server - Server Manager Guide (WSMSSM-AGD)*
- Section 3.6.5 “New Delivery Server publishing targets” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

## 4.4.30 Checking URLs

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select Page > Select Structural Element) > Select Page > Check URLs *or*

> SmartEdit > OpenPage RedDot > Right-click: Validation/Check URLs

You can check whether the URLs of connected external links are still valid. Because the URLs are checked from Management Server, the presence of a firewall can prevent the checking of the URLs. Validation is only performed for external links in the current language variant.

The following URLs are validated:

- External links that were assigned to a structural element with the *Assign URL* action.
- External links that were inserted in a Text element.

**Note - Checking external URLs**

If a Proxy server is needed, it has to be assigned in Server Manager together with the associated port so that external links can be checked. For more information, see Section 3.3 “Editing connections” in *OpenText Web Site Management Server - Server Manager Guide (WSMSSM-AGD)*.

1. Configure the following settings:
   - **Email notification to** - If you select this check box, an email will be sent to the specified address with the result of the operation. By default, this check box is selected and the current user's email address is shown. You can edit the address directly in the box.
   - **Broken links: [Number]** - A list of external links that were corrupt when checked last.
   - **Working links: [Number]** - A list of external links that functioned properly when checked last.
   - **Unchecked links: [Number]** - The number of external links that still need checking. Before you start your first check, the external links in the project are listed here.
   - Select the check boxes next to the links that you want to check or select the **Select all links** check box to select the external links of an area as a whole.
   - Click to edit the URL of the link. The next dialog contains information about the page elements in which the URL is used. You can then edit the URL by element. For more information, see the *Edit URLs by Element* section.
2. Click **Check Selected URLs** to start your check.

For more information, see:

- "Editing URLs by element" on page 88

### 4.4.31 Editing URLs by element

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select Page > Select Structural Element) > Select Page > Check URLs > Edit URLs by Element *or*

> SmartEdit > OpenPage RedDot > Right-click: Validation/Check URLs > Edit URLs by Element

The dialog window shows the elements in which the selected URL is used. You can edit URLs individually for each element or for several elements together.

1. You have the following options:
   - - Click this symbol to open the page preview.
   - You can edit the specified URL for each element in which it is used. To do that, go to the box next to it.
   - **Select all links** - Use this check box to select all the check boxes for the elements. Go to **Edit Selected Links** to edit the URLs for all boxes.
2. Click **OK** to confirm. The *Check URLs* dialog window opens again.

For more information, see:

- "Checking URLs" on page 87

### 4.4.32 (Permanent) spelling check - Web Compliance Manager

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select Page > Select Link) > Select Page > Check Spelling > OK *or*

> SmartTree > Start > Administer Project Structure > Project > (Select Page > Select Link) > Select Page > Check Spelling (Permanent) *or*

> SmartEdit > OpenPage RedDot > Right-click: Validation/Check Spelling (Permanent)

You have the following options for checking the spelling in a page:

- **Check Spelling** - In SmartTree, you can decide whether to perform the spelling check for the current page only or for pages that follow, too. If you choose to include the pages that follow, the spelling check report is sent to you in an email. If you choose to check individual pages only, the spelling check result is shown

directly in the dialog window. In SmartEdit, you can only check individual pages.

- **Check Spelling (Permanent)** - With the permanent spelling check, the dialog window remains open in the foreground when you switch to another page in SmartTree or SmartEdit. The spelling check result of the current page is displayed.

Spell checking is performed for the current language variant.

1. You have the following options:
   - **Source Code** - Click this button to view the source code, which is dynamically created based on the content class.
   - **Preview** - Click this button to display information as described below.
   - **Print** - Click this link to print the error messages for the page.
2. The following information is shown:
   - **Element name** - The name of the element (Headline, Standard Field, or Text element) that was tested.
   - **Element type** - The element type of the tested element.
   - **Element content** - The content of the tested element.
   - **Page status** - The test results with the number of error messages.
   - **Messages**
     - **Word** - The word that contains the error.
     - **Line** - The line in the source code that contains the word.
     - **Suggestions** - Correction suggestions.
3. Click **Close** to close the dialog window.

See also:

- Section 7.2.52 “Spelling check” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

### 4.4.33 (Permanent) page validation - Web Compliance Manager

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > (Select Page > Select Link) > Select Page > Validate Page > OK > Web Compliance Manager *or*

> SmartTree > Start > Administer Project Structure > Project > (Select Page > Select Link) > Select Page > Validate Page (Permanent) *or*

> SmartEdit > OpenPage RedDot
> Right-click: Validation/Validate Page (Permanent)

You have the following options for validating a page:

- **Validate Page** - In SmartTree, you can decide whether to perform the validation for the current page only or for pages that follow, too. If you choose to include the pages that follow, the validation report is sent to you in an email. If you choose to check individual pages only, the validation result is shown directly in the dialog window. In SmartEdit, you can only check individual pages.
- **Validate Page (Permanent)** - When using this action, the dialog window remains open in the foreground when you switch to another page in SmartTree or SmartEdit. The validation result of the current page is displayed.

Validation is performed for the project variant that is specified as the display format.

1. You have the following options:
   - **Source Code** - Click this button to view the source code for the page preview.
   - **Preview** - Click this button for the page preview.
   - **Quick Reference** - Click this button to open a quick reference about Web accessibility.
   - HTML - Use the drop-down list to select the project variant you want to check.
   - **Validation** - Click this button to see the validation result.
   - **Accessibility** - Click this button to see the result of the accessibility check.
   - **CSS** - Click this button to see the result of the cascading style sheet check.
   - **Print** - Click this link to print the error messages for the page.
2. The following information is shown:
   - **Page status** - The page status is either **Passed** or **Rejected**. A page has the status **Rejected** when it contains more errors and warnings than permitted in the validation and accessibility settings.
   - **Error** - Total number of errors from the **Validation**, **Accessibility**, and **CSS** checks.

- **Warnings** - Total number of warnings from the **Validation**, **Accessibility**, and **CSS** checks.
- Depending on your choice - **Validation**, **Accessibility**, or **CSS** - the numbers of errors and warnings are shown for the respective check.
- **Type** - The type of problem. The following types are possible: error, warning, note.
- **Line** - The line in the source code that contains the violation of the rule.
- **Column** - The column in the source code containing the violation to the rule.
- **Messages** - Details about the problem.

3. Click **Close** to close the dialog window.

See also:

- Section 7.2.50 "Validating pages" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

### 4.4.34 Editing templates

**Navigation path**

> SmartTree > Start > Administer Content Classes > Select content class folder > Select content class > Edit Template *or*

> SmartTree > Start > Administer Content Classes > Select content class folder > Select content class > Templates > Select template > Edit Template *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link) > Select page > Edit Template *or*

> SmartEdit > OpenPage RedDot > Right-click: Content Classes/Edit Template

You can edit the code of a template. The changes affect all pages that are based on the corresponding content class.

The **Edit Template** menu item is only available if you have been assigned the **Template Editor** option.

**Note - Editing content class templates**

The content class upon which a page is based can contain multiple templates. You can edit all the templates of the current content class in the Template Editor. You can use the drop-down list in the Template Editor to select a different template of this content class.


1. Edit the code.
2. Confirm with **OK**.

**Note - Setting default display format**

You can edit the code of a template in the Template Editor. This template has been assigned to the project variant that has been determined as default **display format** under *SmartTree* > *Start* > *Administer Project Settings* > *Project* > *Project Variants* > *Select Project Variant*.

The display format can be altered via the tree item **Administer Project Settings**.

1. Open **Project Variants.**
2. Click the corresponding project variant for the display format.
3. Select **Set as Default Display Format** in the Action Menu.

Next to the selected project variant in the tree, **display format** appears.

## 4.4.35 Opening templates as read-only

**Navigation path**

> SmartTree > Start > Administer Content Classes > Select Content Class Folder
> Select Content Class > Open Template as Read-only *or*

> SmartTree > Start > Administer Content Classes > Select Content Class Folder
> Select Content Class > Templates > Select Template > Open Template as Read-only *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page
> Select Link element) > Select page > Open Template as Read-only *or*

> SmartEdit > OpenPage RedDot
> Right-click: Open Content Class/Template as Read-only

You can open a template as read-only. The template cannot be edited and you cannot switch to another template in the content class in the Template Editor view. You can open templates as read-only even if you do not have editing authorization.

The following functions are available in Template Editor:

| This symbol ... | ... triggers this action: |
|---|---|
| (Print) | Sends the code to a printer. |
| (Copy) | Copies the code that you have selected to Clipboard. |
| rtl (Switch Text Direction) | Switches the direction of the text from left to right or vice versa. |
| (Decrease Font Size) | Decreases the font size of the code. |
| (Increase Font Size) | Increases the font size of the code. |

| This symbol ... | ... triggers this action: |
|---|---|
| (Find) | Searches for the string entered in the search box on the left. The code that you have selected is copied to the search box when you click in the box. |
| (Scan for New Placeholders) | Searches for all placeholders manually inserted in the code and marks them as placeholders. |
| (Edit Placeholder) | Opens the *Edit Element* dialog window when you select a placeholder for editing. In this dialog window, you can view but not edit the settings for the element. |

1. Click **Cancel** to close the Template Editor.

## 4.4.36 Submitting templates to the workflow

**Navigation path**

> SmartTree > Start > Administer Content Classes > Select Content Class Folder > Select Content Class > Submit to Workflow *or*

> SmartTree > Start > Administer Content Classes > Select content class folder > Select content class > Templates > Select template > Submit to Workflow *or*

> SmartTree > Start > Administer Project Structure > Project > Select page > Select Link element > Select page > Submit to Workflow *or*

> SmartEdit > OpenPage RedDot > Right-click: Content Classes/Submit to Workflow

Before you can release a template, the template needs to be submitted to the workflow.

**To submit a template to the workflow:**

1. Select the check box of the template draft version that you want to release.
2. Click **OK**.
   The template is submitted to the workflow.

See also:

- "Releasing templates" on page 94

## 4.4.37 Releasing templates

**Navigation path**

> SmartTree > Start > Administer Content Classes > Select content class folder > Select content class > Release Template *or*

> SmartTree > Start > Administer content classes > Select content class folder > Select content class > Templates > Select template > Release Template *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link element) > Select page > Release Template *or*

> SmartEdit > OpenPage RedDot > Right-click: Content Classes/Release Template

The template needs to be released before template changes can have any effect on live projects.

**To release a template:**

1. Select the check box of the template draft version that you want to release.
2. Click **OK**.
   The template is released.

## 4.4.38 Undoing changes (templates)

**Navigation path**

> SmartTree > Start > Administer Content Classes > Select content class folder > Select content class > Undo Changes *or*

> SmartTree > Start > Administer Content Classes > Select content class folder > Select content class > Templates > Select template > Undo Changes *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link element) > Select page > Undo Changes *or*

> SmartEdit > OpenPage RedDot > Right-click: Content Classes/Undo Changes

You can undo the changes that have been made since the template was last released.

**To undo template changes:**

1. Select the check box of the draft version whose changes you want to undo. You now see the following information about the draft status.
   - Processing
   - Waiting for release
2. Click **OK**.
   The template draft is deleted.

**Important - Undoing changes removes all unreleased changes**

When you edit a template after you have submitted it to the workflow, you continue editing the template in the draft status as it was before it was submitted to the workflow. Therefore, when you select the **Undo Changes** action, you will revert all changes that have not been released yet, and the template returns to its original released status.

## 4.4.39 Replacing content classes

**Navigation path**

> SmartEdit > OpenPage RedDot
> Right-click: Content Classes / Replace Content Class

You can replace the content class of a page with a different content class. This lets you change the page design. If you select an appropriate content class, the page content remains unchanged.

**Note - Browsers**

If you use the Netscape, Opera, or Mozilla browser, the **Replace Content Class** function will not be available.

**CAUTION - Replacing content classes**

Ensure that your replacement content class contains the same number and type of elements found on the existing page. If the new content class contains fewer elements, page content will be lost.

Use the *Content Class Groups* dialog box to select the content class that will serve as the basis for the page in the future.

**To replace a content class:**

1. In the **Content Class Groups** section, select the content class folder containing the content class you require. The **List of Content Classes** lists all content classes available for selection. A description and a preview symbol are displayed if this information was saved for the content class. Depending on the action you used to open this dialog window, the page definitions for the content classes may also be listed. Use the symbol to access a template preview. This uses the template that is assigned to the project variant that is used as the display format. The sample texts, images, or default entries for the content elements in the template are displayed. The template preview is only available for content classes and not for page definitions. For more information, see the *Template Preview* section.

2. Select a content class from the **List of Content Classes**.
   The **Edit Headline** dialog window opens.

**Note - Replace content class**

This menu option can be denied to a user or to users of a group via the global authorization package.

See also:

- "Assigning elements for content class replacement" on page 96

## 4.4.40 Assigning elements for content class replacement

**Navigation path**

> SmartEdit > OpenPage RedDot
> Right-click: Content Classes / Replace Content Class > Select content class

In the **Replace Content Class** dialog box, you will find the elements of the original content class mapped to the corresponding and applicable elements of the replacement content class.

**Original content class** refers to the content class that the respective page was based on before replacement. The **replacement content class** refers to the content class that the respective page will be based on after replacement.

1. The following information is available:
   - **Original content class** - This column contains all the elements of the original content class. The element symbol and element name is specified for each element.
   - **Replacement content class** - This column contains drop-down lists. Each drop-down list contains the elements of the replacement content class that can be used for the corresponding element of the original content class.
2. Select an element from the corresponding drop-down-list for each element of the original content class. This selection determines which element of the replacement content class the original content class content will be transferred to. Elements with the same name and of the same element type are preselected in the drop-down list.
   - **Element with no drop-down list** - If there is no suitable element in the replacement content class to replace the element of the original template, the no combo box is displayed. The *Element type not available* message appears. The element content is irretrievably lost in the content class replacement process. The content cannot be restored; not even through versioning. This applies vice versa, too: If there are more elements in the replacement content class than in the original content class, then the *Element type not available* message appears for the original content class. The replacement content class contains more elements (which can be filled with content) than the original content class. If two element types are identical, no drop-down list is displayed.

- **Empty drop-down list selection** - Each drop-down list has an empty selection. Select this if you do not want to transfer the content to the replacement content class.

3. Select the **Replace the content classes of all pages based on this content class** check box if you want to apply this change to all the pages that are based on the original content class. This action can take a very long time, depending on the project size. Usually it takes five seconds per page. This function is only available when you start the content class replacement in SmartTree.
4. Click **OK** to confirm. The replacement process is started.

**Notes Assigning elements**

You can only assign elements to other elements of the same type, but it is possible to “upgrade” some types:

- You can assign the **Anchor** element type to a **List** or to a **Container**
- You can assign the **Standard Field** element type to a **Text**

It is however not possible to downgrade elements, for example, from a multilink to a simple link, or a text field to a standard field.

## 4.4.41 Effect of replacing content classes

Content class replacement affects the pages that were created based on the content class.

The rules below apply for the information, content and preassignments of original content classes.

| Original content class | Replacing a content class - effect on a page |
|---|---|
| Page information | **Page information**, such as page ID, page GUID or author information, generally remains unchanged. |
| Page status | The status of a page in the workflow remains unchanged. |
| Element content | The content of pages whose content class has been replaced remains unchanged. When you replace a content class, the content of an element is transferred from the original content class to the new content class. Content is only lost if the replacement content class does not have a matching element. |
| Authorization package | All types of authorization packages are transferred to new page and the new elements. |
| Workflow | Preassigned workflows connected to link elements are also transferred. The linked pages will retain their workflow status. |
| References | Element references to pages, links or content items remain unchanged. |

| Original content class | Replacing a content class - effect on a page |
|---|---|
| Language variant | Content classes are replaced for all language variants. |
| Templates | All templates are replaced by the templates of the replacement content class, provided the number and name of the templates in the original content class match those of the replacement content class. |
| Keywords | Preassigned keywords on lists or containers are retained. |

The rules below apply for preassigned elements of replacement content classes.

| Replacement content class | Replacing a content class - effect on a page |
|---|---|
| Preassigned content for text, images, standard fields or options lists | These are taken from the replacement content class, unless the respective element of a page (or individual pages) has been preassigned specific content. |
| Elements preassigned with authorizations or workflows | These are not taken from the replacement content class. |
| Preassigned references | These are not taken from the replacement content class. |
| Preassigned content classes | If content classes have been preassigned to structural elements, these preassignments will be taken from the replacement content class. |

## 4.5 Editing content elements

As soon as you have opened a page, you can open and edit the content elements. All content elements are preset with an **Edit RedDot**. The content consists of text, images, and so-called media elements (such as PDF files, WAV files or plug-ins).

### 4.5.1 Editing Image and Media elements

**Navigation path**

> SmartEdit > OpenPage RedDot > Element (Background, Image or Media)
> Edit Media Element

Using the **Edit RedDot** of an *Image*, *Media*, or *Background* element, you can assign image or media files to the content elements. The files can be located in a file folder or Asset Manager folder. You can select a new file, delete the existing one, and you can edit attributes.

1. The following options are available:
   - **Editing Image and Media Elements**
     - - Click this symbol for the file assignment to be removed without further prompting.

- - Click this symbol to select a file. The assigned folder or Asset Manager folders opens. For more information, see the *Selecting Files* or *Editing Asset Manager Folders* section.
- - Click this symbol to edit the attributes of the assigned file. This option is subject to authorizations and is available only if attributes have been defined for the assigned Asset Manager folders or external folder.
- **ALT Attribute** - This box is only available with Image elements. Enter an alternative text for the image. The text is shown as a tooltip. This text is also shown as an alternative to the image if the image cannot be displayed, or if image display is disabled in the browser. Depending on the Image element settings, this may be mandatory or elective. The settings may also be configured to automatically enter the file name in the ALT attribute.

- **Plug-ins**
  - **Plug-in** - Click on a plug-in to run it.
  - - Click the symbol to display the plug-in target. You use the plug-in target to define a plug-in in Server Manager for this section. For more information, see *OpenText Web Site Management Server - Server Manager Guide (WSMSSM-AGD)*.

2. Click **OK** to confirm.

See also:


- "RedDots at a glance" on page 14
- "Selecting files" on page 99
- "Editing Asset Manager folders" on page 102


## 4.5.2 Selecting files

You can use different actions to open the *Select File* dialog window. Depending on the action used to access this dialog window, and on your authorizations, the dialog window lets you:

- View the content of file folders
- Switch to subfolders of WebDAV folders
- Upload files from your local file system to the file folder
- Select files for elements or graphic links, for example, from the file folder
- Search for files
- Preview files
- Delete files

1. The **Select File** dialog window provides information and offers you the following options:
   - **Maximum number of assets displayed** - Shows the **maximum number of assets**, as specified in the folder settings. This number defines up to how many files can be displayed in the dialog window and not how many files the folder can contain. If a file folder contains more files than can be displayed, you can filter the display using a search string.
   - **Assigned file** - Shows the name of the file that is currently assigned to the Image element.
   - **Search for file name containing** - Enter a search string in the box and click **Search** to find a file in the file folder. You can enter only a part of a file name if you use the following wildcard characters:
     - ***** - for any number of characters
     - **?** - for exactly one arbitrary character
   - **Transfer file from local file system** - Click this link to transfer a file from your local file system to the file folder. See also *Transferring Local Files*. The file that you select is shown in a list in the lower part of the dialog window. This list contains all files that are located in this folder.
   - You can edit the following settings in the list of files of the folder that you selected:
     - **File name** - This column lists all file names. Click a file name to use the file, for example, for an image link. Click to delete a file from the list and from the file folder. WebDAV folders may have subfolders. Click a folder name to open the subfolder.
     - **Date** - In this column, you will find the creation date and time of each file.
     - - Click this symbol to open the **Show Usage** dialog window for the file.
     - - Click this symbol to preview the file.
2. Click **Cancel** to close the dialog window.

See also:


- "Transferring local files" on page 101
- "Showing usage" on page 101

### 4.5.3 Transferring local files

You can select a local file and transfer it to the folder.

**To transfer a local file:**

1. Enter the directory path and file name of the desired file in the **Path and file name** box, or click **Browse...** and select a file.
2. Click **OK**.

