



v3.5
PROFESSIONAL
/ ENTERPRISE

Quick Start Guide



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{{a\$2,3,ID,ASC,7}}17



1 — Introduction

Welcome to enVivo!CMS Classic Quick Start Guide. This guide puts you on the fast track to getting up and running with enVivo!CMS Classic and is intended to be read by the Web Administrator. In it, are quick start instructions for installing, upgrading, creating and powering up your website. For more detailed information on all of the functions of enVivo!CMS Classic, refer to the [enVivo!CMS Classic v3.5 Professional / Enterprise Design Guide](#).

2 — System Requirements

WEB SERVER

Web host or server capable of running Active Server Pages, such as:

- Windows 2000 or Windows Server 2003 with Internet Information Services 5.0 and above
- Sun One Active Server Pages 4.0

For Windows NT or Windows 2000 with an NTFS partition, the IUSER_COMPUTERNAME account must have write access to your web directory to run an MS Access database in the specified directory if you wish to upload images or media, or if you wish to use Shortcuts.

Microsoft MDAC 2.7 and above, available for free at <http://www.microsoft.com/data>.

DATABASE

You may choose any of the following as the database back end for enVivo!CMS Classic:

- MS Access

An MS Access 2000 database is used by default and is bundled with enVivo!CMS Classic. While enVivo!CMS Classic can use a Microsoft Access database, you do not need to install Access or Office on your web server; however, you must have the latest Microsoft Jet Database component installed. This can be acquired from <http://www.microsoft.com>.

- MySQL 3.23 and Above

You will need the latest version of My ODBC installed on your web server. MySQL and MyODBC are available at no charge at <http://www.mysql.com>.

- MS SQLServer 6.x/7.x/2000



WEB CONTENT MANAGER CLIENT

- Internet Explorer 5.x and above on Windows, or
- Internet Explorer 5.x and above on Macintosh via Virtual PC. Available at <http://www.microsoft.com/virtualpc>.

SITE VISITOR'S BROWSER

Any web browser, including Netscape. Your Page Template HTML must be cross-browser compatible.

WYSIWYG HTML EDITOR

You can use any WYSIWYG HTML editor to create a page template, including FrontPage, Macromedia Dreamweaver, Hot Dog, Adobe GoLive.



3 — Installing enVivo!CMS Classic

The distribution of enVivo!CMS Classic comes bundled with the enVivo! 101 Sample Site that allows you to have a fully functional website as soon as enVivo!CMS Classic is installed.

For more information on working with the enVivo!101 Sample Site, see [8 — Tutorial Of enVivo!CMS Classic Using The enVivo!101 Sample Website](#) on page 12.

The enVivo! 101 Sample Site runs from the MS Access Database db.mdb located in the envivocms subdirectory.

 **adVice!**

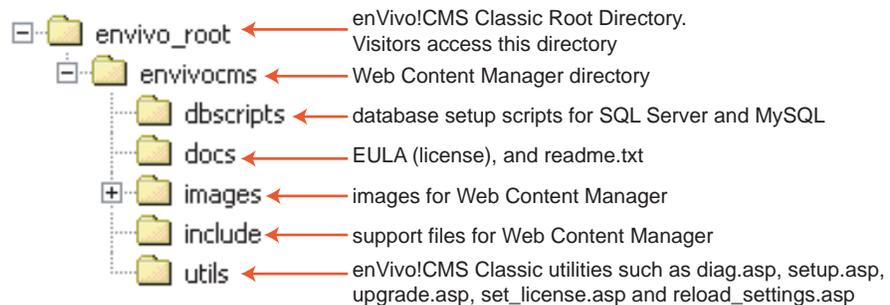
A blank MS Access database called db_blank.mdb is located in the envivocms/ subdirectory.

If you choose the use a blank website, then use db_blank.mdb.

By default enVivo!CMS Classic comes with a license key and certificate for localhost. If you register your download, which can be done at www.envivosoft.com/register, you can get a free 30 day trial license key and certitude for a remote web server. If you have purchased enVivo!CMS Classic, you will have already have your production or staging staging license key and certificate.

