Presto Basic Administrator's Guide

Presto 3.5

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Chapter 1: Getting Started

Inmagic® *Presto* is a social knowledge management platform that lets you organize, search, access, and contribute to information within your organization. The *Presto* interface provides a portal to information resources, and can be configured for individual users and organizations. Your assigned role in *Presto* determines which menus appear and which items are available on the menus.

Logging In

To log in to *Presto*, point a Web browser to the server that is running *Presto*, using the format *http://server-name/presto-instance-name*. For example:

```
http://eng/presto
```

When the Login page appears, enter your assigned **User Name** and **Password**, then click **Log In**.

If the simple form of your User Name does not work (for example, `jdoe`), try using the form username@DOMAIN.local (for example, `jdoe@INMAGIC.local`).

Note: If your organization is using Single Sign On (SSO) or has the OPAC option enabled, you will be logged in automatically, without seeing the Login page.

To log out, click the Log Out link in the upper right corner.

Create Account

If you do not have a user account, click the **Create Account** link on the Login page, provide the requested information, and click **Create Account** to log in to *Presto*. A self-created account provides limited rights, as defined by the built-in Guest user account. Contact your *Presto* Administrator if you think your account should be modified to provide additional rights. (The Create Account link appears only if **ShowCreateNewUserLink** is enabled in Application Settings.)

Reset Password

Click the Reset Password link on the Login page if you need to reset your password. When prompted, enter your User Name, answer the Security Question, enter and confirm a new password, then click **Change Password**. (The Reset Password link appears only if **ShowForgotPasswordLink** is enabled in Application Settings.)

Note: This enables a native user who is locked out of *Presto* to get back in. A locked-out user is one who has typed an invalid password a certain number of times (default 5) within the interval specified in the *Presto* Web.config file. Another way of unlocking an account is to choose **Configure>Users>Set Password**. These methods only pertain to native *Presto* users. For Active Directory users, the change must still be made in the SQL database, as explained in the *Advanced Configuration Guide*.

My Account

The My Account menu provides access to information specific to the logged-in user. Depending on your assigned role, the following options may be available to you:

- View My Tags: See all tags that you have added to any record.
- Manage My Alerts: Create, modify, or delete alerts that inform you if a specified event occurs.
- Subscribe to Global Alerts: Subscribe to an RSS feed based on a Global Alert.
- Update My Profile: Change your user profile settings.

Using the Help

The help describes all of the possible features of *Presto*. If you cannot see or access an option mentioned in the help, that option is probably restricted by your role and permission settings. For example, non-administrative users typically will not see the **Configure** menu.

There are several ways to access help:

- Open a context-sensitive topic for the page you are on by clicking the Help icon 

 on the page you are viewing.
- Open the main help file by clicking the Help link at the top right corner of the screen.
- Get help for Quick Search by clicking the Help link in the Quick Search area of the home page.

Tip! After upgrading to a new version of *Presto*, clear the cache on your Web browser to make sure that you are looking at the latest copy of the help file.

Saving Your Work

To avoid losing work, click **Save** regularly, to ensure that your session does not time out.

Like most Web applications, *Presto* maintains a session for each logged-in user. The session will time out after a period of inactivity, where inactivity means no communication between the user and the server. To avoid timeouts, actively involve the server by clicking **Save** or performing an activity such as clicking a **Look up...** button. If a session times out, any information that has not been saved will be lost

It is especially important to click the main **Save** button when using **Configure>Content Types**. For example, any number of Views can be modified or added, but if the main **Save** button isn't clicked, and the session times out, your work will be lost.

User Interface Overview

Home Page

The home page is the first page that appears when you log in to *Presto*. To return to the home page at any time, click the Home link at the top of the page. The content and menu items that you see depend on the rights assigned to your role. A typical home page includes the following items:

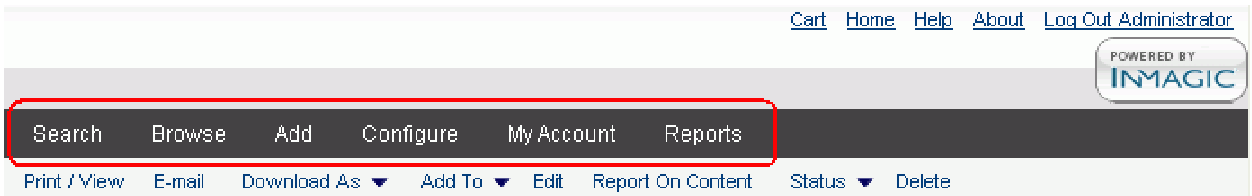
- Menu bar (with available menu items determined by login)
- Quick Search box, which provides the ability to search across all content that is available to you.
- Other content that has been configured by the administrator, such as announcements, blogs, RSS feeds, and links to internal and external content.

You can click the **Minimize** and **Restore** links in the title bar of each control, to show or hide content.

Administrators can configure the home page to determine its content and appearance.

Menu Bar

The menu bar is the main set of menus at the top of the application. Its appearance depends on how the administrator has configured it, your assigned role, and the page you are on. Administrators can customize the menu bar, using **Configure>Menus and Menu Bar**. A typical menu bar is shown below, highlighted in red.



Note: For information about the options that appear *below* the menu bar after searching or browsing, see the Act on Content toolbar.

The main menu bar may include some or all of the following items:

- **Search**. This menu lets you search by the content types that you are allowed to view (as defined by your assigned role in the system). Each option takes you to a search screen for a particular content type. If you prefer to search across *all* records, use the Quick Search field.
- **Browse**. This menu lets you browse through a hierarchy of categories for the collections available to you. Depending on your permissions, it may also allow you to organize collection.
- **Add**. This menu lets you add records for defined content types, if your permissions allow.
- **Blogs**. This menu lets you display any existing Web logs that your role allows. Each blog consists of one or more posts. Depending on your assigned role, you may be able to add posts, comment on existing posts, and perform similar operations. If you do not see a **Blogs** entry on the menu bar, either no blogs have been created, or you do not have permission to view and use blogs, or you need to use **Configure>Menus and Menu Bar>Re-Order Menu Bar**.
- **Forums**. This option lets you display any existing forums that your role allows. Each forum consists of one or more topics; each topic may have one or more posts. Depending on your assigned role, you may be able to add new topics, reply to topics, rate existing posts, and perform similar operations. If you do not see a **Forums** entry on the menu bar, either no forums have been created, or you do not have permission to view and use them, or you need to use **Configure>Menus and Menu Bar>Re-Order Menu Bar**.

- **Configure**. This menu lets an administrator configure the application. For example, a content administrator may be able to configure content (such as, collections and value lists). A system administrator will be able to do what a content administrator can do plus configure the application's user interface (for example, the home page, and the menus and menu bar); configure access control (for example, roles and users); and use tools specifically for the use of a system administrator (for example, to export and import content). Non-administrators will not see the **Configure** option.
- **My Account**. Use this menu to view and manage your alerts and profile, and view your tags.
- **Reports**. This menu lets you view event logs and any reports that have been created for your organization.

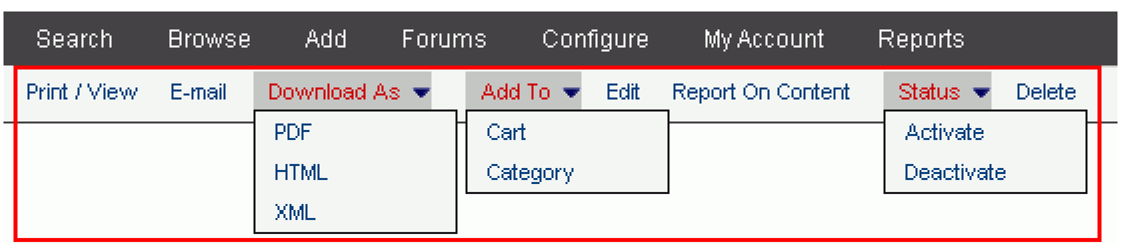
The following options appear above the main menu bar:

- **Cart**. Show items that you added to your InfoCart. Items in a Cart persist only for the current session. When you log out or your session times out, the Cart is emptied.
- **Home**. Return to the home page.
- **Help**. Open the main help. (For context-sensitive help, use the Help icon 

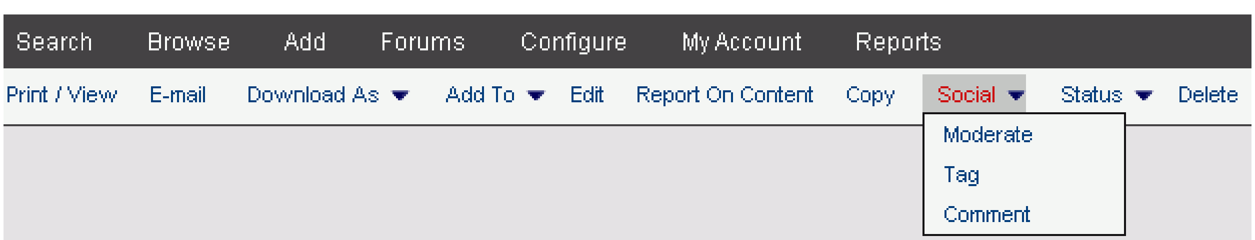
on the page you are viewing)
- **About**. Display information about *Presto*.
- **Log Out** [name of logged-in user]. Shows who is logged in. Click to log out of *Presto*.

Act on Content Toolbar

The Act on Content toolbar appears just below the main menu bar after a search, when browsing, and in other situations. The options on this toolbar depend on the page you are viewing and your permissions. The image below shows the toolbar highlighted in red, with the menus expanded to show the available options.

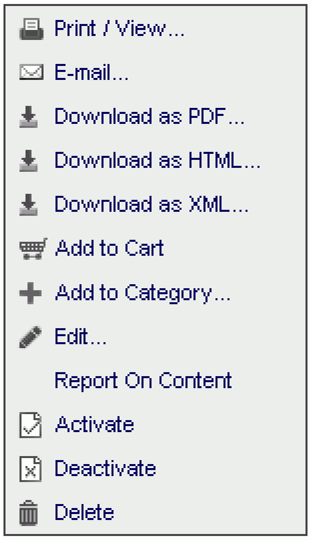


Additional options may appear, depending on your privileges and the context. For example, when a single record is displayed, the **Copy** and **Social** options are available:



To perform an action, select item(s) on the page (for example, check the box next an item on the Search Results page), then select the desired action from the toolbar.

As an alternative to using the toolbar, you can click anywhere in the Search Results pane to open a pop-up menu containing the same options as the Act on Content toolbar. An example is shown below. (Note: You can disable this ability using the Application Setting **EnableRightClickActionMenu**.)



Act on Content Menu Options

All of the possible options on the Act on Content toolbar or equivalent pop-up menu are described below.

Print/View. Click to display the selected items using the Print Friendly screen. If multiple content items are selected, the top portion of the page includes a Summary section with a list of the selected items. To print the displayed items, click the link in the pop-up window.

E-mail. Click to open a dialog that lets you send the selected content by e-mail (your machine must have access to an e-mail server). Use the dialog to specify the requested information: Recipient's name, subject line, optional message, and whether to use HTML or Plain text. You can also specify whether to send the items in a single e-mail or as separate e-mails for each item. Click the **Send E-mail** button in the pop-up (or cancel the request). Note the following:

- The return e-mail address is the one on file for the user logged in to *Presto*.
- The E-Mail Screen (**Configure>Content Types>Screens**) determines the appearance of the e-mail and specifies whether image and document files are included as attachments.

Download As. Use this menu to download the selected items as **PDF**, **HTML**, or **XML**. Follow the instructions in the pop-up dialog to preview and/or download the content. **Tip!** Download as XML uses the *Presto* import/export format for content items, so the information can be imported into *Presto* after (optionally) modifying it. Download as XML is an easy-to-use alternative to submitting an Export Request XML File using **Administrator Tools>Export Content**, and is available to end-users.

Add To. Use this menu to add a single item to one of the following locations:

- **Cart**: Temporarily save selected items in your cart. This allows you to collect and perform actions on content items from multiple search result sets. Items in a Cart persist only for the current session. When you log out, the Cart is emptied. To see and act on content in your Cart, click 

on the menu bar.

- **Category**: Add the selected item to a collection. A pop-up window will appear, so you can navigate to the desired folder in a collection, then click Add in the pop-up to add the item to the category.

Remove from Cart. This action is available if you are on the My InfoCart page and your Cart contains at least one item. Click to remove the selected item(s) from your Cart.

Edit. This action is visible only if your assigned role allows it. Click to open the Edit page for the item. On the Search Results, Browse Collection, and InfoCart screens, exactly one item must be selected when you click **Edit**.

Report on Content. This action will display the search results as a report.

Copy. This action is available when displaying a single record (browse or search, then click a record link). Select this option to copy the selected record, if your permissions allow.

Social. This menu is available when displaying a record (viewing content) after browsing or searching. The **Social** menu may contain the following items:

- **Moderate**: Access a page that lets you remove individual tags, comments, or ratings from a record, if your permissions allow. This is typically done to delete unhelpful or offensive content. For example, if a record indicates that *0 of 10 people found the following comment helpful*, you'd probably want to delete that comment. Or if a record is tagged erroneously (with a word that is unrelated to the content), you can remove that tag. You may also want to remove social content that was contributed by users who are no longer with the company.
- **Tag**: This option appears if tags are enabled for that content type. Select this option to open a control that allows you to tag the record by typing one or more words that will be associated with this record. When the record is displayed, all tags will appear as a "cloud", with more frequent tags appearing more prominently. Tag clouds can be seen by all users who can view the record. Those users can click a tag in the cloud to find associated records.
- **Comment**: Add a comment to the record. A comment is a personal response to an individual content item or blog post. Comments can be seen by all users who can view the record.

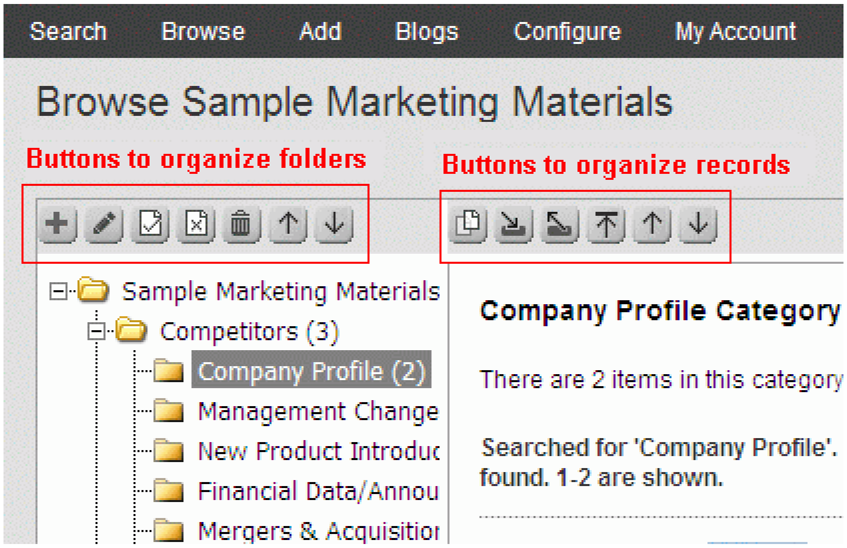
Status. This menu is available if it is relevant for the selected item and your privileges allow it. There are two Status options:

- **Activate.** Makes an item active, if it is currently inactive. Active records can be viewed by authorized users. Active user profiles are allowed to log in.
- **Deactivate.** Makes an item inactive. Inactive items are grayed out and identified by the word "INACTIVE" in red, and inactive users cannot log in. Inactive items can be hidden from sets of users using a Record Filter on the Content Permissions tab in a Role definition

Delete. This action is visible only if your login allows it and if it is relevant for the selected item. Some users are not allowed to delete items. If your permissions allow, select one or more items then choose **Delete** and click **OK** to confirm the deletion request and *permanently delete* the item.

Act on Category Toolbar

The Act on Category toolbar is available on the Browse Collection screen (after selecting an item from the **Browse** menu). It appears at the top of the screen. This topic describes all of the possible buttons that may appear. Depending on your login rights, you may see some, none, or all of these buttons.



Buttons for Organizing Categories (Folders)

Add Subcategory. Click to add a new category under the selected category. By default, new subcategories are added to the end of the list for a category.

Edit Category. Use this option to rename a category. Click the button, enter a new name, click **Update**.

Activate Category. Click to activate a category and all of its contents. When you activate a main-level category, all of its subcategories are also activated. If you activate a subcategory where the main category is deactivated, only the subcategory is activated.

Deactivate Category. Click to make a category and all of its contents inactive. Inactive categories are grayed out, will not appear in a Featured Collection area on the Home page, and are identified by a red "INACTIVE" label above the list of records when the category is selected. When you deactivate a main-level category, all associated subcategories are also deactivated. If you deactivate a subcategory where the main category is active, only the subcategory is deactivated. Note that you cannot deactivate the very top-most folder.

Delete Category. Click to remove the selected category and all of the contents in that category. This does not delete records; it just affects the organization of the collection. Note that you cannot delete the very top-most folder.

Move Category Up and **Move Category Down**. Click to move the selected category up or down. Note that you can also drag and drop categories. When you drag an item over a category that has unexposed subcategories, there will be a slight delay before the subcategories expand. Wait for the subcategories to appear so that you can drop the item precisely where you want it. Note that you cannot move the top-most folder.

Buttons for Organizing Content Items (Records)

Copy to Category. Click to open the Copy to Category pop-up window, navigate to the category to which you want to add a copy of the selected item, then click the **Copy** button. You can copy the item to as many categories as you want. Note that a content item can reside in more than one collection and more than one category. If changes are made to the item, it is reflected from all points of access.

Move to Category. To move a record from one category to another, click the existing folder in the left pane, so that its content items appear in the center pane. Check the box next to the record(s) that you want to move, click the Move to Category button in the toolbar, then use the pop-up window to select the destination folder. You can move items to any category.

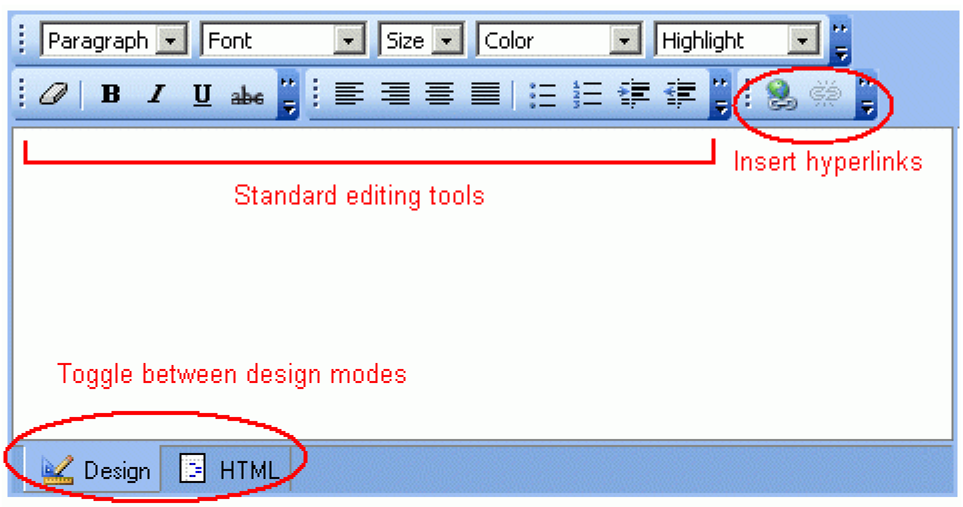
Remove from Category. Click to remove the selected item. This does not delete records; it just affects their occurrence within the collection.

Move to Top of Category. Click to move the selected item to the top of the category.

Move Up in Category and **Move Down in Category**. Click to move the selected item up or down.

The HTML Editor

The HTML Editor appears in many situations when you are creating or editing items. For example, it is used to add and format content for records, blog posts, Web Parts, and other uses. Be sure to test the output in different browsers to ensure that it displays properly, since browsers vary in their ability to display some effects. The editor has two tabs: **Design** (the default) and **HTML**, which are described below. You can toggle between the two modes.



Design Mode

The **Design** tab displays content as it will appear. Use the toolbar buttons and drop-down lists to format content and add links and images. Some common actions are described below:

- To add an image from the image gallery: Click **Insert Image From Gallery**. If you have not already done so, populate the image gallery (click **Browse** to locate an image, then click **Upload**). Click an image in the Gallery, use the preview area to make any desired adjustments, and click **Insert**.

Note that each content type has its own gallery, which *Presto* manages automatically. Any images that you upload will be available the next time you use the image gallery.

- To add an image from another location: Click **Insert Image**, type the full pathname in the Image Source field (for example, http://www.inmagic.com/images/logo.gif), and click **OK**.
- To add a link: Select the text that should function as a link, click the **Create Link** button on the toolbar, then fill in the fields:

This above example would produce the following HTML, where "Boston" is the link text, "Wicked Good" is the hover text, and a new window will open when "Boston" is clicked:

```
<A title="Wicked Good" href="http://www.boston.com"
target=_blank>Boston</A>
```

- To remove a link: Click anywhere in the link and click the **Remove Link** button .
- To quickly add content from any Search Results page: Copy the content from a viewing pane and paste it into the Editor. Any links for that content will automatically be included.

HTML Mode

If you prefer to work directly in HTML, or you want to see how an effect is rendered in HTML, click the **HTML** tab. Note that *Presto* does not validate the HTML, so you should test any hand-coded HTML in all supported Web browsers to ensure that it displays correctly.

The InfoCart

The InfoCart contains any items added to the Cart after searching or browsing. Items in a Cart persist only for the current session. When you log out or your session times out, the Cart is emptied.

- To **add** items to your Cart: After searching or browsing, check one or more records, open the Add To menu, and click **Cart**.
- To **view** an item in the Cart: Click the link for any item that you want to view further. To return to your Cart, click the Cart link at the top of the page.

- To **act on** content in your Cart: Check one or more items that you want to work with, then use the buttons on the Act on Content toolbar to affect those items. The buttons that appear depend on the permission settings for your role. For example, you may be able to print, e-mail, download, or remove items from the cart.

  You can use the following methods to select items in the Cart:

- To select or deselect *individual items*, check or clear the box next to an item.
- To select all items on a *viewing pane*, click the **All** link at the top or bottom of the viewing pane. To clear all the check boxes on a viewing pane, click the **None** link. Note that you can select **All** or **None** on more than one pane, if available.
- To select or deselect all the check boxes for an *entire list*, you must click the **All** or **None** link for *each* viewing pane.
- To **navigate** the content in your Cart: Use the controls at the top and bottom of each viewing pane to move from page to page or to the first and last pages, when applicable.

Customizing the Menus

The menu bar is the main set of menus at the top of the application. Choose **Configure>Menus and Menu Bar** and use the resulting page to customize the *Presto* menus for your organization. Each user's role and "View" permission settings determine which menus and menu items the user can see.