For larger files, it may take a while to complete the asynchronous transfer. In this case, the file will not be visible in the preview or SmartEdit immediately.

### 4.5.4 Showing usage

You can see where in a project a file is used. To do this, open the **Show Usage** dialog window in a file folder using the symbol and in an Asset Manager folder using the **Show Usage** link.

You can generally use files in the following ways:

- in the pages of the project structure, in the elements Text, Image, Background, or Media
- in content classes, for preassigning the elements Image, Background, or Media
- as preview symbols for content classes and page definitions
- as image links
- as style sheets for elements of a content class

Depending on the usage of a file, the dialog window shows the following information:

- **[<Page ID>] <Name of the page>** - Displays the page ID and the name of the page where the file is used
  - **<Element symbol>, <Element name>, <language variants>** - Displays the element symbol and name as well as the language variants where the file is used
- **<Name of the content class>** - Name of the content class in which the file is preassigned
  - **<Element symbol>, <Element name>** - Displays the element symbol and name

You have the following options:

- If you have opened the dialog window from SmartTree, you can click the name of an element to be brought to that place in your project.

- If the file is used in a page, click the symbol for the page preview in the current language variant.
- Click **Close**.

## 4.5.5 Editing Asset Manager folders

The Asset Manager opens when you select a file from, or import a file to, a folder that is defined as an Asset Manager folder. In an Asset Manager folder, you can:

- Search for files
- Import files to the Asset Manager folder
- View files contained in the Asset Manager folder
- View file attributes and file information for each file
- Perform actions on files

The Asset Manager consists of the **Search** area, the **Catalog** area, the **Info** area, and the **Action** area.

Asset Manager folders provide information about the files they contain and allow you to perform actions. The options available to you in an Asset Manager folder are grouped into sections of the user interface.

### Search

In the Search area, you can use search criteria to filter the files that will be displayed in the Catalog area.

- Select a search attribute from the **Attribute** drop-down list to filter the files displayed. You have the following options:
  - File name
  - Original author
  - Last editor
  - Height
  - Width
  - Color depth
  - File size
  - All other attributes in the list are those that you created for this Asset Manager folder.
- For the attributes *Original author* and *Last editor*, choose the required users from the drop-down list. For the other attributes, enter a term that forms part of the attribute that you have selected. You can also use the "*" wildcard.

**Example:** To list GIF files only, select the *File Name* attribute from the drop-down list and enter the **.gif* string in the search box.

- In the case of Asset Manager folders with subfolders, you can include subfolders in the search by clicking **Subfolders**.
- Click the **Start Search** link.
  The files in the Asset Manager folder are filtered according to the criteria you selected. The number of files displayed is limited by the value set for **Maximum number of assets displayed**. When searching in subfolders, the subfolder name in which the file is located is displayed in front of the file name.
- Click the **Reset Search** link to reset the filter.

### Catalog area

- You have two display options for viewing the content of an Asset Manager folder. You can choose between *Thumbnail* and **List.** The **Switch Folder** option lets you switch to other Asset Manager folders or subfolders. For more information, see the *User Interface* section.
- **Select Asset from Local File System** - Click this link to import individual files from your local computer to the Asset Manager folder. The files are administered there and can be used in your project. You configure the relevant settings in the *Transfer Local File* dialog window.
  The names of these files must not contain the characters + or '.
  To transfer several files to an Asset Manager folder in one step, you can use the **Import Assets** action in SmartTree.
- **Move Assets** - Click this link to move files between the subfolders of an Asset Manager folder. You configure the relevant settings in a later dialog.
- **Export Assets** - Click this link to export files from an Asset Manager folder to your local file system. You configure the relevant settings in a later dialog.
- Click the thumbnail of a file to display the file content in a preview window.
  - Image files appear in their original size.
  - Provided an appropriate application is available on your local computer, all other files are also displayed in preview mode. If no such application is available on your local computer, you are prompted to download the file.

### Info area

Click the name of a file in the Catalog area to view the related information. The thumbnail is displayed in the Info area, along with the **File Attributes** and **File Information**.

### Actions area

The number of actions available depends on the settings configured for Asset Manager.

- **Crop Image** - Select this action to crop an image in a later dialog. The cropped image can replace the original file or you can save it in the Asset Manager folder with a different name. If versioning is enabled, you can save it as a version.
- **Extended Image Editing Options** - Select this action to edit an image in a later dialog. You can flip horizontally and vertically, change the image size, and convert it to black and white or to negative. You can also enter ImageMagick commands.
- **Edit Attributes** - Use this action to edit the selected file's user-defined attributes.
- **Update File** - Select this action to replace the content of the selected file with the content of a file on your local computer in a follow-on dialog. This option is not available if versioning has been enabled for your project.
- **Replace Thumbnail** - Choose this action to save a different thumbnail for a file in the Asset Manager folder. You configure the relevant settings in the *Transfer Local File* dialog window.
- **Refresh Thumbnail and File Information** - Use this action to refresh the thumbnails and file information for the selected file. Files with a custom thumbnail are assigned the default thumbnail as a result.
- **Check Out File** - You can only check out files if versioning has been enabled for the Asset Manager folder. Checked-out files are stored in your local file system. For example, you can edit a file in an image processing application and then check the edited file back in the Asset Manager folder. As long as files are checked out, they are locked for other users. The files can be used, but they cannot be edited. A user with the Administrator role can reset all users' checked out files to the current versions.
- **Undo Check-Out** - You can undo the check-out process.
- **Check In File** - Use this action to check in a previously checked-out file.
- **Show Versions** - Versioning is only available if the files of the folder are stored in a file system. With versioning, all the changes made to a file are documented. Older file versions can be restored. Within a project, the latest document version will always be used. This may also be a restored version.
- **Delete File** - Use this action to delete the file displayed in the info area.
- **Show Usage** - Select this action to see in the *Show Usage* dialog window where in a project a file is used.
- **Download File** - Use this action to download the selected file to a local file system.

For more information, see:


- “Transferring local files” on page 101
- “Showing usage” on page 101

## 4.5.6 Editing Standard Field elements (date)

**Navigation path**

> SmartEdit > OpenPage RedDot > Standard Field Element

You can assign a date to the **Standard Field** content element of the **Date** type.

1. Configure the following settings:
   - **Year** - Specify the year.
   - **Month** - Use the drop-down list to specify the month.
   - **Calendar** - Set the day by selecting the corresponding option in the calendar.
   - **Time** - If the time box is available, enter a time. Separate hours and minutes with a colon (00:00).
   - Today - Click this button if you want to use the current date (corresponding to the local settings).
2. Click **OK** to confirm.

## 4.5.7 Editing Standard Field elements (numeric)

**Navigation path**

> SmartEdit > OpenPage RedDot > Standard Field Element

You can enter a number for this element.

1. Use the available field to enter a number or to edit one already there.
2. Confirm with **OK**.

## 4.5.8 Editing Standard Field elements (time)

**Navigation path**

> SmartEdit > OpenPage RedDot > Standard Field Element

You can enter a time for this element.

1. Use the available field to enter a time value in the following form: hh:mm:ss. Also, you can edit any existing time value.
2. Confirm with **OK**.

### 4.5.9 Editing standard fields (text, email, URL, user-defined)

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > Select page
> Content Elements > Select Standard Field element (Text, Email, URL, User-defined)
> Edit Element Content *or*

> SmartEdit > OpenPage RedDot > Standard Field Element

To edit the content of a **Standard Field** element of the type **Text**, **Email**, **URL**, or **User-defined**, enter a text or string. Depending on the element type, you may have to use a set format for your entry, such as for the type **URL**. You can specify element types and the required input format in the content class for a page.

1. Enter a text item that has the required format and the maximum number of characters permitted, or edit an existing item.
2. Click **OK** to confirm.

**Number of characters**

The **Standard Field** element can contain a maximum of 255 characters. This number can be further limited by the element's properties. When a limit is entered, the user will only be able to enter a number of characters corresponding to the number given. If a user tries to enter more characters than allowed, the cursor will remain stationary and no further characters can be entered. This also applies to text entered from the Windows clipboard using the **CTRL+V** keyboard shortcut. In this case the element will only accept a number of characters equal to the number specified. If you enter text from the Windows clipboard that contains more characters than specified a message will appear. The number of characters that still can be added to the Standard Field element is listed at the bottom of the dialog window.

### 4.5.10 Editing Option List elements

**Navigation path**

> SmartEdit > OpenPage RedDot > Standard Field Element

With the *Option List* element, you can use a drop-down list to choose between options defined by the administrator.

1. Select the desired option from the drop-down list.
2. Confirm with **OK**.

## 4.5.11 Editing properties

**Navigation path**

> SmartEdit > OpenPage RedDot > Right-click: Edit Properties *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link) > Select page > Edit Properties *or*

> SmartTree > Start > Administer Content Classes > Select content class folder > Select content class > Instances > Select instance > Edit Properties

You can edit the page headline and other properties. If you have opened the dialog window from SmartEdit, some of the properties listed below will not be available.

**Notes Page headlines and published pages**

The page headline serves for the internal administration of the project. It does not appear on the published page.

Exceptions:

- The **Headline** element that is required for display is used in the template of the content class the page is based on.
- This page is connected to the structural element **List**. The page headline appears in a list on the published page.

1. You have the following options:

   - **Headline** - Enter a headline text in this box. This text is used as page name and as content for the *Headline element*. Note that you will receive a warning message if you try to change the headline of an already released page if you have the option *Generate file names according to Default SEO-friendly file name* in [xref to non-existent element "ms604"] selected and no file name specified.
   - **File name** - Enter a file name in this box. The file name should be entered without the file name extension. For more information on file name extensions, see the info box below.
   - **Generate file name according to Default SEO-friendly file name** - This option is only available if you have selected the **Default SEO-friendly file name** option in the project settings. If you click the link, the file name is calculated based on the headline by using all words of the headline text separated by hyphens. Note that you will receive a warning message if you try to apply the option to file names of pages that have already been released. For more information, see [xref to non-existent element "ms256"].
   - **Site map name** - This option is only available if the current dialog window is open in SmartTree. Enter a text for the site map name in this box. If the page is intended for display in a site map, this text is used as a page name in the site map instead of the page headline.

- **Define as breadcrumb starting point** - This option is only available if the current dialog window is open in SmartTree. Select the check box if you wish to use this page as a starting point for a breadcrumb navigation.
- **Do not use for breadcrumb** - This option is only available if the current dialog window is open in SmartTree. Select the check box if you do not wish to use this page as a starting point for a breadcrumb navigation.

2. Click **OK** to confirm.

### Notes

- **Related pages and administrative changes**

  When searching for related pages or running the **Clean up live server** action, all editorial tasks are taken into account (such as content changes, new or deleted pages, changed links). Administrative changes to file names, *publishing targets*, or the publication structure are not always taken into account because the implications of such changes may be quite complex. OpenText therefore recommends publishing the relevant sections of the project structure again after you have made these types of changes.

- **File name extensions for published pages**

  You can define file name extensions for published pages in several places in SmartTree: under **Administer Project Structure**, under **Administer Content Classes**, under **Administer Project Settings** and under **Administer Publication**. The file name extensions thus assigned are considered during publication as follows:

  1. **File name extension for a page** - First, the file name extension will be considered that was assigned to the page from the Action Menu item **Edit Properties** in the project tree. The following settings are only considered if no file name or a file name without an extension has been entered for the page.**Note:** To publish a file without a file name extension, enter a period after the file name (for example, *test.*). The period is then left out and the file is published without a file name extension (the file *test* is published in this example).
  2. **File name extension for a template** - If no file name extension was assigned to a page in the project structure, the file name extension will be used that was assigned to the template, depending on the published project variant. You edit this type of file name extension below the **Administer Content Classes** tree item. Select the **Templates** tree item in a content class and then select the template to which the project variant you want to publish is assigned. The Action Menu item **Edit Properties** lets you edit the file name extension.
  3. **File name extension for a project variant** - If no file name extension was assigned to the template of the project variant to be published, the file name extension that was assigned to the project variant using the Action Menu item **Edit Project Variant** will be used. To open this dialog for a project variant, select the **Administer Project Settings** tree item and choose the Action Menu item **Edit Project Variant**.

4. **File name extension for project publication** - If no file name extension was assigned for the project variant to be published, the file name extension that was assigned using the Action Menu item **General Settings** will be used. To open this dialog for a project variant, go to *Administer Publication > Project > Edit General Settings*.
5. If you have not defined a file name extension in any of the dialog windows mentioned, the page will be published with the file name extension *.htm*.

You can use the **Edit Properties** item in the Action Menu to restore a deleted page. The page must still exist in at least one other language variant.

See also:

- Section 7.2.43 "Deleting pages" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

## 4.5.12 Editing Text elements (overview)

**Navigation path**

> SmartEdit > OpenPage RedDot > Text Element

Depending on the browser you use, you can edit the Text element content in different editors. When working with Internet Explorer, the following editors are generally available:

- **RedDot Text Editor** - (widest range of functions, highest suitability for project requirements)
- **Telerik RadEditor** - (wide range of functions, adaptable to project requirements)
- **Microsoft Word** - (familiar work environment, formatting is checked and cleaned before content is integrated into a project)
- **Any external editor** - (customized integration possible; the included FCKeditor cannot be used)

When working with a different supported browser, the following editors are generally available:

- **Telerik RadEditor** - (wide range of functions, adaptable to project requirements)
- **FCKeditor** - (wide range of functions, adaptable to project requirements)
- **Microsoft Word** - (familiar work environment, formatting is checked and cleaned before content is integrated into a project)
- **Any external editor** - (customized integration possible)

Your or your administrator's settings listed here determine which editor is started when you edit the content of a Text element:

- Go to *SmartTree > Administer Project Settings > Project > General Settings > Edit Settings*: Select the default text editor to use for the project. In addition, you can set up the use of an external editor or allow the use of Microsoft Word. This project setting is automatically applied to all users in the project who have not configured their user settings.
- Go to *Global Menu > Settings > Menu Item: User Settings* or *Server Manager > Administer Users and Groups > Users > Action: Edit User Data*: Select the preferred text editor for your user. You can choose from the different editors. Microsoft Word or additional external editors are only available if their use has been configured in the project settings.
- Go to *Server Manager > Administer Application Servers > Application Server > Action: Edit Settings*: Select the **Permit ActiveX controls** option to use Microsoft Word as the text editor. If this option is not selected, the default text editor for the project opens.
- In the browser settings: To use Microsoft Word as the text editor, the use of ActiveX Controls must be possible and permitted. If the corresponding browser settings have not been made, the default text editor for the project opens.

You can find details on how to edit Text elements using the **RedDot Text Editor** in another section of this documentation. RedDot Text Editor offers the widest range of functionalities for editing Text elements. In the text editor settings, you can change the formatting options in RedDot Text Editor to meet the requirements of a specific project.

See also:

- "Working with RedDot Text Editor" on page 126

For more information about the options for editing Text elements with the **Telerik RadEditor**, see the separate chapter. RedDot Text Editor and Telerik RadEditor are the two standard text editors. You can customize the formatting options for the Telerik RadEditor in the text editor settings to meet your project requirements.

For more information, see:

- "Working with Telerik RadEditor" on page 148

The **FCKeditor** offers you a wide range of editing options. However, you cannot use the FCKeditor with Internet Explorer (for this browser, we recommend using the RedDot Text Editor or the Telerik RadEditor). In the FCKeditor, you can insert images from your project folders. The editor supports linking to pages within your project through a search dialog. When you have finished editing in the FCKeditor, click the diskette symbol to save your work and close the editor. Alternatively, click the X in the top right corner to close the editor without saving your changes. For more information about the FCKeditor, click the question mark symbol in the editor interface, or go to http://www.fckeditor.net/. (http://www.fckeditor.net/) The text editor settings in the Text element for the content class let you customize the FCKeditor functions for your specific project requirements. You can hide some formatting functions that you do not need in your project.

If you have set **Microsoft Word** as text editor, you can use the editing functions available there. In Microsoft Word, you edit text as an HTML page and not a Word document. When you have finished editing your text in Microsoft Word, save your changes and exit the application as you normally would. When you close Microsoft Word, the content is checked and all Microsoft Word-specific formatting information is removed. Any formatting that does not comply with the text editor settings in the content class is also removed.

In the **General Settings** for a project, you can also set up any other **external editor** for editing the content of Text elements. If you have questions about using this function, please contact your Administrator.

### 4.5.13 Editing Delivery Server constraints (free text constraints)

**Navigation path**

> SmartEdit > OpenPage RedDot > Delivery Server Constraint Element

When a Delivery Server Constraint element for a content class has been created as a free text constraint, you can use the of the Delivery Server constraint element to define it. Free text constraints apply only to the page for which they have been created.

1. You have the following options:
   - **Name** - Enter a name for the Delivery Server constraint. You cannot assign names to free text constraints in the project structure in either SmartTree or SmartEdit.
   - **Description** - Enter a description for the Delivery Server constraint. You cannot assign descriptions to free text constraints in the project structure in either SmartTree or SmartEdit.
   - **Project** - Select the project for which the Delivery Server constraint shall apply, or select the **Project independent** setting to create a constraint that applies to all projects. All projects for the Delivery Server specified in the General Project Settings are listed.
   - **Partial constraint** - Click **Create Partial Constraint**. The *List of Attributes* dialog window opens. Select the attribute for which you wish to define a partial constraint. You define the partial constraint in the next dialog. For more information, see the *Defining Attribute Comparisons* section.
   - **Combination of partial constraints** - Enter the combination of partial constraints in the **Expression** box by connecting the specified serial numbers with logical operators (Example: 1 and 2 and 3). Click **Test expression** to check the syntax of the expression you have entered.**Note:** At least one partial constraint must be defined in the **Expression** box for processing to take place. If only one partial constraint exists, enter *1* in the field accordingly.

2. Click **OK** to confirm your entries.

For more information, see:

- "List of attributes" on page 112
- "Defining attribute comparisons" on page 112

## 4.5.14 List of attributes

**Navigation path**

> SmartTree > Start > Administer Project Settings > Project > Constraints
> Create Delivery Server Constraint > Create Partial Constraint *or*

> SmartTree > Start > Administer Project Settings > Project
> Delivery Server Constraints > Delivery Server Constraint
> Edit Delivery Server Constraint > Create Partial Constraint *or*

> SmartTree > Start > Administer Project Structure > Project > Select Page
> Content Elements
> Select Delivery Server Constraint Element (Free Text Constraint)
> Edit Element Content > Create Partial Constraint *or*

> SmartEdit > OpenPage RedDot > Delivery Server Constraint Element
> Create Partial Constraint

Depending on your selection in the *Project* box, the *Create/Edit Delivery Server Constraint* dialog window lists the available attributes. The attributes are grouped according to attribute classes: user attributes, session attributes, request attributes, content attributes, application attributes, system attributes, group attributes, and registry attributes. Only attribute classes shown in black contain attributes.

1. Click the attribute class from which you want to select an attribute. You will see a list of the attributes that are available.
2. Click the name of the attribute for which you wish to create a partial constraint. The attribute that you have selected is copied to the **Define Attribute Comparison** dialog window.

## 4.5.15 Defining attribute comparisons

**Navigation path**

> SmartTree > Start > Administer Project Settings > Project
> Delivery Server Constraints > Create Delivery Server Constraint
> Create Partial Constraint > Attribute Class > Attribute *or*

> SmartTree > Start > Administer Project Settings > Project
> Delivery Server Constraints > Delivery Server Constraint
> Edit Delivery Server Constraint > Create Partial Constraint > Attribute Class
> Attribute *or*

> SmartTree > Start > Administer Project Settings > Project
> Delivery Server Constraints > Delivery Server Constraint
> Edit Delivery Server Constraint > Edit Partial Constraint *or*

> SmartTree > Start > Administer Project Structure > Project > Select Page
> Content Elements
> Select Delivery Server Constraint Element (Free Text Constraint )
> Edit Element Content > Create Partial Constraint > Attribute Class > Attribute *or*

> SmartTree > Start > Administer Project Structure > Project > Select Page
> Content Elements
> Select Delivery Server Constraint Element (Free Text Constraint)
> Edit Element Content > Edit Partial Constraint *or*

> SmartEdit > OpenPage RedDot > Delivery Server Constraint Element
> Create Partial Constraint > Attribute Class > Attribute *or*

> SmartEdit > OpenPage RedDot > Delivery Server Constraint Element
> Edit Partial Constraint

Define a partial constraint for the attribute you have selected.