Follow the procedures below to install a fresh copy of enVivo!CMS Classic on your web server:

1. Unzip the distribution file enVivo!CMS_Classic_3.x.zip onto your PC's hard drive and note the directory where it was unzipped. Ensure to unzip with the option "Use Folder Names" set to 'On'.



 **caution!**

If using MS Access database, do not keep the MDB file in a location directly accessible from the Internet as hackers will be able to steal it. Keep MDB file in a location not accessible from the Web.

2. Set up your database.
 - a. For SQL Server, run the SQL script "enVivo!CMS_Classic_v3.x_MSSQL.sql" in SQL Server Query Analyzer. This file is located in the /envivocms/dbscripts directory of your local copy of enVivo!CMS Classic.
 - b. For MySQL, run the SQL script "enVivo!CMS_Classic_v3.x_MySQL.sql" with MySQL Admin or any GUI based MySQL Administration tool such as DBTools or MySQL Front. This file is located in the /envivocms/dbscripts directory of your local copy of enVivo!CMS Classic.

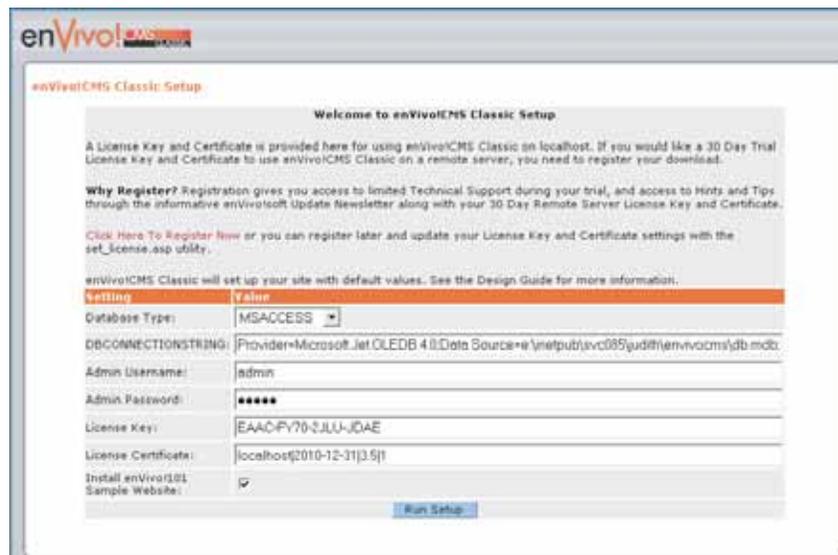


- c. If you are using MS Access, note the actual directory path on your web server to where your MDB file will be located (for example, *c:\inetpub\wwwroot\envivocms_classic.mdb*) as this is required in your DBCONNECTIONSTRING below.
- 3. Start your FTP Client and upload the directory and file structure (as noted from Step 1.) to your web server. Note the URL to your website. For example:
 - *http://www.yoursite.com.*
- 4. Open Internet Explorer and enter the URL to the setup script:
 - *http://www.yoursite.com/envivocms/utils/setup.asp.*



note!

Ensure to check the Install enVivo! 101 Sample Website box if you wish to use this feature.



- 5. Enter the settings for your site. enVivo!CMS Classic is set up with default settings that can be changed in Web Content Manager Setup Panel Preferences. For more information on choosing a DBCONNECTIONSTRING, see [DBCONNECTIONSTRING](#) on page 24 of the enVivo!CMS Classic v3.5 Professional / Enterprise Design Guide.
- 6. Click the Setup button to begin setting up your site.
- 7. Once the “Setup Complete” message appears, test your site by running the enVivo!CMS Classic Diagnostics at *http://www.yoursite.com/envivocms/utils/diag.asp*. The Diagnostics will show you what, if any, problems exist in your installation and will direct you to suggested solutions.
- 8. Once the Diagnostics are OK, you may then log into enVivo!CMS Classic Web Content Manager at *http://www.yoursite.com/envivocms*. The default Administrator login and password is as follows:

Login: admin



Password: admin



4 — Upgrades To enVivo!CMS Classic

This section gives detailed instructions for:

- Upgrading enVivo!CS v2.x to enVivo!CMS Classic v3.5 Standard, and then
- Upgrading enVivo!CMS Classic v3.5 Standard to enVivo!CMS Classic v3.5 Professional / Enterprise.