- Specify how the menu bar should appear (which items should be displayed and in what order) by clicking Re-Order Menu Bar.
- Adjust individual menus (add, remove, reorder items) by clicking the menu name and using the resulting page to make changes. You can configure the following *Presto* menus:
  - **Search Menu**. This menu has items that let users access advanced search screens. The search screens available to users are based on the permissions assigned to them. For example, the "Search" menu appears by default, and by default all users can see it. However, you can modify role and permission settings for individual users to prevent them from seeing certain items on that menu, or to prevent the menu from appearing at all for a particular user.
  - **Browse Menu**. This menu has items that let users view and organize collections. The collections available to users are based on the permissions assigned to them.
  - **Add Menu**. This menu has items that let users access data-entry screens. The add pages are available to users based on the permissions assigned to them.
  - **Blogs Menu**. This menu has items that let users access blogs. Blogs are available to users based on the permissions assigned to them.
  - Any customized menus that were added using Create New Custom Menu.
- Create a new top-level menu by clicking **Create new Custom Menu**.
- Delete a custom menu by clicking **Delete** next to the menu name, then confirming the deletion. Note that you cannot delete the default menus (Search, Browse, Add, Configure).

The following menus *cannot* be configured from the Configure Menus and Menu Bar page, but you can adjust roles and permissions (**Configure>Roles>System Permissions**) to determine who can see what:

- **Forums**. This option lets users access forums, depending on the user permissions.
- **Configure**. This menu lets administrators configure *Presto*. The options that appear on this menu (and whether the menu appears at all) are determined by the user's role. For example, a content administrator may be allowed to configure content (such as collections and value lists). A system administrator can perform all possible configuration tasks.
- **My Account**. This menu lets users view and manage their alerts and profile, and view any tags they have assigned to content. To configure this menu, adjust roles and permissions.
- **Reports**: This menu lists reports supplied with *Presto*, and any additional reports that have been created.

Creating a New Custom Menu

To create a custom menu for the *Presto* menu bar, choose **Configure>Menus and Menu Bar**, click **Create new Custom Menu**, then follow the instructions below. You can add a drop-down menu that contains multiple items, or you can add a menu that functions as a single button-style link.

To add a single button to the menu bar

1. For **Menu Type**, select **Single menu bar link**.
2. Enter a menu name, which will appear on the *Presto* menu bar.
3. Enter a full or partial URL (such as `http://www.inmagic.com` or `www.inmagic.com`), then click **Test URL** to test the validity of the URL. For partial URLs, *Presto* assumes `http://`. If the URL is to a secure Web site, you must include `https://`.
4. Click **Save**.

To add a drop-down menu

1. For **Menu Type**, select **Drop-down menu**.
2. Enter a menu name, which will appear on the *Presto* menu bar. For example, you could add an item called "External Web Sites".
3. Enter a description, which is for internal use only, to identify the menu.
4. Click **Create Custom Menu Item**.
5. Use the pop-up window to define the menu item. For example:

   Menu Item: Inmagic Web Site

   URL: http://www.inmagic.com

   You can enter a full or partial URL. If you enter a partial URL (such as www.inmagic.com), *Presto* assumes `http://`. If the URL is to a secure Web site, you must include `https://`.

   Click the **Create Menu Item** button to populate the **Menu Includes** list. Repeat to add more items. Close the pop-up window when you are done.
6. Use the controls to adjust the list if desired. You can move selected items up or down, edit an item, remove an item, or clear the entire list.
7. Click **Save**.

Re-Order Menu bar

You can determine which menus appear on the *Presto* menu bar and specify the order in which they appear.

1. Choose **Configure>Menus and Menu Bar**.
2. Click **Re-Order Menu Bar**.
3. To add an existing menu to the menu bar, select an **Available Menu** and use **Select** to add it to the **Displayed Menus** list.
4. To re-order menus on the menu bar, select a menu item in the **Displayed Menus** list, then use the following options:

   Move Up or **Move Down** to move the selected menu in the direction you want.

   Remove to take the menu off the menu bar. Note that you cannot remove the Configure menu.

   Clear List to empty the **Displayed Menus** list and start over. Note that you cannot clear the Configure menu.
5. Click the **Save** button when you are done.

Chapter 2: Configuration Overview

Configuring Presto

Administrators can use the **Configure** menu to perform the operations described below. Depending on your assigned role and how *Presto* is set up for your organization, the **Configure** menu may allow some or all of the following operations.

- Content Types: Define a "class" of object (Books, Articles, CDs, etc.) that will contain records.
- Screens: Use the Configure Content Types page to modify the default screens (Advanced Search, Detail, Print, Edit, Add, E-Mail) for each content type.
- Views: Use the Configure Content Types page to create and modify views (Citation, Gallery, Grid, Alert, RSS Feed) for each content type.
- Content Collections: Set up collections of content that users can browse.
- Blogs: Set up blogging for authorized users.
- Forums: Set up forum groups, and create forums to add to the group
- Reports: Create reports which can be displayed in Presto, added to a Home Page, or integrated into a SharePoint site.
- Value Lists: Define lists of items that users can select from when creating, editing, or searching.
- Home Page: Configure the *Presto* portal and optionally provide different home pages for different roles.
- Menus and Menu Bars: Create, add, remove, and reorganize menu items.
- Roles: Define permissions to specify the actions that each user can perform.
- Users: Configure user accounts.
- Administrator Tools: Perform import, export, monitoring, and database cleanup tasks, and perform advanced configuration by adjusting the **Application Settings**.
- Events: Activate events to log them and to enable users to set up alerts.
- Global Alerts: Set up alerts that will generate RSS feeds for all users with permission to subscribe to global alerts.

Configuration Guidelines

The following list provides guidelines for when to perform configuration tasks.

High Priority

- Configure Users and Roles to set up accounts and adjust permissions.
  - For security reasons, change the Administrator's password from the default (admin, admin).
  - Create *Presto* user profiles and adjust role permissions.

- If you are using Active Directory, use Administrator Tools to import Active Directory user accounts (optional but recommended). For more information, see Active Directory and Single Sign On (SSO).
- Configure Content Types to define a "class" of object (Books, Articles, CDs, etc.) that will contain records. Create and modify Views for each content type, to determine how records and alerts appear, and modify the default Screens (for searching, editing, printing, etc.) that are generated for each content type.
- Set up Social Features (configure Screens, Views, and permissions).
- Configure the Home Page to customize the *Presto* portal.

Medium Priority

- Configure Events to enable logging and alerts, and set up global alerts to generate RSS feeds.
- Configure Value Lists to define lists of items that users can select from when creating, editing, or searching.
- Configure Content Collections to set up collections of content that users can browse.
- Configure Blogs and Forums for authorized users.

Ongoing (Maintenance)

- Use **Configure>Administrator Tools** to perform administrator tasks.
- Outside of *Presto*, back up the SQL database on a regular basis, as you would with any valuable application data.

Application Settings

Presto administrators can change the Application Settings, which are described in the *Presto Advanced Administrator's Guide.*

Important! This can affect the stability, security, and performance of the *Presto* Web application. Only advanced users should adjust these settings.

To adjust Application Settings

1. Log in to *Presto* with administrator rights.
2. Choose **Configure>Administrator Tools>Application Settings**.
3. Modify the settings to adjust various features. When making changes to long entries, you can edit the XML in place or copy it into a UTF-8 Unicode editor, such as Windows Notepad, make your changes, then copy it back into the field.

   Important! Application Settings are described in the *Presto Advanced Administrator's Guide.*
4. Click **Save** to retain your changes or **Cancel** to exit without saving.

   Important!: Clicking **Save** immediately updates the SQL **dbo.AppConfig** database table in the *Presto* catalog. If you accidentally save changes that render *Presto* inoperable, you may be able to revert to a previously-saved value if you avoid making any further changes to the settings. For information, please contact Inmagic, Inc.

Administrator Tools

Administrators can choose **Configure>Administrator Tools** to access options for monitoring and configuring the system:

- Import Content. Import instance data specified in an XML or CSV file.
- Export Content. Export metadata definitions or instance data to an XML file.
- Monitor Jobs. Monitor the status of current or previously submitted jobs.
- Monitor Services. Monitor the status of services.
- Application Settings: Make advanced configuration changes.
- Import Active Directory Users. This tool is available only if Active Directory is enabled.
- Database Cleanup: Perform certain database commands to clean up obsolete records or optimize searching.

Monitoring Jobs

Use Monitor Jobs (**Configure>Administrator Tools>Monitor Jobs**) to monitor the status of current and previously submitted jobs. Jobs can have a status of Scheduled, Queued, Running, or Completed, and a result of Success or Failure.

To navigate the list of jobs

Use the page navigation controls at the top and bottom of the viewing pane to move from page to page or to the first and last pages, when applicable. You can use the **Sort by** drop-down list to re-order the whole list by a particular order (such as start date time from oldest to newest, or status from A to Z).

To search for particular jobs

To search for particular jobs, enter a value in the field provided and press **Enter** or click . To reset the search, click the **Remove Filter** link.

Monitoring Services

Inmagic Presto Services are responsible for performing long-running tasks in the background, and they should always be running. The services run as a single multi-threaded Windows Service and are transparent to the end user.

Use the Monitor Services page (**Configure>Administrator Tools>Monitor Jobs**) to monitor the health and availability of the Presto Services.

If certain tasks, such as e-mailing content or alert message delivery, are not functioning, check this page to further diagnose the issue.

Click the **Refresh** button at the bottom of the page to update the display.

For information about Inmagic Presto Services, see the *Presto Advanced Administrator's Guide*.

Database Cleanup

Use the Database Cleanup tool to remove obsolete records from the database or optimize the SQL full text catalog to improve search performance.

Removing Soft-Deleted Records

When data is deleted from *Presto* in the user interface, it is not always removed from the *Presto* database. Instead, the data is just marked as Deleted and remains in the database. This is known as a soft-delete, and it allows *Presto* to recover the deleted data if necessary. Hard delete permanently removes all previously deleted data or data marked as Deleted from the *Presto* database, as if it never existed. This includes all previously deleted Content Types, Blogs, Forum Groups, Forums, associated links to alerts, events, categories, permissions, etc., as well as all user content such as records, blogs, posts, and forum topics.

Typical situations in which you would use this feature are listed below:

- If you want to clean up the database by removing unnecessary objects. For example, if you create a content type, Blog, or Forum, but then decide that you don't need it and never intend to use it.
- If you are running low on disk space for the *Presto* database and you want to remove all previously deleted data.

To remove soft-deleted records

1. Choose **Configure> Administrator Tools>Database Cleanup**.
2. Select an operation: **Remove Soft-Deleted Records**.
3. Confirm or cancel the operation.

Removing All Navigation Information

If you set **EnableNavigationInfoRecording** to **True** in Application Settings, user navigation information (a list of users and the pages where they went) is recorded in the *Presto* database. This information is used for the User Navigation Information report. To reclaim disk space, you can remove this information from the database. Note that the **EnableNavigationInfoRecording** option is off by default. If it is turned on, the information will start being recorded again. Use **Remove All Navigation Information** option whenever you want to discard the navigation data.

To remove all navigation information from the database

1. Choose **Configure> Administrator Tools>Database Cleanup**.
2. Select an operation: **Remove All Navigation Information**.
3. Confirm or cancel the operation.

Optimize SQL Full Text Catalog

Click the **Optimize SQL Full Text Catalog** button to improve relevance ranking behavior by optimizing the SQL catalog. The optimization begins as soon as you click the button. This operation:

- Is recommended after performing large imports.
- May take several minutes to an hour or more, depending on the size of the database.

- May consume significant database server resources while running and should be avoided during peak business hours.
- May not be necessary on SQL 2008 servers.

Note: There are two ways to run SQL optimization: Manually, by using the button on this page (in which case the optimization begins immediately), or automatically daily at a specific time (default 3:00 A.M., controlled by Presto Services and the **SqlOptimizeProcessorJobTime** in Application Settings). For more information, see the *Advanced Administrator's Guide.*

Backup and Restore

Important! Backup and Restore operations require exclusive access to the *Presto* database. We strongly recommend that you:

- Stop the *Presto* Web application by stopping its Web site or shutting down IIS completely before you start any Backup or Restore operation.
- Stop Inmagic Presto Services.

To back up a *Presto* database, follow conventional SQL database backup procedures, using any supported backup tool. Use the corresponding restore tool to restore a backed-up database. Consult your SQL Server documentation for more information. You must restart IIS and Inmagic Presto Services before continuing to use *Presto*. Failure to perform these restarts is likely to result in corruption of the restored database.

Chapter 3: Configuring Content Types

Content types describe the characteristics of a type of content. For example, a content type for Books may contain the fields Title, Author, Description, and Date. Every record that is added to the database belongs to a specific content type. Typically, an organization's content types are set up when *Presto* is first installed, but administrators with "Configure Content" rights can create and edit content types as needed.

Built-in (System) content types are also provided, for Blog Posts, User Profiles, Forum Topics, and Reports. These content types can be edited but cannot be copied or deleted.

Each content type has its own screens and views, which can be edited to affect search, display, and print appearance. Default screens and views are generated when you define a content type.

To configure content types

1. Select **Configure>Content Types**. Your System Permissions (Configure>Roles) must allow you to Configure Content.
2. Perform the actions described below:
   - To edit a content type, click the content type's link. Note that the built-in System content types are listed at the bottom of the page, under System Content Types.
   - To create a new content type, click the **Create new Content Type** button, or use the **Create a Copy** button next to a content type to create a new content type based on an existing one. You cannot copy or create System Content Types.
   - To edit a content type's screens (Advanced Search Screen, Detail Screen, Print Friendly Screen, Edit Screen, Add Screen, E-Mail Screen), click **Configure Screens** next to a content type. Note that you cannot create or delete screens; they are automatically generated when a content type is created.
   - To create, edit, or delete views (Citation Views, Gallery Views, Grid Views, Alert View, RSS Feed View), click **Configure Views** next to a content type.
   - To change the order in which content types are listed in Search Results and on other screens, click **Set Listing Order**.
   - To permanently delete a content type *and all records* of that content type, click the **Delete** button next to the content type. You will see a warning message and you can either continue or cancel. You cannot delete the built-in System Content Types. **Note**: Deleted content types may be recoverable in case of accidental deletion. Please contact Inmagic Support for information.

Important! If multiple users are making changes to a content type at the same time, the changes of the last user who saves are retained. After saving changes to a content type, you should wait until the job completes before attempting to edit the same content type again.

Set Content Type Listing Order

You can specify the order in which content types, blogs, and user profiles are listed on all screens that list all available content types, such as the Search Results page and the Configure Content Types page. Note that your System Permissions (**Configure>Roles**) must allow you to Configure Content.

1. Choose **Configure>Content Types**.
2. Click the **Set Listing Order** button.

The default order is **Blog Post**, then **Profile**, then the content types in the order in which they were created.

Creating or Editing a Content Type

To create a content type, choose **Configure>Content Types**, **Create new Content Type**. Define the content type, then click **Save**. After creating a content type, it takes a few seconds for your changes to be processed. Then the new content type will be listed on the screen. (You must refresh the screen in *Presto* first.) The new content type will automatically be added to the **Search** menu and the **Add** menu. It will not appear on the Home Page unless you explicitly add it (using **Configure>Home Page**).

To edit a content type, choose **Configure>Content Types** and click the link for a content type.

Your System Permissions (**Configure>Roles**) must allow you to Configure Content. Use the tabs described below to define the content type. To save changes, click **Save**. Note that if another user starts configuring the same content type before your changes have been completely saved, your changes may be lost.

Overview Tab

Use the Overview tab to specify the following attributes for a Content Type:

- **Name** (required). Assign a name to identify this content type, such as Book. This form can be used in search criteria (for example, Book.Author:Smith). This form is not Localized (for example, it will *not* be *Book* in English and *Livre* in French).
- **Singular Form of Name** (required): This form of the name will be used for display purposes and will appear in menus and lists. This form is Localizable (for example, it can appear as *Book* in English and *Livre* in French). For simplicity, it is recommended that you use the same form for the Name and the Singular Form of Name in the default Locale.
- **Plural Form of Name**. This form is used for display, in several places on the Search Results page. This form is Localizable. Typically, you would enter a Plural Name if the Name is singular (for example, if the Name is "Book", use a plural form of "Books"). If a plural name is not specified, the Name will be used.
- **Description**. Supply a short explanation of the content type.
- **Icon Image**. Click the Replace link to select an image to represent this content type.

User Defined Fields Tab

Use the User Defined Fields tab to define fields for this content type. As you add fields, they are listed on this screen. Each column heading summarizes the field's attributes. A dash (-) means the option is not available for that Data Type, and the word (No) or (Yes) in parentheses means the value is hard-coded and cannot be changed.

Tip! Try to add all desired fields when you first define the Content Type. Fields that you add when creating a Content Type are automatically included on all default Screens and Views. Any fields that you add later, by editing the content type, will need to be added manually to Screens and Views. Also, once you add records to the database, you cannot add an Automatic Number field.

A new Content Type does not have any fields, so you have to add them by selecting **Create new Field**. When you click **Create new field**, a dialog pops up so you can define the field's attributes.

Data Types

You can specify the following Data Types.

Data Type	Purpose:
Text	Fields that will hold text and/or numbers that should not be calculated, such as phone numbers.
HTML Text	Fields that will hold HTML-tagged text, which can be used to bold or italicize text, play videos, display images (from a Presto image gallery or other sites), etc.
Integer	Positive or negative whole numbers, including 0.
Decimal*	Positive or negative numbers that can include decimal digits, such as 15.38.
URL	An URL field is designed to hold URLs, such as www.inmagic.com, plus optional Alternate Text. Fields defined as URL will have a "Test URL" button next to them on the Add or Edit screen, so you can test any URL that you enter, to confirm that it is a valid address.
Date*	Fields that will hold dates.
Timestamp*	Presto will add the current system date and time based on the server time.
Boolean	A value of True or False.
File	Use for a field that will hold images, documents, or other files. After selecting File as the Data Type, use the Supported File Types control (see below) to specify which file types will be allowed in the field. When a file is selected in a field defined as File, that file will be loaded into Presto and will appear in the record when users search and browse.
Automatic Number	Presto will generate a unique sequential number. You cannot add an Automatic Number field after records have been created.

* Formatting for Decimal, Date, and Timestamp fields is determined by the Screens and Views, depending on the Locale of the logged-in user. For example, a value of 15.38 in a Decimal field can be formatted as $15.38 or £15,38. For details, see Format Strings for Text, Dates, and Numbers.

Field Attributes

The attributes that appear when creating or editing a field depend on which **Data Type** is selected. All of the possible options are listed below.

Option	Description
Name	The Name appears throughout the UI to identify this field and is used as the default label when data is displayed, unless you modify Screens and Views.
Description	The Description only appears when editing a Content Type. Users never see it.
Data Type	The Data Type indicates what type of content this field will hold and determines how the field will function. See the previous table for descriptions of each Data Type.
Related	Check this box to use this field to link to another content type.
Related Strict	If this box is checked, the "Look up" link on an Add or Edit screen will function like a strict value list, meaning it will only allow users to select values from the list. If this box is *not* checked, users can enter values in addition to selecting them. For example, if you are editing a Book (Referrer content type), and the Add or Edit screen includes the Publisher Name field from the Publisher (Target content type), clicking "Look up" will display a list of existing publishers. If the Publisher field is Related Strict, you can select a Publisher Name from the list, but you cannot enter a new publisher name.
Related Content Type	The target content type for the link.
Related Field	The target field for the link.
Required	This attribute determines whether the field must have data in every record for this content type. If you check Required, users will not be able to save a new record unless the field is filled in.
Searchable	This attribute determines whether field values will be indexed, so users can search the field. It also lets the field be used for sorting on Search Results pages (if the field is included in the View). Whenever a record is added, the data for a Searchable field is indexed. If there are fields in the content type that should not be searched, it is best to exclude them from the index to save space and processing time.
Value List	Use this option to assign a previously-created value list to a field. For example, a Value List for "Country" might include Canada, Mexico, and USA. A control with the contents of the value list will be generated when the value of the field is edited. Several controls are available (drop-down list, pop-up lookup, check boxes, option buttons, etc.) depending on whether the list is strict or permissive and whether the field supports multiple values. Users can select items from the list when creating, editing, or searching. If you assign a Strict list, users must select from the list. If you assign a Permissive list, users can add values that are not in the list. Value Lists are created separately from content types and can be shared among multiple content types.
Size	Specify the number of characters that can be stored in a Text field for each record. Set the Size to Unlimited to allow very long fields, such as Descriptions. (Note: If you select Unlimited or a size over 250, you will not be able to implement a See Also link for this field on a Detail Screen.)
Default Value	Specify a value that will be stored if no value is entered. If the field has a Strict Value List, the Default Value control is a drop-down list that lets you select an item from the the value list. The field will display the default value when users add a record. For example, a Date field could show the Current Date. Some fields allow a system-generated Unique Identifier. Boolean fields can be True or False. Some fields (such as Automatic

	Number) do not allow defaults.
Multi-Value	This attribute allows multiple values in a single field. A Multi-Value field is useful for content where more than one entry is appropriate, such as E-mail addresses or phone numbers.
Unique	A Unique field is required to contain a unique value. Not available when Multi-Value is checked.
Set only on record create	If you check this box, *Presto* will add a timestamp (date and time) only once, when the record is created. For example, you might check this option for a field called Record Created, but uncheck it for a field called Record Edited. The format of the timestamp is determined by configuring the Screen or View.
Supported File Types	Specify which file types will be allowed in the field. Select **No restrictions** to allow any file type, or select **Restrict file types to** and then specify which file types are allowed (.doc, .xls, .pdf, .ppt, etc.). If users enter a non-allowed file type, a message will be displayed and the file will not be uploaded.
Seed Value	Seed Value is the starting value for the very first record that gets created. If you want your first Automatic Number value to be 100 instead of 1, put 100 in the Seed Value box.

System Fields Tab

Use the System Fields tab to view internal system properties that every content type contains. Unless noted, System fields are not editable, but they are Searchable. The following System fields are automatically created by *Presto* for the content types indicated below.