1. The following information is shown:
   - **Attribute** - Name of the attribute.
   - **Description** - Description of the attribute.
   - **Path** - Attribute path to which the declaration applies.
   - **Type** - Attribute type; possible values: integer, string, Boolean value.
   - **Multivalue** - Shows whether the **Multivalue** parameter has been set. For multi-value attributes, you can enter multiple values separated by semi-colons in the Operand box (value list).
2. You have the following options:
   - **Operator** - Choose the way in which an attribute value/value list is compared with the value/value list specified as **Operand**. You have the following options:
     - **contains** - Content is delivered if the first attribute value contains the string specified here. Other values of multivalued attributes will not be evaluated.
     - **eq (equal)** - Content is delivered if the attribute value is equal to the value specified here.
     - **ne (not equal)** - Content is delivered if the attribute value is not equal to the value specified here.
     - **gt (greater than)** - Content is delivered if the attribute value is greater than the value specified here.

- **ge (greater than or equal)** - Content is delivered if the attribute value is greater than or equal to the value specified here.
- **lt (less than)** - Content is delivered if the attribute value is smaller than the value specified here.
- **le (less than or equal)** - Content is delivered if the attribute value is smaller than or equal to the value specified here.
- **contains any** - For value lists: Content is delivered if the value list for the attribute contains at least one of the values specified here.
- **contains all** - For value lists: Content is delivered if the value list for the attribute contains all of the values specified here.
- **exists in any** - For value lists: Content is delivered if the value list specified here contains at least one of the values for the attribute.
- **exists in all** - For value lists: Content is delivered if the value list for the attribute contains all attribute values.
- **not contains any** - For value lists: Content is delivered if the value list for the attribute contains none of the values specified here.
- **not contains all** - For value lists: Content is delivered if the value list for the attribute contains not all of values specified here.
- **not exists in any** - For value lists: Content is delivered if the value list for the attribute specified contains none of the values.
- **not exists in all** - For value lists: Content is delivered if the value list for the attribute does not contain all attribute values.

- **Fixed value** - Select this option and specify a value or (for multi-value attributes) a value list in the **Operand** box. This defines the partial constraint together with the operator specified.
- **Placeholder** - Select this option to define a placeholder. This can be completed by users in either SmartTree or SmartEdit. This option is not available for free text constraints.
  - **Name** - Specify a name for the placeholder.
  - **Description** - Enter a description for the placeholder.
  - **Default value** - Specify a default value.

3. Click **OK** to confirm your entries.

## 4.5.16 Editing Delivery Server constraints (placeholders)

**Navigation path**

> SmartEdit > OpenPage RedDot > Delivery Server Constraint Element

If the Delivery Server Constraint element of a content class uses a constraint containing one or more placeholders, you can edit these placeholders in the **Edit Delivery Server Constraint Placeholder** dialog window.

Depending on how many placeholders have been defined in the constraint, and which ones, the dialog shows you the relevant details and input fields. All placeholders generally have the following structure:

- **Name of placeholder**
- **Description of placeholder**
- **Standard field** - Enter a value that is used as an operand in the constraint. For user groups, an options list is shown instead of the input field. The value you enter is not checked.
- If the assigned attribute is a **value list**, the values are shown in the next line.
- **Use default value** - If you select this check box, the default value specified in the constraint is used for the placeholder.

## 4.5.17 Editing Delivery Server elements

**Navigation path**

> SmartEdit > OpenPage RedDot > Delivery Server Element

You can edit the content of an element that is provided by a Delivery Server (for example, a Web Component).

Depending on how the Delivery Server element is configured in the content class, various editing options are available. For more information, see the Delivery Server documentation.

To be able to edit a Delivery Server element, administrative requirements must be met. These have already been described for creating a Delivery Server element.

For more information, see:

- Section 5.2.6 “Editing elements (Delivery Server elements)” in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*

## 4.6 Working with CKEditor

As well as Telerik RadEditor or RedDot Text Editor, CKEditor allows you to edit the content of Text elements. How to work with CKEditor is described on the following pages. Project settings in SmartTree provide the option to assign other text editors for editing Text elements. For more information, see Section 2.2.1 "Administering project settings" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*. In addition to this, and depending on their authorizations, users can select their preferred text editor in the *User Settings*. Administrators also have the project settings option to disable the user's individual text editor preferences.

### 4.6.1 Editing source codes in CKEditor

You can switch from normal to source code view in the CKEditor, provided you have the appropriate authorization. In the source code view, you can check and edit HTML tags. Here, you can also integrate scripts and forms.

**To edit source code in CKEditor:**

1. In the tool bar, click the 

**Source** button.
2. Edit the source code.
3. To switch back to normal view, click the **Source** button again.

### 4.6.2 Inserting images or editing image properties

**Navigation path**

> CKEditor > Place pointer in required image position or select image >  Image

You can insert images that are located in a file folder or Asset Manager folder in your project, on your local computer, or on the Internet. You can edit the image properties of a previously inserted image.

**To insert an image:**

1. Place the cursor in the required image position.
2. Click  **Image**.
3. In the **Image Properties** dialog window, you have the following options:
   - **Inserting an image from the internet**

     Enter the image URL in the **URL** box. Click **OK** in the **Image Properties** dialog to insert the image in the Text element.
   - **Inserting an image from Asset Manager**

a. Click the **Browse Server** button and select your Asset Manager folder, for example **Images**, in the next dialog.

b. Click **OK** to open the Asset Manager. In the Asset Manager, select your image and click **OK**.

c. Click **OK** in the **Image Properties** dialog to insert the image in the Text element.

- **Inserting an image from local file system**

  a. Click the **Upload** button. In the next dialog, click **Browse** to select an image file from your local file system.

  b. Double-click your image file and click **OK**. In the next dialog, select the Asset Manager folder you want to upload the image to and click **OK**.

  c. The image displays in the preview of the **Image Properties** dialog and the image path is inserted in the **URL** box. Click **OK** to insert your image in the Text element.

**To edit an image:**

- Click the image to select it and click the **Image** button to open the **Image Properties** dialog. You have the following options:

  - **Image Info tab** - edit image attributes such as *Width*, *Height*, *Border*, and *Alignment*. You can enter an alternative text in the **Alternative Text** box. For details, see the CKEditor documentation.

  - **Advanced tab** - this dialog provides further editing options. For details, see the CKEditor documentation.

## 4.6.3 Inserting or editing tables

**Navigation path**

> CKEditor > Place pointer in required position or in table > Table

CKEditor offers the following options for inserting and editing tables:

- **To insert a new table** - click the **Table** button in the tool bar. The **Table Properties** dialog window opens in the **Table Properties** tab. Here you can edit the desired table properties, such as number of rows and columns, *Border size*, *Width* and *Height*, and cell padding or spacing.

  The **Advanced** tab provides further editing options. For details, see the CKEditor documentation.

  When you have finished customizing your table, click **OK** to insert the table in the Text element.

**Note:** If you use this option to insert a new table, note the following:

- If you select the outer frame of a table, the selected table is replaced by the new table.
- If you place the cursor within a table cell, the new table is inserted into the cell.

- **To edit a table** - you can either use the table actions in the tool bar or right-click in the table to open the context menu. Compared to the tool bar, the context menu offers a more comprehensive list of options, for example, merging or splitting table cells. For details, see the CKEditor documentation.

  **Tool bar options:**

  -  - Defines the properties of the entire table in which the cursor is currently positioned. The **Table Properties** dialog opens where you can edit the table properties.
  -  - Defines the properties of the cell where the cursor is currently positioned. The **Cell Properties** dialog opens where you can edit the cell properties such as width, height, alignment, span, and colors.
  -  - Deletes the row where the cursor is currently positioned.
  -  - Inserts a new row above the row where the cursor is currently positioned.
  -  - Inserts a new row below the row where the cursor is currently positioned.
  -  - Deletes the column where the cursor is currently positioned.
  -  - Inserts a new column to the left of the column where the cursor is currently positioned.
  -  - Inserts a new column to the right of the column where the cursor is currently positioned.

## 4.6.4 Inserting or editing links

**Navigation path**

> CKEditor
> Select text or image, or place pointer in link text or select image with link
>  Link

You can use CKEditor to create links to different kind of targets. Possible targets include:

- A jump mark within the same Text element
- A page within the same project
- A file on your local computer (the file is then stored in a folder or Asset Manager folder)
- A file in a file folder or Asset Manager folder
- An Internet address
- An E-mail address

**To create a link:**

1. Select text or image, or place cursor in link text or select image with link.

   Click the  **Link** button to open the **Link** dialog in the **Link Info** tab.

2. Select your link type from the **Link Type** drop-down list. Depending on the selected link type, a corresponding dialog window appears below the list:

**Page from Management Server**

a. You have the following options to reference a Management Server page:

   - **Use Preview** - click the button to open the Management Server preview. Navigate to the page you want to link in the Text element and click **Select Page as Link**.
   - **Use Page Search** - click the button to open the **Page Search**. For details how to perform a page search, see "Page search" on page 167. In the result list, click the page link in the required result.
   - **Use Personal Links** - you can insert links from existing link groups and link lists. Click the button to open the **Link Groups** dialog. Proceed as follows:

     i. Click one of the **Link Groups** that contains the desired link. Available links are displayed in the **Link List**.

     ii. Click the desired link in the **Link List** section.

For more information about personal links, see Section 4.1.3 “Personal links” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*.

b. After you have selected the page, its headline text appears in the **Headline** box.

c. Additionally, you have the following options:

- In the **Jump mark in WSM page** box, you can enter an anchor name as a jump mark if available in the selected page. If no jump mark is set, the link will point to the top of the page.
- You can select an **Additional link attribute** from the drop-down list by names predefined in your Management Server project.
- In the **Target** tab, you can select a target attribute from the **Target** drop-down list.
- In the **Advanced** tab, you can edit additional options. For more information, see the CKEditor documentation.

d. Click **OK** to finish creating the link.

### Asset from Management Server

In CKEditor, you can reference a file located in an Asset Manager or file folder. Alternatively, you can select a file from your local computer. The file is then imported to an Asset Manager folder or file folder first. You can also remove a file that you once selected.

#### To reference a file from Asset Manager:

Select this option to reference a file that is already located in an Asset Manager folder or file folder.

a. Click **Browse Server** to find your file in Asset Manager. Alternatively, you can enter the internal `GUID` of your asset in the **Identifier of an asset from Management Server** box.

b. In the next dialog, select your Asset Manager or file folder and click **OK**.

c. In the Asset Manager, select your file. Click **OK**.

d. The internal `GUID` of your file appears in the **Identifier of an asset from Management Server** box.

e. Additionally, you have the following options:

- You can select an **Additional link attribute** from the drop-down list by names predefined in your Management Server project.
- In the **Target** tab, you can select a target attribute from the **Target** drop-down list.
- In the **Advanced** tab, you can edit additional options. For more information, see the CKEditor documentation.

f. Click **OK** to finish creating the link.

**To upload and reference a file from local file system:**

a. Click the **Upload** button. In the next dialog, click **Browse** to find the file in your local file system.

b. Double-click your file and click **OK**. In the next dialog, select the Asset Manager or file folder you want to upload the file to and click **OK**.

c. In the **Link** dialog, the internal `GUID` of your file appears in the **Identifier of an asset from Management Server** box.

d. Additionally, you have the following options:

- You can select an **Additional link attribute** from the drop-down list by names predefined in your Management Server project.
- In the **Target** tab, you can select a target attribute from the **Target** drop-down list.
- In the **Advanced** tab, you can edit additional options. For more information, see the CKEditor documentation.

e. Click **OK** to insert the link in the Text element.

### URL

Proceed as follows:

a. Select a protocol to be used as prefix of the URL from the **Protocol** drop-down list.

b. Enter the URL of your link target in the **URL** box.

c. Additionally, you have the following options:

- You can select an **Additional link attribute** from the drop-down list by names predefined in your Management Server project.
- In the **Target** tab, you can select a target attribute from the **Target** drop-down list.
- In the **Advanced** tab, you can edit additional options. For more information, see the CKEditor documentation.

d. Click **OK** to finish creating the link.

### Link to anchor in the text

This option is only possible if anchors already exist in the text. Proceed as follows:

a. In the **Select an Anchor** area, select your anchor from one of the drop-down lists, either

- **By Anchor Name** or
- **By Element ID**

b. Additionally, you have the following options:

- You can select an **Additional link attribute** from the drop-down list by names predefined in your Management Server project.
- In the **Advanced** tab, you can edit additional options. For more information, see the CKEditor documentation.

c. Click **OK** to finish creating the link.

**E-mail**

Proceed as follows:

a. Enter the respective E-mail address in the **E-Mail Address** box.

b. Optionally: enter a text as message subject in the **Message Subject** box.

c. Optionally: enter a text in the **Message Body** box.

d. You can select an **Additional link attribute** from the drop-down list by names predefined in your Management Server project.

e. In the **Advanced** tab, you can edit additional options. For more information, see the CKEditor documentation.

f. Click **OK** to finish creating the link.

### 4.6.4.1 Inserting and editing anchors

**Navigation path**

> CKEditor
> Select text or image, or place pointer at the required position in the text
> Anchor

You can use anchors to jump to defined positions in a page using a link. The anchor is the target of the link. You can edit existing anchors.

**To insert and edit an anchor:**

1. Select text or image, or place pointer at the required position in the text. In the tool bar, click **Anchor**.
2. In the **Anchor Properties** dialog, enter a name for the anchor in the **Anchor Name** box.
3. Click **OK**. The anchor symbol appears in the selected anchor position.
4. To change the anchor name, double-click the anchor symbol to open the **Anchor Properties** dialog again.

## 4.6.5 Using the CKEditor symbols

The table below gives you an overview of all the symbols and their functions that are available in CKEditor. Text editing techniques are similar to those in any word processor. In addition, you can find a list of keyboard shortcuts in the CKEditor documentation.

**Table 4-1: Symbols in the upper toolbar**

| Symbol | Function |
|---|---|
| | Undoes the last action. |
| | Restores the last action that had been undone. |
| | Selects all content in the text editor. |
| | Performs a spelling check. |
| | Cuts content and copies it to the Windows clipboard |
| | Copies the selected content to Clipboard. |
| | Inserts content from Clipboard into the editing area. Formatting information is displayed to comply with HTML as far as possible. |
| | Inserts content from Clipboard into the editing area. When content was copied from Microsoft Word, the formatting information complies with HTML. |
| | Inserts content from Clipboard into the editing area. All formatting is removed. |
| Format | Applies paragraph formatting to the selected text. |
| Font | Applies the selected font type to the selected text. |
| Size | Applies the selected font size to the selected text. |

| Symbol | Function |
|---|---|
| | Applies bold formatting to the selected text. |
| | Applies italic formatting to the selected text. |
| | Underlines selected text. |
| | Strikes through selected text. |
| | Subscripts selected text. |
| | Superscripts selected text. |
| | Removes text formatting. |
| | Specifies the font color of selected text. |
| | Specifies the text highlight color of selected text. |
| | Inserts a numbered list. |
| | Inserts a list with no numbers. |
| | Removes a tabulator. |
| | Inserts a tabulator. |
| | Formats selected text as indented quotation. |
| | Aligns content to the left. |
| | Aligns content to the center. |
| | Aligns content to the right. |

| Symbol | Function |
|---|---|
| | Aligns content justified. |
| | Defines the text direction from left to right. |
| | Defines the text direction from right to left. |
| | Sets `span` tag with language and text direction attributes. |
| | Opens the **Image Properties** dialog window. For more information, see "Inserting images or editing image properties" on page 116. |
| | Opens a dialog window that provides actions for creating or editing tables. For more information, see "Inserting or editing tables" on page 117. |
| | Inserts a horizontal line. |
| | Opens a table of symbols where you can choose special characters. |
| | Opens dialog window where you can edit the properties of the current table. |
| | Opens dialog window where you can edit the properties of the current table cell. |
| | Deletes selected row in the current table. |
| | Adds row above the current table row. |
| | Adds row below the current table row. |
| | Deletes current table column. |
| | Inserts table column to the left. |
| | Inserts table column to the right. |

| Symbol | Function |
|---|---|
| | Opens the **Link** dialog window where you can insert a link. For more information, see Section 7.4.4 “Inserting or editing links” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*. |
| | Removes a link. |
| | Opens the **Anchor Properties** dialog window. For more information, see “Inserting and editing anchors” on page 122. |
| | Opens the **Find and Replace** dialog window in the **Find** tab. |
| | Opens the **Find and Replace** dialog window in the **Replace** tab. |
| | Emphasizes block elements and displays the associated HTML tag, for example paragraph or heading. |
| Source | Switches to source code view. |
| | Opens a preview of the current page. |
| | Opens CKEditor documentation. |

## 4.7 Working with RedDot Text Editor

As well as CKEditor or Telerik RadEditor, RedDot Text Editor allows you to edit the content of Text elements. Administrators have the option in the SmartTree project settings to assign other text editors for editing Text elements. For more information, see Section 2.2.1 “Administering project settings” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*. Depending on their authorizations, users can select their preferred text editor in the *User Settings*.

## 4.7.1 Using the RedDot Text Editor symbols

**Navigation path**

> RedDot Text Editor

The table below provides an overview of all symbols and their functions that are available in the RedDot Text Editor.

Text editing techniques are similar to those in any word processor.

**Note - Symbols of the toolbar**

Not all of the symbols described in this section may be at your disposal. Whether they are available depends upon the editing functions set for the element to be edited. If necessary, ask your administrator.

| Icon | Function |
|---|---|
| | Deletes existing content. New content can be entered |
| | Inserts local files (.txt, .htm, .html) |
| | Inserts the content of Text elements from project pages with Released status. For detailed information, see "Selecting Text element content from the server" on page 136. |
| | Sends contents contained in the text editor to the printer |
| | Cuts content and copies it to the Windows clipboard |
| | Copies content to the Windows clipboard |
| | Inserts content from the Windows clipboard. The formatting that conforms to HTML standards and the text element settings will be adopted. |
| | Inserts content from the Windows clipboard. Formatting is removed before the text is inserted. |
| | Reverses the last editing step |
| | Restores the last editing step |
| | Performs a spell check |
| | Opens the symbol table. For detailed information, see "Opening symbol tables" on page 147. |
| M | Applies different tags to selected text. For detailed information, see "Inserting or editing markup tags" on page 147. |
| rtl | Defines the text direction (from right to left or from left to right) |
| A | Removes the formatting of selected text |

| Icon | Function |
|---|---|
| | Applies bold formatting to selected text |
| | Applies italic formatting to selected text |
| | Underlines selected text |
| | Subscripts selected text |
| | Superscripts selected text |
| | Applies the selected font size to selected text |
| | Applies the selected font type to selected text |
| | Aligns text and images on the left side of the page |
| | Aligns text and images in the middle of the page |
| | Justifies text and images |
| | Aligns text and images on the right side of the page |
| | Inserts a tabulator |
| | Removes a tabulator |
| | Applies a numbered or bulleted list to selected paragraphs. For detailed information, see "Inserting lists" on page 145. |
| | Applies the selected colored to selected text |
| | Highlights selected text with selected color |
| | Uses ActiveX controls to insert Word, Excel, or HTML documents from a file directory into the text editor. For detailed information, see "Inserting documents using ActiveX Control" on page 136. |
| | Inserts a table. For detailed information, see "Inserting tables" on page 137. |
| | Edits the properties of a table or a cell. For detailed information, see "Formatting tables (table properties)" on page 138 or "Formatting tables (cell properties)" on page 140. |
| | Inserts a line above the insertion point |
| | Inserts a line below the insertion point |
| | Removes a line |

| Icon | Function |
|---|---|
| | Inserts a column to the left of the insertion point |
| | Inserts a column to the right of the insertion point |
| | Removes a column |
| | Inserts a cell to the left of the insertion point |
| | Inserts a cell to the right of the insertion point |
| | Removes a cell |
| H1 H2 H3 H4 H5 H6 | Places the text at headline level |
| HR | Inserts a horizontal line |
| | Assigns a no automatic line break property to the selected text |
| | Removes a link |
| | Inserts a link. For detailed information, see "Inserting links" on page 131. |
| | Inserts a jump mark. For detailed information, see "Defining jump marks" on page 135. |
| | Inserts an image or edits the properties of an image. For detailed information, see "Inserting or editing images" on page 142. |
| style1 | Assigns the selected style to the marked text segment |
| DIV tags | Sets the selected style in a DIV tag not a SPAN tag |

In the lower section of the text editor, you now have a zoom function next to the Help button:


A slider allows you to zoom in and out of the text editor, with zoom percentages ranging between 50 and 150. The display is only enlarged or reduced while the text editor is open. When you close the text editor, this setting is not saved. To reset the zoom to 100 %, double-click the slider.