You must upgrade enVivo!CS v2.x to enVivo!CMS Classic v3.5 Standard before installing the upgrade to v3.5 Professional / Enterprise.

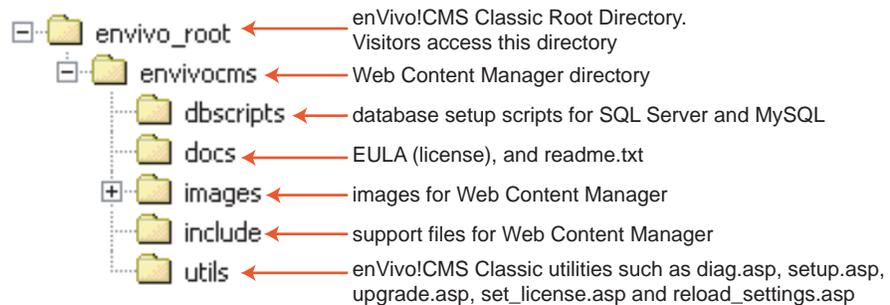
UPGRADING FROM ENVIVO!CS V2.X TO ENVIVO!CMS CLASSIC V3.5 STANDARD

! caution!

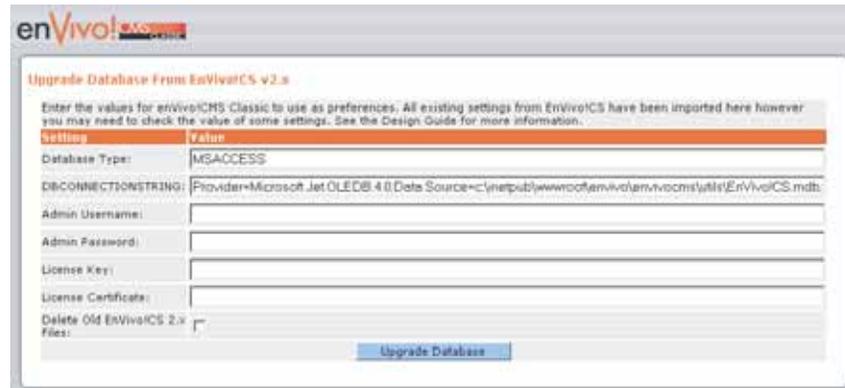
If you have modified or customized the source code in EnVivo!CS then following this procedure will result in your customizations being removed. Should you wish to carry your customizations over to enVivo!CMS Classic then you will need to purchase a copy of enVivo!CMS Classic - Developer Edition.

Upgrading from EnVivo!CS v2.x is easy. Just follow these steps:

1. Backup your site including the database and config file (inc_config.asp) to a suitable offline location.
2. Unzip the distribution file enVivo!CMS_Classic_3.x.zip onto your PC's hard drive and note the directory where it was unzipped. Ensure that you unzip with the option "Use Folder Names" set to 'On'.



3. Start your FTP Client and upload the directory and file structure (as noted from Step 1.) to your web server overwriting all files already on your web server. Note the URL to your web site. For example:
 - <http://www.yoursite.com>
4. Open Internet Explorer and enter the URL to the setup script:
 - <http://www.yoursite.com/envivocms/utils/upgrade.asp>



 **note!**

Server.Mappath is not supported for DBCONNECTIONSTRING in enVivo!CMS Classic.

5. enVivo!CMS Classic will import your existing settings from your EnVivo!CS v2.x Config File. If you are using an MS Access database and your DBCONNECTIONSTRING contains a relative Server.Mappath statement, this will be converted to an absolute setting.
6. Click the Upgrade button to begin setting up your site.
7. Once the "Setup Complete" message appears, see [Upgrading From enVivo!CMS Classic v3.5 Standard to v3.5 Professional / Enterprise](#).