System Field	Description
ContentItemId	A unique, automatically generated integer to identify each record. Used internally by *Presto*.
Title	Title of the forum post. Editable.
Post	Body (message) of the forum post. Editable.
Topic Creator	The author of the forum post. Editable.
IsFeatureTopic	Forum topic is or is not featured. Featured topics appear in the "Featured Topics" section at the top of the listing page; normal topics do not.
IsLocked	Forum topic is or is not locked (read-only).
Number Of Views	How many times the forum topic title has been clicked (total number of views, not unique views)
Last Post Date	Date and time of the most recent post.
CompatibilityId	An internal identifier for forums.
ForumRefKey	An internal identifier for forums.
Rating	This field holds Ratings.
Tags	This field holds Tags.
Comments	This field holds Comments.
Category	This field holds any assigned collection categories. A collection is a group of records that users can browse. A category is a folder within the collection. For example, the Collection "Marketing Materials" could include the Categories "Competitors" and

	"Products" and "Analysis". For more information, see Configure Content Collections.
DateCreated	This field identifies the date and time when the record was created.
DateModified	This field identifies the date and time when the record was last modified.
AllText	This Text field contains every searchable word in the content type record instance. Note that the Advanced Search Screen includes this box by default (called either AllText or Words Anywhere), so users can search all indexed fields.
ContentItemLanguage	This Text field is used for localization.
Active	This field indicates whether the record has been marked Active or Inactive. It is a Boolean field, meaning its value is either True (Active) or False (Inactive). By using this flag, *Presto* can control access to individual records. For example, users can mark old records Inactive, so non-administrators cannot access them.
(multiple fields)	The System Fields tab for the Profile content type lists each field defined for the Profile content type (UserName, FirstName, LastName, etc.).
MyPicture	This field holds image files for Profiles. You can restrict the file types (BMP, GIF, JPG, etc.) that will be allowed in this field.
Locale	For the Profile content type, click the Locale link, then use the Default Value drop-down list to select a default locale for use on the Create New User page, then click Update.
TimeZone	For the Profile content type, click the TimeZone link, then use the Default Value drop-down list to select a default time zone for use on the Create New User page, then click Update.
Report Name	The identifier that is used to link the French/Spanish/English versions of the same report.
Display Name	The report name that appears in the user interface. Editable.
Report Description	The report description. Editable.
Report Stored Proc	The name and parameters used to create or run a report.
ReportFile	Byte Array of the Stimulsoft report.
Sort Order	The order of the report on the Report list.
Filters	Filters assigned in Presto, to be applied before the report is run.
Public	Boolean. Whether a report is public or not.
Created By	The user who created the report.
Event Report	Boolean. Whether the report is one of the Event Log reports.

Content Type Relationships

You can link multiple content types, to access and display a combination of information from each. For example, a screen can show a list of titles (from the **Book** content type) together with the Publisher's name and address (from the **Publisher** content type).

To create a relationship, you associate a field in one content type with a single-value field in another content type, where both fields contain identical data. When data in the associated fields matches, those records are linked, or associated, and the record information from both content types is available for display (depending on how your screens are configured). For more information, see Specifications for Content Type Relationships.

To explain relationships, we will use the following example:

- The “Book” content type includes Title, Author, Summary, ISBN number, PublisherID.
- The “Publisher” content type includes Publisher Name, Address, Phone Number, ID.
- Create a relationship by associating the PublisherID field in "Book" with the ID field in "Publisher".
- Design Detail, Edit, Add, Print, and E-mail screens for the Books content type, which include information from the Publisher content type.

Let's say that the **Book** content type includes a record for a book called Out of the Wild, published by Rand-McNally, and the **Publisher** content type includes a record for Rand-McNally. Because the PublisherID in Book matches the ID in Publisher, information from the matching records can be included on various screens. For example, a Detail screen designed for the **Book** content type could display this combination of fields from both content types:

Title: Out of the Wild
Published by: Rand-McNally, 200 First Street, New York, NY 10010

Referrer and Target

In each relationship, there are two participants:

Referrer content type ==> **Target** content type

To create a relationship, a field in the Referrer content type links to a field in the Target content type. When a content type is participating in a relationship, it is possible to place values from either related content type on the Detail, Print Friendly, E-mail, Add, and Edit screens.

Types of Relationships

One to One

One employee has one Informational record.

Referrer content type (and field)	Target content type (and field)
Employee (SSN=unique)	Information (SSN=unique)

One to Many

One newspaper can have many articles.

Referrer content type (and field)	Target content type (and field)
Newspaper (DatePublished=unique)	Articles (DatePublished=not unique)

Many to One

Many books can have the same publisher.

Referrer content type (and field)	Target content type (and field)
Book (PublisherID=not unique, single value)	Publisher (ID=unique)

Many to Many (example #1)

Many books can have many authors.

Referrer content type (and field)	Target content type (and field)
Book (AuthorID=multi-value)	Author (ID=unique)

Many to Many (example #2)

Many magazine covers can have many articles.

Referrer content type (and field)	Target content type (and field)
Cover (DatePublished=not unique, single value)	Article (DatePublished=not unique)

Specifications for Content Type Relationships

- Both fields (Referrer and Target) in a relationship must be equivalent Data Types. Text, Integer, Decimal, and Date are supported. Automatic Number and ContentItemId can be used as a target, if the Referrer is an Integer.
- The target content type's field must be single-value. The user interface enforces this.
- A target can have multiple referrers.
- Each content type can participate in multiple relationships. For example, a Book content type can have a relationship with both an Author and a Publisher content type.
- A content type in a relationship is only aware of its target and referrer content types. For example, in Publisher <=> Book <=> Author, Book can add fields from both Publisher and Author to its screens, but Publisher cannot add fields from Author to its screens, nor could Author add fields from Publisher.
- Relationships can be strict or permissive (similar to value lists). A permissive relationship allows the user to specify a value that does not already exist in the related content type. A strict relationship requires the user to select a value from the related content type. **Note**: Full integrity checking is not performed, even for strict relationships. For example, if a Book is associated with a Publisher, the system will not prevent the Publisher from being deleted, and the relationship will be broken.
- Search will not search or return related content type records. For example, if Book and Author are related and a user is searching Books, only Books will be searched and returned.
- A field can be changed to or from Related, as desired.
- If a control other than Link Grid is used, and multiple related records are found, only the first related record will be displayed.
- The number of records shown for the Link Grid or Link Edit control is determined by **MaxGridLinkItems** in Application Settings (default 100). For the Link Edit control, you can search for more terms.
- Advanced Search screens and Views do not support relationships.

Creating Relationships

This example will use the following association to create a Many to One relationship (many books to one publisher):

Referrer Content Type (**Book**), Field (**PublisherID**) ==> Target Content Type (**Publisher**), Field (**ID**)

We will assume that both content types already exist. If they did not exist, you would have to create Publisher first, so it would be available for selection as the target.

1. Choose **Configure>Content Types**.
2. Click the link to edit the Referrer content type (**Book**).
3. On the Edit Content Types page, click the **User Defined Fields** tab.
4. Create a field that will be used to make the association. For this example, we will use the **PublisherID** field, because we expect that it will contain matching values in records in both the Book and Publisher content types. Note that both the Referrer and the Target content types must be equivalent Data Types, and the user interface enforces this.
5. In the Create Field window, use the following controls to define the link between content types:
   - Enter the **Name** (PublisherID).
   - Optionally, enter a **Description**.
   - For **Data Type**, select Integer because the ID field in the Publisher content type is Automatic Number. (Automatic Number can be used as a target only if the Referrer is an Integer.)
   - Check **Related** to use the PublisherID field in the Book content type as the link.
   - Check **Related Strict** to specify a strict relationship (similar to strict value lists). A strict relationship ensures that the system will prevent the user from entering a value that is not in the related content type. **Note**: The default controls that are created do not exhibit this behavior, so you will have to reconfigure screens, as stated in step 8 below.
   - Select a **Related Content Type** (Publisher) to identify the target content type for the link.
   - Select a **Related Field** (ID) as the target of the link, to set up a relationship between two content types.
   - **Searchable**: Note that values from the related content type will not be searched. For example, if Book and Publisher are related and a user is searching Books, only Books will be searched and returned.
   - **Multi-Value**: For this example, do *not* check this box, so the Related field (PublisherID in the Book content type) can only contain a single value.
   - **Unique**: For this example, do *not* check this box. This means the Related field (PublisherID in the Book content type) does *not* need to contain a unique value in each record for the Book content type.
   - Fill in the other fields as you normally would.
6. Click **Update** in the pop-up window.
7. Click **Save** on the Edit Content Type page.
8. Your next step is to Configure Screens for Related Fields because the default controls do not incorporate relationships.

Configuring Screens for Relationships

After defining a relationship, you can add fields from the related content type to screens. The steps below are based on the following example:

Referrer Content Type (**Book**), Field (**PublisherID**) ==> Target Content Type (**Publisher**), Field (**ID**)

The publisher identification number provides the link between content types. When the ID is identical for records in the Book and Publisher content type, the records match and can be displayed.

Controls for Related Fields

Most controls can be used for related fields displayed on screens. However, the Link Edit and Link Grid controls should be used when multiple related records are expected to be displayed:

- The **Link Edit** control results in a pop-up window containing a grid so users can search for and select the record in the related content type. The Link Edit control is only available on the Add and Edit screens.
- The **Link Grid** control is a read-only control that results in a grid displaying related records. If a control other than Link Grid is used, and multiple related records are found, only the first related record will be displayed.

Note: The number of records shown for both controls is determined by **MaxGridLinkItems** in Application Settings (default 100). For the Link Edit control, you can search for more terms.

For more information, see Specifications for Content Type Relationships.

Creating an Add or Edit Screen for Relationships

The instructions below explain how to configure an **Add** screen for the Referrer content type (**Book**, in this example), which includes related fields from the **Publisher** content type. **Note**: Creating an Edit screen is essentially the same as creating an Add screen, so you can adapt the instructions below.

Prerequisite: Create a content type that includes a Related field. See Creating Relationships.

1. Choose **Configure>Content Types**.
2. Click the **Configure Screens** link next to Book (the Referrer content type, which includes a Related field).
3. On the Configure Screens page, click **Add Screen**.
4. In the Body section, edit the control **PublisherID**.
5. Use the Edit Control pop-up as follows:
   - **Associated Content Type**: This is already set to Book. Do *not* change this.
   - **Associated Field**: Under **Related Fields**, select **PublisherID => Publisher : ID**. The listed fields use the format *ReferrerField → TargetContentType : TargetField*.
   - **Control Type**: Select **Link Edit**. On the Add screen, this will result in a pop-up window containing a grid so users can search for and select the record in the related content type. For example, if you are on the Add Book screen, when you click the **Look up** button for the PublisherID field, you would see a grid containing perhaps Publisher Names, Cities and States, and when you click the link for one of them, the Publisher ID (not necessarily shown in the grid) would be pasted into the Book PublisherID box on the Add screen.
6. Select the field(s) that will appear in the Link Edit pop-up, after users click the **Look up** button:

- **Field**: Select the field(s) to display in the Link Edit pop-up.
- **Column Label**: The label that will identify this field in the Link Edit pop-up. If blank, it will use the field name.
- **Format String**: Optionally, type a format string, with {0} being the placeholder for the field data. For example, {0:d} uses the short date format, such as 10/31/2010. The string can include text and HTML tags. For example: *This record published on <i>{0:d}</i>*. For more information, see Format Strings for Text, Dates, and Numbers.
- **Width**: Pixel width of this field in the Link Edit pop-up. Enter only a value (do not include *px*). Information longer than the width will wrap.
- **Order**: Determines the order in which fields will appear in the Link Edit pop-up (if you added multiple fields). For example, set Name to 10 and State to 20 to make Name appear first, then State. The first field listed will be used as the link to copy the target field value into the edit box on the Add screen.
- Click **Add** by the list of fields if you want to add more fields to the Link Edit pop-up, or use **Delete** to remove a field.

7. Adjust the remaining Field Value Attributes:
   - **Default Sort Field**: The field by which information will be sorted by default in the Link Edit pop-up. When using the Link Edit control, you can click the column headings to change the sort order.
   - **Default Sort Order**: Indicate how fields should be sorted by default in the Link Edit pop-up. Ascending (the default) uses A to Z order. Descending may be more appropriate for Date fields, to list more recent dates first.
   - **Items per Page**: Type a value, such as 20, to indicate the maximum number of items to list per page in the Link Edit control. When the number is exceeded, users can click a link to display subsequent pages. If this value is left blank, all items will be shown on one page.
8. Adjust the **Field Label Attributes** to control how the field is labeled on the Add screen. For more information, see Screen Controls (Configure Screens).
9. Click **Update**.
10. Click **Save**.
11. To test the Add screen, select the **Book** content type from the **Add** menu. Examine the screen to see if any changes are required. Note that related fields with Link Edit controls have a **Look up** button next to them. Click the **Look up** button to see the Link Edit pop-up that you defined, and confirm that you are satisfied with the fields that are listed, their order, sort order, and number of items per page. Typically, you will want to make minor adjustments by editing the screen again, until you are satisfied with the appearance.

Creating a Detail, Print-Friendly, or E-mail Screen for Relationships

The instructions below explain how to configure a **Detail** screen for the Referrer content type (Book, in this example) which includes related fields from the Publisher content type. **Note**: Creating a Print-Friendly or E-mail screen is essentially the same as creating a Detail screen, so you can adapt the instructions accordingly. Note that Link Grid controls are not sent in Plain Text e-mail messages.

Prerequisite: Create a content type that includes a Related field. See Creating Relationships.

1. Choose **Configure>Content Types**.

2. Click the **Configure Screens** link next to the Referrer content type that includes a Related field (Book, in this example).
3. On the Configure Screens page, click **Detail Screen**.
4. In the Body section, edit the control for **PublisherID**.
5. Use the Edit Control pop-up as follows:
   - **Associated Content Type**: This is already set to Book. Do *not* change this.
   - **Associated Field**: Select **PublisherID => Publisher : ID**. (The listed fields use the format *ReferrerField → TargetContentType : TargetField*.)
   - **Control Type**: Select **Link Grid**. On the Detail screen, this will result in a grid displaying related records. The total number of records shown is controlled by **MaxGridLinkItems** in Application Settings (default 100). When displaying records on the "many" side of a relationship (i.e., if the relationship would result in multiple records), it is important to use a Link Grid control. If this is not done, then the control will only show the value from the first record retrieved.
6. Specify the field(s) that will appear in the Link Grid display on the Detail screen:
   - **Field**: Select the field(s) to include in the Link Grid display.
   - **Column Label**: Type a label to identify this field in the Link Grid display. If blank, the column heading will use the field name.
   - **Format String**: Optionally, type a format string, with {0} being the placeholder for the field data. For example, {0:d} uses the short date format, such as 10/31/2010. The string can include text and HTML tags. For example: *This record published on <i>{0:d}</i>*. For more information, see Format Strings for Text, Dates, and Numbers.
   - **Width**: Pixel width of this field in the Link Grid. Enter only a value (do not include *px*). Information longer than the width will wrap.
   - **Link**: Check this box if you want the field to act as a link to the record in the related content type.
   - **Order**: Determines the order in which fields will appear in the Link Grid display (if you added multiple fields). For example, set Name to 10 and State to 20 to make Name appear first, then State.
   - Click **Add** by the list of fields if you want to add more fields to the Link Grid display, or use **Delete** to remove a field.
7. Adjust the remaining Field Value Attributes:
   - **Default Sort Field**: The field by which information will be sorted by default in the Link Grid display.
   - **Default Sort Order**: Indicate how fields should be sorted in the Link Grid display. Ascending (the default) uses A to Z (low to high) order. Descending may be more appropriate for Date fields, to list more recent dates first.
   - **Items per Page**: Type a value, such as 20, to indicate the maximum number of items to list in the Link Grid. When the number is exceeded, users can click links to display subsequent pages. If this value is left blank, all items will be shown on one page.
8. Adjust the Field Label Attributes to control how the field is labeled on the Add screen. For more information, see Screen Controls (Configure Screens).

9. Click **Update**.
10. Click **Save**.
11. To test the Detail screen, do a search that retrieves a record in the Referrer content type (Book). Click one of the listed books to display the Detail screen. Examine the screen to see if any changes are required. Note that fields from the target content type (Publisher) are displayed in a Link Grid. Confirm that you are satisfied with the fields that are listed, their order, sort order, and number of items per page. Also check any links that you included. For example, you may have made Publisher a link (in the Summary or Body section). Typically, you will want to make minor adjustments by editing the screen again, until you are satisfied with the appearance.

Chapter 4: Configuring Screens and Views

Each content type has its own set of screens and views, which affect search, display, and print appearance. Default screens and views are generated when the content type is created. If you have the appropriate rights, you can configure screens and views.

Configuring Screens

Screens determine how a single instance of a record, blog post, user profile, or forum topic appears. You can edit screens, but you cannot create or delete them.

To configure screens

1. Choose **Configure>Content Types** and click **Configure Screens** for a content type. System Content Types (Blog Post, User Profiles, Forum Topics, and Reports) are listed at the bottom of the Configure Content Types page.
2. On the Configure Screens page, click a tab to indicate which screen you want to modify:
   - Advanced Search Screen: For searching within a content type.
   - Detail Screen: For viewing a record. The display is read-only. For Blogs and Forums, the Detail Screen is hard-coded and cannot be modified.
   - Print Friendly Screen: To format a record when printing or downloading as PDF or HTML.
   - Edit Screen: To edit an existing record. For Blogs and Forums, the Edit Screen is hard-coded and cannot be modified.
   - Add Screen: To add a new record. This screen should contain every Property Field the user is allowed to enter. For Blogs and Forums, the Add Screen cannot be modified.
   - E-mail Screen: Optimized for sending e-mail as HTML or Text. When e-mailing as Text, all Custom Value controls are removed and therefore not rendered.
3. Each screen consists of at least one section (Body, Summary, etc.), whose layout and appearance is determined by its **Controls**. Use the Configure Screens page to:
   - Add a control to a section of a screen by selecting **Create new Control** in that section.
   - Edit an existing control by clicking a link in the **Associated Field** column of a section.
   - Delete a control by clicking the **Delete** button to the right of the Associated Field.

   The **Controls** list on the Configure Screens page may include some or all of these columns:

Associated Field	Control Type	Label	Required	Order	Links to detail page
Lists each field on the screen. [Square brackets] indicate system-generated fields. (None) indicates a control that is not associated with a field.	The type of control	Text that identifies the control. The field name is used by default.	Search, Edit, and Add screens only. Indicates whether a value must be supplied by the user.	Change values to reorder controls. For example, if you have Title 10, Author 20, and Subtitle 30, you can move Subtitle up by changing its value to 15.	E-mail Screens only. Indicates whether the field serves as a link to the Detail Screen, so users can click the link to display details.

4. Use the **Create Control** or **Edit Control** pop-up window to define the control. (If you have a pop-up blocker enabled, this window will not appear. Disable your pop-up blocker and try again.) For descriptions of each available control, see [Screen Controls (Configure Screens)](#).
5. Click **Add** (or **Update**) to apply your changes and close the window.
6. Click the main **Save** button periodically. If this button isn't clicked and the session times out, all of your changes will be lost.

Notes

- If multiple users make changes to the screens for a content type at the same time, the changes of the last user who saves are retained. After saving changes to the screens for a content type, wait until the job completes before attempting to edit the screens for the same content type again.
- *Presto* generates each screen when the Content Type is created. Any field that is later added to the Content Type definition must be *manually* added to each screen, as needed. (The only exception is that new Required fields are added to the Add screen automatically.) If a field is deleted from the Content Type definition, any associated controls will be removed from the screens.

Types of Screens

Advanced Search Screen

The Advanced Search screen appears when users select a content type from the **Search** menu, so users can search for a specific content type.

To edit this screen, choose **Configure>Content Types**, **Configure Screens**, **Advanced Search Screen**.

This screen consists of the following areas:

Title. Specify the title of the screen. The default title is "Search [Content Type name]". For example: Search Archives.

Caption. Include instructions or a brief description to appear below the Title. For example: "Search the archives back to 1990. For earlier dates, contact the Research Center." You can include HTML tags to provide formatting or links to additional information.

Body Section. This is the main area of the search screen. By default, it lists all searchable user-defined fields specified when the content type was created, plus the Tags and Rating fields, if those features were enabled when the content type was created. It also contains the Associated Field **[AllText]**, which is a system field whose default label is "All Text". It is recommended that you leave this field on the screen so users can easily search all fields in a single content type.

You can add, edit, or delete controls to determine what appears in the body area. Click any Associated Field to change its settings, or click **Create new Control**. For descriptions of each available control, see [Using the Configure Screen Controls](#). Note that labels are required to identify each control. Specify a **Label Position** of Side (the default) or Above.

To require that a field appear on the screen, click the Associated Field link, then check the **Required** box on the dialog that appears. Some System Fields might not allow you to designate them as Required.

Change the **Order** values to reorder the controls. For example, say you have three fields, Title, Author, and Subtitle, with Order values of 10, 20, and 30 respectively. To move the Subtitle field up (so the order is Title, Subtitle, Author), specify any value between 10 and 20 (say 15) as the new Order value for the Subtitle field.

Detail Screen

The Detail Screen defines how a single record is displayed when it is viewed, after performing a search. **Note**: For Blogs and Forums, the Detail Screen is hard-coded and cannot be modified.

To edit this screen, choose **Configure>Content Types**, **Configure Screens**, **Detail Screen**.

This screen consists of the following areas. By default, all user-defined fields specified when the content type was created appear in both the Summary and Body sections. Click any Associated Field to change its settings. Click **Create new Control** to add a control. Click **Delete** to remove a control. For descriptions of each available control, see Using the Configure Screen Controls.

Title. Specify the title of the screen. The default title is "View [Content Type name]".

Summary Section. Specify which information should appear in the area at the top right of the screen, to summarize the record. For example, a news article might include Author, Date, and Headline. Change the Order values to determine the order in which the controls appear on the screen (ascending numeric value). If a control is listed as Required, this is derived from the properties of the associated field, not the screen.

Body Section. Use this section to specify which controls should appear in the main body of the screen, and specify a **Label Position** of Side (the default), Above, or None (if you do not want to include labels). By default, all user-defined fields specified when the content type was created appear in both the Summary and Body sections. The Summary Section also includes the Rating field if Ratings were enabled when the content type was created. The default Body Section includes the Tags and Comments fields if these features were enabled when the content type was created. Note that Required fields are determined by the field definition, not the screen.

A Detail Screen can optionally display a **See Also link** to other items of the same content type that have the same field value. To add a See Also link:

1. For **Associated Field**, select any field except an HTMLText field or a Text field whose size is Unlimited or greater than 250 characters. (An unlimited Text or HTMLText field cannot serve as a See Also link destination due to its size.)
2. For **Control Type**, select one of the following: Label, Hyperlink, Hyperlink File, Text Area Read-Only.

Print Friendly Screen

The Print Friendly Screen defines how records will be formatted for print when users click the **Print/View** button, and when they use **Download as PDF** or **Download as HTML**.

To edit this screen, choose **Configure>Content Types**, **Configure Screens**, **Print Friendly Screen**.

The Print Friendly Screen consists of the sections described below. Click any Associated Field link to change its settings. For descriptions of each available control, see Using the Configure Screen Controls.

Title Section. Specify which field should serve as the title. The field is used as a link to jump to the section of the page containing that record. Note that only one field can appear in the Title Section.

Body Section. Specify the main body of the report. By default, this section includes all user-defined fields specified when the content type was created, plus Tags and Rating fields if those features were enabled when the content type was created. Specify a **Label Position** of Side, Above, or None (the default). Change the Order values to determine the order in which the controls appear on the screen (ascending numeric value).