### CAUTION - Using white font in RedDot Text Editor

When you set the font color to white, the background is shown in gray after you save your work or reopen RedDot Text Editor. This display makes it

easier for you to edit the white text. The gray background is not visible in SmartEdit or on the published page.

**Note - Breaking lines in text editors**

Use the [ENTER] key in the text editor to insert a new paragraph. A `<p>` tag is added to the HTML source code. Use the key combination [SHIFT]+[ENTER] to insert a line break. A `<br>` tag is added to the source code.

RedDot Text Editor is only available in Internet Explorer. If you use a different supported browser, use the Telerik RadEditor.

For more information, see:

- "Working with Telerik RadEditor" on page 148

You can also edit the source code in the RedDot Text Editor.

For more information, see:

- "Editing source codes in RedDot Text Editor" on page 130

## 4.7.2 Editing source codes in RedDot Text Editor

**Navigation path**

> RedDot Text Editor

You can switch from normal to source code view in the RedDot Text Editor, provided you have the appropriate authorization. In the source code view, you can edit HTML tags. Here, you can also integrate scripts and forms.

**To edit source code in RedDot Text Editor:**

1. Right-click in the *edit area*.
   A pop-up menu opens.
2. Select **Source Code** from the pop-up menu, and the source code of the text will be displayed in the edit area.
3. Edit the source code.
4. Right-click again, and switch to the normal view via the pop-up menu.

## 4.7.3 Inserting links

**Navigation path**

> RedDot Text Editor > Select text or image > Insert/Edit Link

You can use a text item or an image in the RedDot Text Editor as the starting point for a link. The target of such a link can be a jump mark, a URL, an email address, a file, or another page.

1. You have the following options:

   - **href** - Enter the desired reference target in this box:

     - If you want to enter an external URL as **HREF**, start with the **http://** protocol followed by the name, for example, *http://www.company.com*.
     - If you want to enter an email address as **HREF**, start with **mailto:**, followed by the email address, for example, *mailto:your_name@your_address.com*. You can also enter an email address as **HREF** in which the subject line is preset. For spaces in the subject line, use the following special characters: *%20* for a space and *%26* for an ampersand (&). The **HREF** for an email address with the subject line *All & everything about programming* would read like this: *mailto:firstname.lastname@company.com?subject=All%20%26%20everything %20about%20programming*.
     - If you select an additional attribute for the link that should not display a page or send an email, enter the following text: *javascript:void(0)*.
     - **Insert Jump Mark** - Click this symbol to select a jump mark as the reference target. The *Select Jump Mark* dialog window opens.
     - **Insert Link to Page** - Click this symbol to search for a specific page to use as the reference target. The *Page Search* dialog window opens.
     - **Insert Link from Link List** - Click this symbol to select a reference target from a link list. The *Link List* dialog window opens.
     - **Insert File Link** - Click this symbol to select a file as the reference target. You can choose a file from your local computer or from a folder or Asset Manager folder.
   - **title** - Enter text that will be displayed as a tooltip for the link.
   - **target** - Enter a target for the link. In addition to the targets **_blank**, **_parent** , **_self**, and **_top**, you can enter any kind of target, for example, names of frames. Ask your administrator about the various options available, if required.
   - **lang** - Enter a standardized language code for the reference text (for example, en for English, de for German, or fr for French).

- **hreflang** - Enter a standardized language code for the reference target (for example, en for English, de for German, or fr for French).
- **Additional Attribute** - Select an additional attribute from the drop-down list. If you do not want any pages to be displayed for the link, enter the following text for href: *javascript:void(0)*. You can use these additional attributes to select predefined scripts and targets, which will be inserted in the source code of the page automatically. Ask your administrator for information on which additional attributes can be used for which purpose, if required. If there are no additional attributes available, you will have to create and define them in SmartTree first. For more information, contact your administrator.

2. Click **OK**.

### Notes

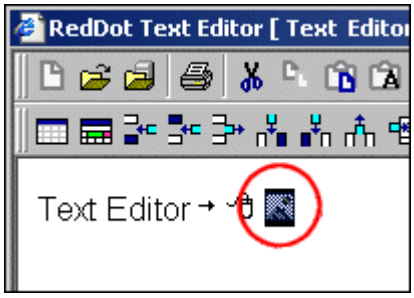
- **Entering external URLs**

  The RedDot Text Editor lets you enter links to external URLs directly (for example, *www.company.com*). To check the link, click the **Insert/Edit Link** symbol. The URL is copied to the **href** box and completed (in our example: *http://www.company.com*). The link text in the RedDot Text Editor and the URL in the **href** field are interdependent. If you change the link text in the RedDot Text Editor, the entry in the dialog window is changed automatically, and vice versa. That is why the RedDot Text Editor does not let you enter an external URL as a link text that refers to a completely different URL.**Example:** The *www.abc.com* link text entered in the RedDot Text Editor cannot refer to the external URL *http://www.xyz.com*.

- **Selecting images**

  To open the *Insert/Edit Link* dialog window for an image, you first have to select the entire image. Select the image by placing the pointer next to the image. Then use the appropriate Arrow key while keeping the Shift key pressed.

  The selected image should look like this:




See also:


- "Page search" on page 167
- "Inserting links from link lists" on page 134

- "Inserting jump marks" on page 134

You create, define, and delete additional attributes under *Administer Project Settings* in SmartTree.

You can find out how to define jump marks in a different section of this documentation.

See also:

- "Defining jump marks" on page 135

RedDot Text Editor is only available in Internet Explorer. If you use a different supported browser, use the Telerik RadEditor.

For more information, see:

- "Working with Telerik RadEditor" on page 148

### 4.7.4 Inserting file links

**Navigation path**

> RedDot Text Editor > Select text or image > Insert/Edit Link
> > Insert File Link

In RedDot Text Editor you can reference a file located in an Asset Manager or file folder. Alternatively, you can select a file from your local computer. The file is then imported to an Asset Manager folder or file folder first.

**To insert a file link:**

1. Select one of the following options:
   - **Select File from Local File System** - Select this option to reference a file that is not yet located in an Asset Manager or file folder. Click **OK** to open the *Select File from Local File System* dialog window. The file is then imported to an Asset Manager folder or file folder.
   - **Select File from Server** - Select this option to reference a file that is already located in an Asset Manager folder or file folder. In the next dialog window, click one of the available Asset Manager folders or file folders to open it and select a file.
2. Click **OK**.

## 4.7.5 Inserting links from link lists

**Navigation path**

> RedDot Text Editor > Select text or image > Insert/Edit Link
> Insert Link From Link List

You can insert links from existing link groups and link lists.

**To insert links from link lists:**

1. Click one of the **Link Groups** that contains the desired link. Available links are displayed in the **Link List**.
2. Click the desired link in the **Link List** section.

## 4.7.6 Inserting links in pages

**Navigation path**

> RedDot Text Editor > Select text or image > Insert/Edit Link
> Insert Link in Page

You can insert links to existing project pages. The Page Search dialog box opens that allows you to search and select the desired pages.

See also:

- "Page search" on page 167

## 4.7.7 Inserting jump marks

**Navigation path**

> RedDot Text Editor > Select text or image > Insert/Edit Link
> Insert Jump Mark

You can insert jump marks. The jump mark is the target to which you can jump with the help of the link.

You can use jump marks in a page to jump forward or backward within the page. You can also use a jump mark to jump from one page to another. For this, the pages must be located within one container.

**Note - Jump marks to different pages**

You can use a link to allow users to jump from one page to another. To do this, you need to know the jump mark of the other page. Only the jump marks of

the current page are listed in the *Select Jump Mark* dialog window. You enter the jump mark of the other page in the **HREF** box and place # (number sign) in front of it.

**To insert a jump mark:**

1. Select a jump mark from the **Defined jump marks** list in which all jump marks of the current page are listed.
   The selected jump mark is displayed in the **Selected jump mark** box.
2. Click **OK**.
   The # number sign and the jump key name are added in the **HREF** box of the **Insert/Edit Link** dialog box.

To define jump marks, see:

- "Defining jump marks" on page 135

## 4.7.8 Defining jump marks

**Navigation path**

> RedDot Text Editor > Select text or image > Define Jump Mark

You can use jump marks on a page to jump forward or backwards within the page. Before connecting a link with a jump mark, you have to define the jump mark. The jump mark is the target of the link.

1. Any selected text will be preset as the name of the jump mark. You can change the name in the **Define Jump Mark** dialog window. When using an image as a jump mark, specify a name in the dialog window.
2. Click **OK**.
   The text or image will be displayed in the RedDot Text Editor in the form of a link. This format is only visible in the RedDot Text Editor. It is not visible in the page preview, SmartEdit, or on the published page.

You can define a jump mark as the link target.

For more information, see:

- "Inserting links" on page 131

### 4.7.9 Inserting documents using ActiveX Control

**Navigation path**

> RedDot Text Editor

You can drag documents with the extensions TXT, DOC, XLS, RTF, HTM, and HTML from the file directory into the RedDot Text Editor.

1. Position the pointer where you want to insert the document.
2. Drag the document from its file directory and drop it on the symbol. The symbol is initially white. As soon as the arrow of the symbol changes color to green, drop your document. When you see the symbol with a red color, it means that ActiveX Control is processing the insertion of your document. Depending on the file size, this process can take some time to complete.

### 4.7.10 Selecting Text element content from the server

**Navigation path**

> RedDot Text Editor > Place pointer in the editing area
> Select Text From Server

You can select content from Text elements of your current project and insert them in the RedDot Text Editor. Only content items from pages to which you have at least read access are available for selection.

1. Enter a search term.
2. Select the **Language variant** you wish to search.
3. Click **Start search**. The **Text element content that was found** section lists all text items found in the language variant specified.
4. Click **Preview** to display the Text element content in a preview window.
5. Select the text item you require.
6. Click **OK**.
   The text is transferred to the RedDot Text Editor. During transfer, all formatting is deleted that is not valid for the Text element.

**CAUTION - Inserting Text element content**

Note that when you insert Text element content in the RedDot Text Editor, any previous content is deleted.

## 4.7.11 Inserting tables

**Navigation path**

> RedDot Text Editor > Place pointer in editing area > Insert Table

You should use a table when you want to display information in a particular form and order or images and text next to one another.

1. You have the following options:
   - **Rows** - Enter the number of rows for the table.
   - **Columns** - Enter the number of columns for the table.
   - **Table Properties**
     - **Background image** - Click to assign a background image to the table.
     - **Alignment** - Use the drop-down list to define the table alignment. You have the following options:
       - **center**
       - **left**
       - **right**
     - **Width** - Enter a value for the width of the table. Use the drop-down list to select the unit of measure. You have the following options:
       - **Percent**
       - **Pixels**
     - **Background color** - Use the drop-down list to select a background color for the table, or click to define the background color of the table.
     - **Border color** - Use the drop-down list to select a border color for the table, or click to define the border color for the table.
     - **Border width** - Enter a value for the border width. Enter an integer for the border width, for example “1”. If you enter “0”, the table is displayed without a border.
     - **Cell padding** - Enter a value for the space between cell content and cell border.
     - **Cell spacing** - Enter a value for the space between the cells.
   - **Cell Properties**
     - **Background image** - Click to assign a background image to the table.
     - **Horizontal alignment** - Use the drop-down list to select the horizontal alignment of content within a table cell. You have the following options:

    - **center**
    - **left**
    - **right**
  - **Vertical alignment** - Use the drop-down list to select the vertical alignment of content within a cell. You have the following options:
    - **baseline**
    - **bottom**
    - **middle**
    - **top**
  - **Background color** - Use the drop-down list to select a background color for the table cell, or click ... to define the background color of the table cell.
  - **Border color** - Use the drop-down list to select a border color for the table cell, or click ... to define the border color for the table cell.
  - **Wrap text** - Select this check box to automatically wrap the table cell content. Clear this check box if you do not want to wrap text.
  - **Display Header Tags (TH Tag)** - Select this option to set the cells of the first table row and the first table column as the table header. In the source code, the cells are enclosed in TH tags (<TH>.</TH>).
2. Click **OK**.
   Your settings are saved.

**Note - Switch cells**

You can switch between cells within the table via the arrow keys.

## 4.7.12 Formatting tables (table properties)

**Navigation path**

> RedDot Text Editor > Select table > Format Table

You can format an existing table. Click the border of the table to select it. Click the symbol to open the **Format Table** dialog window.

1. You have the following options:
   - **Table Properties**
     - **Short description** - Enter a short description of the table.
     - **Background image** - Click the ... button to open a dialog in which you can assign a background image to the table.

- **Background color** - Click the button to open the color palette, and choose a background color for the table. Use the symbol to delete the color value.
- **Size**
  - **Height** - Enter a value for the height.
  - **Width** - Enter a value for the width. Use the drop-down list to select the unit of measure. You have the following options:
    - **Percent**
    - **Pixels**
- **Layout**
  - **Alignment** - Use the drop-down list to define the alignment. You have the following options:
    - **center**
    - **left**
    - **right**
  - **Inner lines** - Select the inner lines that should be displayed. You have the following options:
    - **None**
    - **Rows**
    - **Columns**
    - **Groups**
    - **All**
  - **Outer lines** - Select the outer lines that should be displayed. You have the following options:
    - **None**
    - **Box**
    - **Top**
    - **Bottom**
    - **Top and Bottom**
    - **Left and Right**
    - **Left**
    - **Right**
  - **Cell padding** - Enter a value for the space between cell content and cell border.

    - **Cell spacing** - Enter a value for the space between the table cells.
  - **Border**
    - **Border width** - Enter a value for the border width of the table, for example, *1*. If you enter *0*, the table is displayed without a border.
    - **Color** - Click to open the color palette, and choose a color for the table border. Use the symbol to delete the color value.
    - **Light** - Click to open the color palette, and choose a lighter hue for the cell border. Use the symbol to delete the color value.
    - **Dark** - Click symbol to open the color palette, and choose a darker hue for the cell border. Use the symbol to delete the color value. Settings made for **light** and **dark** will replace those made for **color**.
2. Confirm with **OK** to save your settings, click **Preview** to see the results of your settings in the RedDot Text Editor, or click **Cancel** to discard your settings.

**Note - Switch cells**

You can switch between cells within the table via the arrow keys.

See also:

- "Formatting tables (cell properties)" on page 140

## 4.7.13 Formatting tables (cell properties)

**Navigation path**

> RedDot Text Editor > Place pointer in cell > Format Table

You can format the cells of a table.

1. You have the following options:
  - **Cell Properties**
    - **Short description** - Enter a short description of the table cell.
    - **Background image** - Click the button to open a dialog in which you can assign a background image to the table cell.
    - **Background color** - Click the button to open the color palette, and choose a background color for the table cell. Use the symbol to delete the color value.
    - **Alignment**
      - **Horizontal** - Use the drop-down list to select the alignment of content within the cells. You have the following options:

        - **center**
        - **left**
        - **right**
    - **Vertical** - Use the drop-down list to select the vertical alignment of contents within the cells. You have the following options:
        - **baseline**
        - **bottom**
        - **middle**
        - **top**
- **Span**
    - **Columns** - Enter a value for the number of columns.
    - **Rows** - Enter a value for the number of rows.
- **Size**
    - **Height** - Enter a value for the height of the table cells.
    - **Width** - Enter a value for the width of the table cells. Use the drop-down list to select the unit of measure. You have the following options:
        - **Percent**
        - **Pixels**
- **Border**
    - **Color** - Click the symbol to open the color palette and choose a color for the cell border. Use the symbol to delete the color value.
    - **Light** - Click the symbol to open the color palette and choose a lighter hue for the cell border. Use the symbol to delete the color value.
    - **Dark** - Click the symbol to open the color palette and choose a darker hue for the cell border. Use the symbol to delete the color value. The settings for **Light** and **Dark** overwrite the settings made for **Color**. The cell settings overwrite the table settings.
- **Wrap text** - Select this check box to automatically wrap the table cell content. Clear this check box if you do not want to wrap text.

2. Confirm with **OK** to save your settings, click **Preview** to see the results of your settings in the text editor, or click **Cancel** to discard your settings.

**Note - Switch cells**

You can switch between cells within the table via the arrow keys.

See also:

- "Formatting tables (table properties)" on page 138

## 4.7.14 Inserting or editing images

**Navigation path**

> RedDot Text Editor > Position pointer in desired image location or select image
> Insert/Edit Image

With the RedDot Text Editor, you can insert images and edit their properties for the following formats: *.png*, *.jpg*, and *.gif*.

1. You have the following options:
   - **Select image from local file system** - Select this option if you want to insert an image that has been stored locally.
   - **Select image from server** - Select this option to insert an image file that is stored in a file folder or Asset Manager folder on the application server.
   - **Edit image properties** - Select this option if you want to edit the properties of an image. This option is only available after you have selected an image.
2. Click **OK**.

## 4.7.15 Editing image properties

**Navigation path**

> RedDot Text Editor > Select image (click image) > Insert/Edit Image *or*

> RedDot Text Editor
> Select image (place pointer next to image and press SHIFT + arrow key)
> Insert/Edit Image

You can edit image properties in the RedDot Text Editor.

1. Edit the image properties. You have the following options:
   - **Alignment** - Use the drop-down list to select the alignment of the image in the text.
   - **Border** - Select the border width. Enter a whole number, for example, 1. The number 0 indicates that the image should not have a border.
   - **VSpace** - Enter a value for the vertical space between the image and text.
   - **HSpace** - Enter a value for the horizontal space between the image and text.
   - **Height** - Specify the height of the image in pixels.
   - **Width** - Specify the width of the image in pixels.

- **Image Size** - Specify the image size in percent.
- **ALT** - Enter the text that appears when the pointer is positioned over the image.
- **TITLE** - Enter a unique and meaningful name for the image.
- **LANG** - Enter a standardized language locale for the language of the ALT and TITLE attributes (for example, de - German, en - English, fr - French).
- **LONGDESC** - Enter a reference to the file that contains a detailed description of the image.

2. Confirm with **OK** to save your settings, click **Preview** to see the results of your settings in the text editor, or click **Cancel** to discard your settings.

### 4.7.16 Selecting images from local file systems

**Navigation path**

> RedDot Text Editor > Position pointer in required image position
> Insert/Edit Image > Select image from local file system > OK *or*
> Telerik RadEditor > Place pointer in required image position or select image
> Insert Image or Edit Image Properties > Tab: Asset > File: Select
> Select File from Local File System

You can insert an image that is stored on your local computer into a Text element.

**To select a file:**

1. Click **Browse** to search your file system.
2. Click **Upload**.
   Following your selection, you can define in which file folder or Asset Manager folder you want to save the file. For more information, see "Selecting folders" on page 154.
3. Click **OK**.

**Note - Importing image files with the same name repeatedly**

When the same image is imported several times in the same folder or Asset Manager folder, a copy of each file is created, for example, *name(1).jpg*, *name(2).jpg*, *name(3).jpg*. You can overwrite the files stored in the folder or Asset Manager folder or save selected files under new names. For more information, see "Correcting file names" on page 154.

## 4.7.17 Selecting folders

If you upload a file that you saved locally to Management Server, you can select a folder, Asset Manager folder, or a subfolder in your project by storing the file. Subfolders are shown indented in the list.

You can hide folders or Asset Manager folders in the text editor. This folder or Asset Manager folder is not available as an option to choose from. This setting also applies to the subfolders of an Asset Manager folder. If only one folder or Asset Manager folder is available for selection, the selection dialog is skipped. For more information, see Section 3.4 "Editing folders" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*.