UPGRADING FROM ENVIVO!CMS CLASSIC V3.5 STANDARD TO V3.5 PROFESSIONAL / ENTERPRISE

To upgrade from enVivo!CMS Classic v3.5 Standard to v3.5 Professional/Enterprise follow these steps:

1. Backup your enVivo!CMS Classic installation.
2. Contact enVivo!soft Support at <http://www.envivosoft.com/support> and request a v3.5 License Key and Certificate.
3. Download the enVivo!CMS Classic Upgrade distribution ZIP file from <http://www.envivosoft.com/download>.
4. Extract the enVivo!CMS Classic v3.5 Upgrade ZIP file to a directory on your local hard drive. Ensure that "Use Folder Names" is enabled when extracting.
5. Upload the extracted files in the structure exactly as they are on your local hard drive to your Web Server (usually via FTP) overwriting any existing files.
6. Run the database upgrade utility, upgrade30-35.asp. This will make modifications to your enVivo!CMS Classic database to enable the new functionality. This utility is located in the UTILS directory; e.g. <http://www.yoursite.com/envivocms/utils/upgrade30-35.asp>.



7. Enter an Administrator username and password and your new enVivo!CMS Classic v3.5 License Key and Certificate and then click "Run Upgrade".

After a few minutes, the upgrade will be completed. Run the enVivo!CMS Classic Diagnostics to ensure that your upgrade completed successfully.

5 — Ten Easy Steps To Create A Website

note!

Ensure that your links to images in your Page Templates are relative and match the IMAGE_LIBRARY_LOCATION setting in enVivo!CMS Classic.

adVice!

Don't forget to upload your Page Template's images when you create your Page Templates.

note!

It is the category that determines what Templates are used.

When starting out with a blank database in your enVivo!CMS Classic website, it can be a little overwhelming to know where to start. Here is the basic step by step order of tasks that need to be completed in order to set up a basic enVivo!CMS Classic-powered website:

1. Page Templates – Choose whether you are going to use ASP or HTML Page Templates.
2. Create your site's look and feel through your Page Templates. You only need one to start. More can be create later.
3. Create at least one Article List Template for the category action.
4. Create at least one Article Layout Template for the article action.
5. Create your first category. This will automatically become your ROOT_CATEGORY.
6. Create the rest of your category structure for your content. You may need to create additional Page Templates, Article List Templates and Article Layout Templates if you want some categories to have a different look and feel.
7. Determine what action will be your Home Page - either category or article - and set these preferences in Home Page Settings. See [Home Page Settings](#) on page 18 of the enVivo!CMS Classic v3.5 Professional / Enterprise Design Guide for more information.
8. Create your articles in the respective categories that will make up the Content of your website.
9. Now visit your site as a visitor by browsing to your site's URL.
10. Your site is now set up – refine and add more content!

6 — Transferring From A Staging Environment To Production

Most Web Developers construct their site off line in a “staging” environment and then cut over to the new site when development is complete and the project has been signed off. When you purchase enVivo!CMS Classic for a domain, you are also issued with a staging license by enVivo!soft. If you require a staging license, then contact enVivo!soft support with your request at <http://www.envivosoft.com/support>.

Because all image and media links in enVivo!CMS Classic are relative, it is easy to move your site from staging to production. Here are the steps for transferring:

1. Use your FTP client to open an FTP connection into your staging web server and navigate to the enVivo!CMS Classic root directory. This is the directory that visitors would go to when visiting the site.
2. Download all files, directories and subdirectories to your local hard drive ensuring that you maintain the existing file structure.
3. Close your FTP connection to your staging server.
4. If you are using SQL Server or MySQL as your database and the data needs to be moved to your production database server, transfer your database to your production database server using the tools supplied with SQL Server or MySQL.
5. Open the config file inc_config.asp in the envivocms/ subdirectory and ensure that the DBCONNECTIONSTRING setting will still be valid for your production server (i.e., MS Access database location, SQL server address/database name).
6. Open an FTP connection to your production web server.
7. Upload your website structure to your production server.
8. If your production server is on a different domain name to your staging server, run the set license utility to update the license key/certificate combination for the new domain. Refer to [7 — Other enVivo!CMS Classic Utilities](#) on page 11.
9. Run the enVivo!CMS Classic Diagnostics to ensure that your site is functioning correctly on your new web server. Correct any problems if they exist.
10. Access your website as a visitor to test visitor access.
11. Access Web Content Manager on your production web server to ensure that your site is functioning correctly.



note!

This includes Images, Media, ASP Page Templates and Shortcut Redirect directories.



note!

Ensure that your production web server is free of other files prior to uploading your new site.



7 — Other enVivo!CMS Classic Utilities

DIAG.ASP

Diag.asp is the enVivo!CMS Classic diagnostic. This utility allows you to check the installation of enVivo!CMS Classic and identify common installation problems.

RELOAD_SETTINGS.ASP

This utility allows you to reload configuration settings stored in the database into memory. This would commonly be used when changing from one database to another.

SET_LICENSE.ASP

The Set License utility allow you to re-enter license key and license certificate information. This is most commonly used when transferring from a staging environment to production or enVivo!soft has issued you with a new license/key certificate combination.

8 — Tutorial Of enVivo!CMS Classic Using The enVivo!101 Sample Website

The enVivo!101 Sample Website is a pre-built website that allows you to become familiar with the different objects within enVivo!CMS Classic without having to build a complete website from scratch. It contains examples of the most commonly used features of enVivo!CMS Classic. Below is a brief tutorial on how the enVivo!101 Sample Website is put together and how it can be used as a template for building your website.

For this overview, run enVivo!CMS Classic on your localhost, <http://localhost>, with Web Content Manager available at <http://localhost/envivocms>.

THE VISITOR VIEW OF THE ENVIVO!101 SAMPLE WEBSITE

After you have installed enVivo!CMS Classic as per the Quick Start Guide, look at what website visitors see at <http://localhost>.



The enVivo!101 Sample Website is made up of many objects seamlessly working together. They are the:

- Page Template - this Page Template is actually an ASP Page Template.
- Top Toolbar - this is an example of a Content Block.
- Left Side Bar - this is an example of some basic dynamic menu navigation using the cI\$ enVivo Tag.
- Content that appears in the center of the page.
- "enVivo!Extra" Right Side News Stories - This is an example of an aI\$ enVivo Tag which is also called through a Content Block.

THE PAGE TEMPLATES

In the enVivo!101 Sample Website, the first thing you will want to become familiar with is how the Page Templates - the design of the website - are separated from the content.

To view the Page Templates of the enVivo!101 Sample Website, open a separate browser window and log into Web Content Manager at <http://localhost/enviocms> as an administrator (usually using the default admin/admin username and password combination).

In the Assets Panel, select Templates, then HTML Templates. Click the Edit button next to the "Default Page Template". The HTML for the Page Template as used in the enVivo!101 Home Page is displayed. Scroll down and look for:

- `{{cb$toolbar}}` - This is a call to the "toolbar" Content Block which displays the Top Toolbar of the enVivo!101 Sample Site. See [The Top Toolbar](#) on page 13 for more information.
- `{{cb$sidebar}}` - This is a call to the "sidebar" Content Block. This content block calls the `cl$` Tag which generates the dynamic menu navigation on the left sidebar. See [The Left Side Navigation](#) on page 15 for more information.
- `{{content}}` - This is the main Content enVivo Tag which tells enVivo!CMS Classic where on the Page Template to display the dynamic content (i.e. the Article). See [The Main Content](#) on page 16 for more information.
- `{{cb$envivo_extra}}` - This is another Content Block call that places the "enVivo!Extra" right side News Articles. See the [The enVivo!extra Right Side News](#) on page 17.

adVice!