If a control is listed as **Required**, this is derived from the properties of the associated field, not by the screen.

Edit Screen

The Edit Screen defines which fields appear when a record of this content type is edited.

To edit this screen, choose **Configure>Content Types**, **Configure Screens**, **Edit Screen**. **Note**: For Blogs and Forums, the Edit Screen is hard-coded and cannot be modified.

The Edit Screen consists of the sections described below. Click any Associated Field to change its settings. For descriptions of each available control, see Using the Configure Screen Controls.

Title. Specify the title of the screen. The default title is "Edit [Content Type name]".

Caption. Include instructions or a brief description to appear below the title. For example: "Edit an existing article." You can include HTML tags to provide formatting or links to additional information.

Body Section. Add, edit, or delete controls to determine what appears in the main body area. Click any Associated Field to change its settings, or click **Create new Control**. For descriptions of each control, see Using the Configure Screen Controls. Typically, you would include a control for each field that users will be allowed to edit. Note that each field can have only one editable control on the screen. If you try to add another, an error message appears, and you must either delete the control or modify it before continuing. Labels are required to identify each control. Specify a **Label Position** of Side (the default) or Above.

Change the **Order** values to reorder the controls. For example, say you have three fields, Title, Author, and Subtitle, with Order values of 10, 20, and 30 respectively. To move the Subtitle field up (so the order is Title, Subtitle, Author), specify any value between 10 and 20 (say 15) as the new Order value for the Subtitle field.

If a control is listed as **Required**, this is derived from the properties of the associated field, not by the screen.

Add Screen

Each content type has a customized Add Screen. The Add Screen determines what the screen looks like when adding a new record for a particular content type.

To edit this screen, choose **Configure>Content Types**, **Configure Screens**, **Add Screen**. **Note**: For Blogs and Forums, the Add Screen is hard-coded and cannot be modified.

The Add Screen consists of the sections described below.

Title. Specify the title of the screen. The default title is "Add [Content Type name]". For example: "Add Archives".

Caption. Instructions or a brief description to appear below the title. For example: "Add a new article to the catalog." You can include HTML tags to provide formatting or links to additional information.

Body Section. This is the main area of the Add Screen. Click any Associated Field to change its settings, or click **Create new Control**. For descriptions of controls, see Using the Configure Screen Controls. Typically, you would include a control for each field that users will be allowed to specify when adding a record for this content type. By default, this section includes all user-defined fields specified when the content type was created, plus any required fields added later, plus Tags if Tags were enabled when the content type was created, plus Category. You can add or remove controls to determine what appears in the body area. Note that each field can have only one editable control on the screen. If you try to add another, an error message appears, and you must either delete the control or modify it before continuing. Labels are required to identify each control. Specify a **Label Position** of Side (the default) or Above.

Change the **Order** values to reorder the controls. For example, say you have three fields, Title, Author, and Subtitle, with Order values of 10, 20, and 30 respectively. To move the Subtitle field up (so the order is Title, Subtitle, Author), specify any value between 10 and 20 (say 15) as the new Order value for the Subtitle field.

If a control is listed as **Required**, this is derived from the properties of the associated field, not by the screen.

E-mail Screen

Each content type has a customized E-mail Screen, which determines the appearance of e-mails that are sent when users click the **E-mail** button on the Search Results page, Detail Screen, InfoCart, or Browse Collection page. The resulting dialog lets users specify the recipient's name, Subject line, and an optional message. They can also indicate whether to send the e-mail as HTML or Plain text, and whether to send items in a single e-mail or as separate e-mails. The return e-mail address is the e-mail address on file for the user logged in to *Presto*.

To edit this screen, choose **Configure>Content Types**, **Configure Screens**, **E-mail Screen**.

The E-mail Screen consists of the sections described below. Click any Associated Field to change its settings, or click **Create new Control**. For descriptions of each available control, see Using the Configure Screen Controls.

Title Section. In the Controls area, specify an Associated Field that will serve as the title of the screen. Use the Label Position drop-down list to indicate the position of the title. The Links to Detail Page column indicates whether the selected field will provide a link to the Details Screen, so users can click the title to get more information. To turn this setting on or off, click the Associated Field link then check or clear the **Links to detail page** option.

Body Section. Specify how the main body of the e-mail should appear. Click an Associated Field to change its settings. Change the Order values to determine the order in which the controls appear on the screen (ascending numeric value).

Files Section: Specify the following options:

- **Attach Files to E-mail**: Check this box to attach the files associated with the record(s) to the e-mail message. This specifies whether image and document files are included as attachments.
- **Append File Names to End of Body Section**: Check this box if you want the attached file names included at the end of the body of the e-mail.
- **Maximum E-mail Size (KB)**: Optionally, specify the maximum size allowed for an e-mail message, in Kilobytes. If the e-mail exceeds the specified size, it will not be sent. For example, if you specify 100KB and you send 10 records with 10KB files each, the message will not be sent.

Signature Section: Optionally, use the HTML Editor to include a signature that will be included at the end of each e-mail for this content type. This might be your company information or disclaimer text.

Using the Configure Screen Controls

Each screen consists of at least one control. Most Control Types are designed for use with screens that accept user input. Others just display content or provide links for viewing content. For more information, see Configuring Screens.

Control Types for Screens

All of the possible Control Types are listed below. The ones that are available depend on which type of screen you are configuring and which Associated Field is selected. For details about each control, see Field Value Attributes for Controls on Screens.

Control Type	Description
Boolean Search	Option buttons for Search Screen with values Any, True, False.
Categorylink	Link to the Browse Collection page for that category.
Checkbox	Selected = True, deselected = False.
Checkboxgroup Search	Produces two option buttons labeled **Any Item** and **Selected Items** and a checkbox control for each item in the value list.
Comments Listing	A set of controls to display comments and indicate whether they were helpful.
Custom Value	Allows you to design customized controls. This control appears at the bottom of most control-selection drop-down lists.
Date Edit	A text box for typing a date and a calendar control for selecting a date.
Date Search	A set of controls to facilitate date searches.
Datetime Search	A set of controls to facilitate date/time searches.
Dropdown	Produces a drop-down list containing items on the value list.
File Edit	Control for browsing to and uploading a file.
HTML Edit	Rich Text box with formatting controls.
Hyperlink	Link to the URL's target page; or if it's the only control in the Body section, displays the target Web page.
Hyperlink Edit	A text box for typing or pasting the URL, a **Test URL** button, and a text box for typing Alternate Text to display in hyperlinks.
Hyperlink File	Link to open the file and view content; or if it's the only control in the Body section, shows the image or document (provided that the browser in use is capable of rendering the document type).
Label	Displays simple field content. Use the available Attributes to determine how the information is formatted. Assigning a **Label** control to any field on an Edit screen renders that field read-only.

LinkEdit	Available only for Related fields on Add/Edit Screens. It opens a pop-up window containing a Grid which allows you to search for and select the record in the other content type to which you want to Link. For example, if you're on the Edit Catalog Record screen, when you click the Lookup button for the Supplier field, you would see a grid containing perhaps Supplier Names, Cities and States, and when you click the link for one of them, the Supplier ID (not necessarily shown in the grid) would be pasted into the Supplier Edit box. To access the Link Edit control, configure a screen and go to the Edit Control pop-up, and select a Related field in the Associated Field list. Then you can select Link Edit from the Control Type drop-down list.
LinkGrid	Available only for Related fields, and only for Detail, Print-Friendly, and Edit Screens. An associated (target) Content Type uses a Link Grid to display records that refer to it. Link Grid is used only on Detail, Print-Friendly & Edit Screens. For example, the Link Grid on an Edit screen might show all Archives records with the same Issue Date specified in the Covers record. So one magazine (with a cover) might have 50 articles in it, which would appear in the Link Grid. To access the Link Grid control, configure a screen, go to the Edit Control pop-up, and select a Related field in the Associated Field drop-down list. Then you can select Link Grid from the Control Type list.
List to List	Produces two side-by-side lists. The **Available** list on the left contains value list items. The **Selected** list on the right shows selected items. Additional controls support selecting and removing items and clearing the Selected list.
Membership (Password) Edit	For the Profile Content Type only. The User Name and Password are a single control. The Associated Field is "UserName", and the Control Type is "Membership (Password) Edit". Examples of usage: (a) Deleting the "UserName" control from an Edit screen removes both the User Name field as well as the Password link. (b) In order for the Change Password button to appear, you have to use the Membership (Password) Edit control. (c) If you change "User Name" to be a Label in the Profile Edit Screen, you won't be able to change the password.
Popup Lookup	Produces a **Look Up** button that, if clicked, opens the value list, so users can select an item to search for. If the value list is **permissive**, users can also type in the box.
Radiogroup	Produces an option button for each item in the value list.
Rating Search	A set of controls to permit searches by My Rating or Overall Rating.
Tag Cloud or Social Tags Edit	Tag Cloud displays tags as clickable search links. Font size and color indicate how often the tag is used in a record. Social Tags Edit is an editable, scrollable text box.
Tag Cloud or Text Area Read Only	Tag Cloud displays tags as clickable search links. Font size and color indicate how often the tag is used in a record. Text Area Read Only lists tags with the count after the tag in parentheses.
Text Area Edit	Scrollable text box. Separate values with line breaks.
Text Area Read-Only	Scrollable window for viewing the text.
Textbox	Single line text box.
User Ratings	Displays two rows of stars for users to specify their ratings and see overall ratings. Will not appear on the Add Screen.

Field Value Attributes for Controls on Screens

The following table describes the Field Value Attributes for controls available when configuring screens. The control that you are configuring may include one or more of these attributes, depending on the control type, the screen type, and the type and properties of the associated field.

Field Value Attribute	Description
Associated Content Type	Specify which Content Type the control is for, by selecting an item from the Associated Content Type list.
Associated Field	Select a field from the Associated Field list list. [Square brackets] indicate System Fields. If you want to create a Custom Value control, select (None) to indicate that the control is not associated with a field.
Control Type	The available Control Types depend on the selected Associated Field and the screen type.
Required	Available on the Advanced Search screen only. Check this box if the control must be populated for all searches. (Note that controls on Add and Edit screens may also be required, but this is derived from the properties of the associated field.)
Links to Detail Page	Available on the E-mail Screen only. Typically used for the Title field. Check this box if you want the selected field to link to the Details Screen, so users can click the Associated Field to get more information.
Value Separator (HTML)	Applies only to controls for Multi-Value fields. It will appear for Label controls, and for Custom Value controls that use the Associated Field Value. Change the value from the default ( ) to control how multiple values appear. For example, you can separate multiple values with a semicolon and a space instead of having one on each line.
Font attributes (name, size, color, etc.)	Colors can be specified in a variety of formats including name, RGB value (100,200,215), or #A31318 format. You can specify multiple font names separated by commas (Verdana, Courier) if you are not sure the primary font will be available on all systems.
Format String	Specify how dates, numbers, or text in the field should appear. The Locale affects formatting of dates and other values. For example, {0:d} specifies the short date format, so *December 6, 2009* would appear as *12/06/2009* for the English - United States Locale. {0} indicates field content. For more information, see Format Strings for Text, Dates, and Numbers.
Width	Specify width of control in pixels. Width is also used to specify the width of a thumbnail for **Hyperlink File** controls on Detail screens, and the width of a thumbnail for **File Edit** controls on Add and Edit screens.
Height	Specify in pixels.
Number of repeat columns	Used instead of Width and Height for certain controls, such as Radiogroup or Checkboxgroup.
Repeat direction	Vertical or Horizontal.
Suppress control if associated field is empty	Typically used on Detail or Print Friendly screens. Applies to read-only controls (labels, hyperlinks, or read-only text areas).
PopWidth and PopHeight	Specify the width and height of the pop-up window in pixels. The pop-up window appears only if the file in question contains an image.

Truncate value when a word exceeds this number of characters	Use for trimming long text fields. Especially useful to prevent display of a large number of characters with no embedded spaces (which might not wrap, distorting the view). The truncated value appears in the screen, but the full value can be seen in the tool tip for the control.
Display see also link	Applies only to the Detail Screen, for certain controls. Provides a link to other items of this content type with the same field value. Note that a field whose size is Unlimited or over 250 characters cannot serve as a See Also link destination due to its size.
Date Search Options	Advanced Search Screen only. Provides a series of check boxes for selection of date search options that will appear in a drop-down list on the search screen, in addition to controls for more precise specification.

Field Label Attributes for Controls on Screens

The Field Label identifies the field associated with the control on a screen. The following attributes can be specified for a field label:

- **Position**. Inherit (default; means use the position established for the current screen section), Side, Above, None (for read-only controls)
- **Text**. Associated field name (default), or alternate text that is entered
- **Font Size**.
- **Font Names**. You can specify multiple font names separated by commas (Verdana, Courier) if you are not sure the primary font will be available on all systems.
- **Text Color**. Colors can be specified in a variety of formats including name (Red, Green, Blue), RGB value (100,200,215), or #A31318 format.
- **Effects**. Select **Bold**, **Italicize**, **Underline**, **Overline**, or **Strikeout**.

Custom Value Controls for Screens

Custom Value controls can be added to a screen to accomplish advanced operations that are not possible using other controls. They are often used to create hyperlinks or as a more powerful alternative to Format Strings.

Warning: Custom Value controls are very powerful. Be sure the value specified conforms to the surrounding HTML in the template.

To add a control that is *not* associated with a field

Add a Custom Value control that is *not* associated with a field if you always want the control to appear. For example, you can add explanatory text above an edit or query box to explain what to type in that box.

1. Choose **Configure>Content Types**, click **Configure Screens** for a content type, and click the tab for the type of screen you want to configure.
2. Click **Create new Control** or edit a control by clicking a link in the **Associated Field** column of the desired section.
3. Select **(None)** in the **Associated Field** drop-down list.
4. The **Control Type** and **Custom Value Output Type** will be set to **Custom Value**.

5. In the **Custom Value** field, enter standard text or HTML or Javascript. For example:

```
<script type="text/javascript">doc.getElementById('cntrlID_50701').value
= 'Edition';</script>
```

To add a control that is associated with a field

Associate a Custom Value control with a field if you do *not* want the control to appear when the field is empty, or if you want to include the field contents in the result (see the example above, "Written by Mark Twain."). You can also use this method to create links to pages, so you can construct a link that behaves like a search result. For example, in a database of magazines, you could create an "Associated Records" link for a field on a Detail Screen to search magazine archive records with the same Issue Date. You can also create e-mail links.

1. Choose **Configure>Content Types**, click **Configure Screens** for a content type, and click the tab for the type of screen you want to configure.
2. Click **Create new Control** or edit a control by clicking a link in the **Associated Field** column of the desired section.
3. Select a field in the **Associated Field** drop-down list. Only certain fields allow custom value controls to be set.
4. Set the **Control Type** to **Custom Value**.
5. Set the **Custom Value Output Type** to **Associated Field Value**. This will cause the content of the Associated Field to appear when the screen is used.

   Note: To achieve certain results, you may need to add multiple custom controls, where the **Custom Value Output Type** is set to either **Custom Value** or **Associated Field Value**. Please see the example following these steps.
6. [optional] Enter a **Format String** (see Format Strings for Text, Dates, and Numbers).
7. [optional] Enter a value for **Truncate value when a word exceeds this number of characters**, to control the display length.
8. When a Custom Value control is associated with a field, the **Suppress Control If Associated Field Is Empty** box is always checked. This ensures that the control will not appear if the value of the associated field is empty. If the control should always appear, do not associate it with a field.
9. [optional] Specify the **Encode Value** to construct a search hyperlink based on the current field value:

   None: Do not encode values (use the information exactly as-is to construct the URL).

   URL Encode: Use this option for textual data to ensure that non-alphanumeric characters are rendered properly. For example, a space will be rendered as %20.

   Base64 Encode (if encoding numeric values): Base64 encoding must be used if you are constructing a search link using the **ContentItemId** field. If the Content Item ID value is not encoded, it will not work for all values.

   Search Encode: Use this option to encode the link in the same way that *Presto* encodes searches internally when constructing links to pages, so you can construct a link that behaves like a search result.

10. If you are adding a Custom Value control to a Detail screen, the **Suppress Highlighting** option is available. Check it if you want to prevent search criteria from being highlighted when the record is displayed.

Example: Three Custom Value Controls Associated with the Same Field
To display the text "`Written by Mark Twain.`", three Custom Value controls are used. Each control is associated with the Author field, so none of the controls will appear if that field is empty. Controls 1 and 3 supply surrounding text and formatting (using HTML table tags to align the content). Control 2 supplies the field content (Author's name).

Control 1: Formatting to add before field content	
Associated Field	Author
Custom Value Output Type	Custom Value
Custom Value	<tr valign="top"><td colspan="2">Written by
Control 2: Field content	
Associated Field	Author
Custom Value Output Type	Associated Field Value
Control 3: Formatting to add after field content	
Associated Field	Author
Custom Value Output Type	Custom Value
Custom Value	**.**</td></tr>

Configuring Views

Views determine how records, blogs, and user profiles are displayed and how alerts appear. When a new content type is created, default views are generated. You can modify the default views, create additional views, or delete views.

To configure views

1. Choose **Configure>Content Types**, and click **Configure Views** for a content type.

   The Configure Views page lists five types of views: Citation View, Gallery View, Grid View, Alert View, RSS Feed View.

2. Use the **Single Content Type Filtered View** drop-down list at the top of the page to specify which view will be used by default when displaying items of this content type (for example, to display records in a filtered search result). When a new content type is created, the Citation View is used by default. If you want to use a different view, select it from the list. All views defined for the content type are listed, except the Alert View and the RSS Feed View.

3. Next to a particular type of view, either click the view name to edit it, or click **Create new View**. (To delete a view, click the **Delete** link, if available.)

4. Specify the following information for the view that you are creating or editing. You can may see some or all of these fields:

   - **Name**. Assign a unique name or phrase to identify the view in drop-down lists

- **Description**. Provide optional information about the view. The description appears only on the Configure Views page.
- **Record Separator (HTML)**. Use HTML to indicate how to separate records in the view. The default value is a line break
. Record separators are used in all views except the Grid View.
- **Default Sort Field**. Indicate which field should be used to determine the default sort when the view first appears. The list includes Relevance (the default) and all fields that are included in the view. The Default Sort is used only when displaying a single content type (for example, in each section of the "Summary by type" search results). See **Default Sort Order, below.**
- **Default Sort Order -** Indicate how records should be sorted. You can choose Descending (default, most appropriate for relevance or date sorts) or Ascending (most appropriate for all other sorts). **Note:** The Default Sort is ignored in situations where multiple content types are displayed. For example, the Default Sort does not apply to Browse Collection, because each Browse category can show content items from multiple Content Types. Since multiple Content Types inherently use different views, no individual view's Default Sort Order can be used.

Each view contains at least one section for displaying content. The view items that you place in sections determine which content will appear.

	Citation View	Gallery View	Grid View	Alert View	RSS View
Thumbnail Section: Serves as the main body of the Gallery View. Displays small images that serve as a preview and provide links to the Detail page.		x			
Title Section: Consists of the record title or similar identifier, which typically provides a link to the full record.	x	x		x	x
Snippet Section: Contains one or more fields that summarize the record, such as author, date, and a limited amount of text from the record body. NOTE: **Note**: Images specified in the Snippet Section of the RSS Feed View are displayed in *Presto* RSS feeds if the user is logged into *Presto* (for example, in the RSS Web Part on the *Presto* home page). If the feed is accessed via a third-party feed reader, `/images/ui/not-available-image.gif` is displayed instead of the image.	x	x		x	x
Default Section: Serves as the main body of the Grid View. Typically contains several fields such as title, author, and date, with one of those fields providing a link to the Detail screen.			x		

5. In the desired section, either edit an existing item by clicking an **Associated Field** link, or click **Create new View item**.
6. Use the **Create/Edit View Item** pop-up window to define the item. The available options depend on the content type, view type, and section that you are configuring. **Note:** If you have a pop-up blocker enabled, this window will not appear. Disable your pop-up blocker and try again.

- **Associated Field**. Select a field from the list. This list includes all of the fields that are available for this content type, including user-defined fields, System fields maintained by *Presto* (shown in square brackets) and Class Attributes. A value of (None) indicates a control that is not associated with a field (not typically used).
- **Format String**. Type a format string, with {0} being the placeholder for the field data. For example, {0:d} indicates the short date format, such as 12/6/2008. The Locale of the logged-in user affects the formatting. Note that the string can include text and HTML tags. For example, the Format String *This record published on {0:d}* will produce output such as *This record published on 12/6/2008.* As another example: If you specify *"List Price: <i>{0:C}</i>"* (without the quotes), the value "15" in a Decimal field will appear as *List Price: $15.00*, if the Locale of the logged-in user is English - United States. For a list of valid format strings, see Format Strings for Text, Dates, and Numbers.
- **Links to Detail page**. Check this box if you want this field to serve as a link to the Detail screen for this record. In some cases, this box is already checked (for all fields in a Title or Thumbnail section) and cannot be cleared. This control is not available for fields in a Snippet section.
- **Suppress Control If Associated Field Is Empty**. Clear this box if the control should be displayed even if the field is empty (contains no information). This control is usually selected by default. It is not applicable to Grid Views.
- **Item Separator (HTML)**. Enter the separator that should be used after the current field. The default is a line break (
). If you do not want line breaks, you can specify another character, such as a space ( ) or a non-breaking space ( ) or a comma-space. This provides a way to concatenate several fields into one paragraph in a Citation View. If you installed the sample data, you can look at the Sample CD Citation View, which uses a slash surrounded by non-breaking spaces (/) between Title and Artist. Note that Grid Views do not have item separators.
- **Maximum Visible Characters**. Specify the maximum number of visible characters that should appear (the default is 1024), or select **Unlimited** to display all characters. This value determines how much of the field content to display in the Snippet or Default section. Typically, you should show just enough text to help users get an idea of the record's content, but not enough to take up too much of the screen. This item is not applicable to the Thumbnail section.
- **Sort Property Label**. Specify text to identify this field in the **Sort by** drop-down list on the Search Results page. The default is the associated field name. Not applicable to Alert View or RSS Feed View.
- **Column Header Label**. Use the associated field name as the column header, or specify the text you want to use. This field only applies to Grid Views.
- **Column Alignment**. Specify left, center, or right. Grid Views only.
- **Wrap Column Text**. Specify whether column text should wrap. Grid Views only.
- **Column Width**. Specify the width of this column. Grid Views only.

7. Click **Update** (or **Add**) to save changes, then **Close Window**.
8. On the main Configure View page, click **Update**.
9. On the Configure Views page, click **Save**. Wait until the job completes before attempting to edit the views for the same content type again.

Note: Click the main **Save** button periodically as you edit views. If this button isn't clicked and the session times out, changes will be lost. If multiple users are making changes to the views for a content type at the same time, the changes of the last user who saves are the ones that are retained.