The dialog window also opens when you can select a locally stored image file to add it to a Text element. In this case, you can select in which file folder or Asset Manager folder you want to save the file.

1. Select a folder, Asset Manager folder, or subfolder.
2. Click **OK**.
   Depending on what type of folder you selected, either the **Select File** dialog box or the Asset Manager opens.

When you upload a locally stored file and select a file folder or an Asset Manager folder that already contains a file with the same name, the **File Name Correction** dialog box opens.

For more information, see:

- "Correcting file names" on page 154
- "Selecting files" on page 99

## 4.7.18 Correcting file names

The **File Name Correction** dialog window will only appear if you attempt to import a file that has the same name as one located in the previously selected file folder or Asset Manager folder.

**To correct a file name:**

1. Select one of the following options:
   - **Proposed file name** - Proposes a new file name for the file. Select this option if you do not want to replace the existing file in the project.
   - **Replace** - Select this option if you want to replace the existing file in the project. The image file is thus replaced wherever it appears.
   - **Rename file** - This option allows you to rename the file you intend to import. Enter the new name in the box. The new name must be complete, including the file name extension, for example .gif, .jpg.

2. Click **OK** to validate the selected option or click **Cancel** to reject the options available. If you select **Cancel**, the previously selected file will not be imported.

### 4.7.19 Inserting lists

**Navigation path**

> RedDot Text Editor > Insert List

You can select various list types for your list.

1. Select a list type. You have the following options:
   - **Standard** - Select this check box to use the browser-specific settings for the list. Depending on the browser you are using, these can vary in terms of display and customizability.
   - **Square bullet** - Select this check box to use filled-square bullets for your list.
   - **Circle** - Select this check box to use circle bullets for your list.
   - **Number style A., B., C., Number style a., b., c.** - , - Select a number style from the list.
   - **Number style 1., 2., 3., Number style I., II., III., Number style i., ii., iii.,** - Select a number style from the list.
2. Click **OK** to confirm.

**Note - Inserting nested lists**

Using the RedDot Text Editor, you can embed lists to varying depths. However, do not use more than two or three levels to ensure that the list is as clear as possible.

1. Begin by entering the list item of the first level. You have two options:
   - If you want to enter new text, place the pointer in the position where you want the list to start. Use the **List** symbol in the toolbar to select a list type. The pointer is now located behind the selected list item. Enter your text.
   - If you already have text that you want to appear in list form, place the pointer before the text that should begin the list level. Use the **List** symbol in the toolbar to select a list type. Press the Return key to place the text behind the list item.
2. Now enter the second level list item. You have two options:
   - If you want to enter new text in a second list level, place the pointer at the end of the line and use the **List** symbol in the toolbar to insert the next level list item. A new level will be created. Place the pointer behind the list item. Now, enter your text.

- If you already have text in the first level that you want to place in the second level of the list, place the pointer before the paragraph that you want to appear in the second level. Use the **List** symbol in the toolbar to select a list type. The text is now displayed on the second level below the new list item. Press the Return key to place the text behind the list item.

3. To create further list items in the current level, just hit the Return key.
4. To embed another level, repeat this step.

**Example:**

1. First level
   - Second level, first entry
   - Second level, second entry
   - Second level, third entry
     - Third level

## 4.7.20 Selecting styles in the RedDot Text Editor

**Navigation path**

> RedDot Text Editor

In the RedDot Text Editor, you can select styles from a drop-down list.

1. Select the text to which you wish to apply a style.
2. Choose a style from the drop-down list.

**Note - Formats defined in the style sheet**

In the drop-down list, you will find individual and element-related style sheet classes that have been defined in the assigned style sheets. Style sheet classes for HTML elements, for instance, H1 or P, are used automatically in the text editor. They are not included in the drop-down list. Only style sheet classes that can be used for the HTML element where your cursor is positioned are available for selection from the drop-down list. For instance, different classes will be available for a list than for a paragraph of continuous text.

## 4.7.21 Opening symbol tables

**Navigation path**

> RedDot Text Editor > Open Symbol Table

You can call up a symbol table in the RedDot Text Editor with which you can insert special characters that are not available on your keyboard.

1. Select a **Font** from the drop-down list. You can then select a symbol in this font.
2. Move the cursor over the symbol table. An enlarged preview of the character below the cursor is shown in the bottom-right corner of the dialog window.
3. Click the character that you want to insert in the text editor, or click **Cancel** to exit the symbol table.

**Note - Using special characters**

The special characters you insert in the RedDot Text Editor using the symbol table will only be displayed correctly if the client computer has installed the required charset. Otherwise the special characters appear as boxes.

If you do not want to use special characters in a project, you can disable the *Symbol Table* dialog window using the **Symbol Table** check box in the text editor settings for the text element.

## 4.7.22 Inserting or editing markup tags

**Navigation path**

> RedDot Text Editor > Select text > Insert/Edit Markup

You can enclose a complete text or parts of your text in special markup tags in the source code. Currently, markup tags are available for abbreviations (acronyms) and for specifying a language.

1. Select a markup tag from the drop-down list. You have the following options:
   - **Abbreviation** - Select this option for an abbreviation in your text that you wish to explain in the markup tag.
   - **Language** - Select this option to specify the language for the tagged text that you have selected.
2. When you select **Abbreviation**, you enter the full form of the abbreviation in the **title** text box. When you select **Language**, you enter the standardized language ID in the **lang** box (for example, *en* for English, *de* for German, *fr* for French).
3. Click **OK** to apply the markup tags to the source code of your Text element.

**Abbreviation** markup tags are identified by a dotted line below the relevant text item in the RedDot Text Editor. This dotted line is not visible in SmartEdit, in the page preview, or on the published page.

**Notes Using markup tags**

You can use markup tags in the source code to ensure your published pages comply with accessibility guidelines. For instance, markup tags allow screen readers that are reading out Web page text to identify an abbreviation or recognize a term as belonging to a different language. The screen reader will then read out the explanation for an abbreviation or adjust the pronunciation for the specified language.

The examples below show how RedDot Text Editor and Telerik RadEditor convert markup tags in the source code into HTML elements:

- Example of an abbreviation:`<ACRONYM title="Hypertext Markup Language">HTML</ACRONYM>`
- Example of a foreign-language term:`<SPAN lang=es>Server</SPAN>`

You can find a list of all ISO language codes (ISO 639: 2-letter codes) at *http://www.w3.org/WAI/ER/IG/ert/iso639.htm*

See also:

- "Editing source codes in RedDot Text Editor" on page 130

## 4.8 Working with Telerik RadEditor

As well as CKEditor or RedDot Text Editor, Telerik RadEditor allows you to edit the content of Text elements. How to work with Telerik RadEditor is described on the following pages. Administrators have the option in the SmartTree project settings to assign other text editors for editing Text elements. For more information, see Section 2.2.1 "Administering project settings" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*. Depending on their authorizations, users can select their preferred text editor in the *User Settings*.

### Telerik RadEditor with enabled HTML5 mode

The Telerik RadEditor supports editing content that contains HTML5 tags. To enable this option, the **HTML5 mode in RadEditor** check box must be selected in the SmartTree project settings.

The following limitations apply if you edit text in the RadEditor with HTML5 mode enabled:

- *Browser compatibility* – HTML5 can be edited with up-to-date Firefox and Safari browsers and Internet Explorer 9. Older versions of IE do not support HTML5. Actual rendering support might vary with different browsers.

- *Copy and paste of HTML5 elements in IE* –Pasting HTML5 elements does not work in Internet Explorer 9. It will only paste anything up to the first HTML5 element in the clipboard. Other browsers are not affected.
- *Cell padding* –There is no `cell padding` setting available in Table Wizard. Already existing values cannot be changed.
- *Acronyms* –The markup tool can no longer insert `<acronym>` elements, whereas `lang=` and `<abbr>` can still be inserted. Already existing `<acronym>` elements can still be edited.
- *Clear Formatting Tool* –The **Clear formatting** tool is not available in the tool bar and cannot be used.
- *Option elements* –The RadEditor removes `<option>` elements from `<datalist>`.

## 4.8.1 Using the Telerik RadEditor symbols

The table below gives you an overview of all the symbols and their functions that are available in Telerik RadEditor. Text editing techniques are similar to those in any word processor. In addition, there are keyboard shortcuts for some functions.

Telerik Inc. owns the copyrights and trademarks of Telerik RadEditor. It is prohibited to use Telerik RadEditor without or outside the OpenText Web Site Management Server environment.

**Note - Symbols of the toolbar**

Not all of the symbols described in this section may be at your disposal. Whether they are available depends upon the editing functions set for the element to be edited. If necessary, ask your administrator.

**Table 4-2: Symbols in the upper toolbar**

| Symbol | Keyboard shortcut | Function |
|---|---|---|
| | CTRL+Z | Undoes the last action. |
| | CTRL+Y | Restores the last action that had been undone. |
| | CTRL+A | Selects all content in the text editor. |
| | | Performs a spelling check. |
| | CTRL+C | Copies the selected content to Clipboard. |
| | CTRL+V | Inserts content from Clipboard into the editing area. Formatting information is displayed to comply with HTML as far as possible. |

| Symbol | Keyboard shortcut | Function |
|---|---|---|
| | CTRL+ALT+V | Inserts content from Clipboard into the editing area. When content was copied from Microsoft Word, the formatting information complies with HTML. |
| | CTRL+SHIFT+V | Inserts content from Clipboard into the editing area. All formatting is removed. |
| | | Inserts a horizontal line. |
| Ω | | Opens a table of symbols where you can choose special characters. |
| M | | Applies markup tags to selected text. For more information, see "Inserting or editing markups" on page 162. |
| Paragraph Style | CTRL+SHIFT+N | Applies paragraph formatting to the selected text. |
| CSS Class | | Applies a style sheet to the selected text. Use the *Assign fixed style sheet* action to define the style sheet in the Text element content class. For more information, see Section 5.1.9 "Assigning fixed style sheets" in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*. |
| Fonts | CTRL+D | Applies the selected font type to the selected text. |
| Size | | Applies the selected font size to the selected text. |
| **B** | CTRL+B | Applies bold formatting to the selected text. |
| *I* | CTRL+i | Applies italic formatting to the selected text. |
| U | CTRL+U | Underlines selected text. |
| abc | | Strikes through selected text. |
| $x^2$ | CTRL+SHIFT+K | Superscripts selected text. |
| $x_2$ | CTRL+SHIFT+J | Subscripts selected text. |
| A | | Specifies the font color of selected text. |
| | | Specifies the text highlight color of selected text. |

| Symbol | Keyboard shortcut | Function |
|---|---|---|
| | CTRL+SPACEBAR | Removes text formatting. |
| | | Assigns a no automatic line break property to the selected text |
| | | Defines the text direction (from right to left or from left to right) |
| | CTRL+SHIFT+O | Inserts a numbered list. |
| | CTRL+SHIFT+U | Inserts a list with no numbers. |
| | CTRL+M | Inserts a tabulator. |
| | CTRL+SHIFT+M | Removes a tabulator. |
| | CTRL+E | Aligns content to the left. |
| | | Aligns content to the center. |
| | CTRL+R | Aligns content to the right. |
| | CTRL+J | Aligns content justified. |
| | | Opens a menu that provides actions for creating or editing tables. For more information, see "Inserting or editing tables" on page 158. |
| | CTRL+G | Opens the *Insert or Edit Jump Mark* dialog window. For more information, see "Inserting jump marks" on page 155. |
| | CTRL+SHIFT+G | Opens the *Jump Marks* dialog window. For more information, see "Administering jump marks" on page 156. |
| | CTRL+L | Opens the *Insert or Edit Link* dialog window. For more information, see "Inserting or editing links" on page 155. |
| | CTRL+SHIFT+L | Removes a link. |
| | CTRL+SHIFT+i | Opens the *Insert Image or Edit Image Properties* dialog window. For more information, see "Inserting images or editing image properties" on page 152. |

**Table 4-3: Symbols in the lower status bar**

| Symbol | Function |
|---|---|
| | Switches to the editing view. |
| | Switches to the source code view. |
| | Switches to the preview mode. |

**Note - Breaking lines in text editors**

Use the [ENTER] key in the text editor to insert a new paragraph. A `<p>` tag is added to the HTML source code. Use the key combination [SHIFT]+[ENTER] to insert a line break. A `<br>` tag is added to the source code.

## 4.8.2 Inserting images or editing image properties

**Navigation path**

> Telerik RadEditor > Place pointer in required image position or select image
> Insert Image or Edit Image Properties

You can insert images that are located in a file folder or Asset Manager folder in your project, on your local computer, or on the Internet. You can edit the image properties of a previously inserted image.

**To insert images:**

1. Place the pointer in the required image position.
2. Click **Insert Image or Edit Image Properties** .
3. Click the tabs in the dialog window to choose the source for image files:
   - **Asset** - Use **Select** to open a dialog window where you can choose whether you want to upload a file that you have saved locally or select a file from an Asset Manager or file folder.
   - **Internet** - Enter the **URL** of an image on the Internet. Select the protocol you require from the list. The address protocol is deleted automatically when the image is inserted.
4. You can edit the following properties:
   - **Alternative text** - Enter an alternative text that should appear when the image cannot be displayed.
   - **Alignment** - Use the list to select the alignment of the image in the text.
5. Click **OK**.

**To edit the properties of an image:**

1. Select the image.
2. Click **Insert Image or Edit Image Properties**.
3. You can edit the following properties:
   - **Alternative text** - Enter an alternative text that should appear when the image cannot be displayed.
   - **Alignment** - Use the list to select the alignment of the image in the text.
4. Click **OK**.

For more information, see:

- "Selecting images from local file systems" on page 153
- "Selecting folders" on page 154

## 4.8.3 Selecting images from local file systems

**Navigation path**

> RedDot Text Editor > Position pointer in required image position
> Insert/Edit Image > Select image from local file system > OK *or*
> Telerik RadEditor > Place pointer in required image position or select image
> Insert Image or Edit Image Properties > Tab: Asset > File: Select
> Select File from Local File System

You can insert an image that is stored on your local computer into a Text element.

**To select a file:**

1. Click **Browse** to search your file system.
2. Click **Upload**.
   Following your selection, you can define in which file folder or Asset Manager folder you want to save the file. For more information, see "Selecting folders" on page 154.
3. Click **OK**.

**Note - Importing image files with the same name repeatedly**

When the same image is imported several times in the same folder or Asset Manager folder, a copy of each file is created, for example, *name(1).jpg*, *name(2).jpg*, *name(3).jpg*. You can overwrite the files stored in the folder or Asset Manager folder or save selected files under new names. For more information, see "Correcting file names" on page 154.

### 4.8.4 Selecting folders

If you upload a file that you saved locally to Management Server, you can select a folder, Asset Manager folder, or a subfolder in your project by storing the file. Subfolders are shown indented in the list.

You can hide folders or Asset Manager folders in the text editor. This folder or Asset Manager folder is not available as an option to choose from. This setting also applies to the subfolders of an Asset Manager folder. If only one folder or Asset Manager folder is available for selection, the selection dialog is skipped. For more information, see Section 3.4 "Editing folders" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*.

The dialog window also opens when you can select a locally stored image file to add it to a Text element. In this case, you can select in which file folder or Asset Manager folder you want to save the file.

1. Select a folder, Asset Manager folder, or subfolder.
2. Click **OK**.
   Depending on what type of folder you selected, either the **Select File** dialog box or the Asset Manager opens.

When you upload a locally stored file and select a file folder or an Asset Manager folder that already contains a file with the same name, the **File Name Correction** dialog box opens.

For more information, see:

- "Correcting file names" on page 154
- "Selecting files" on page 99

### 4.8.5 Correcting file names

The **File Name Correction** dialog window will only appear if you attempt to import a file that has the same name as one located in the previously selected file folder or Asset Manager folder.

**To correct a file name:**

1. Select one of the following options:
   - **Proposed file name** - Proposes a new file name for the file. Select this option if you do not want to replace the existing file in the project.
   - **Replace** - Select this option if you want to replace the existing file in the project. The image file is thus replaced wherever it appears.
   - **Rename file** - This option allows you to rename the file you intend to import. Enter the new name in the box. The new name must be complete, including the file name extension, for example .gif, .jpg.

2. Click **OK** to validate the selected option or click **Cancel** to reject the options available. If you select **Cancel**, the previously selected file will not be imported.

## 4.8.6 Inserting jump marks

**Navigation path**

> Telerik RadEditor
> Select text or image, or place pointer in jump mark text or select image with jump mark
> Insert or Edit Jump Mark

You can use jump marks to jump to defined positions by using a link. The jump mark is the target of the link. You can edit existing jump marks.

**To insert a jump mark:**

1. Define the jump mark name. Any selected text will be preset as the name of the jump mark. You can change the preset name. When using an image as a jump mark, specify a name in the dialog box.
2. Click **OK**.

## 4.8.7 Inserting or editing links

**Navigation path**

> Telerik RadEditor
> Select text or image, or place pointer in link text or select image with link
> Insert or Edit Link

You can use Telerik RadEditor to create links to different kind of targets. Possible targets include:

- A jump mark within the same Text element
- A page within the same project
- A file on your local computer (the file is then stored in a folder or Asset Manager folder)
- A file in a file folder or Asset Manager folder
- An Internet address
- An email address

Use the tabs in the dialog window to choose from different link targets.

- **Jump mark** - Select a predefined jump mark from the drop-down list to use as the link target.

- **Page** - Click **Select** to open the search dialog in which you can select a previously defined page as the link target. For more information, see the *Searching Pages* section.
- **Asset** - Click **Select** to open a dialog in which you can choose whether you want to define a file that you have saved locally as the link target or a file in a file folder or Asset Manager folder as the link target. For more information, see "Inserting file links" on page 157.

  **Note:** To remove a selected file, you can do the following: either remove the link completely or click **Select** and then in the next dialog box click **No File**.
- **Internet** - Enter an Internet address that you want to be the link target. Select the protocol you require from the drop-down list. The address protocol is deleted automatically when the image is inserted.
- **Email** - Enter the user's email address in the **Address** box and the subject of the mail in the **Subject** box.

You can edit the following properties for a selected link:

- **Tooltip** - Enter a tooltip for the link. Browsers show this text as a tooltip.
- **Target** - Decide where you want to have the link target displayed.
  - **_blank** - The link target is shown in a new browser window.
  - **_self** - The link target is shown in the same browser window that contains the calling link.
  - **_parent** - If the page that contains the link is part of a frame structure, the link target is shown in the parent frame.
  - **_top** - If the page that contains the link is part of a frame structure, the link target is shown in the top frame.

For more information, see:

- "Page search" on page 167

## 4.8.8 Administering jump marks

**Navigation path**

> Telerik RadEditor > Administer Jump Marks

The dialog window shows all jump marks that were defined in the Text element.

You have the following options:

- **Jump to** - Use this button to select the jump mark specified in the dialog window in the text editor.

- **Remove** - Use this button to remove the jump mark specified in the dialog window in the text editor. The jump mark text remains in the text editor.

For more information, see:

- "Inserting jump marks" on page 155

## 4.8.9 Inserting file links

**Navigation path**

> Telerik RadEditor > Select text or image > Insert or Edit Link > Tab: Asset > File: Select *or*

> Telerik RadEditor > Place pointer on link text or select image with link > Insert or Edit Link > Tab: Asset > File: Select

In Telerik RadEditor you can reference a file located in an Asset Manager or file folder. Alternatively, you can select a file from your local computer. The file is then imported to an Asset Manager folder or file folder first. You can also remove a file that you once selected.

**To insert or remove a file link:**

1. Select one of the following options:
   - **Select File from Local File System** - Select this option to reference a file that is not yet located in an Asset Manager or file folder. Click **OK** to open the *Select File from Local File System* dialog box. The file is then imported to an Asset Manager folder or file folder.
   - **Select Asset** - Select this option to reference a file that is already located in an Asset Manager folder or file folder. In the next dialog box, click one of the available Asset Manager folders or file folders to open it and select a file. For more information about this dialog box, see "Selecting folders" on page 154.
   - **No File** - Select this option to remove a linked file.
2. Click **OK**.