This is almost a complete page with the exception of the Content Blocks and the Content Tag itself. Any change here would be reflected across the whole site.

note!

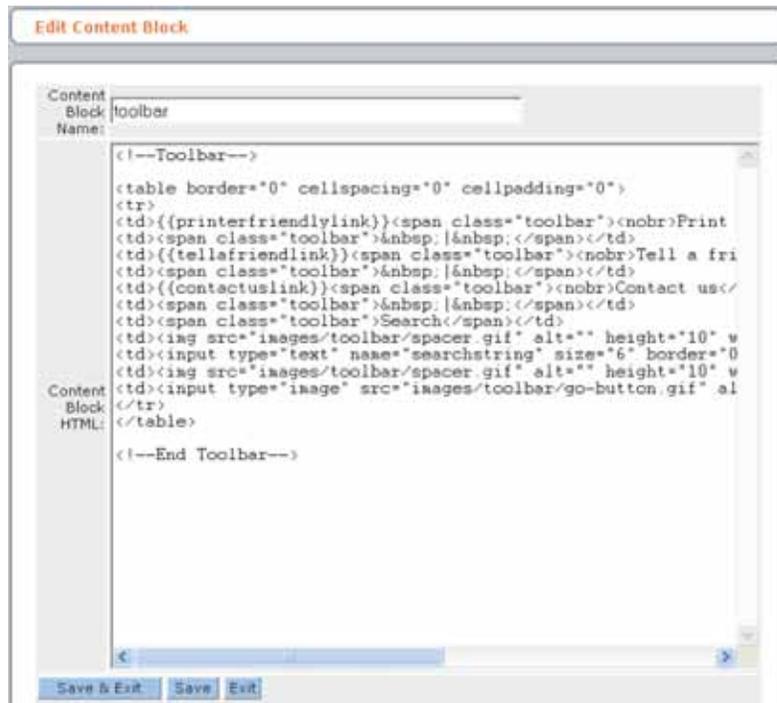
References to images are relative. See any IMG tag.

To see the ASP Page Template equivalent of the HTML Page Template where you can see the ASP functional equivalents of the enVivo Tags above, go to Assets Panel/ Templates/ASP Page Templates and edit `tmp_page_template.asp`.

THE TOP TOOLBAR

The Top Toolbar contains the Tell A Friend, Contact Us, Print This Page and Search functionality for the enVivo!101 Sample Website. This is a special Content Block that needs to be investigated fully to understand how it works.

In the Assets Panel of Web Content Manager, click on "Content Blocks" and edit the "toolbar" Content Block.



Observe that in this Content Block:

- The Content Block does not use the Rich Text Editor, therefore, HTML must be manually edited.
- Any changes made to this Content Block will be reflected across the whole website immediately. This highlights the reduction in administration that using Content Blocks can bring.
- The "Print This Page" link is surrounded by the `{{printerfriendlylink}}` and `{{/printerfriendlylink}}` enVivo Tags. If you view the HTML source generated by the enVivo!101 Home Page, you'll see that this automatically links to the Printer Friendly version of the current page.
- The "Tell A Friend" link is surrounded by the `{{tellafriendlink}}` and `{{/tellafriendlink}}` enVivo Tags. These automatically call the Tell A Friend Emailer and attach the URL to the correct page to the email sent.
- The "Contact Us" link is surrounded by the `{{contactuslink}}` and `{{/contactuslink}}` enVivo Tags. These tags automatically call the Contact Us Emailer.
- The Search field is placed within this Content Block so that the site can be searched from any page.