Types of Views

There are five types of views, described below. Each view determines how content appears.

Citation Views

A Citation View displays records in paragraph format on the Search Results page, the InfoCart, and Browse Collection. At least one Citation View must be defined. *Presto* generates a default Citation View when a content type is created. A Citation View contains a Title Section, which identifies the record, and a Snippet Section, which contains one or more fields that summarize the record. The Snippet Section of the default view includes the following fields in the order listed:

- All user-defined fields for the content type
- [Category], the system field containing the category or categories assigned to the item

If you have more than one citation view, specify a **Default Citation View**.

Note that the Default Sort specified for the Citation View will be ignored for Browse Collection, which uses the order in which items are arranged in the category. (*Presto* cannot apply a Default Sort because each Category can include content items from multiple Content Types, which inherently use different views.)

Click any Associated Field to change its settings. For more information, see Configuring Views.

Gallery Views

A Gallery View displays records as thumbnail images. Gallery Views are optional and are not available for all content types. *Presto* does not supply a default Gallery View. A Gallery View consists of a Thumbnail Section (the main body), a Title Section, which identifies the record and usually provides a link to the full record, and a Snippet Section, which contains one or more fields that summarize the record. For more information, see Configuring Views.

Grid Views

A Grid View displays records in a tabular format on the Search Results page. Grid Views are optional and are not available for all content types. *Presto* does not supply a default Grid View. A Grid View consists of a Default Section, which serves as the main body of the view. It typically contains several fields, with one field providing a link to the Detail screen. For more information, see Configuring Views.

Alert View

The Alert View determines the appearance of e-mail messages that are used to deliver alerts. For blogs, the Alert View is used to format a Blog Post for inclusion in an Alert message. The Alert View is also used for RSS Feeds if no RSS Feed View exists. Each content type can have only one Alert View, which cannot be deleted. The Alert View also determines which fields are included in the Content Events portion of the Event Log (**Reports>View Event Log**), for events that have been activated (**Configure>Events**).

An Alert View consists of a Title Section, which identifies the record, and a Snippet Section, which summarizes the record.

A default Alert View is generated when a content type is created. The default view contains only the first field in the content type at the time the content type was created. You can add more fields as desired. However, it is recommended that you only add the fields that users will want to see in e-mail messages. You can use the RSS Feed View to control which fields appear in RSS feeds. Adding fields to the Alert View increases the size of the Event Log.

The Alert View controls only a portion of the information sent in an alert. The alert message automatically includes the Full Name (first and last) of the user who made the change, a date and time stamp, and other information. Typically, you would use the Alert View to include just one or two fields (enough to briefly identify the record). For example, you could include one identifying field in the Title Section (and nothing in the Snippet Section).

For more information, see Configuring Views.

RSS Feed View

An RSS Feed View is very similar to an Alert View. It is used for delivering messages to an RSS Feed. For blogs, this view is used to format a Blog Post for inclusion in an Alert message directed to an RSS feed. If an RSS Feed View is not defined, the Alert View will be used. Each content type can only have one RSS Feed View. For more information, see Configuring Views.

An RSS View consists of a Title Section, which identifies the record, and a Snippet Section, which summarizes the record.

Note: Images specified in the Snippet Section of the RSS Feed View are displayed in *Presto* RSS feeds if the user is logged into *Presto* (for example, in the RSS Web Part on the *Presto* home page). If the feed is accessed via a third-party feed reader, `/images/ui/not-available-image.gif` is displayed instead of the image.

Deleting a View

If there is just one view defined, you are not allowed to delete it. For example, you can only define one Alert View for each content type, so you cannot delete that view. However, if there are multiple views defined, you can delete the additional views.

To delete a view

1. Choose **Configure>Content Types**.
2. Click **Configure Views** for a content type.
3. On the Configure Views page, click the **Delete** link that appears to the right of the view name. This link only appears if there is more than one view defined.
4. Click **Save**.

Format Strings for Text, Dates, and Numbers

When configuring screens or views, you can include Format Strings to affect how text, dates, and numbers appear. **Note**: In addition to the formats described below, you may be able to use any of the Microsoft .NET Framework 3.5 format characters (http://msdn.microsoft.com/en-us/library/97x6twsz.aspx), but you should test the screens and views before use to ensure that the formatting appears as you intended.

Formatting Dates and Times

To change the appearance of dates, specify a Format String for a Date or Timestamp field (including Date Created and Date Modified system fields) when you use Configure Screens or Configure Views. The Format String must include {0} as the placeholder for the field data, as shown in the examples below. A formatted date uses the settings for your Locale.

You can include text and HTML tags as part of the Format String (outside of the brackets). For example, you can define a Format String that says *This record published on {0:d}*.

Supported formats are shown below, with examples of how December 6, 2009 would appear with an English - United States locale (on the East coast).

Date Formats (for Date fields)	
{0:d}	12/6/2009
{0:D}	Thursday, December 06, 2009
Timestamp Formats (for Timestamp fields)	
{0:d}	12/6/2009
{0:D}	Thursday, December 06, 2009
{0:g}	12/6/20091:36 PM EST
{0:G}	12/6/20091:36:58 PM EST
{0:f}	Thursday, December 06, 20091:36 PM EST
{0:F}	Thursday, December 06, 20091:36:58 PM EST
{0:t}	1:36 PM EST
{0:T}	1:36:58 PM EST

Formatting Numbers

Formatted numbers use the decimal and currency symbols for your Locale. The following table shows examples of Format Strings applied to the number 1234 with an English - United States locale, with {0} being the placeholder for field data.

Number Format	Result
{0:g}	1234.0000
{0:n}	1,234.00
{0:n01}	1,234.0
{0:f}	1234.00
{0:c}	$1,234.00

For **Screens**, the appearance of numbers is controlled by the Format String specified for the field in **Configure>Content Types>Configure Screens**. If no Format String is specified for the Detail Screen, numbers will include no significant zeros to the right of the decimal (for example: 2). You can include text and HTML tags in the Format String (outside of the curly brackets). For example, *Original cost was {0:n} USD.*

For **Views**, the appearance of numbers is controlled by the Format String specified for the field in **Configure>Content Types>Configure Views**. Views used on the Search Results page have 4 significant zeros to the right of the decimal (for example: 2.0000). You can modify this by changing the Format String. Note that you can include text and HTML tags as part of the Format String (outside of the curly brackets). For example: *This item has a list price of {0:c}*. For more information, see Configuring Views.

Formatting Multi-Value Fields

For Multi-Value fields, the text of the Format String appears only before the first value and after the last value, as shown in the example below. The values are separated by the Value Separator specified for the field in its content type definition.

Example:

If the Format String for a Decimal field is: Cost: {0:c}!!!

And the Value Separator is: --

Then the result is: Cost: $12.30 -- $45.60 -- $78.90!!!

To format a multi-value field to produce the example output shown above:

Note that this example discusses Screens, but you could also perform these steps for Views.

1. Use **Configure>Content Types** to create a new content type with a Multi-Value field. For this example, create a Decimal field and use a double dash as the value separator.
2. Use **Configure Screens** to modify the **Detail Screen** to set the fields to have a **Format String** in this format: **Cost: {0:c}!!!**
3. Choose the new content type from the **Add** menu, type multiple values in the multi-value fields, then **Save** the record.
4. Do a search, then examine the Detail Screen. The **Cost:** text appears before the first value, and the **!!!** appears after the last value. The value separator (--) appears between each value.

Chapter 5: Configuring the Home Page

The home page serves as the *Presto* portal and is the first page that users see when they log in. Administrators can configure the home page for their organization, and optionally provide different home pages for different roles.

Configuring a home page involves adding Web Parts to zones (areas) of the home page. By default, each home page consists of six **zones** labeled **I** through **VI**. (Depending on how *Presto* was configured, your home page might have a different number of zones and they might be labeled differently.) You cannot add or remove zones when configuring a home page, but you can add or remove as many Web Parts as you want. For example, you might add two Featured Collections to zone 3 and a Quick Search box to zone 1. Removing all Web Parts from a zone results in an empty zone.

The following Presto Web Parts can be used on a home page:

- **Featured Collection**. Each collection provides links to a taxonomically organized content collection.
- **HTML Area**. Provides news or information, and can include links and images.
- **Presto Reports**. Displays a report.
- **Quick Search**. Lets users quickly search across multiple content types.
- **RSS Feed**. Delivers real-time information, such as news feeds, from the specified source(s). This is also how you display *Presto* blog content on a home page (add the RSS feed URL for a *Presto* blog).

You can change the content and appearance of each Web Part, but not the size. Each Web Part is dynamic and will expand in size to accommodate its designated content, within its zone.

Presto uses a default skin with a gray and blue theme. An alternate skin, with a white and green theme, is also installed.

Quick Start for Configuring a Home Page

1. Choose **Configure>Home Page**. (Note that the System Permissions for your role must allow "Configure Basic User Interface".)
2. In this step, you will specify a combination of **role and locale**, in order to configure the home page for all users who log in with that combination.

   Tip! Home pages are role-based. Every user with a particular role specified as their Primary Role sees the same home page. Therefore, you should configure the home page for the Everyone role first, since it serves as the default for all roles. You do *not* have to configure a different home page for each role. All roles will use the Everyone page unless a home page is explicitly configured for another role.

   a. Click the **Select Role & Locale** button.

   b. Use the pop-up control to select a login combination:

   - **Role**. Choices include Everyone (default), System Administrator, Content Administrator, Viewer, and any other roles you have added. Typically, the Everyone home page is the only one you need to configure, since it serves as the default for all roles. The only reason to modify a page other than Everyone is if you want different pages for different departments, for example, or if you plan to have one home page for Administrators and one for users.

- **Locale**. The locale identifies regional and language settings, to determine the appearance of numbers, dates, time, language, and home page for the logged-in user. Choices may include English (US, Canada, UK, New Zealand, Australia) and Francais (Canada), depending on how *Presto* was configured.

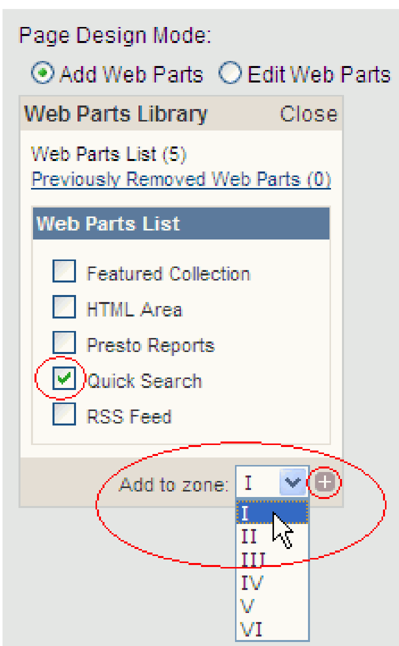
c. Click **Load Page**.

3. Add and edit Web Parts, as explained below.
4. To permanently save your work, click **Publish**. This rolls out your changes to all *Presto* users whose Primary Role corresponds to the role whose home page you just configured. Users will see the changes the next time they navigate to the home page.
5. [Optional] You can use the **Export**, **Import**, and **Clear All** buttons to back up home pages for safekeeping, eliminate previously-removed Web Parts to improve performance, or clone an existing home page to be used for a new role. See Using Export, Import, and Clear All.
6. To exit the home page designer, click **Exit**. (If you did not Publish first, your changes will be lost.) For more information, see Publish and Exit.

The following sections explain how to add Web Parts, specify their content and formatting, and drag them to reposition them on the page. If you no longer want a Web Part to appear, you can remove it; and you can easily add it back again if you change your mind.

To add a Web Part to a Presto home page

1. Select **Add Web Parts** as the **Page Design Mode**. Notice that the Web Parts Library appears at the left of the screen.
2. Check one or more boxes in the **Web Parts List**, select a zone from the **Add to zone** list, then click the ⊞ **Add** button.



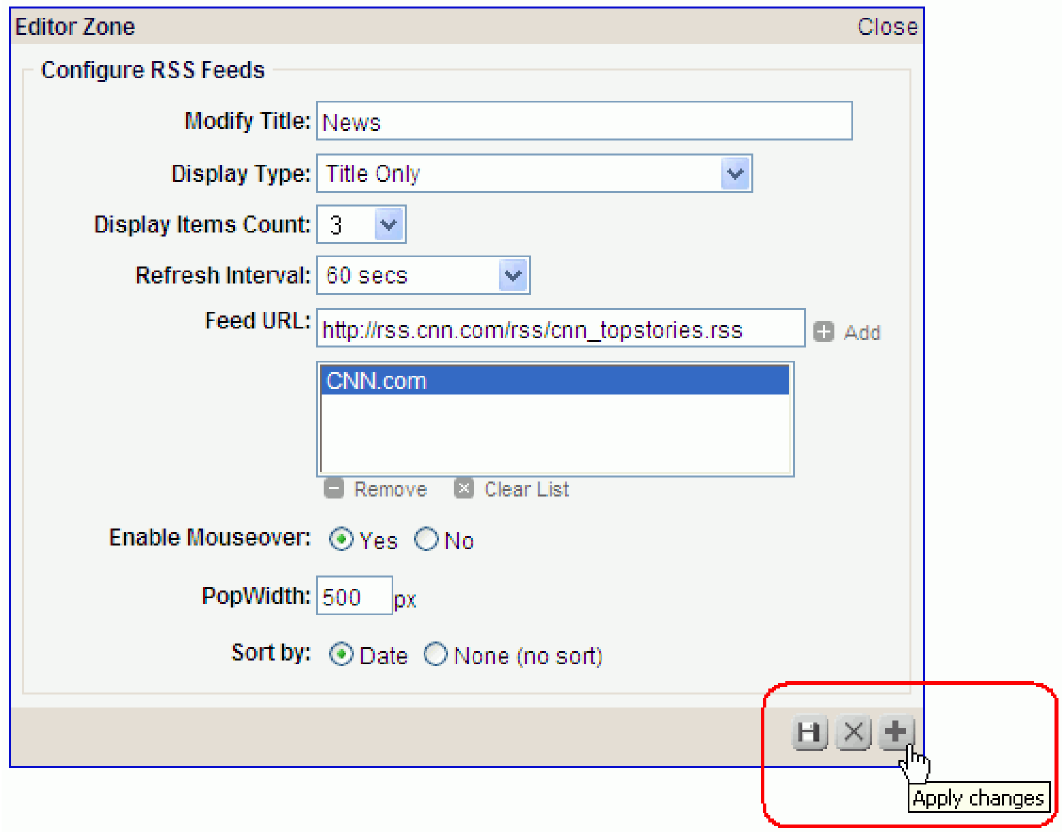
The Web Part (with default content) is added to the specified zone, and the screen layout is automatically saved in the editor. The lower half of the page provides a preview

3. Now edit the Web Part to define its content (see below).

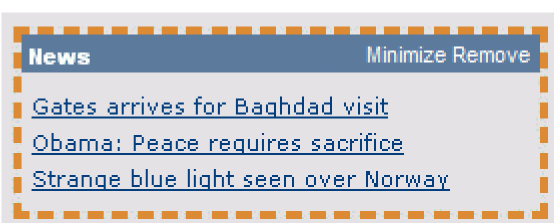
To edit Web Parts on a Presto home page

You can edit a Web Part to specify its content and formatting:

1. Select **Edit Web Parts** as the **Page Design Mode**.
2. Click **Edit** in the title bar of the Web Part that you want to edit.
3. This opens an editor zone, which contains settings specific to that Web Part. Adjust the settings to affect the Web Part's appearance and functionality, as described in the topic Presto Web Parts.
4. To preview (and temporarily save) your changes, click the **Apply changes** button at the bottom right of the Web Part editor zone.



5. In the lower part of the screen, the area you are working on is highlighted so you can easily see your changes as you apply them:



6. To permanently save your changes, click **Publish**.
7. Click **Exit**.

To remove a Web Part

- Click **Remove** in the Web Part's title bar. You can do this in either Page Design Mode.

To replace a Web Part that you removed

1. Select **Add Web Parts** as the Page Design Mode.
2. In the Web Parts Library, click the **Previously Removed Web Parts** link.
3. Check the box for the Web Part that you want to restore, select a zone from the **Add to zone** list, then click the ⊞ **Add** button.

To move a Web Part

1. Position the cursor over the Web Part's title bar so a four-way arrow appears.
2. Drag the Web Part to a different zone.

To specify a Web Part's default state (minimized or restored)

You can determine whether a Web Part initially appears minimized or full-sized on the Home Page. In either Page Design Mode:

- Click the **Minimize** link in the Web Part's title bar if you want the control to be minimized by default.
- Click the **Restore** link if you want the control to be full-sized by default.

Users can change the size by clicking the Minimize or Restore link on the Web Part on the Home Page.

Presto Web Parts

A Web Part is a configurable set of controls that provides administrators with the ability to modify the content, appearance, and behavior of Web pages directly in a browser. *Presto* includes a number of Web Parts that administrators can add to home pages. To end users, the configured Web Parts appear as search or display areas on the *Presto* home page. **Note**: Using *Presto* Web Parts with Microsoft SharePoint is discussed in a separate document.

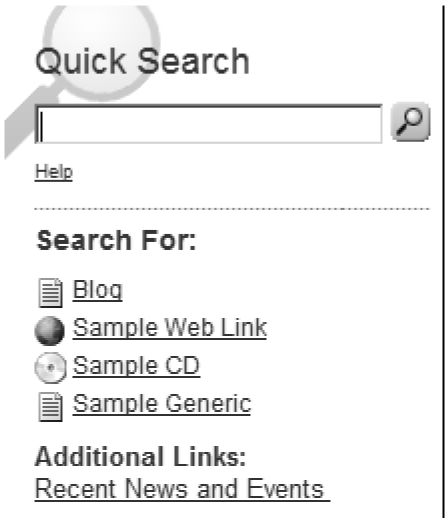
Administrators can add any Web Part multiple times to multiple pages, and each instance can be individually modified. For example, a home page can include multiple HTML areas and RSS feeds, each of which is configured differently.

Each Web Part is dynamic and will expand in size to accommodate its designated content, within the zone in which it is placed.

Presto includes the following configurable Web Parts.

Quick Search Web Part

The **Quick Search** area lets users search across multiple records, including blogs, by entering text in the supplied box. This area can include a list of "Search For" links that users can click to open a customized search page for a particular content type. Additionally, it can include links that point to any destination you choose. The following example shows a customized Quick Search area.

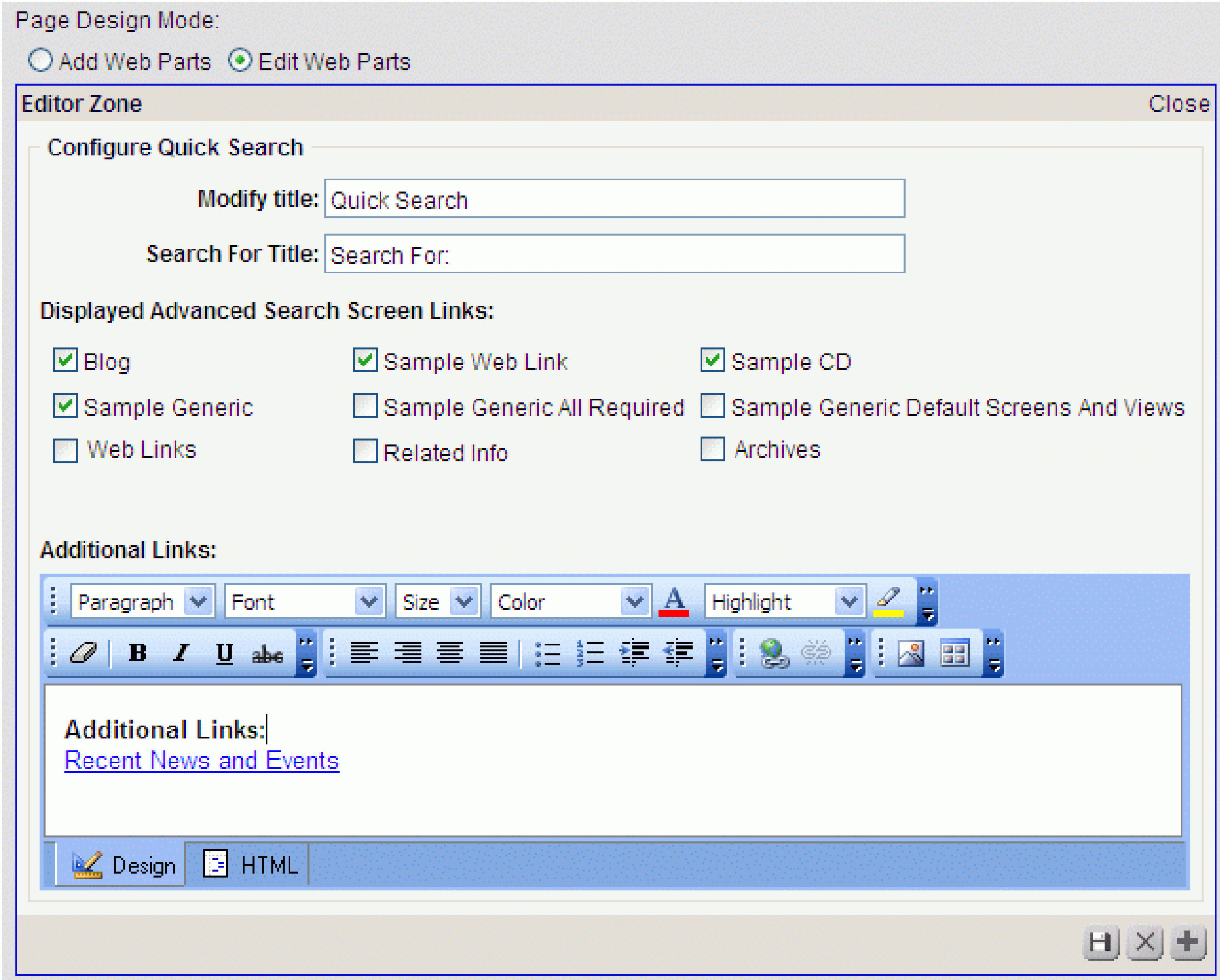


Use the following settings to determine how the Quick Search Web Part will appear:

- **Modify title**. Specify a label to appear above the field (the default is "Quick Search").
- **Search For Title**. Specify a label to appear above the list of search items (the default is "Search For:"). If you choose not to populate the list of Displayed Links, this label will not be displayed on the home page.
- **Displayed Advanced Search Screen Links**. Check one or more boxes to build the "Search For" list. Each box represents a defined content type. Users will be able click a link to open an advanced search screen for that content item; for blogs, they will be able to access an advanced search screen to search across one blog or all blogs.
- **HTML Editor**. To provide links to destinations other than advanced search screens, use the HTML Editor. Use the **Create Link** button  on the toolbar or click the **HTML** tab to encode HTML directly. For examples and instructions, see Using the HTML Editor.