## 4.8.10 Inserting or editing tables

**Navigation path**

> Telerik RadEditor > Place pointer in required position or in table
> > Insert Table

Telerik RadEditor offers several options for inserting and editing tables:

- To insert a new table, use the pointer to select the required number of table cells in the displayed grid (at the top of the menu).
- To insert a new table, click **Insert Table**. This opens a dialog window where you can edit the table properties, supported by tabbed dialog boxes. For detailed information about the dialog boxes, see "Editing table properties" on page 159.

  **Note:** If you use this option to insert a new table, note the following:

  - If you select the outer frame of a table, the selected table is replaced by the new table.
  - If you place the pointer within a table cell, the new table is inserted into the cell.
- To edit a table, you can either use the actions in the table menu or click right to open a separate menu:
  - - Inserts a new line above the line where the pointer is currently positioned.
  - - Inserts a new line below the line where the pointer is currently positioned.
  - - Deletes the line where the pointer is currently positioned.
  - - Inserts a new column to the left of the column where the pointer is currently positioned.
  - - Inserts a new column to the right of the column where the pointer is currently positioned.
  - - Deletes the column where the pointer is currently positioned.
  - - Merges the cell where the pointer is currently positioned to the cell on the right.
  - - Merges the cell where the pointer is currently positioned to the cell below.
  - - Divides vertically merged cells back into individual cells.
  - - Divides horizontally merged cells back into individual cells.

- - Deletes the cell where the pointer is currently positioned.
- - Defines the properties of the cell where the pointer is currently positioned. The *Cell Properties* tab opens. For detailed information on your setting options, see "Editing table properties" on page 159.
- - Defines the properties of the entire table in which the pointer is currently positioned. The *Table Properties* tab opens. For more information, see "Editing table properties" on page 159.

## 4.8.11 Editing table properties

**Navigation path**

> Telerik RadEditor > Place pointer in required position > Insert Table > Insert Table *or*

> Telerik RadEditor > Place pointer in table > Insert Table > Set Table Properties *or*

> Telerik RadEditor > Place pointer in table or select table > Right-click: Set Table Properties *or*

> Telerik RadEditor > Place pointer in cell > Insert Table > Set Cell Properties *or*

> Telerik RadEditor > Place pointer in cell > Right-click: Set Cell Properties

You can use the Table Wizard to insert new tables in the Telerik RadEditor and to edit the table properties.

Use the tabs in the dialog window to switch between the different areas.

**To edit the table properties:**

1. Select the area tab where you want to make changes, then apply the settings:
   - **Table Layout** - Define the number of rows and columns for your table and which cells are merged. A preview of the table view shows you what the structure of your table looks like.
     - **Columns**
       - **Columns** - Use the plus symbol to add to the number of columns you require, or remove columns using the minus symbol.
       - **Span** - Click a cell in the table view. Use the plus symbol to merge the selected cell with the cell next to it on the right. Use the minus symbol to undo this operation.
     - **Rows**

    - **Rows** - Use the plus symbol to add to the number of rows you require, or remove rows using the minus symbol.
    - **Span** - Click a cell in the table view. Use the plus symbol to merge the selected cell with the cell below. Use the minus symbol to undo this operation.
- **Table Properties** - You can edit the properties of the entire table here.
  - **Size**
    - **Height** - Specify the table height. You can specify the height in pixels (px) or in percent (%). If you do not select a unit, the pixel specification is used.
    - **Width** - Specify the table width. You can specify the width in pixels (px) or in percent (%). If you do not select a unit, the pixel specification is used.
  - **Appearance**
    - **Cell margin** - Enter a value for the space between the table cells, in pixels.
    - **Cell padding** - Enter a value for the space between the cell and the cell content, in pixels.
    - **Alignment** - Define the table alignment within the Text element.
    - **Background color** - Select a background color for the table.
    - **CSS class** - Using the drop-down list, select a CSS class to be used for the text in the table. Use the *Assign fixed style sheet* action to define the CSS classes for the Text element content class. For more information about assigning fixed style sheets, see Section 5.1.9 "Assigning fixed style sheets" in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*.
    - **Background image** - Define a background image for the table. Click ... to select an image from the local file system or Asset Manager.
    - **ID** - Specify the ID for the table to which you can refer.
- **Cell Properties** - You can edit the properties of individual table cells. In the **Preview** of the table view, click the cell whose properties you want to edit.

  **Note:** To edit multiple cells concurrently, press CTRL and select the cells.

  - **Height** - Specify the cell height. You can specify the height in pixels (px) or in percent (%). If you do not select a unit, the pixel specification is used.
  - **Width** - Specify the cell width. You can specify the width in pixels (px) or in percent (%). If you do not select a unit, the pixel specification is used.

- **Alignment** - Use the symbols in the list to select the vertical and horizontal alignment of the content within a cell.
- **Background** - Select a background color for the cell.
- **CSS class** - Using the drop-down list, select a CSS class to be assigned to the text in the cell. Use the *Assign fixed style sheet* action to define the CSS classes for the Text element content class. For more information, see Section 5.1.9 "Assigning fixed style sheets" in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*.
- **Background image** - Define a background image for the cell. Click ... to select an image from the local file system or Asset Manager.
- **ID** - Specify the ID for the cell to which you can refer.
- **No text wrapping** - If you select this check box, the text within the cell is not wrapped.

- **Accessibility** - Define additional table properties, which can, for example, be used to improve the accessibility of the page.
  - **Header rows** - Enter the number of rows that you want to use as the horizontal table header. You can choose a maximum of two rows.
  - **Header columns** - Enter the number of columns that you want to use as the vertical table header. You can choose a maximum of two columns.
  - **Caption** - Enter a short description for the table.
  - **Alignment** - Use the symbols in the list to select the position and alignment of the text that you entered as the *caption*.
  - **Summary** - Enter a text that summarizes the table content. The summary is usually not displayed by browsers. Devices that, for example, assist the vision-impaired when reading the page can, however, access the information.
  - **Associate cells with headers** - Select this check box to add information to the table's HTML source code. This provides information on which header row and header column each cell is assigned to (using the `headers` and `id` attributes). The structure of the table thus becomes clearer, for example, for speech output devices.

2. Click **OK**.

## 4.8.12 Inserting or editing markups

**Navigation path**

> Telerik RadEditor > Select text > Insert/Edit Markup

You can enclose a complete text or parts of your text in special markup tags in the source code. Currently, markup tags are available for abbreviations and acronyms and for specifying a language.

**To insert or edit a markup tag:**

1. Highlight the text in the editing area.
2. Click **Insert/Edit Markup**.
3. You can do the following:
   - **Define the language of the selection** - Select this check box to specify a language for the highlighted text, and then select the standardized language ID in the **ISO 639-1 code** list.

     **Tip:** Instead of highlighting a full paragraph, for example, you can just put the cursor into the paragraph and click **Insert/Edit Markup**. The language is then specified for the full paragraph. This setting also applies to table cells
   - **The selected text is neither an acronym nor an abbreviation** - Select this option to specify that the highlighted text is neither an acronym or an abbreviation. This is the default setting.
   - **The selected text is an acronym** - Select this option to specify that the highlighted text is an acronym, and then enter the full form in the **Definition** box.
   - **The selected text is an abbreviation** - Select this option to specify the highlighted text as abbreviation, and then enter the full form in the **Definition** box.
4. Click **Save** or **OK**.
   The markup tags are applied to the source code of your Text element. Abbreviations and acronyms are highlighted in a different color.

**Notes Using markup tags**

You can use markup tags in the source code to ensure your published pages comply with accessibility guidelines. For instance, markup tags allow screen readers that are reading out Web page text to identify an abbreviation or recognize a term as belonging to a different language. The screen reader will then read out the explanation for an abbreviation or adjust the pronunciation for the specified language.

The examples below show how RedDot Text Editor and Telerik RadEditor convert markup tags in the source code into HTML elements:

- Example of an abbreviation:`<ACRONYM title="Hypertext Markup Language">HTML</ACRONYM>`
- Example of a foreign-language term:`<SPAN lang=es>Server</SPAN>`

You can find a list of all ISO language codes (ISO 639: 2-letter codes) at *http://www.w3.org/WAI/ER/IG/ert/iso639.htm*

## 4.9 Editing structural elements

As soon as you have opened a page, you can edit the structural elements. A structural element is preset as either a **Link RedDot** or a **MultiLink RedDot**.

### 4.9.1 Editing Link elements

**Navigation path**

> SmartEdit > OpenPage RedDot > MultiLink RedDot or Link RedDot
> Edit Image link

The **Edit Link Element** dialog window is available for the **Anchor**, **List**, and **Container** elements.

Your editing options vary, depending on the type of structural element.

**Editing Link Elements**

| Structural element type | RedDot symbol | Editing options |
|---|---|---|
| Anchor (Link) | | Connect Existing Page<br>Reference Page<br>Reference Link<br>Create and Connect Page<br>Assign Target Container<br>Edit Target<br>Assign URL<br>Disconnect Following Page |
| Anchor (Image Link) | | Edit Image<br>Delete Image<br>Assign Target Container<br>Edit Target<br>Connect Existing Page<br>Reference Page<br>Reference Link<br>Create and Connect Page<br>Assign URL<br>Disconnect Following Page |

| Structural element type | RedDot symbol | Editing options |
|---|---|---|
| Anchor (Dynamic Image Link) | | Edit Image<br>Delete Image<br>Assign Target Container<br>Edit Target<br>Connect Existing Page<br>Reference Page<br>Reference Link<br>Create and Connect Page<br>Assign URL<br>Edit Page Order<br>Expand Dynamic Link<br>Delete Dynamic Link<br>Disconnect Following Page |
| Anchor (Dynamic Link) | | Connect Existing Page<br>Reference Page<br>Reference Link<br>Create and Connect Page<br>Assign Target Container<br>Edit Target<br>Assign URL<br>Edit Dynamic Link Order<br>Expand Dynamic Link<br>Delete Dynamic Link<br>Disconnect Following Page |
| List (Without Pages) | | Connect Existing Page<br>Reference Page<br>Reference Link<br>Create and Connect Page<br>Add URL<br>Assign Target Container<br>Edit Target<br>Edit Keyword Assignment |
| List (With Pages) | | Connect Existing Page<br>Reference Page<br>Reference Link<br>Create and Connect Page<br>Add URL<br>Assign Target Container<br>Edit Target<br>Edit Page Order<br>Edit Keyword Assignment<br>Remove Items from List |
| Container (Without Pages) | | Connect Existing Page<br>Create and Connect Page<br>Edit Container Properties<br>Edit Keyword Assignment |

| Structural element type | RedDot symbol | Editing options |
|---|---|---|
| Container (With Pages) | | Connect Existing Page<br>Create and Connect Page<br>Edit Container Properties<br>Edit Page Order<br>Edit Keyword Assignment<br>Remove Items from List |
| Target Container (Without Pages) | | Connect Existing Page<br>Create and Connect Page<br>Edit Container Properties<br>Edit Keyword Assignment |
| Target Container (With Pages) | | Connect Existing Page<br>Create and Connect Page<br>Edit Container Properties<br>Edit Reference List of Container<br>Edit Page Order<br>Edit Keyword Assignment<br>Remove Items from List |
| Hit List | | Delete Records<br>Add Records |

### Edit link properties

The **Link name** box of the **Rename Link** section lets you

- enter the link name of most element types
- rename the link of most element types.

This section is not available for the following element types: List and Container.

### Plug-ins

- **Plug-in** - Click on a plug-in to run it. You define plug-ins in Server Manager.
- - Click the symbol to display the plug-in target. You use the plug-in target to define a plug-in in Server Manager for this section. For more information, see *OpenText Web Site Management Server - Server Manager Guide (WSMSSM-AGD)*.

Your editing options also depend on the element authorizations you have. When a structural element references another structural element, you have different editing options, too.

See also:


- "Connecting existing pages" on page 166
- "Referencing pages" on page 176
- "Referencing links" on page 177
- "Referencing pages from other projects (project selection)" on page 177

## 4.9.2 Connecting existing pages

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project
> Connect Existing Page *or*

> SmartTree > Start > Administer Project Structure > Project > Select page
> Select structural element > Connect Existing Page *or*

> SmartEdit > OpenPage RedDot > MultiLink RedDot or Link RedDot
> Connect Existing Page

You can connect a link or multilink (container or list) to an existing page. The page search opens where you can search and select the desired pages.

**Tip - Connecting existing pages**

You can also use Clipboard or in SmartEdit the Page Search panel to connect existing pages.

**CAUTION - Start page**

Any page that you connect to the **Project** tree item becomes your project's **start page**. Whenever you connect a new page, it replaces an existing start page including all its subsequent pages. These pages are disconnected from the **Project** tree item and will be listed below the **Unlinked Pages** tree item.

You can find them using the **Connect Existing Pages** menu item, and connect them anywhere within the project structure. Only **Administrators** can connect pages to the **Project** tree item.

See also:

- "Page search" on page 167

As well as the function described here, there are also different ways to connect pages in SmartEdit. To obtain an overview, see the separate section.

For more information, see:

- "Connecting pages" on page 29

### 4.9.3 Page search

You can search for pages based on various criteria and settings. You can also view the results list from your previous search.

The *Page Search* dialog window is used for different actions in Management Server (for example, the *Connect Existing Page* action). However, the options in the dialog window are identical.

1. You have the following options:
   - **Show last search results list** - Click this link to view the results list from your previous search. The last search result is deleted when the user logs off.
   - The default search dialog contains the following fields:
     - **Content** - Specify one or several words that occur in the text of the page you are looking for. The following elements are searched: **Text**, **Standard Field**, and **Image** (file name of images). You can leave this box blank.
       - **Use full-text index** - This check box is only available if your administrator has created a full-text index for the current project and language variant. Select the check box to use the full-text index. This can speed up searches in large-scale projects.
         Refer to the information box below for information on how to create a full-text index for your project and the advantages this presents.
     - **Headline** - Specify one or more words that occur in the headline of the page you are looking for. You can leave this box blank.
       - **Use full-text index** - This check box is only available if your administrator has created a full-text index for the current project and language variant. Select the check box to use the full-text index. This can speed up searches in large-scale projects.
         Refer to the information box below for information on how to create a full-text index for your project and the advantages this presents.

  - **Hits per results page** - Specify the number of pages to be shown in the results list.
  - **Max. number of hits** - Specify the maximum number of pages to be shown in the results list.

- You can choose additional search criteria from the drop-down list and click the symbol to add them to your search. The search result lists pages matching *all* the search criteria. For each **search criterion** you add, you have to select an **Operator** and specify a **Value**. You cannot leave the **Value** box blank. If you decide not to use a search criterion you have previously added, delete the criterion before running your search. The following search criteria are available:

  - **Page ID** - Choose an **Operator** from the drop-down list and specify a page ID in the **Value** box.
    To list all pages that have IDs in a particular value range, add the **Page ID** search criterion twice. Choose the *Greater than* **operator** for the first criterion and specify the minimum value of the value range. Choose the *Less than* **operator** for the second criterion and specify the maximum value of the value range.
  - **Page GUIID** - As **Operator** value, only *Equal* is available. In the **Value** box, enter the exact page `GUID` value.
  - **File name** - As **Operator** value, only *like* is available. In the **Value** box, enter the file name or part of the file name.
  - **Content class** - Click to choose a content class. For more information, see the *Content Class Groups* section.
  - **Creation date** - Click to select a creation date. For more information, see the *Setting Date and Time* section. To find pages that were created in a particular time period, proceed as described for the **Page ID** search criterion.
  - **Modification date** - Click to select a modification date. For more information, see the *Setting Date and Time* section. To find pages that were changed in a particular time period, proceed as described for the **Page ID** search criterion.
  - **Created by** - Click to select an original author. For more information, see the *Finding Users* section.
    - **Active user** - Select this check box to find pages created by the user who is currently logged on.
  - **Changed by** - Click to select an editor. For more information, see the *Finding Users* section.
    - **Active user** - Select this check box to find pages changed by the user who is currently logged on.

- **Keyword** - Click ... to select a category and keyword. For more information, see the *Selecting Keywords* section.
- **Special pages** - Select the project pages that you want to search from the drop-down list. In general, only the pages are searched and not, for example, the *URLs* that are also displayed in SmartTree as page symbols. You have the following options:
  - **Active pages** - The search includes only pages that are linked within the project structure or located below the **Unlinked Pages** tree item.
  - **Linked pages** - The search includes only pages that are linked within the project structure.
  - **Unlinked pages** - The search includes only pages that are not linked within the project structure. These pages are listed below the **Unlinked Pages** tree item.
  - **Pages in Recycle Bin** - The search includes only pages that are located in the **Recycle Bin**.
  - **All pages** - The search includes all project pages except those located in the archive.
- **Page status** - Choose a page status from the drop-down list. Searching for pages by status is the same as opening your task list. For example, if your only search criterion is the page status **Pages saved as draft**, the search returns all pages listed under **Pages saved as draft** when you click the *Tasks* tab in the Main Menu. The options available to you in the results list are the same as those in the corresponding task list. Users with the *Administrator* role can also view other users' pages with the status specified. The following page statuses are available:
  - **Pages saved as draft** - The search includes all pages that have been saved as drafts.
  - **Pages waiting for release** - The search includes all pages that have been submitted to you for release.
  - **Pages waiting for correction** - The search includes all pages that have been submitted to you for correction.
  - **My pages in workflow** - The search includes all pages that you have edited and submitted to the workflow.
  - **Resubmitted pages** - The search includes all pages that have been resubmitted to you.
  - **Pages I released** - The search includes all pages that you have already released but which still need to be released by other users.
  - **Translated pages saved as draft** - The search includes all translated pages that have been saved as drafts.
  - **Translated pages waiting for release** - The search includes all translated pages that have been submitted to you for release.

- **Translated pages waiting for correction** - The search includes all translated pages that have been submitted to you for correction.
- **My translated pages in workflow** - The search includes all translated pages that you have edited and submitted to the workflow.
- **Pages waiting for translation** - The search includes all pages that have been submitted to you for translation. Select the **Source language variant** of the pages waiting for translation from the drop-down list.
- **All users' pages** - Select this check box to search all users' pages with the status specified. This check box is available only to users who have been assigned the *Administrator* role.

- **Workflow** - Click ... to choose a content workflow. See also the section *Selecting the Workflow*.

- Click to delete a search criterion.

2. Click **Start** to start your search. Click **Clear** to specify new search criteria or **Cancel** to cancel the search.

**Note - Creating full-text indexes for the page search (Microsoft SQL server)**

For projects on a Microsoft SQL server, you can create a full-text index for page searches. This makes page searches more efficient. The search then returns only pages containing the exact words specified, not pages containing variants of the words specified. For example, the search for the term *work* does not return pages containing the words *workload* or *overworked*. Search results also depend on the update interval your administrator has set for the full-text index. The search result may therefore not include new pages.

You need to create a separate full-text index for every language variant of your project. You can do this at any time. To create a full-text index, perform the following steps. The description of the steps is based on the procedure in Microsoft SQL Server 2008.

1. Start **Microsoft SQL Management Studio**.
2. Under **Databases**, select the project database for the project you require.
3. Under **Tables**, select the table IO_VAL_<language variant> of the language variant you require (for example, IO_VAL_ENU).
4. Right-click to open the shortcut menu, and select *Full-Text Index -> Define Full-Text Index*. The *Full-Text Indexing Wizard* starts.
5. Click **Next** to confirm the Start dialog box.
6. A **unique index** is shown, for example, IX_IO_VAL_ENU11. Click **Next** to confirm.

7. In the *Select Table Columns* dialog box, select the check boxes for the columns **VAL4** and **VAL5**, and confirm with **Next**. You also have the option of entering a language for hyphenation for the two columns.

8. In the *Select Change Tracking* dialog box, select **Manually**, and confirm with **Next**.

9. In the *Select Catalog, Index Filegroup, and Stoplist* dialog box, enter a **Name** for the full-text catalog, or select an existing name. Click **Next** to confirm your entries.

10. In the next dialog box, create population schedules specifying update intervals for the full-text index. Depending on the change frequency of your project, a new full-text index should be created daily or weekly. Click **Next** to confirm your entries.

11. Click **Finish**.
    A message informs you that the full-text index has been created.

You have now created a full-text index for one project and one language variant. Repeat this procedure for all projects and all language variants for which you require full-text indexes for the page search.