THE LEFT SIDE NAVIGATION

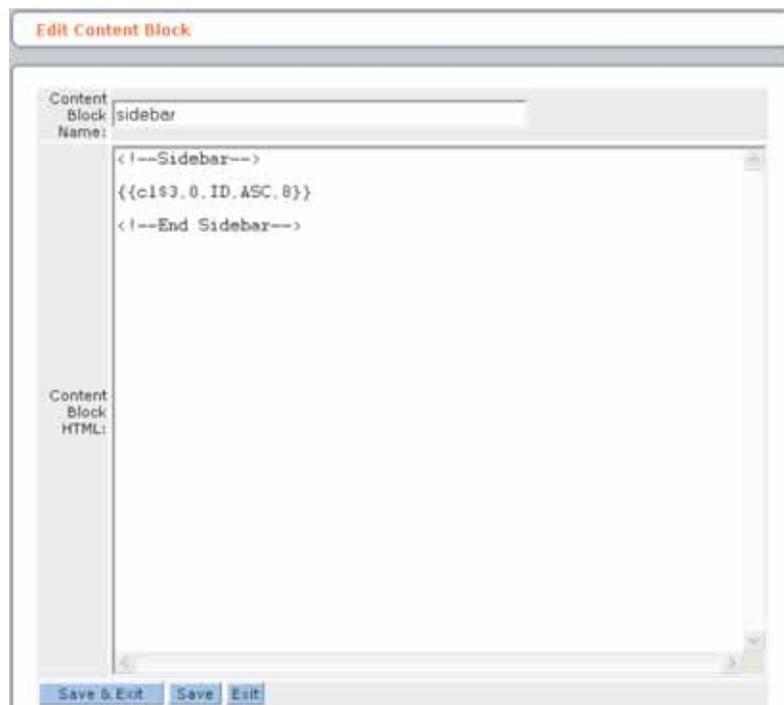
Upon installation, the Left Side Navigation initially contains five links. They are:

- Editing Content
- Managing Media
- Workflow Controls
- Features, and
- Other.

In Web Content Manager, expand the "Sidebar" Category in the Content Panel. Notice how there are also five subcategories, each relating to the five items in the Left Side Navigation.

To add an item to the Left Side Navigation, click on the Sidebar category, then click New Category. Create the category as per the instructions in [Creating a New Category](#) on page 54 of the enVivo!CMS Classic v3.5 Professional / Enterprise Design Guide. Ensure that the "Display In Category List" checkbox is checked. Once you save the category and refresh your visitor view of enVivo!101, you will notice that an extra menu item has appeared in the Left Side Navigation.

How is this achieved? This is done through a cl\$ tag ("cl" stands for Category List). Go to Assets Panel/Content Blocks then edit the "Sidebar" Content Block. Notice that there is a cl\$ enVivo Tag like this:



`{{cl$3,0,ID,ASC,8}}`

The `cl$` tag given here will display subcategories of Category 3, will traverse deeper into the category hierarchy, ordering the categories by their ID in ascending order and will use the Category List Template with ID 8. For more information on `cl$` tags, see [EnVivo Tag Generator](#) on page 35 of the enVivo!CMS Classic v3.5 Professional / Enterprise Design Guide.

Since this `cl$` Tag is using the Category List Template with an ID of 8, in Web Content Manager, go to Assets/Templates/Category List Templates and you will see that the Category List Template used is called "Sidebar Category List". Edit this Category List Template to investigate how Category List Templates work. See [Category List Templates](#) on page 49 of the enVivo!CMS Classic v3.5 Professional / Enterprise Design Guide for more information.