  In the example shown above, the link to "Recent News and Events" was added using Create Link, and the text "Additional Links:" was typed into the editor.
- Save your changes by clicking the **Apply changes** button at the bottom of the Web Part control. A preview appears in the lower part of the designer screen.
- Close the Web Part editor zone by clicking **Close** at the top of the Web Part control.

To produce the Quick Search area shown above, the following settings were used in the home page designer (**Configure>Home Page**):



HTML Area Web Part

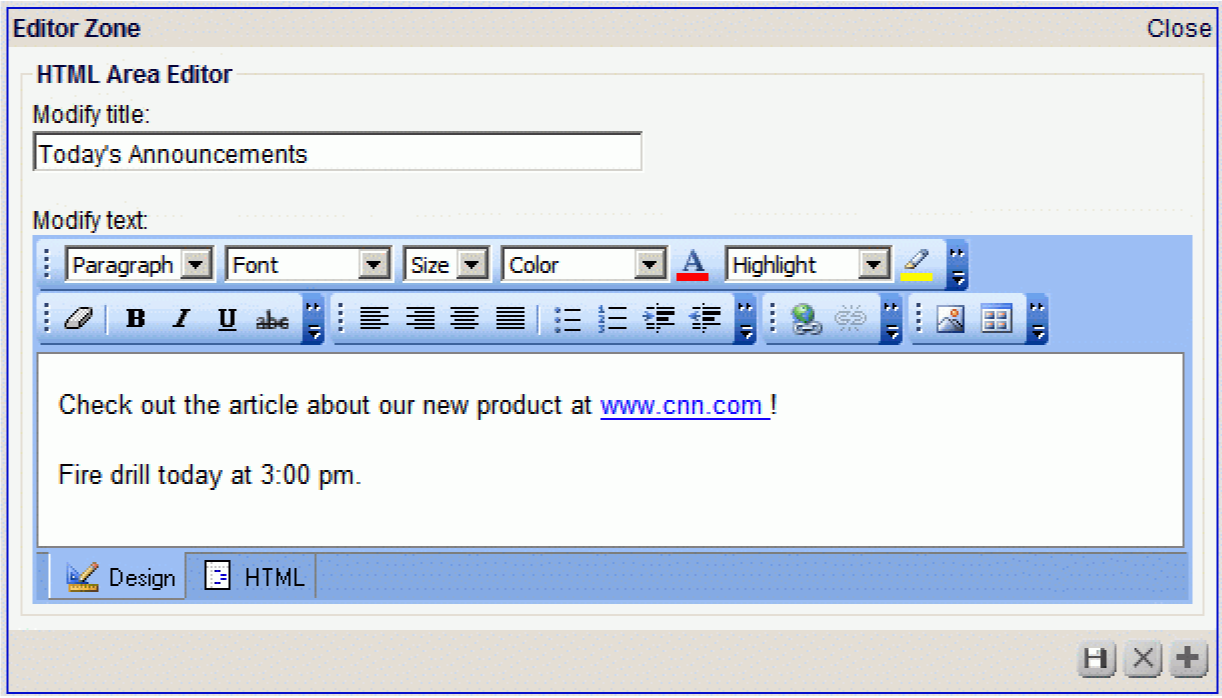
An **HTML Area** provides a place to present news or information. HTML areas can include text, links, and images. The example below shows an HTML area that is being used to convey announcements. You can include zero, one, or multiple HTML areas, each configured uniquely. The colors of the title bars are controlled by the skin and cannot be adjusted in the Web Parts editor.

Use the following settings to determine how an HTML Area Web Part will appear:

- **Modify title**. Specify the title bar text ("Today's Announcements" for example).
- **Modify text**. Use the HTML Editor to add and format text, links, and images. For more information, see Using the HTML Editor.
- Save your changes by clicking the **Apply changes** button at the bottom of the Web Part control. A preview appears in the lower part of the designer screen.

- Close the Web Part editor zone by clicking **Close** at the top of the Web Part control.

To produce the HTML Area shown above, the following settings were used in the home page designer (**Configure>Home Page**):



Featured Collections Web Part

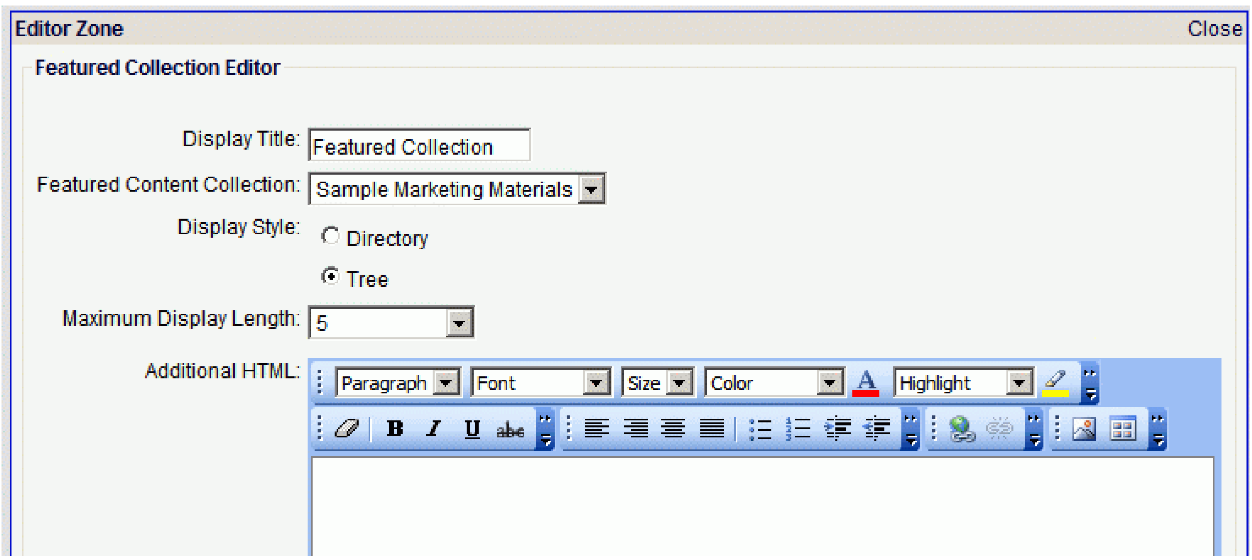
You can include featured collections on a *Presto* home page. A Featured Collection displays top-level links to a taxonomically organized content collection. This lets users quickly find commonly accessed content. The following example shows a Featured Collection using a tree display.

Use the following settings to determine how a Featured Collection Web Part will appear:

- **Display Title**. Specify text for the title bar. The default title is "Featured Collection". You may choose to call it something else, such as "Marketing Materials".
- **Featured Content Collection**. Select a pre-defined content collection from the list.
- **Directory Display Style**. Show top-level categories in a Yahoo!-style directory display, using the following options:
- **Maximum Display Length**. Specify how many top-level categories should appear.

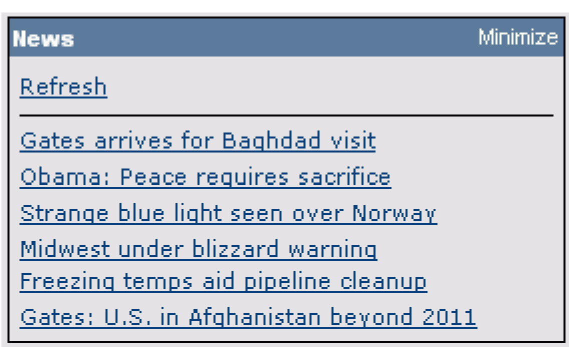
- **Maximum Sub-Category Display Length**. Specify how many sub-categories should appear. If the number is 0 (zero), only the top-level category will appear.
- **Icon for Top Category**. Select an icon that will appear to the left of each top-level category (Folder, Bullet, or None).
- **Tree Display Style**. Show top-level and sub-level categories in a standard Windows-type folder display (see the figure above), then specify the Maximum Display Length to indicate how many top-level categories should appear.
- **Additional HTML**. Use the HTML Editor to add and format text, links, and images. For more information, see Using the HTML Editor.
- Save your changes by clicking the **Apply changes** button at the bottom of the Web Part control. A preview appears in the lower part of the designer screen.
- Close the Web Part editor zone by clicking **Close** at the top of the Web Part control.

To produce the Featured Collection shown above, the following settings were used in the home page designer (**Configure>Home Page**):



RSS Feeds Web Part

Use the **RSS Feeds** Web Part to display one or more RSS feeds on a *Presto* home page. If you want multiple RSS feeds on the home page, you can either add multiple feeds to a single RSS Feed Web Part, or add multiple RSS Feed Web Parts to the page. The following example shows a typical news feed.



Note: If feeds in the RSS Web Part on the Home page are not working because the *Presto* application server has no direct external access to the Internet, you can specify a proxy URL to use for RSS feeds, as explained in "RSS Feed Configuration" in the *Advanced Administrator's Guide*.

Use the following Web Part settings to determine how the feed will appear:

- **Modify title**: Specify text for the title bar, to identify the content. The default is "RSS Feed".
- **Display type**: Select one of the following:
  - Select **Title Only** if you want to display only the titles, as shown in the example above.
  - Select **Short Description (May Include Photo)** if you want a two-column RSS feed. The left column will contain a title and short description for the specified **Number of Main Items**; the right column will list additional items, up to the total **Display Items Count**.

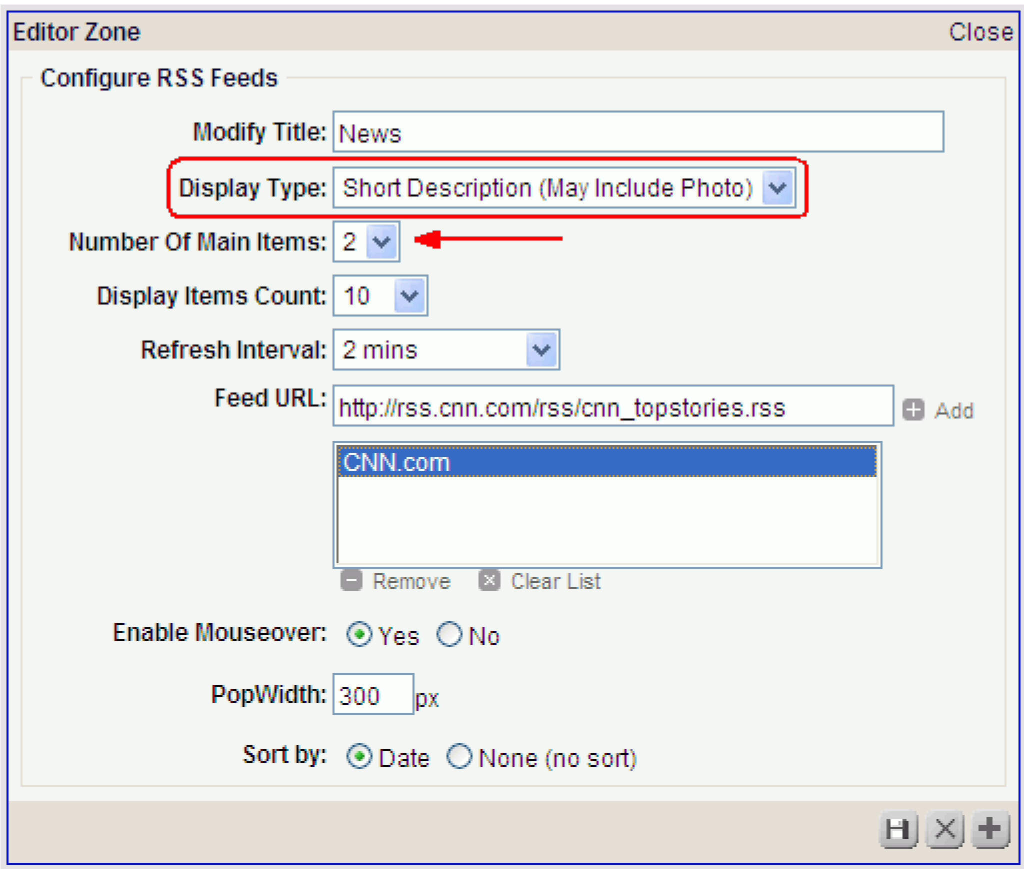
    Tip! To display just one article from an RSS feed (such as today's episode of a comic strip), select the Short Description option and set the both the **Number of Main Items** and the **Display Items Count** to 1. When these two values are the same, only main items are displayed, so there will be only one column.
- **Number of Main Items**: This field appears only for a Display Type of **Short Description (May Include Photo)**. Select a value to indicate how many items should be listed in the left column. The default value is 2.
- **Display Items Count**: Specify the maximum number of items to display. For a two-column (Short Description) display, this value determines the total across both columns (right column plus left column). If the RSS Feed Web Part contains multiple feeds, this value determines the total across all feeds.
- **Refresh Interval**: Specify how often *Presto* should check for updated content.
- **Feed URL**: You can one or more feeds to the Web Part. Type or paste the URL for the RSS feed and click **Add**.
  - To add an external RSS feed, such as a news feed, locate the feed online as you normally would, then copy the URL from the browser's title bar and paste it in the Feed URL box.
  - To add the RSS feed URL for a *Presto* blog, open the **Blogs** menu, and click the name of the blog that you want to add. Right-click the "Subscribe to RSS Feed" button in the toolbar and choose **Copy Shortcut** (Internet Explorer) or **Copy Link Location** (Firefox). The URL will look something like this: http://webserver/Presto/feed.rss?q=MQ==&swi=&qcf=1&ibf=True

  If you add multiple feeds to a Web part, and you are using a Display Type of **Title Only**, the source of the feed is listed, as shown in the example below.

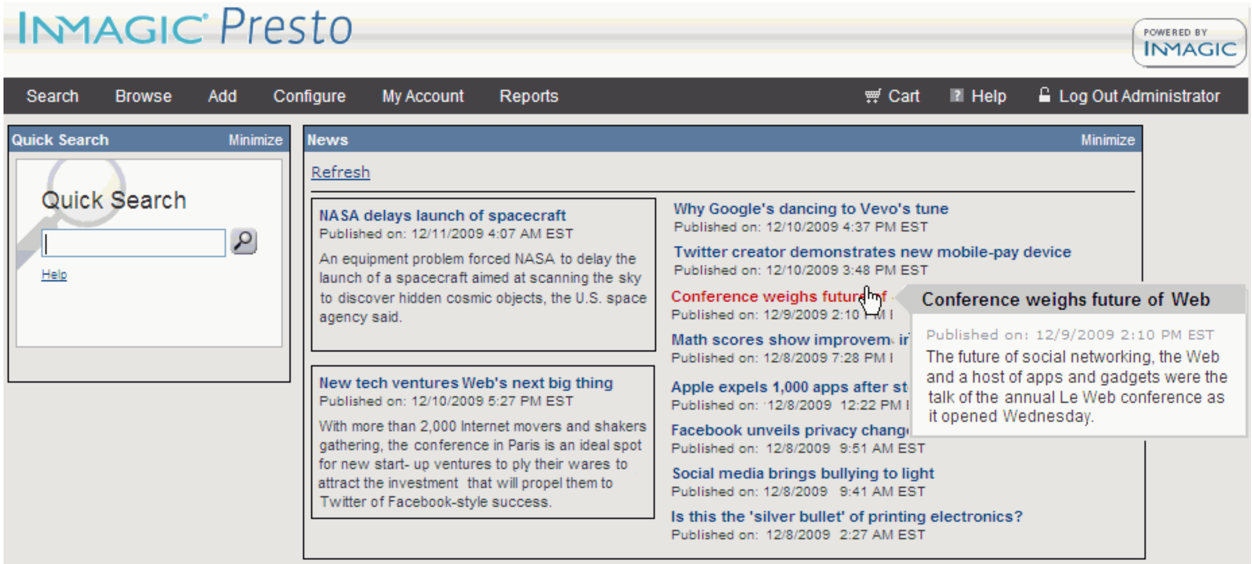
Note: If you put multiple feeds in one Web Part, the items shown are the most recent across both feeds. If all the posts in one feed are more recent than all the posts in another feed, you won't see any posts at all from the second feed. For this reason, you may want to use a separate Web Part for each feed.

- **Enable Mouseover**: Select **Yes** to preview content by resting the mouse over an item in the RSS feed. For a Display Type of Title Only, the mouseover occurs on the title. For a Display Type of Short Description, the mouseover occurs on the items in the right column.
- **PopWidth**: Specify the width (in pixels) for the mouseover display. The default is 500 pixels. If the Display Type is set to Short Description, specify a conservative width that will accommodate *Presto* users who have low-resolution or non-widescreen monitors. 300 pixels typically works well.
- **Sort by**: Specify whether feed items should be sorted by **Date** (most recent at the top) or **None (no sort)**.
- Click **Apply and close** (the left-most button at the bottom of the window).

The following example shows settings for an RSS feed, with the Short Description option selected:



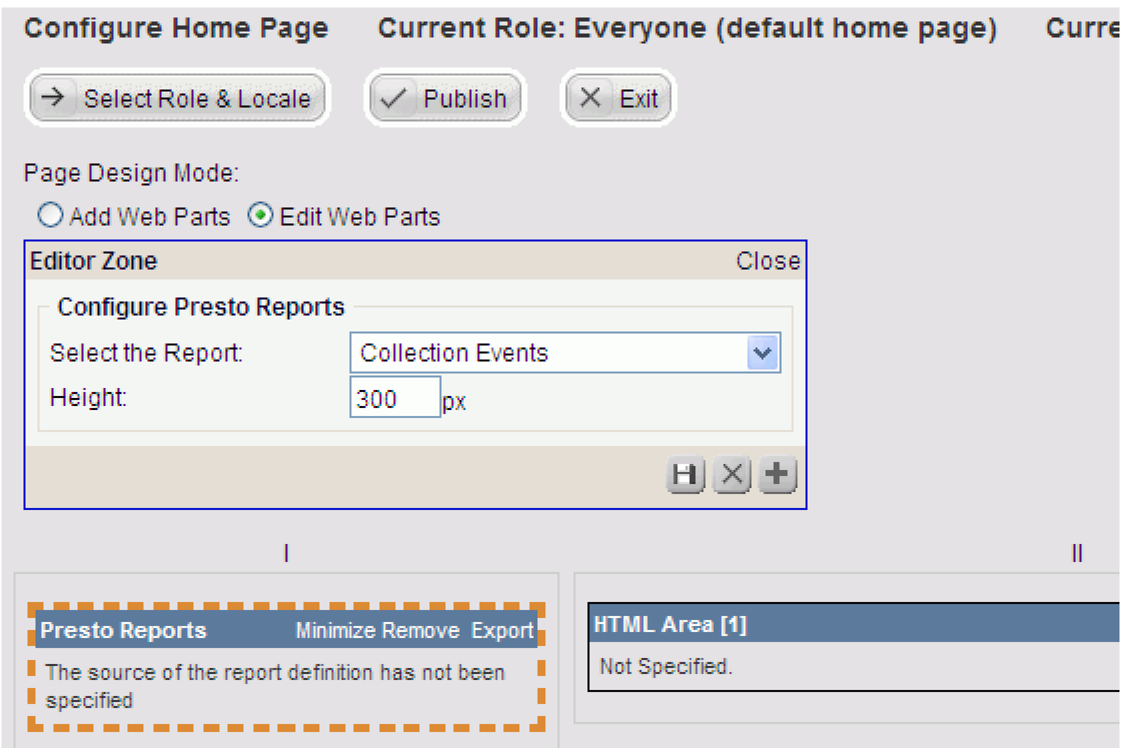
The above settings will result in 2 main items (in the left column), a total of 10 items, and a 300-pixel wide mouseover area:



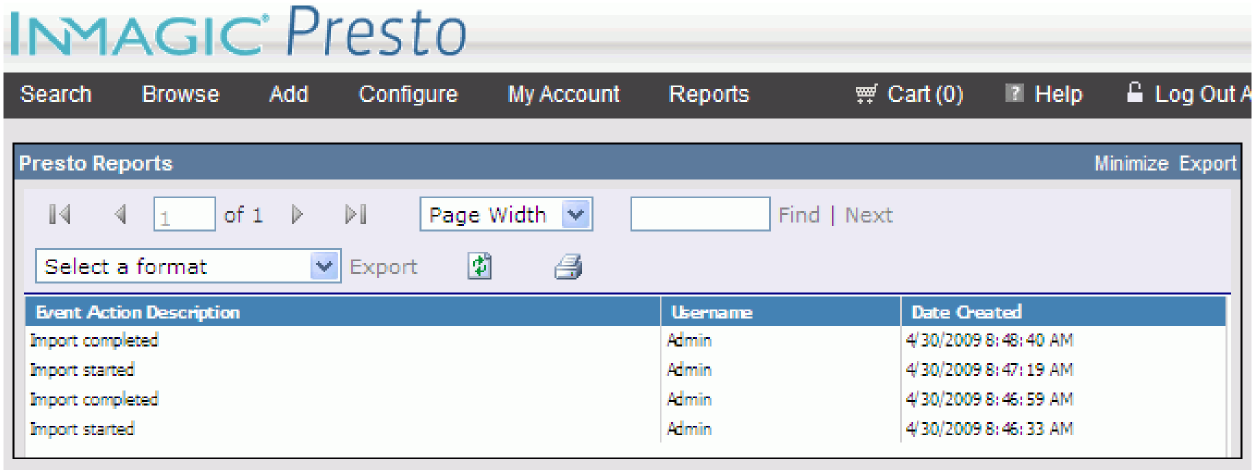
Presto Reports Web Part

Use the **Presto Reports** Web Part to add a report to the Home Page.

Choose **Edit Web Parts** as the Page Design Mode, then use the **Select the Report** drop-down list in the Editor Zone to select a report and adjust the **Height** of the report Web Part. Click the **Apply changes** button at the bottom of the Web Part control. Close the Web Part Editor Zone, then **Publish** the change.



The following example shows a report that was added to a *Presto* home page.



Using Export, Import, and Clear All

You can use the **Export**, **Import**, and **Clear All** buttons in the home page designer to perform the following operations:

- Back up home pages for safekeeping
- Eliminate Previously-Removed Web Parts (previously-removed Web Parts can adversely affect performance of the home page)
- Clone an existing home page to be used for a new role

Using these buttons, you can:

- **Export** all home pages for all Role & Locale combinations. A separate file will be created for each combination. The default directory for Export and Import (.\system\webpartbackup) is created automatically.
- **Clear All** home page content from the database for all Role & Locale combinations (not just those on the current page). **Warning!** This option permanently deletes all Web Parts. Be sure to **Export** first, so you have a backup. If you do not Export prior to using Clear All, you will lose your home pages and will have to reconstruct them by hand.
- **Import** the home page for the currently-selected Role & Locale.

Note that **Import** loads the home page for the currently-selected Role & Locale, but **Export** and **Clear All** affect all home pages for all Role & Locale combinations.

Example #1: Configuring French and English Home Pages

This example describes how to create home pages that do not include any previously-removed Web Parts. (Removing Web Parts is a typical part of the design process, but "leftover" Web Parts can affect performance.)