More information on creating and maintaining a full-text index can be found in the MSDN Full-Text Indexing Overview (http://msdn.microsoft.com/en-us/library/cc879306.aspx)

**Note**: If you are using a Microsoft SQL Server 2000 to create a full-text index, the results of the full-text search may be somewhat restricted compared to the search results with Microsoft SQL Server 2005 or Microsoft SQL Server 2008. Microsoft SQL Server 2000 cannot adequately index *XML* code or *HTML* code and indexes an expression like * beach * as a complete term. This means that this expression cannot be found when you search for the term *beach*. However, if the word *beach* is in the middle of a sentence such as * Enjoy a day on the beach with your family. *, *beach* will be properly indexed and also found in a search.

With Oracle databases, a full-text index is automatically created during installation.

See also:


- "Content class groups" on page 174
- "Setting date and time" on page 174
- "Finding users" on page 175
- "Selecting keywords" on page 71
- "Selecting workflows" on page 176
- "Search results" on page 172

### 4.9.4 Search results

The **Search Result** dialog window lists the pages matching all the search criteria specified in the page search. The search result can also be used to view your tasks. This is equivalent to a search using the search criterion **Page status**. In the case of such a search, the dialog window offers you additional options, which have already been described in other sections of this documentation. For information about these topics, see the links below.

**Grouping and Sorting** - You can group and sort your search results based on various criteria. You have the following options:

- **Display or hide group and sort options** - Click this link to display or hide the options for grouping and sorting the search results.
- **Hits per results page** - Specify the number of pages to be shown in the results list.
- **Refresh** - Click this link to apply any changes to the group and sort options or the number of hits per results page to the results list. When you have refreshed the results list, the group and sort options are automatically hidden.
- **Group by** - Select a criterion for grouping the results list. You can sort the groups in **ascending** or **descending** order.
- **Sort by** - Select a criterion for sorting the results list. You can sort the pages in **ascending** or **descending** order.
- **Refresh** - Click this link to reset the group and sort options to the default setting (Group by: don't group; Sort by: Page name).

**Result List** - The result list provides the following information about each page:

- A symbol indicates the page status. The following symbols are possible:
  - - The page has been released and is linked within the project structure.
  - - The page is not linked within the project structure. It is listed below the **Unlinked Pages** tree item.
  - - The page is being edited by a user.
  - - The page has been sent to a user for correction.
- **Page ID** - The page ID follows the page status symbol.
- **Page name** - Click a page name to switch to the page (in SmartEdit) or copy the page to Clipboard (in SmartTree).
- **Last editor** - Last user to edit the page. Click the user name to send the last editor an email.
- **Modification date** - Time when the page was last edited.
- **Original author** - User who created the page. Click the name to send the original author an email.

- **Creation date** - Time at which the page was created.
- **Content class** - Content class folder and content class on which the page is based.
- **Workflow** - Content workflow in effect for this page.

The following options are available in the result list:

- - If you have used the quick search in SmartTree to run the page search, you can select a check box for each page. You can then click the **Create Shortcut in Clipboard for Pages Selected** button to reference the pages collectively to Clipboard.
- - Click this symbol to preview the page.
- **Select all entries of this results page** - If you have used the quick search in SmartTree to run the page search, this check box lets you select all entries on the results page and reference them collectively to Clipboard.
- **First page, Previous page, Next page, Last page** - If your search has returned many pages, click these links to move between the result pages.

If you have selected the *Page status* search criterion in the page search, the search results offer you additional options that are also provided in the Tasks module. For more information, see Section 6 "Working with tasks" in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*.

**Tip - Keyboard shortcuts for the dialog window**

If you are using the Internet Explorer, you can use the keyboard shortcuts below in this dialog window.

| Keyboard shortcut | Function |
|---|---|
| CTRL+LEFT ARROW | Show first results page |
| LEFT ARROW | Show previous results page |
| RIGHT ARROW | Show next results page |
| CTRL+RIGHT ARROW | Show last results page |
| CTRL+A | Select all |
| ENTER or BACKSPACE key | Back to previous dialog window |

If you open the dialog window using the actions for the tasks at the project tree item in SmartTree, you have more options available. For more information, see the relevant sections.

For more information, see:

- Section 7.1.17 "(Translated) pages saved as draft" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*
- Section 7.1.19 "(Translated) pages waiting for release" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

- Section 7.1.21 “(Translated) pages waiting for correction” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*
- Section 7.1.24 “Pages waiting for translation” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

### 4.9.5 Content class groups

You can use different actions to open the *Content Class Group Selection* dialog window. The options in the dialog window can differ slightly depending on the action.

1. In the **Content Class Groups** section, select the content class folder containing the content class you require. The **List of Content Classes** lists all content classes available for selection. A description and a preview symbol are displayed if this information was saved for the content class. Depending on the action you used to open this dialog window, the page definitions for the content classes may also be listed.

   Use the symbol to access a template preview. This uses the template that is assigned to the project variant that is used as the display format. The sample texts, images, or default entries for the content elements in the template are displayed. The template preview is only available for content classes and not for page definitions. For more information, see Section 5.5.10 “Template preview” in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*.

2. In the **List of Content Classes**, click the name of a content class to select it.

### 4.9.6 Setting date and time

Various actions open the **Set Date and Time** dialog window. The options in the dialog window can differ slightly depending on the action.

1. Configure the settings you require.
   - **Year** - Specify a year.
   - **Month** - Choose a month from the drop-down list.
   - **Calendar** - To set a day, select the option for that day in the calendar.
     - **Today** - Click to use the current date (according to the local setting of your computer).
   - **Time** - If required, enter a time, separating hours and minutes with a colon (00:00).
2. Click **OK** to confirm.

### 4.9.7 Finding users

The *Find Users* dialog box is used for a variety of actions. The options in the dialog box can differ slightly depending on the action.

1. You have the following options:

   - **Attribute**
     - **Search criteria** - Lets you customize your search with up to four search criteria.
       - User name - Select up to four search criteria from the drop-down menus. You have the following options:
         - User name
         - Full name
         - Description
         - Email address
         - Module name
         - Language of user interface
         - Project name
         - Account system
         - Group name
   - **Operator**
     - like - Choose **like** or **not like** from the drop-down list. If you select **like**, the search returns all users matching the value in the next field. If you select **not like**, the search returns only users not matching the value in the next field.
   - **Value**
     - - Specify a value for the search criterion you have selected. You can also use the "*" wildcard. For instance, if you enter "a*", the search returns all users whose name starts with "a". If you enter "*a", the search returns all users whose name ends in "a". If you enter "*a*", the search returns all users whose name contains "a".
   - **Reset** - Click this link to reset the form.
   - **Search** - Click this link to start the search.
   - **Result** - Lists your search results. You can sort the displayed users according to the criteria listed (user name, complete name, description, email address)

by clicking the respective criterion. Users are initially listed in ascending order. If you click the same criterion again, users will be listed in descending order. The ▲ (ascending) and ▼ (descending) arrows indicate the order in which criteria are listed.

- ☐ - Select the check box(es) for the user(s) you want to select.
  If only one user is available for selection, an option field is shown instead of a check box.
- **User name** - Shows the sign-in name of a user.
- **Full name** - Shows a user's full name.
- **Description** - Shows a description of a user.
- **Email address** - Shows a user's email address.

- ☐ **Select all** - Select this check box to select all users.
- << - Click this symbol to browse to the first page of the result list.
- < - Click this symbol to browse to the previous page of the result list.
- **Page 1 / 10** - Shows which page within the result list you are looking at.
- > - Click this symbol to browse to the next page of the result list.
- >> - Click this symbol to browse to the last page of the result list.

2. Click **OK** to edit the selected users. Select **Cancel** to terminate the procedure.

## 4.9.8 Selecting workflows

You can use a content workflow as a search criterion in the page search.

1. Select the content workflow you wish to use as a search criterion.
2. Click **OK** to confirm.

## 4.9.9 Referencing pages

**Navigation path**

> SmartEdit > OpenPage RedDot > Link RedDot or Edit Image Link
> Reference Page

You can search for an existing page and you can have a link reference the page. The page search opens where you can search and select the desired pages.

See also:

- "Page search" on page 167

## 4.9.10 Referencing links

**Navigation path**

> SmartEdit > OpenPage RedDot > Link RedDot or Edit Image Link
> Reference Link

You can have one link refer to another.

1. Use **Link Groups** to select the group that contains the desired link. Available links are displayed in the **Link List**.
2. Find the desired link in the **Link List** and click on it to add.

## 4.9.11 Referencing pages from other projects (project selection)

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > Select Page
> Select Structural Element > Reference Page from Other Project *or*

> SmartEdit > OpenPage RedDot > Link RedDot
> Reference Page from Other Project

You can create a reference to a page in another project for an Anchor element. When you do this, a permanent link is created based on the publication settings of the page in the other project. A reference to another project can only be created for projects that have at least one project variant with the same name. Language variants are assigned in a later dialog.

The page in the other project is displayed in the page preview and in SmartEdit, although it cannot be edited there. When the current project is published, the page from the other project is not published again. The page must already exist in the publishing target of the other project so that the reference in the published page of the current project can be correctly executed.

1. In **Project Selection**, click on the project which contains the page you want to reference. All projects which were assigned to you in your user settings will be displayed.
   The page search opens, letting you search the project you have selected.

See also:

- "Page search" on page 167

**Note - Displaying pages from other projects in SmartEdit**

A link to a page in another project can be recognized in SmartEdit because the reference target opens in a new browser window.

**CAUTION - Checking references to other projects**

References to pages in other projects are determined on creation and then used on publication without any further checks. To ensure that a reference target is still accessible from a particular link, select the action **Check References to Other Projects** on the Project tree item, or the action **Check Reference to Other Project** on the relevant Anchor element.

See also:

- Section 7.7.26 “Checking references to other projects” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*
- Section 7.1.14 “Checking references to other projects” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

## 4.9.12 Editing language variant assignments

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > Select Page
> Select Structural Element > Reference Page from Other Project > Select Project
> Start > Select Page *or*

> SmartEdit > OpenPage RedDot > Link RedDot
> Reference Page from Other Project > Select Project > Start > Select Page

For a reference to a page from another project to be displayed in all language variants, each language variant in the current project must be assigned a language variant in the other project.

1. In the drop-down list under **Other Project** select a language variant in the other project for each language variant in the current project. The reference to the other project is shown only if
   - A language variant in the other project has been assigned to a language variant in the current project, and
   - The page exists in the other project language variant assigned.
2. Click **OK** to confirm.

Whenever language variants are added to the current project or the other project, you have to update the language variant assignment for references to the other project accordingly.

## 4.9.13 Creating and connecting pages (content class selection)

**Navigation path**

> SmartEdit > OpenPage RedDot > MultiLink RedDot or Link RedDot
> Create and Connect Page

You can create a new page for a container, list, or link. The page is then connected to the respective element. Every page is based on a content class.

1. In the **Content Class Groups** section, select the *content class folder* containing the content class you require. The **List of Content Classes** lists all content classes available for selection. A description and a preview symbol are displayed if this information was saved for the content class. Depending on the action you used to open this dialog window, the page definitions for the content classes may also be listed. Use the symbol to access a template preview. This uses the template that is assigned to the project variant that is used as the display format. The sample texts, images, or default entries for the content elements in the template are displayed. The template preview is only available for content classes and not for page definitions. For more information, see the *Template Preview* section.
2. Select a content class from the **List of Content Classes**. The **Edit Headline** dialog window opens.

See also:

- "Editing headlines" on page 179
- "Template preview" on page 181

As well as the function described here, there are also different ways to create pages in SmartEdit. To obtain an overview, read the separate section.

See:

- "Creating pages" on page 29

## 4.9.14 Editing headlines

**Navigation path**

> SmartEdit > OpenPage RedDot > MultiLink RedDot or Link RedDot
> Create and Connect Page > Select a content class *or*

> SmartEdit > OpenPage RedDot > Headline Element *or*

> SmartEdit > Right-click: Create Unlinked Page > Select content class *or*

> SmartTree > Start > Administer Project Structure > Project
> Create Unlinked Page > Select content class *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link element) > Create and Connect Page > Select content class *or*

> SmartTree > Start > Administer Content Classes > Select content class folder > Select content class > Instances > Select Instance

When you create a new page, you must assign it a headline, which will be displayed in the tree view. The name of the content class and the page ID are used by default, but you can change this. Page headlines should be as meaningful as possible, that is, they should give some indication of the content of a page. If the content of a page headline is not used for the **Headline** element, we recommend you use specific **naming conventions** for page headlines.

When you create a page, it is automatically assigned a page ID. To view the page ID of a page, choose the **Show Page Information** Action Menu item in SmartTree. Each page ID is unique.

1. Enter a meaningful headline for the page in the box.
2. Click **OK** to confirm. The page is created and displayed in the tree under the selected heading.

**Notes Page headlines and published pages**

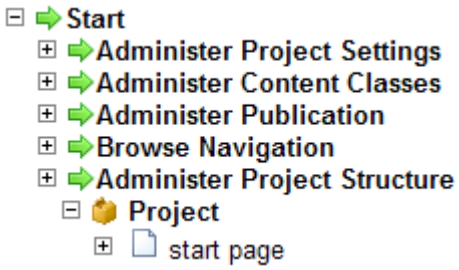
The page headline serves for the internal administration of the project. It does not appear on the published page.

Exceptions:

- The **Headline** element that is required for display is used in the template of the content class the page is based on.
- This page is connected to the structural element **List**. The page headline appears in a list on the published page.

**Example 4-6: Page headline in tree view**

In the following figure, the page headline **start page** was assigned to the start page.




You can change the headline of an existing page using the **Edit Properties** action.

For more information, see:

- "Editing properties" on page 66
- "Showing page information" on page 72
- Section 7.7.9 "Editing headlines - naming conventions" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

## 4.9.15 Template preview

**Navigation path**

> SmartTree > Administer Project Structure > Project > Create Unlinked Page
> Template Preview *or*

> SmartTree > Administer Project Structure > Select Structural Element
> (Select Page > Select Structural Element) > Create and Connect Page
> Template Preview *or*

> SmartTree > Administer Project Structure > Select Structural Element
> Select Page > (Select Structural Element > Select Page) > Replace Content Class
> Template Preview *or*

> SmartEdit > Right-click: Create Unlinked Page > Template Preview *or*

> SmartEdit > OpenPage RedDot > MultiLink RedDot or Link RedDot
> Create and Connect Page > Template Preview *or*

> SmartEdit > OpenPage RedDot
> Right-click: Content Classes / Replace Content Class > Template Preview

When you create a page or replace the content class of an existing page, you can display a template preview of the content class to make sure you select the content class you require.

When you have carried out the action described above, a new window with the **Template Preview** opens. This uses the template that is assigned to the project variant that is used as the display format. For the *content elements* in the template, the sample texts, images, or default entries are shown. All elements of the template that can be displayed are visible, including text or graphic elements such as images or background color, which are defined in the source code for the template. To preview another template for a content class, change the display settings using the **Settings** menu item in the global menu. Then define the project variant that has this template assigned to it as the display format.

1. Click **Apply**.
   The template of the selected content class is applied to the page.

For more information, see:

- Section 3.3.2 "Display settings" in *OpenText Web Site Management Server - Overview Guide (WSMS-UGD)*

## 4.9.16 Editing properties

**Navigation path**

> SmartEdit > OpenPage RedDot > Right-click: Edit Properties *or*

> SmartTree > Start > Administer Project Structure > Project > (Select page > Select Link) > Select page > Edit Properties *or*

> SmartTree > Start > Administer Content Classes > Select content class folder > Select content class > Instances > Select instance > Edit Properties

You can edit the page headline and other properties. If you have opened the dialog window from SmartEdit, some of the properties listed below will not be available.

**Notes Page headlines and published pages**

The page headline serves for the internal administration of the project. It does not appear on the published page.

Exceptions:

- The **Headline** element that is required for display is used in the template of the content class the page is based on.
- This page is connected to the structural element **List**. The page headline appears in a list on the published page.

1. You have the following options:

   - **Headline** - Enter a headline text in this box. This text is used as page name and as content for the *Headline element*. Note that you will receive a warning message if you try to change the headline of an already released page if you have the option *Generate file names according to Default SEO-friendly file name* in [xref to non-existent element "ms604"] selected and no file name specified.
   - **File name** - Enter a file name in this box. The file name should be entered without the file name extension. For more information on file name extensions, see the info box below.
   - **Generate file name according to Default SEO-friendly file name** - This option is only available if you have selected the **Default SEO-friendly file name** option in the project settings. If you click the link, the file name is calculated based on the headline by using all words of the headline text separated by hyphens. Note that you will receive a warning message if you try to apply the option to file names of pages that have already been released. For more information, see [xref to non-existent element "ms256"].
   - **Site map name** - This option is only available if the current dialog window is open in SmartTree. Enter a text for the site map name in this box. If the page is intended for display in a site map, this text is used as a page name in the site map instead of the page headline.

- **Define as breadcrumb starting point** - This option is only available if the current dialog window is open in SmartTree. Select the check box if you wish to use this page as a starting point for a breadcrumb navigation.
- **Do not use for breadcrumb** - This option is only available if the current dialog window is open in SmartTree. Select the check box if you do not wish to use this page as a starting point for a breadcrumb navigation.

2. Click **OK** to confirm.

### Notes

- **Related pages and administrative changes**

  When searching for related pages or running the **Clean up live server** action, all editorial tasks are taken into account (such as content changes, new or deleted pages, changed links). Administrative changes to file names, *publishing targets*, or the publication structure are not always taken into account because the implications of such changes may be quite complex. OpenText therefore recommends publishing the relevant sections of the project structure again after you have made these types of changes.

- **File name extensions for published pages**

  You can define file name extensions for published pages in several places in SmartTree: under **Administer Project Structure**, under **Administer Content Classes**, under **Administer Project Settings** and under **Administer Publication**. The file name extensions thus assigned are considered during publication as follows:

  1. **File name extension for a page** - First, the file name extension will be considered that was assigned to the page from the Action Menu item **Edit Properties** in the project tree. The following settings are only considered if no file name or a file name without an extension has been entered for the page.**Note:** To publish a file without a file name extension, enter a period after the file name (for example, *test.*). The period is then left out and the file is published without a file name extension (the file *test* is published in this example).
  2. **File name extension for a template** - If no file name extension was assigned to a page in the project structure, the file name extension will be used that was assigned to the template, depending on the published project variant. You edit this type of file name extension below the **Administer Content Classes** tree item. Select the **Templates** tree item in a content class and then select the template to which the project variant you want to publish is assigned. The Action Menu item **Edit Properties** lets you edit the file name extension.
  3. **File name extension for a project variant** - If no file name extension was assigned to the template of the project variant to be published, the file name extension that was assigned to the project variant using the Action Menu item **Edit Project Variant** will be used. To open this dialog for a project variant, select the **Administer Project Settings** tree item and choose the Action Menu item **Edit Project Variant**.

4. **File name extension for project publication** - If no file name extension was assigned for the project variant to be published, the file name extension that was assigned using the Action Menu item **General Settings** will be used. To open this dialog for a project variant, go to *Administer Publication > Project > Edit General Settings*.

5. If you have not defined a file name extension in any of the dialog windows mentioned, the page will be published with the file name extension *.htm*.

You can use the **Edit Properties** item in the Action Menu to restore a deleted page. The page must still exist in at least one other language variant.

See also:

- Section 7.2.43 "Deleting pages" in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*

## 4.9.17 Editing images

**Navigation path**

> SmartEdit > OpenPage RedDot > Link RedDot > Edit Image

You can select an image for an image link and assign it an ALT attribute.

1. You have the following options:
   - **Edit Image Element**
     - **Select Image** - Click the link to select a new or different image for the image element.
   - **Edit Image Properties**
     - **ALT attribute** - Enter in this field a name for the alternative text of the image. This text will be displayed if the image cannot be displayed or if the image display function of the browser has been turned off.
2. Confirm with **OK**.

See also:


- "Selecting files" on page 99
- "Editing Asset Manager folders" on page 102

## 4.9.18 Deleting images

**Navigation path**

> SmartTree > Start > Browse Navigation > Project > Select Image Link > Delete Image *or*

> SmartTree > Start > Administer Project Structure > Project > Select Image Link > Select Link > Delete Image *or*

> SmartEdit > OpenPage RedDot > Link RedDot > Delete Image

You can delete the image assigned to an image link. The image is removed from the selected image link only. The image remains in the folder or Asset Manager folder where it was imported.