THE MAIN CONTENT

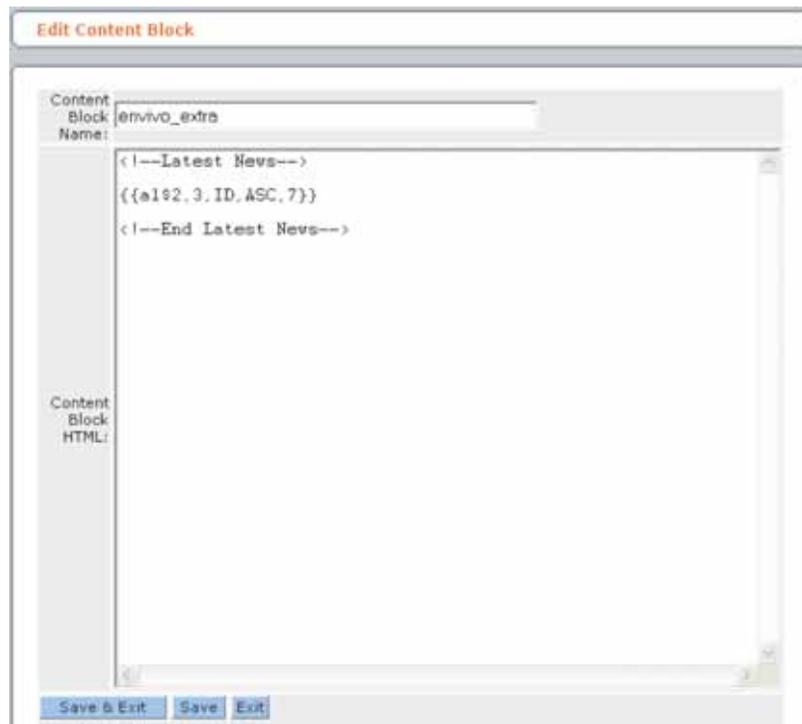
In the center of the enVivo!101 Sample Website, the main content is displayed. This is placed in the center by using the `{{content}}` enVivo Tag in the HTML Page Template or the ASP Function equivalent in the ASP Page Template. When you visit <http://localhost> as a visitor, the page that is displayed by default, the Home Page, is determined by the Settings in the Preferences. Further investigation of the Home Page Settings (Settings Panel/Preferences/Home Page Settings) shows that the DEFAULTACTION is set to "article" and the DEFAULTID is set to 3. Therefore the article with ID of 3 will be displayed. Further investigation reveals that this article is located in the "Home" category which is also the Root Category. Editing this article will edit the Home Page on the enVivo!101 Sample Website.

Since the Home Page action is "article", an Article Layout Template is used to define what Article Fields are displayed. If you edit the Home category's properties, you'll see that the Article Layout Template used is called "General Article Layout". In Web Content Manager, go to Assets Panel/Templates/Article Layout Templates and edit the "General Article Layout" Article Layout Template. This will give you an example how an Article Layout Template is put together. See [Article Layout Templates](#) on page 46 of the enVivo!CMS Classic v3.5 Professional / Enterprise Design Guide for more information about Article Layout Templates.

Clicking any of the Left Sidebar Items will display the articles in their respective categories. You can cross-reference this in Web Content Manager by navigating with the Content Panel to any of the subcategories under the "Sidebar" category to see what articles will be displayed under each subcategory. If you edit any of these subcategories, you will see which Article List Templates, Article Layout Templates and Page Templates are used. See [Editing an Existing Category](#) on page 57 of the enVivo!CMS Classic v3.5 Professional / Enterprise Design Guide for more information.

THE ENVIVO!EXTRA RIGHT SIDE NEWS

As you know, the right side enVivo!extra News articles are displayed on every page and are called through the `{{cb$envivo_extra}}` Content Block enVivo Tag in the HTML Page Template. If you go to Assets/Content Blocks and edit the "envivo_extra" Content Block, you'll notice that this is called by an `al$` enVivo Tag.



`{{al$2,3,ID,ASC,7}}`

This `al$` enVivo Tag is a command to show articles from Category 2 - the Latest News Category - and to show the top 3 articles sorted by ID in ascending order and to use Article List Template with ID of 7.

Next, let's look at the Article List Template with ID of 7. In Web Content Manager, go to Asset Panel/Templates/Article List Templates and edit the "enVivo!extra Article List" Article List Template.



Upon further investigation of this Article List Template, you'll notice the (<!-- LOOPSTART -->) and (<!-- LOOPEND -->) markers as well as what article fields are displayed; i.e., {{title}} along with the {{articlelink}} and {/articlelink}} enVivo Tags that create the link to the actual article. For more information, see [Article List Templates](#) on page 42 in the enVivo!CMS Classic v3.5 Professional / Enterprise Design Guide.

Now that you have had a change to see how easy it is to work with the enVivo!101 Sample Site, you can edit its various objects to create your own website. Or, you can start with a blank database and create your own, unique website.