This scenario assumes that you have installed *Presto* and created content types and collections, and you are now ready to configure the new home pages:

1. Configure home pages for the Everyone role for the French and English locales exactly how you want them to be. (This will probably involve removing at least one Web Part.) Be sure to **Publish** each home page when the design stage for that page is complete.

2. Click **Export**. This will generate multiple XML files (one for each Role & Location combination).

   Important! Copy the resulting XML files to another location for safekeeping. This is a precaution to ensure that you do not accidentally clear or delete existing home pages, which can be time-consuming to reconstruct.

3. Click **Clear All**.

   Warning! This permanently deletes all Web Parts for all Role & Locale combinations, not just those on the current page. Never use this operation unless you have first used **Export**.

4. Choose **Configure>Administrator Tools**, click **Application Settings**, and navigate to the **HomePages** section.

5. Change the value in the HomePage field to the corresponding page that has no Web Parts. For example, change **~/home/Default.aspx** to **~/home/Default_NoParts.aspx**.

   Notes:

   - If you created your own custom home page .aspx file, you'll need to create a corresponding .ASPX with no Web Parts.
   - If you click Home after doing this and before step 7, the home page will be completely empty. This is normal at this point.
   - If you omit this step, when you import, you'll get all the out-of-the-box Web Parts, plus the ones you exported (e.g., duplicate copies of several Web Parts).
   - When you select a Role & Locale combination for which no home page customization has yet been performed, no Web Parts will appear (see Example #2 below).

6. Choose **Configure>Home Page**.

7. Select the **Everyone - English** combination, **Import** its home page, then **Publish**.

8. Select the **Everyone - French** combination, **Import** its home page, then **Publish**.

The result is two home pages designed the way you want them without any Previously-Removed Web Parts.

Example #2: Cloning a Custom Home Page

In this scenario, you will create a custom home page for a new Role & Locale combination (Viewer/English).

1. Do one of the following:

   - Complete the steps in Example #1, or
   - For an out-of-the-box configuration, configure the **Everyone, English - United States** home page the way you want it, then **Publish**, then **Export**. Then choose **Configure>Administrator Tools**, click **Application Settings**, navigate to the **HomePages** section, and change the value in the HomePage field to the corresponding page that has no Web Parts (for example, change **~/home/Default.aspx** to **~/home/Default_NoParts.aspx)**.

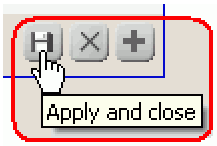
2. In Windows Explorer, navigate to the folder to which you exported home pages.

3. Create a copy of the Role_Everyone~en-US.xml file, and name it Role_Viewer~en-US.xml.

4. In **Configure>Home Page**, select the **Viewer/English** combination, and click **Import** then **Publish**. You've essentially cloned the Everyone/English home page for the Viewer role, and can now proceed to make the customizations specific to the Viewer role.

Publish and Exit

To *temporarily* save changes while you are working in the home page designer, click "**Apply changes**" or "**Apply and close**" at the bottom of a Web Part Editing Zone.



To permanently save your work and exit the home page designer, click **Publish**, then **Exit**.

Publish does two things: It saves your changes and rolls out the home page to all *Presto* users whose Primary Role corresponds to the role whose home page you just configured. Users will see the changes the next time they navigate to the home page. Note that this only publishes the home page that is currently loaded (based on the selection you made using the **Select Role & Locale** button).

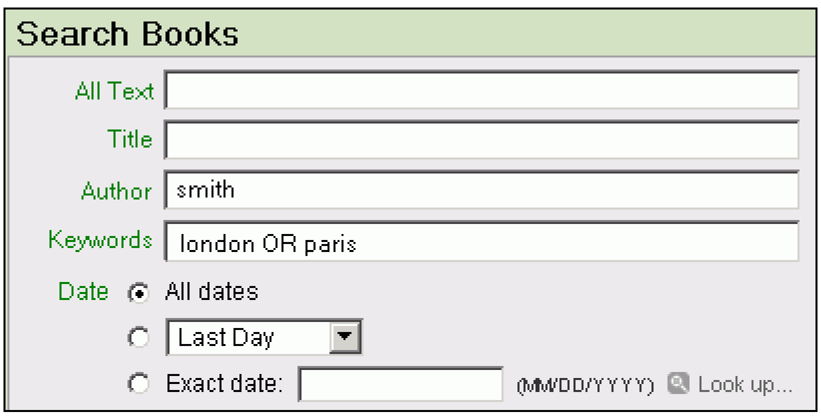
Exit closes the designer. It does *not* save changes. **Note**: If you click **Exit** without clicking **Publish**, your changes will be lost.

Chapter 6: Searching

You can use the following methods to search for records:

- **Quick Search**: Type a query to search the entire database, then press **Enter** or click . The Quick Search box is usually available on the home page and the **Search** menu. For a quick summary, see Basic Search Syntax. For more information, see Advanced Search Syntax.

- **Advanced Search Screen**: To search one specific content type, select an item from the **Search** menu or the "Search for" list on the home page, then use the Advanced Search Screen. An example is shown below. The screen's appearance depends on how it was configured. You can type words or phrases in one or more fields to search the content type. If the screen includes a field such as "AllText" or "Word Anywhere", you can search across all fields in that content type. For more information, see Basic Search Syntax and Advanced Search Syntax.



- Blog Posts: To restrict your search to one or more blogs, select **Blog Post** from the **Search** menu, then enter a query. **Note**: To search blogs, you must have the "View Post" Blog Permission (Configure Roles), and an administrator must have added the "**Blog Post**" item to the Search menu, by selecting **Configure>Menus and Menu Bar**.

After searching, you can use the Act on Content Toolbar to print, edit, download, and perform other operations on the records that were found.

Basic Search Syntax

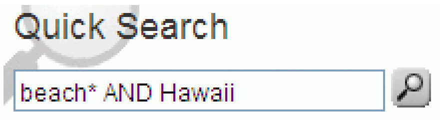
This table provides a quick summary of some common searches. For complete information, see Advanced Search Syntax.

Example	Find Records containing...
vacation	The word *vacation* (and variants such as *vacations*, *vacationing*, etc.)
vacation Paris	The words *vacation* and *Paris* in any order, including variations such as *vacations* and *Parisian.*
vacation **AND** Paris	(same as above)
London **OR** Paris	Either the word *London* or the word *Paris*
vacation **NOT** cruise	The word *vacation* and not the word *cruise*
[vacation **NEAR** city]	The word *vacation* near the word *city* (before or after) within the same field
"All roads lead to Rome"	The phrase "*All roads lead to Rome*"
"vacation"	The word *vacation* (will not find *vacations*, *vacationing*, etc.)
auto*	Words that begin with *auto* (*auto*, *automobile*, *automatic*, etc.)
"auto loan"*	The exact phrase "*auto loan*" or phrases such as "*automobile loans*" or "*automatic loaner*" (truncation applies to each word in the phrase)
~auto	**Synonyms** for *auto* (*auto, car, truck, automobile*, etc.)
~auto loan	Synonyms for *auto* and for *loan*, in any order
~"auto loan"	The phrase or phrases consisting of synonyms for *auto* and *loan* (*auto loan*, *car loans*, *truck rentals*, etc.)
^study	The word *study* and its **stems** (*studies*, *studying*, *studious*, etc.), when stemming is configured to be off (default). If stemming is on, you can simply search for *study*.
^"high quality steak"	The phrase "*high quality steak*" as well as the phrase "*highest quality steaks*" (**stems** of each word)
="high quality steak"	The exact complete **term** "*high quality steak*". Partial matches, such as "*quality steak*", will not be found. **Note**: Only use term searches (=) in the Quick Search box or an AllText or number-like field on an Advanced Search Screen.
="high quality"*	A term that begins with "*high quality*"
[1 TO 15]	Values within the range, inclusive (1, 2, 7, 15)
[A TO D]	Values within the range, inclusive (A, B, C, D)
{A TO D}	Values within the range, exclusive (A0 to Czzzzzz)

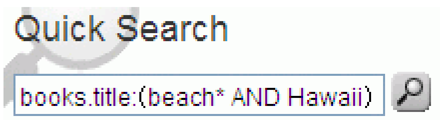
Advanced Search Syntax

Note: For a quick summary of how to search, see Basic Search Syntax.

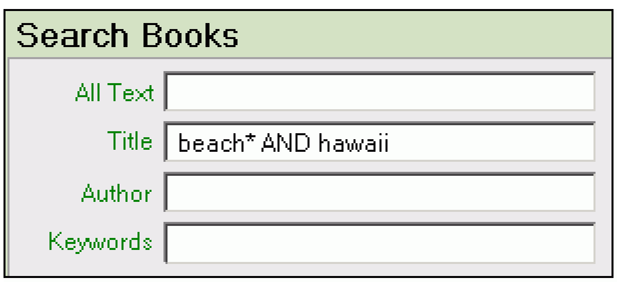
You can enter a query in the **Quick Search** box to search the entire database (all fields defined as Searchable, including blogs and social content). For example:



You can use Advanced Syntax to narrow the search to a specific content type or field. For example, to restrict the above search to just the Title field of the Books content type:



To search a specific field, or a combination of fields, select an item from the Search menu, then use the **Advanced Search Screen** for the selected content type. For example, this search is equivalent to the Quick Search shown above:



Some Advanced Search Screens include a box labeled **AllText** or **Words Anywhere** (or something similar), which allows you to search all fields for that content type.

Refining a Search

After searching, you can use the **Filter** box at the right of the screen to narrow the results. The new search is performed only against the current search results. For example, if you searched for *shoes* and got 100 records, you can use the **Filter** box to search the results for *red*, which should find fewer records.

Advanced Syntax Summary

The syntax described below may be used in the **Quick Search** box and for other advanced uses. It is *not* intended for use on the Advanced Search Screen.

To construct complex queries, you can use the syntax described below:

```
Content_Type_Name.Field_Name:Value
```

For example, to search the Books content type for a Summary that contains the phrase "city life":

```
Books.Summary:"city life"
```

To do a Term search, use an equals sign (=). Partial matches will not be found:

```
Books.Title="King Lear"
```

When searching for Ratings, Tags, or URLs, you can include an optional qualifier name and value:

```
Content_Type_Name.Field_Name.Qualifier=Value
```

The Qualifier depends on which field you are searching. For example, to search Books that were tagged "travel" by the user Admin:

```
Books.Tags.Admin=travel
```

All of these search methods are described in more detail below.

Quick Search vs. AllText

When using the **Quick Search** box, you are searching the entire database (all content types and fields), unless you use Advanced Syntax to specify otherwise. Therefore, you can simply type **beach** to search the entire database for the word *beach*.

When using the **AllText** box (sometimes called Words Anywhere) on an Advanced Search Screen, you are searching one particular content type, so there is no need to specify the content type in your query. (The content type is implied.)

If you are using any other box on the **Advanced Search Screen**, the search pertains only to that particular field. Attempting to use Advanced Syntax in a field on the Advanced Search Screen is likely to result in an error or not return any records.

Case and Punctuation

Special operators (AND, OR, NOT, NEAR, TO) must be all upper case. Otherwise, searches are case-insensitive (so INMAGIC, inmagic, and InMagic are all equivalent).

If a content type or field name includes spaces, you must use an underbar (for example, News_Archives).

Some punctuation marks (period, colon, equals sign, ~, ^, double quotation marks, parentheses) have special meaning and are interpreted as part of the query syntax. All other punctuation marks are handled as literal text. For example, the following searches are valid:

```
Joe's house
d'Artagnan
```

If you think special characters might be misinterpreted, enclose the search criteria in "double quotation marks". For example:

```
"inmagic.com: press release"
```

Stop Words and Leading Articles

Stop words (sometimes called noise words) are commonly-used words, such as a, an, the, for, to, and in. *Presto* ignores stop words in a phrase, within the search criteria as well as the record text. (Stop words are not indexed, to avoid bloating the index with unnecessary words.) For example:

- A search for “suitable use” finds records that contain “suitable for use” or “suitable in use”.
- A search for “suitable for use” finds records that contain “suitable use”, “suitable for use”, “suitable in use”.

Leading articles are words that come at the beginning of a term and are meant to be ignored when sorting or searching. The default leading articles for US - English are A, An, The. For example, *The Sun Also Rise*s will be sorted under "Sun", not "The"; and a search for ="sun also rises" will find "The Sun Also Rises".

Word and Phrase Searching

You can search for a single word or multiple words. If you type multiple words, it is like doing an AND search, meaning *all* of the words must be present, in any order. Use "double quotation marks" to indicate an exact phrase (all words, in the order specified).

Enter this:	To find:
comedy	Records that contain that word in any field
comedy club	Records that contain *both* words, in any order (*comedy* and *club*). Records that contain only one of the words will not be found.
"Boston comedy club"	Records that contain that exact phrase (all words, in that order).
"comedy club" boston	Records that contain the phrase "*comedy club*" and the word "*boston*"

Advanced Word and Phrase Searching

You can do advanced word and phrase queries in the Quick Search box.

Quick Search:	To find:
books.summary:adventure	Books that contain the word *adventure* in the Summary field
books.summary:"young adult"	Books that contain the phrase "*young adult*" in the Summary field

Truncation

Use an asterisk (*) at the end of a word or phrase to represent one or more characters, as a way of broadening a search:

- The asterisk must be at the end of a word or a phrase (it cannot be embedded).
- The asterisk must be outside of the quotation marks (for a phrase search) or the brackets (for a NEAR search).
- Truncation applies to all words in a phrase search, and both words in a NEAR search.

Enter this:	To find:
car*	Words such as *car*, *cars*, *carpet*, etc.
"new car"*	Phrases such as "*news carrier*", "*newly carpeted*", etc. The asterisk must be outside of the quotation marks, and it affects both words.
[new NEAR car]*	Words such as *newspaper* close to (before or after) words such as *carpet. T*he asterisk must be outside of the brackets, and it affects both words.

Boolean Searches (AND, OR, NOT)

Use Boolean operators (AND, OR, NOT) to do more specific searches. The operators must be all upper case or *Presto* will interpret them as ordinary words. If you include multiple operators, use parentheses to control evaluation order. Parentheses are required in Boolean expressions if you are using advanced syntax to specify the content type or field.

Enter this:	To find:
london OR paris	Either word (This usually finds more records than an AND search)
london AND paris	Both words
london NOT paris	Records that contain *London* but not *Paris*
london OR "south of france"	Records that contain either word or phrase
(london OR paris) AND madrid	Records that contain either *London* or *Paris* and that also contain *Madrid*
london OR (paris AND madrid)	Records that contain *London* or records that contain both *Paris* and *Madrid*
NOT london	Records that do not contain the word *London*
((a OR b OR c) AND (d OR e) NOT (g OR h))	*Complex expressions require parentheses for clarity.*

Advanced Boolean Searches

You can do advanced Boolean queries in the Quick Search box.

Quick Search:	To find:
books.title:(london OR paris)	Books whose Title contains the word *London* or the word *Paris*
books.title:(london OR paris) AND (books.publish_date="2009")	Books whose title contains the word *London* or the word *Paris* and which were published in 2009. (Note that publish_date is an Integer field.)
(books.title:(london OR paris)) OR (magazines.title:(london OR paris))	Books or magazines whose title contains the word *London* or the word *Paris*
books.title:(london bridge)	Books whose title contains *London* and *bridge*
books.status:(NOT "on order")	Books that are not on order.

Range Searches

Use the following syntax to search for a range of numbers, dates, or text. The start and end values must each consist of just one word (not multiple words), and the word TO must be all upper case. Note that truncation (*) is not allowed.

Use square brackets to include the start and end values in the search result:

```
[start TO end]
```

Use curly brackets to exclude the start and end values:

```
{start TO end}
```

The following examples show how to do range searches on an Advanced Search Screen.

Enter this:	To find:
[10 TO 30]	Values within the range, inclusive (10, 11, 23, 29, 30)
{10 TO 30}	Values within the range, exclusive (11, 23, 29)
[a TO d]	a, b, c, d
{a TO d}	b, c

Advanced Range Searches

You cannot do a "plain" range search in a Quick Search box. For example, the search **[10 TO 30]** will fail. Instead, specify the content type and/or field, and use an equals sign (=) to indicate a range search. If the specified values are not found within a single term entry in a field, no records will be returned.

Quick Search:	To find:
books.copies=[1 TO 5]	Any of the values 1, 2, 3, 4, 5 in the Copies field for Books
books.copies={1 TO 5}	Any of the values 2, 3, 4 in the Copies field for Books
books.copies=([1 TO 5] NOT 4)	Any of the values 1, 2, 3, or 5 (but not 4) in the Copies field for Books
articles.date=[19971204 TO 19990531]	Articles dating from December 4, 1997 to May 31, 1999
articles.date={19971204 TO 19990531}	Same as above, but exclude the starting and ending values
articles.subject=[a TO c]	Articles whose subject starts with words such as *Aardvark, Able, Ball...*

Finding Words Near Each Other

Use the following syntax to find words located close to one another (before or after). This can help you find records when you are not sure of the exact phrasing or word order.

```
[word1 NEAR word2]
```

The word NEAR must be all upper case. You cannot use stemming or synonyms or phrases.

Enter this:	To find:
[paris NEAR vacation]	The word *paris* near *vacation* (before or after)
[paris NEAR vacation]*	Items such as "*Parisians take longer vacations*" or "*Vacationing students flock to Paris*". The asterisk must be outside of the brackets, and it affects both words.

Finding Synonyms

You can precede a word or phrase with a tilde (~) to expand the search to include synonyms (~funny finds amusing, silly, etc.). **Note**: Synonym searching works only if a thesaurus has been configured, as described in the *Presto Advanced Administrator's Guide*.

- If you are doing a phrase search, the tilde must be outside of the quotes. All quoted words will be affected.
- You cannot combine stemming with a synonym search.

Enter this:	To find:
~auto	Synonyms for *auto*, such as *automobile*, *car*, *truck*, etc.
~auto loan	Synonyms for *auto*. Only “auto” will be synonym-searched – the tilde does not apply to “loan”.
books.summary:~auto	This advanced search can be done in a **Quick Search** box to find Books whose Summary contains *auto* or its synonyms.

Searching for Ratings

A rating is a number of stars assigned to a record by users. If an Advanced Search Screen includes the ability to search for ratings, you can check the box(es) to indicate which ratings you want to find.

Advanced Searching for Ratings

You can use the Quick Search box to search the Rating field for a number of stars (from 1 to 5), using the following syntax:

```
Content_Type_Name.Rating.Qualifier=Value
```

You can also search for ratings given by a particular user, or the Overall (average) rating.

Quick Search:	To find:
rating.jsmith=3	Records that user name JSmith gave 3 stars
rating.overall=4	Records with an average of 4 stars
rating.overall=4.5	Records with an average of 4.5 stars
books.rating.overall=[3.0 TO 3.9]	Books that have an average rating of 3 to 3.9 stars
books.rating.jsmith=3	Books that user name JSmith gave 3 stars
books.rating.overall=3	Books with an average rating of 3 stars
rating.john_doe=""	Records that user name "John Doe" has not rated

Searching for Tags

A tag is a descriptive word or term that users may assign to records or blog posts, to help locate the record easily. The simplest way to search for a tag is to use the **Tags** field on an Advanced Search Screen, or click a tag in a cloud.

Advanced Searching for Tags

For more complex queries, search the System field called "Tags", using the following syntax:

```
Content_Type_Name.Tags=Value
```

There is one optional qualifier, which is the user name (the person who assigned the tag):

```
Content_Type_Name.Tags.User_Name=Value
```

You can use the Quick Search box to do an advanced search for tags.

Quick Search:	To find:
tags=humor	All records tagged *humor*
books.tags=humor	Books tagged *humor*
tags.admin="local interest"	All records tagged *local interest* by user name Admin
books.tags.john_doe="boston area"	Books tagged *Boston Area* by user name John Doe
tags=""	All untagged records

Searching for Comments

A comment is a remark that was added to a record or blog post by an authorized user, typically in response to another user's comment. Comments are stored in a System field called Comments. When you perform a query, comments are also searched (for example, if you enter "funny" in the Quick Search box). To restrict your query to *only* look for Comments, you can use the **Comments** field on an Advanced Search Screen.

Advanced Searching for Comments

You can use the Quick Search box to do an advanced search for comments, using the examples below for guidance.

Quick Search:	To find:
comments:"new york"	All records whose Comments field contains the phrase *"New York"*
books.comments:"new york"	Books whose Comments field contains the phrase *"New York"*
comments=""	All uncommented records

Searching for URLs and Alternate Text

The easiest way to search for URLs or Alternate Text is to enter a word or phrase in the appropriate field on an Advanced Search Screen.

For more complex searches, you can use the following syntax in the Quick Search box, where "Field_Name" represents the name of a field whose Data Type is URL:

```
Content_Type_Name.Field_Name=Value
```

and you can use the following syntax to find Alternate Text in an URL field, where "Value" is a word or phrase that occurs in the Alternate Text:

```
Content_Type_Name.Field_Name.alternatetext=Value
```

For URL fields, note that only the Alternate Text (not the URL) is Term indexed. The following table provides several examples.

Quick Search:	To find:
books.site:(www.inmagic.com)	Books where the "Site" field contains the full complete term *www.inmagic.com*. Partial matches will not be found.
books.site:(edu)	Books where any portion of the URL contains edu
books.site.alternatetext=""	Records that do not contain Alternate Text
books.site.alternatetext="acme web site"	Books where the "Site" field has Alternate Text containing the exact complete term *Acme Web Site*. Partial matches will not be found.
books.site.alternatetext:"acme"	Books where the "Site" field has Alternate Text containing the word *acme*.
books.field1="" AND books.field2=""	Books where all URL fields are empty (assuming the Books content type has two URL Data Type fields, called "Field1" and "Field2")

Searching for Terms

A term search requires an exact complete match with the entire value in a field, and is indicated by an equals sign (=). Only use term searches in the Quick Search box or an AllText or number-like field (not a text field) on an Advanced Search Screen.

A Term search can include Boolean operators (AND, OR, NOT), ranges, and truncation (*). Note that Stemming, NEAR searches, and Synonym searches are not supported. You can omit leading articles (configurable, but defaulting to *A*, *An*, *The*), so *="great gatsby"* will find "*The Great Gatsby*". For more information, see Full Text vs. Term vs. Phrase.

Quick Search:	To find:
books.title="red river"	Books with the exact Title "*Red Rive*r" (or "*The Red River*" or "*A Red River*", depending on which leading articles are defined). Titles such as "*Red River Valley*" or "*Red Rivers*" will not be found, because they are not an exact complete match.
books.title="red river"*	Books with titles that begin with "Red River" such as "*Red River*s" or "*The Red River Valley*".
books.title=red river	If you omit the quotes, you are doing a Term search for *red* **and** a word search for *river*. You will not find the term "*Red River*".