1. Confirm with **Yes**. The assignment of the image to the image link is deleted.

## 4.9.19 Editing container properties

**Navigation path**

> SmartEdit > OpenPage RedDot > MultiLink RedDot (Container) > Edit Container Properties

Select the link **Edit Container Properties** if you wish to assign the property *target container* to the link, or if you wish to withdraw it.

1. Confirm with **Yes**, and the Container element is set as target container.

**Note - Editing target containers**

You can only deactivate the target container property of a container if no pages have been assigned to the target container. Where pages have already been assigned, the respective menu item will not be displayed. But once the assigned pages have been removed the menu item will once again become available. You can edit the assignments via the **Edit Reference List of Container** menu item.

See also:

- "Editing reference lists of containers" on page 186

## 4.9.20 Editing reference lists of containers

**Navigation path**

> SmartEdit > OpenPage RedDot > MultiLink RedDot (Container)
> Edit Reference List of Container

You can edit the reference list within a target container of a page.

The **Edit Reference List of Container** dialog window contains a list of links leading to the current target container.

1. You have the following options:
   - **Preview** - You can view the page in the page preview.
   - - Display the position of the link in the tree.
   - You can use the check box to select individual links.
   - You can select all the links.
2. Click **Delete** to delete the selected links leading to the current target container.

## 4.9.21 Assigning target containers

**Navigation path**

> SmartEdit > OpenPage RedDot > Link RedDot > Assign Target Container

You can assign a target container to links and also to Area, Hit List, and List elements. Prior to this you must have set the corresponding container element as target container.

1. Select the option of the target container to which you want to assign the link.
2. Confirm with **OK**.

See also:

- "Editing container properties" on page 185

## 4.9.22 Editing targets

**Navigation path**

> SmartEdit > OpenPage RedDot > Link RedDot > Assign Target

You can assign a target to a link and to a dynamic link.

1. You can make the following settings:
   - **Default** - You may find here a target preassigned to the element.
   - **User-defined** - If required, insert a meaningful target name in this box. Specifications may be: _blank, _parent, _self, _top, and, if the target is the frame of a frameset, insert the corresponding frame name.
2. Confirm with **OK**.

## 4.9.23 Adding URLs

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > Select page > Select Link (List element) > Assign URL *or*

> SmartEdit > OpenPage RedDot > MultiLink RedDot > Assign URL

You can connect lists to external URLs. You can edit URLs like pages, using the Action Menu. The following actions are available for editing URLs:

- Edit Properties
- Page Preview
- Permanent Page Preview
- Delete Page

These actions have already been described elsewhere. For more information, see the corresponding sections in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*.

1. Enter a name for the link in the **Link name** box. This name will be used as link in the list that has been connected to an external URL and for the sort order settings.
2. Enter a URL for the link in the **URL** box. For example: *http://www.company.com*.
3. Select a **target** from the drop-down list. You can choose between: _blank, _parent, _self, and _top.
4. Click **OK** to confirm.

**Tip - Checking URLs**

The **Check URLs** action available on the **Project** tree item in the project structure lets you check at any time whether the links to any URLs you have added to the project are still valid.

See also:

- Section 7.1.13 “Checking URLs for entire projects” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*
- Section 7.2.43 “Deleting pages” in *OpenText Web Site Management Server - SmartTree Guide (WSMSST-AGD)*
- “Editing properties” on page 66
- “(Permanent) page preview” on page 81

## 4.9.24 Editing page order

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > Select Page > Select MultiLink > Edit Page Order *or*

> SmartEdit > OpenPage RedDot > MultiLink RedDot > Edit Page Order

You can change the order of pages that are stored in a **Container** element or that are displayed in a **List** element. This action will only be available if, in SmartTree, the sort mode has been set to **Manual** for the respective structural element in the *Edit Sort Order Settings* dialog window.

1. Select the page that you would like to shift.
2. Use the symbols for page sorting as follows:
   - - Shifts the selected page to the highest position.
   - - Shifts the selected page to the next higher position.
   - - Shifts the selected page to the next lower position.
   - - Shifts the selected page to the lowest position.
3. Continue in this manner until all pages are in the desired order. The pages are sorted in all language variants. Pages that do not exist in the current language variant, are shown by page ID only at their current sorting position. This means that all pages in all language variants can be taken into account when sorting.
4. Confirm with **OK** to save the altered page order.

## 4.9.25 Editing dynamic link order

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > Select page > Select Link > Edit Dynamic Link Order *or*

> SmartEdit > OpenPage RedDot > Link RedDot (Dynamic link) > Edit Dynamic Link Order

You can edit the order of the dynamic links.

1. Select the link that you want to move.
2. Use the symbols for link sorting as follows:
   - - Shifts the selected link to the highest position.
   - - Shifts the selected link to the next higher position.
   - - Shifts the selected link to the next lower position.
   - - Shifts the selected link to the lowest position.
3. Continue in this manner until all links are in the desired order. The links are sorted in all language variants.
4. Confirm with **OK** to save the altered link order.

## 4.9.26 Expanding dynamic links

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > Select page > Select Link > Expand Dynamic Link *or*

> SmartEdit > OpenPage RedDot > Link RedDot > Expand Dynamic Link

You can expand a dynamic link. This means that you can create multiple new links for a dynamic link.

1. In the **Add dynamic link(s) field**, enter the number of links you wish to add.
2. Specify where you wish to insert the new link(s).
   - **Insert new link(s) above selected link** - With this option selected, the new links are inserted above the link you have selected in the tree structure for your project.
   - **Insert new link(s) below selected link** - With this option selected, the new links are inserted below the link you have selected in the tree structure for your project.
3. Determine how to assign the link name:

- **Do not create link names** - With this option selected, new link(s) you insert are not assigned a name.
- **Adopt selected link name** - With this option selected, new link(s) keep the name of the link you have selected.
- **New link name** - With this option selected, the new link(s) are assigned a name. Enter a link name in the field on the right.

4. Click **OK** to confirm. The specified number of links is inserted below or above the dynamic link you have selected.

**Note - Dynamic element property**

The structural element (Anchor or Container) must have the property *dynamic element* and must have been assigned the **Dynamic** block marks in the Template Editor.

## 4.9.27 Deleting dynamic links

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > Select Page > Select Link > Delete Dynamic Link *or*

> SmartEdit > OpenPage RedDot > Link RedDot > Delete Dynamic Link

You can delete a *dynamic link*.

1. Confirm with **Yes**. The selected link is irretrievably deleted.

## 4.9.28 Disconnecting following pages

**Navigation path**

> SmartEdit > OpenPage RedDot > Link RedDot

You can disconnect a page that follows a link. If the disconnected page is not connected to any other links, it is available as an unlinked page.

1. Click **Disconnect Following Page**.
2. Confirm with **Yes** if you really wish to disconnect the following page from the link. Select **No** for returning to the dialog window **Edit Link Element**.

## 4.9.29 Removing items from lists

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > Select Page
> Select List Element or Container Element > Remove Items from List *or*

> SmartEdit > OpenPage RedDot > MultiLink RedDot > Remove Items from List

You can disconnect pages from a *List* or a *Container* element. The disconnected pages or URLs are stored under the **Unlinked pages** tree item if they are not connected to other structural elements.

1. Select the check box for the page or URL that you wish to remove from the list or container.
2. Click **OK** to confirm.

**Tip - Removing items from lists**

Use meaningful names so that pages and URLs can be clearly identified in the list or container.

## 4.9.30 Editing keyword assignments

**Navigation path**

> SmartTree > Start > Administer Project Structure > Project > Select Page
> Select MultiLink > Edit Keyword Assignment *or*

> SmartEdit > OpenPage RedDot > MultiLink RedDot > Edit Keyword Assignment *or*

> SmartTree > Start > Administer Content Classes > Select Content Class Folder
> Select Content Class > Structural Elements > Select MultiLink Element
> Preassign Keywords

In the **Edit Keyword Assignment** dialog window, you can

- assign a keyword to a multilink element (list or container)
- remove an existing keyword assignment from a multilink
- preassign categories and keywords to a multilink element using content classes

For more information, see "Working with categories and keywords" on page 44. For additional information about *preassigning keywords*, see Section 5.5.28 "Preassigning keywords (content class)" in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*.

1. Edit the keyword assignment. You will find existing keyword assignments and their **Status** under **Category** and **Keyword**: Released keyword assignment,

new / deleted keyword assignment waiting for release (if a structural workflow has been set up). You have the following options:

- Click **Add** to assign a category and/or keyword to the selected multilink. The **Select Keyword** dialog window opens.
- Click to delete an existing keyword assignment.
- **All keyword assignments required** - With this check box selected, only pages with all categories and keywords listed here are connected to the multilink (AND operator). If you do not select this check box, all pages with at least one category and keyword combination listed here are connected to the multilink (OR operator). When you select the check box, any pages that are, for example, already connected to the multilink but have only one of the keywords are disconnected from the multilink. These pages are shown as **Unlinked pages**, provided they are not connected to any other link.

2. Click **OK** to confirm.

You can find information about working with keywords and categories in another part of this documentation.

See also:


- "Working with categories and keywords" on page 44
- "Editing categories and keywords" on page 46
- "Assigning keywords (edit page)" on page 70
- "Selecting keywords" on page 71


## 4.9.31 Selecting keywords

This dialog window lists all the categories and keywords that have been created in the project. You can select a category and a keyword, or a category without a keyword.

You can create categories with and without keywords.

1. Select a **category** from the drop-down list.
2. You have the following options:
   - Select a **keyword** from the drop-down list to assign it. All keywords of the selected category are displayed.
   - To assign a category only, select **[Category]** in the keyword list. By default, the **[Category]** item is added to the keyword list when you create a category.
3. Click **OK** to confirm.

**Note - Selecting categories and keywords**

If no category is offered in the drop-down list **Category**, or if the list under **Keywords** is empty, this means that for this project there has not been created

a category or a keyword for a category. In this case, categories and keywords must first be created, as is the case if you do not find appropriate keywords.

For more information about working with keywords and categories, see:

- "Working with categories and keywords" on page 44
- Section 5.5.28 "Preassigning keywords (content class)" in *OpenText Web Site Management Server - Content Classes Guide (WSMS-ACC)*

## 4.9.32 Editing a hit list

**Navigation path**

> SmartEdit > OpenPage RedDot > MultiLink RedDot Hit List

You can add and delete records to/from a hit list.

1. You have the following options:
   - **Delete Records** - Use this link to open a dialog window in which selected records can be deleted.
   - **Add Record** - Use this link to add a record to the existing records.
2. Close the dialog window with **Cancel** if you do not want to select any of the options available.

See also:

- "Deleting records" on page 193

## 4.9.33 Deleting records

**Navigation path**

> SmartEdit > OpenPage RedDot > MultiLink RedDot of a Hit List
> Delete Record

You can delete the records displayed in a hit list.

1. Select the records you want to delete via the check boxes.
2. Click **Delete** to delete the selected records, or leave the dialog window without deleting any records via the **Cancel** button.

# Glossary

The glossary comprises terms that have a special meaning in the Management Server context; they can also be used in a non-specific, general context. In addition, specific terms for Management Server are also explained.

### Action Menu

The Action Menu is a component of the user interface in Server Manager and in SmartTree. The menu items for a marked tree element can be found in the Action Menu.

### AddPage RedDot

The AddPage RedDot is a symbol that opens a function in SmartEdit mode for adding pages to a Container.

### Anchor elements

The Anchor element is used as placeholder for a link in the template and represents the function of an `<A>` tag.

### AppendPage RedDot

The AppendPage RedDot is a symbol that opens a function in SmartEdit mode for adding pages to a container.

### Application server

The application server is the server on which the Management Server software is installed.

### ASCII/ANSI

ASCII code is an **A**merican **S**tandard **C**ode for **I**nformation **I**nterchange, ANSI is a character set type or also called code page type used by Windows.

### Authorization

Authorizations restrict the editing opportunities of users in a project.

### Authorization package

Authorization packages contain defined authorizations for users and groups. They receive a name and can be used at several positions in the tree.

### Background element

The Background element is a content element that is used as a placeholder for the background image in the template. It represents the *background* attribute of the `<BODY>` tag.

### Block mark

Block marks are used in the Template Editor. Block marks are used to apply specific properties to sections of the template. For example, you can use the block mark to mark the code that is to be used repeatedly for functions such as *List* or *Dynamic link*.

### Category

A category is a crucial component in the process of assigning keywords in SmartTree and SmartEdit. You can assign keywords to every category.

### Clipboard

Clipboard is a component of the user interface in Server Manager and in SmartTree and SmartEdit.

### ClosePage RedDot

The ClosePage RedDot is a symbol that is used to close the page edit mode in SmartEdit.

### Container elements

The Container element is a structural element that is used as placeholder in the template. Container elements are used to define areas in a page (frame page). These can be filled with one or more independent pages.

### Content class

Content classes are made up of the source code of a specific format (such as HTML, WML, or SGML) and placeholders or elements. They are the basis of every page in the project.

### Content class folder

Content classes and all that goes with them (elements, templates, style sheets, and instances) are administered in content class folders. Content folders are created and administered in SmartTree.

### Content element

A content element is an element that carries content (such as an image, text, or file) while not having any link properties. Included are elements of the type Text, all variants of Standard Fields, Image, Background, Database Content, List Entry, Media, Option List, Transfer, and Headline.

### Dynamic element

A dynamic element is a property that can be assigned to a link or container.

### Dynamic link

A dynamic link is a structural element that has been assigned the dynamic element property. You can increase or reduce the number of dynamic links.

### Edit area

The edit area is a component of the user interface in the Template Editor. The code of a template is edited in this area.

### Edit RedDot

The Edit RedDot is a symbol that is used to open elements for editing in SmartEdit.

### Element

Elements serve as placeholders for areas of the code in the template and can be assigned specific properties.

### File folder

File folders store and administer the files that are used in pages. The file folders themselves are created and administered in SmartTree.

### Headline elements

The Headline element is a content element and contains the title of a page.

### HTML

Hypertext Markup Language - an open standard or file format for creating and displaying multimedia content on the World Wide Web. The special aspect of hypertext is the so-called links.

### Image elements

The Image element is a content element that is used as a placeholder for an image in the template.

### Keyword

A keyword is a crucial component in the process of assigning keywords in SmartTree and SmartEdit. Pages and structural elements that have been assigned the same keyword will be connected automatically.

### Language variant

Language variants are created in SmartTree. Multlilingual element content of a project is administered via language variants. For instance, a German and an English content can each be assigned to an element in this way.

### Link RedDot

The Link RedDot is a symbol that is used to edit the properties of a link in SmartEdit.

### List elements

The List element is a structural element that is used as a placeholder for a list in the template. It represents any number of `<A>` tags.

### LockedPage RedDot

The LockedPage RedDot is a symbol. The LockedPage RedDot identifies pages in SmartEdit that are currently being edited by other users or that do not have the relevant authorizations. You cannot open elements that are marked with a LockedPage RedDot.

### Mandatory RedDot

The Mandatory RedDot is a symbol. This symbol indicates elements in SmartEdit that need to be filled with content before you can save the page.

### Media elements

The Media element is a content element that is used in the template as a placeholder for a media file (for example, a Microsoft Office, PDF, or Real Audio file).

### Meta elements

Meta elements are elements that let you display meta information on a Web site. There are two meta elements, *Attribute* and *Info*.

### Multilink

The elements List and Container are multilinks. Multilinks allow you to link multiple pages in both SmartEdit and SmartTree. In SmartEdit, multilinks are marked with the MultiLink RedDot . The MultiLink RedDot lets you edit the link properties of a multilink in SmartEdit, or you can use it to connect pages to multilinks.

### Notes

Users can use notes to exchange information and news on certain pages.

### OpenPage RedDot

The RedDot OpenPage is a symbol that opens pages in SmartEdit.

### Option List elements

The Option List element is a content element that is used to provide users with multiple values for element properties in SmartEdit. Users can thus, for example, choose from different background colors or different font sizes for headings.

### Page information

The page information contains all relevant information about a page. This includes, for example, information about the page status, the creation and modification date, and the publication settings.

### Page preview

The page preview in SmartTree and SmartEdit lets you see what a page will look like when it is published. The preview shows the project variant that you defined as the display format.

### Page

Pages are an essential component of a project. The project structure consists of pages that are connected by structural elements. Each page is based on a content class.

### Panel

The panels provide various functions in the different modules. In the Homepage module, you can use the panels to customize your Homepage. In the SmartEdit, Tasks, and Search modules, the panels provide useful functions for editing pages.

### Placeholder

Placeholders are used in the Template Editor for specific sections of the code. These sections can be edited in SmartEdit and SmartTree. Images, text, and links, for example, are replaced.

### Project structure

The project structure is a component of the user interface in SmartTree. The project structure is created underneath the *Administer Project Structure* tree item.

### Project variant

Projects can be published in different formats (such as HTML, XML, or SGML). These are called project variants. Along with templates, project variants determine the appearance of the page.

### Project

A project consists of pages that are based on content classes and the connection to them. You can edit a project in SmartTree and SmartEdit.

### Publishing target

A publishing target is a directory on the application server or a directory on the FTP server or Delivery Server. Project variants and language variants can be assigned different publishing targets.

### Reaction

A reaction is a workflow component. Reactions can be defined for particular actions. One possible action is **Create Page**. The reaction **Send E-mail Notification** can be connected to this action. As soon as a user reads the page, another user will be informed via e-mail.

### RedDot placeholder

RedDot placeholders are inserted in the template as placeholders for RedDot symbols and the elements connected to them.

### RedDots

You can edit a project in SmartEdit using RedDots. These include:

- AddPage RedDot
- AppendPage RedDot
- ClosePage RedDot
- Edit RedDot
- Form RedDot
- Keyword RedDot
- Link RedDot
- LockedPage RedDot
- Mandatory RedDot
- MultiLink RedDot
- OpenPage RedDot
- Release RedDot
- SaveElement RedDot
- Translate RedDot

### Server Manager

Server Manager is a component of the software. You can use Server Manager to configure all settings for the project and the server.

### SmartTree

SmartTree is a Management Server module. You can configure administrative settings for selected projects in SmartTree. Site builders and administrators can work in SmartTree.

### Standard Field elements

The Standard Field element is a content element that is used in the template as a placeholder for a date, number, a short piece of text, or time.

### Structural element

All elements that can be connected to pages in the SmartTree mode are structural elements. Included are Anchor, Area, Container, Frame, List, and Hit List.

### Submit to Workflow

Submit to Workflow entails completing the editing of a page. Pages can only be released or published if this action is executed.

### Tag

*Tag* is a label that classifies a piece of data. In addition to the plain text, HTML or XML files (also PDF and Word documents) contain special codes, so-called *tags*. You can recognize tags by arrows that surround them: `<` and `>`. Tags include a beginning tag and an ending tag: `<tag>` and `</tag>`. The text between the tags is called the condition or value area.

### Target container

A target container is a container that is used as the target for pages.

### Tasks

Tasks are an integral part of a workflow. A user can view his or her tasks using the **Tasks** button in the Main Menu.

### Template Editor

The Template Editor is a component of the SmartTree. It can only be used by users who have been assigned the **Template Editor (TE)** option. Templates are created from an existing source code and from placeholders with element properties in the Template Editor.

### Text editor

You can use a text editor to edit the content of Text elements. You have a choice of different text editors.

### Text elements

The Text element is a content element that is used as a placeholder for text in the template.

### Thumbnail

A thumbnail - also termed preview image - is a small image or image symbol that is displayed instead of the real image.

### Translate RedDot

The Translate RedDot is a symbol used to identify elements whose content has been translated or is intended to be translated. If the flag in the RedDot is moving, the content is still to be translated. If the flag is not moving, the content of the element has been translated already.

### URL

Uniform Resource Locator, for example, *http://www.company.com* - The unique address of an Internet computer or any particular information on it.

### Workflow

A workflow consists of actions and reactions. Workflows let you define the users who can release pages at a certain stage in the workflow and which reactions result from specific page actions. You can set up workflows for content-based changes (content workflows) and for structural changes (structural workflows).