Searching the Category Field

You can search the Category field just as you would search any other field, for words, phrases, or terms.

If you are doing a Term search, you need to start at the root node name (which defaults to the name of the collection with the word Collection after it, but can be changed). For example, to retrieve the Earthquakes subcategory of the Disasters category in the News collection:

```
books.category="news collection disasters earthquakes"
```

Using Stemming

Stemming (^) is the ability to find not only word stems but grammatical variations of words and phrases (plurals and tenses). This typically causes better search results. Stemming is on by default, but it can be configured to be off (by adjusting SearchDefaultStemming, as explained in the *Presto Advanced Administrator's Guide*).

If **Stemming is on** (the default), you do not need to include a caret (^). To prohibit stemming, enclose the search criteria in quotes:

- study finds studious, studying, students, etc. (stemming occurs)
- "study" finds study (quotes prohibit stemming)
- "study"* finds study, studying, but not studious or studies (does truncation, not stemming)

If **Stemming has been turned off**, include a caret (^) to request stemming:

- study finds study (stemming does not occur)
- ^study finds study, studious, studying, studies, etc. (stemming occurs)
- ^"run study" finds "run study", "running studies", etc. (stemming applies to all quoted words)

The rules for stemming are listed below:

- Stemming behavior is determined by the primary language that was designated at *Presto* installation time. For example, if you are using French and English, but French is the primary language, then stemming is performed only with French.
- If you use stemming on a phrase, the caret must be outside of the quotation marks. Stemming is applied to all quoted words.
- Stemming works for Full Text searches (but not for Term searches).
- You can do either stemming or synonym, but not both on the same search item.

Finding Empty Fields

To find empty fields, use empty quotes in either of the following ways:

- Advanced Search Screen: Type "" in any field box (not an AllText box)
- Quick Search: Use the form books.subjects=""

Finding Active or Inactive Records

Every record is either active or inactive. An inactive record is one that has been restricted (for example, it can only be accessed by System Administrators).

If the Advanced Search Screen contains a field that allows you to search for active or inactive records, you can simply type **true** (to find active records) or **false** (to find inactive records).

Otherwise, you can use the following syntax in the Quick Search box:

```
Content_Type_Name.Active=True
Content_Type_Name.Active=False
```

The following table provides several examples. Note that an equals sign (=) is required.

Quick Search:	To find:
active=true	All active records
active=false	All inactive records
active=(true OR false)	All records in the database
books.active=true	All active records for the Books content type
books.active=false	All inactive records for the Books content type
books.active=(true OR false)	All records for the Books content type

Finding All Records

To find all records in the database, enter the following criteria in the Quick Search box:

```
active=(true OR false)
```

To find all records for a specific content type (such as Books), enter the following criteria in the Quick Search box:

```
books.active=(true OR false)
```

Full Text vs. Term vs. Phrase

If a field was marked Searchable when it was created, then any content added to that field is indexed, so it can be searched. Most Searchable fields are both Full Text indexed and Term indexed. A Term index stores each complete entry in that field as a discrete unit. A phone number, an e-mail address, or the title of a book are typical examples of terms. If a field was marked as Multi-Value when it was created, it may contain multiple entries, or terms. The following example shows three entries, or terms, in the Title field:

```
She Wore a Yellow Ribbon
A Midsummer Night's Dream
Seven Brides for Seven Brothers
```

Most commonly, you will do a Full Text search, which does not require an exact match. For example, the following search finds records that contain the word *ribbon*:

```
ribbon
```

A Term search, indicated by an equals sign (=), requires an exact complete match to an entry, and is more rarely used. See below for details.

Full Text Search Capabilities

A Full Text search is indicated by a colon (:). It is the most common and flexible search method. When doing a **Full Text** search, you can:

- Search for words
- Search for "phrases" by enclosing them in quotation marks
- Use truncation (*) for words or phrases (new* finds news, newspaper, etc.)
- Use stemming (^) for words or phrases (^go finds went, gone, going, goes, etc.)
- Search for synonyms (~) of words or phrases (~funny finds amusing, etc.)
- Search for two words or phrases that are NEAR each other ([red NEAR rooster])
- Include Boolean AND, OR, NOT

Term Search Capabilities

A Term search (exact match) is indicated by an equals sign (=), and may be required for certain types of searches. Term searches should only be done in the Quick Search box or an AllText or number-like field (not a text field) on an Advanced Search Screen.

When doing a **Term** search, you can:

- Specify the complete term or search for "strings" within a term by enclosing them in quotation marks
- Use truncation (*) at the end of a word or "string" (the asterisk must be outside of the quotation marks)
- Do an inclusive range search [start TO end] for numbers, dates, or text
- Do an exclusive range search {start TO end} for numbers, dates, or text
- Include Boolean AND, OR, NOT

The following are *not* supported for Term searches:

- Stemming (^) is not supported
- NEAR searches are not supported
- Synonym searching (~) is not supported

Note that Term searches are always used when searching for:

- Ratings
- Active or inactive records
- Empty fields

Phrase vs. Term

There is an important distinction between a phrase search and a term search. A phrase search, which is indicated by "quotation marks", searches for a series of words. A term search requires an exact complete match of a term entry in a field. A partial match will not find the record. For example, if the Title field contains this term:

```
Seven Brides for Seven Brothers
```

The following term search will be successful:

```
Books.Title="seven brides for seven brothers"
```

A phrase search will also find the record:

```
Books.Title:"seven brides"
```

A truncation search will also find the record:

```
Books.Title="seven brides"*
```

However, this term search will *not* find any records, because it does not specify the full, complete term:

```
Books.Title="seven brides"
```

Advanced Uses for Queries

This topic provides reference information about where and how to use queries. For related information, see Advanced Search Syntax.

Where to Use Queries

You can construct queries in the following locations:

- Quick Search box: Searches the entire database (unless you use Advanced Syntax)
- AllText box (sometimes called Words Anywhere) on an Advanced Search Screen: Searches all fields in the specified Content Type (unless you use Advanced Syntax). **Important!** If you use Advanced Syntax in any other field on the Advanced Search Screen, it will be interpreted as literal text and probably will not find any records.
- Filter box (on various pages, including Search Results, Browse Collection)
- Alerts and Global Alerts ("Containing keywords" control, "A user whose username contains", etc.)
- RSS Feeds created using the **Subscribe as Feed** button on the Search Results page
- Record Filter (Configure Roles)
- Import (Match criteria)
- Export (FilterQuery)
- Hyperlinks constructed for various uses (for example, links included when using Configure Screens)

Using Queries Outside of Search Screens

If you are constructing a query for use in an import file, an export request, a hyperlink, or similar situations, the recommended approach is to use an Advanced Search Screen to do the search, then paste the resulting query string into the desired location. For example, if you use the Advanced Search Screen to search for an Issue Date, *Presto* will display a string that looks something like this:

```
issue_date=["20080415000000" TO "20090530000000"]
```

You can copy and paste this string to the desired location. Keep the destination context in mind (that is, where you are planning to use the query) to determine what the query string should look like. In some situations (such as when specifying matching criteria in an import file), you may need to omit the portion of the string that specifies the content type or field name.

The samples below show how you might use a query string in certain situations.

Sample Export Request (Partial)

This example shows a query included in an export request file, to specify which records to export.

```
<ObjectSpecifier Name="Newspaper Archives"
   FilterQuery="issue_date=[20080415000000 TO 20090530000000]">
</ObjectSpecifier>
```

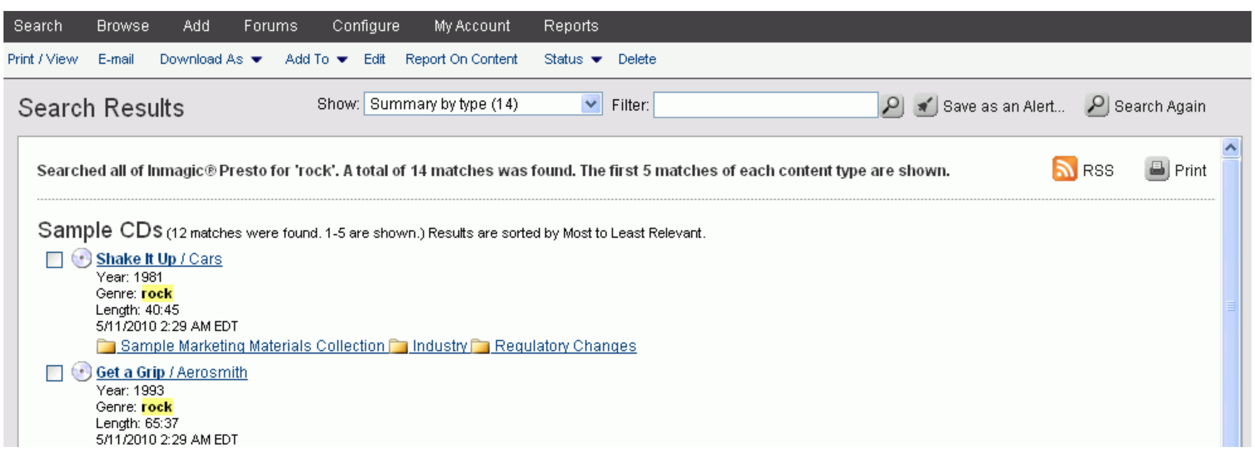
Sample Import File (Partial)

This example shows how to specify matching criteria in an import file, to indicate which records should be modified or deleted. Note that only the query itself is included, not the entire syntax string.

```
<Match>
   <PropertyValues>
        <PropertyValue name="ID">[1 TO 15] OR 18 OR 75</PropertyValue>
   </PropertyValues>
</Match>
```

Working with Search Results

The Search Results page lists the items found by your search.



- **Act on Content**: To act on one or more content items (**Print/View**, **E-mail**, etc.), check the box in front of one or more items, then use the Act on Content toolbar at the top of the window.
- **Report on Content**: Generate a report that shows the records retrieved by the search. This option is also available if you display a single record.
- **View or Copy**: To view details about a record (or have the opportunity to copy a record), click the record link.

Use the options at the top of the Search Results page to perform actions on the set of records found:

- **Show**. Select a view from the **Show** drop-down list. The total number of matches for each content type in the list is indicated (in parentheses).
- **Filter**. To search within the results that were found, enter a value in the **Filter** box, using standard search syntax, and press Enter or click . To remove the filter and return to the previous results, click the **Remove Filter** link that appears.
- **Save as an Alert**. Create a new Alert based on this query.
- **Search Again**. Return to where you started the original search, such as the Home Page, with the original search criteria still in place (for example, in the Quick Search box).

Use the options at the top right of the Inmagic Presto search results tab to perform the following actions:

- **RSS**. Create an RSS feed to display new records that match the search criteria.
- **Print**. Print the items that are included in the viewing pane (whether or not they are currently visible in the scrollable view).

Navigation

Each content area of the viewing pane shows only a limited number of items found, out of the total number that were found. For example, it may display 5 out of 12 found. To display all items, click the **Show all matching <content-items>** link at the bottom of a section in the viewing pane. After showing all matching content items, you can use the following controls:

- Select or deselect items by clicking **All** or **None**. You can then use the Act on Content toolbar to affect the selected items. (Note that All and None are only available when viewing records for a *single content type.)* Also note that to select or deselect all of the items in the *entire list*, you must click **All** or **None** for *each* viewing pane.
- Go to another page by clicking **Next** or **Previous**, by selecting a number from the **Page** drop-down list, or by typing a page number and pressing **Enter**.
- Use the **View** drop-down list to change the number of items displayed on a page.
- Use the **Sort by** drop-down list to re-order the entire list.

Search Provider Tabs (Federated Search)

By default, search results are displayed on the *Presto* Search Results page. If the Federated Search feature has been configured, an additional tab may appear on the Search Results page for each configured provider, such as Google, Bing, Wikipedia, or SharePoint, to display the results of a Quick Search.

To enable Federated Search, an administrator must configure search adapter settings in the *Presto* Application Settings. Further configuration is required for Google, SharePoint, and certain other search adapters.

Note: For instructions, see the *Presto Advanced Administrator's Guide*.

Any user who is a member of a role with the System Permission “PERFORM FEDERATED SEARCH” will be able to use the additional tab(s). Note that the Act on Content actions are not available when a search provider tab is selected.

Viewing Content

The View Content page shows details for the record that you clicked on the search results page. The Detail Screen that was configured for this content type by your administrator determines the appearance of the page and which controls are available.

Main Area of Screen

Content appears in the main area of the screen. You may see an article, a Web site, a blog post, or other content. In some cases, you may be asked if you want to view or download the item. The following options appear at the top of the main area:

- **Search Again**. Return to the original search location (such as the Home Page), with the query criteria still in place.
- **Back to Search Results**. Click **Back to Search Results** to return to the Search Results page.
- In some cases, you can click **Next** and **Previous** to navigate among items.

Act on Content toolbar

Use the buttons on the **Act on Content toolbar**, at the top of the screen, to affect the item that you are currently viewing. The options that appear depend on your assigned privileges, which type of item you are viewing, and how you accessed the current page. Some options are only available if you are viewing an individual record (if you did a search and then clicked a record from the search results page), and if your permissions have been configured to allow that feature (such as ratings, comments, or tags). Typical options include **Print/View**, **E-mail**, **Download As** (**PDF, HTML, XML**), **Add to** (**Cart**, **Category**), **Edit**, **Copy**, **Social** (Moderate, Tag, Comment), **Status (Activate or Deactivate**), **Delete**.

Right Side of Screen

Key information about the item appears on the right side of the screen. The information you see depends on the item type. For example, you may see Author, Title, Description, and so on.

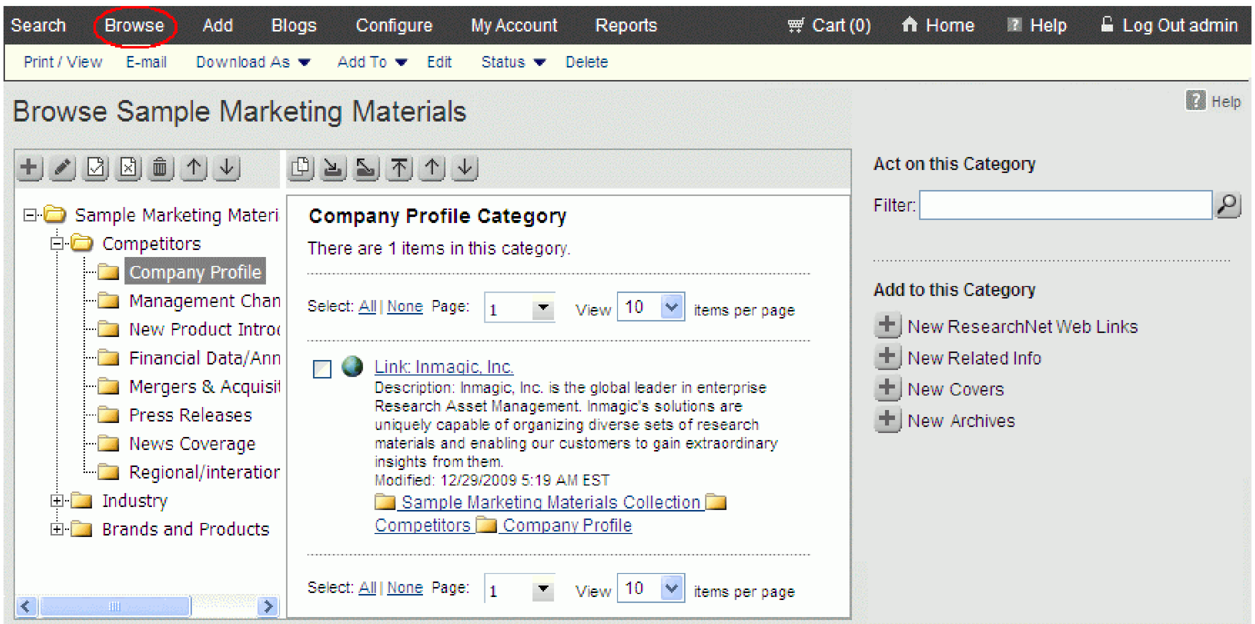
Additionally, the following items may appear:

- **Tag cloud**. A tag cloud is a box that contains words or phrases (tags) that users have applied to this item to improve search results. More frequent tags are more prominent. Tag clouds appear only if tags are enabled for the content type, and the control has been added to the Detail Screen.
- **Ratings**. Ratings indicate how valuable users consider the content item to be, from a rating of 1 star (low) to 5 stars (high). Ratings appear only if ratings are enabled for the content type, and the control has been added to the Detail Screen.
- **Comments**. A comment is a personal response to an individual content item or blog post. Comments appear only if comments are enabled for the content type, and the control has been added to the Detail Screen.

Chapter 7: Browsing Content Collections

Browse and Organize Collections

Browsing provides an alternative to searching. The **Browse** menu contains content collections that were set up by an administrator. Select a content collection from the **Browse** menu to display the collection. Each folder (or category) contains records that you can print, view, e-mail, download, and so on. If you have the appropriate rights, you can also organize records and folders. All of these actions are explained below.



Browsing a Collection

The **left pane** displays folders, or categories. To locate content, you can expand and collapse folders, or click on a folder. The number of content items appears in parentheses after the folder name, unless this feature has been disabled. When you click a folder that contains content, the records are displayed in the center pane.

The **center pane** displays records in the selected folder. Use the navigation controls to move from page to page and to specify how many items to display per page. To perform an action on a record, select it (check its box, or use the **All** or **None** option to select or deselect all records), then use the available menus and options, described below. **Note**: To select or deselect all items on *all* pages, use the **All** or **None** option on *each* page of results. For long lists, it may be more efficient to increase the number of items displayed per page first.

A Note about Sort Order: When viewing items in a Category on the Browse Collection page, the sort specification in the View is ignored. The order of the items is determined by the person whose role permits them to organize records (see below).

Acting on Content and Categories

When browsing a collection, you can use the following methods to act on content and categories:

- Act on Content toolbar: Depending on your rights, you can perform the following actions on the selected item(s): Print/View, E-mail, Download as PDF, HTML, or XML, Add a record to another category, Activate, Deactivate, or Delete a record.
- **Act on this Category (Filter)**: To search within the currently selected folder, enter a value in the **Filter** box. To reset the search and return to the previous results, click the **Remove Filter** link. To learn how to search, see Search Syntax.
- **Add to this Category**: Users with the appropriate rights can add records to the selected category: Select a folder in the left pane, then click the appropriate  **New** button (for example, **New Article**) to open the Add screen. Fill in the fields, and click **Save** to create a new record in the selected folder.

Organizing Folders in a Collection

If you have the appropriate rights, the Act on Category Toolbar appears above the list of folders, when browsing a collection:

You can use this toolbar to organize the collection. For example, you can add a subcategory (folder), edit (rename) a category, activate or deactivate a category, delete a category, or move a category up or down. You can also select a folder and then drag it to a new position. The changes you make affect all users who can access this collection.

Organizing Records in a Collection

If you have the appropriate rights, the Act on Category Toolbar appears above the list of records in the center pane, when browsing a collection. You can use the following buttons to organize content items:

You can copy a record to a category, move it to another category, remove it from a category, move it to the top of a category, and move it up or down in a category. The changes you make affect all users who can access this collection.

Note that a record can belong to more than one collection and more than one category. You can easily move records from one folder to another: Click a folder in the left pane, to display its records in the center pane, check the box next to the record(s) that you want to move, click the Move to Category button in the toolbar, then use the pop-up window to select the destination folder.

Note that the Sort defined for the Citation View is not applied to records in a collection, because each Category can include records from multiple Content Types, which inherently use different views. To reorder records, you can move them up or down, by checking the box next to a record, then using the Move Up or Move Down button.

A content collection is a set of records that users can access from the **Browse** menu, as an alternative to searching. Collections provide a way of grouping content type record instances within user-defined categories. This concept is similar to tagging, but the categories are pre-defined. For example, you might have a collection of Regions (North America, South America, Asia, Europe). A record can belong to multiple categories, both within and across collections. It is also possible to exclude a content type entirely from a collection.

Choose **Configure>Content Collections** to perform the following tasks on content collections:

- To create a content collection, click **Create new Content Collection** on the Configure Content Collections page. When you create a collection, *Presto* adds it to the **Browse** menu.
- To edit a content collection or view its settings, click a collection then make any desired changes.
- To delete a content collection, click the **Delete** button next to the collection that you want to delete, then click **OK** to confirm.

After creating a collection, you need to populate it, using any of these methods:

- Search for existing records, check one or more records found, then use the **Add to Category** button in the toolbar.
- Click **Add to Category** when adding or editing a record.
- Select a collection from the **Browse** menu, navigate to a category, and use the **New**..." buttons under **Add to this Category** on the right side of the screen to create a record and add it to the selected category.

To organize the collection, select it from the **Browse** menu and use the resulting page to add and rename folders, move content items from one folder to another, and so on.

Related Topics

- To remove a collection from the **Browse** menu without deleting the collection, use **Configure>Menus and Menu Bar**.
- To determine who can browse the collection, use **Configure>Roles>Collection Permissions**.

Create New Content Collection

To create a content collection, choose **Configure>Content Collections**, **Create new Content Collection**, then follow the steps below:

1. Enter a unique **Name** for the collection. This name will appear on the **Browse** menu to identify the collection.
2. Enter a brief **Description**, which will identify the collection to administrators, when the collection is listed on the Configure Content Collections page.
3. Specify which **Content Types** the collection should include:
   - **All Content Types**: This may result in a very large collection.
   - **Restricted to**: To assemble a smaller collection, select the content types that you want to include. Select an item in the **Available Content Types** list and click **Select** to move it to the **Allowable Content Types** list. Repeat to add another content type. You can use **Remove** to remove a selected content type from the list, or **Clear List** to start over.

4. Click the **Save** button.

   When you save a new collection, *Presto* automatically adds it to the **Browse** menu.

5. To populate the collection, use any of these methods:

   - Search for existing records, check one or more records found, then use the **Add to Category** button in the toolbar.
   - Click **Add to Category** when adding or editing a record.
   - Select a collection from the **Browse** menu, navigate to a category, and use the **New**..." buttons under **Add to this Category** on the right side of the screen to create a record and add it to the selected category.

6. To organize the collection, select it from the **Browse** menu, then use the toolbars on the Browse page to organize the folders and content items that make up the collection. For more information, see Browse and Organize Collections.

7. To determine who can browse the collection, use **Configure>Roles>Collection Permissions**.

Allowed users can then select a collection from the **Browse** menu to browse through records, as an alternative to searching.

Edit Content Collection

To edit a content collection, choose **Configure>Content Collections**, **Edit Content Collection**, then follow the steps below.

1. Enter a unique **Name** for the collection. This name will appear on the **Browse** menu to identify the collection.

2. Enter a brief **Description**, which will identify the collection to administrators, when the collection is listed on the Configure Content Collections page.

3. Specify which **Content Types** the collection should include:

   - **All Content Types**: This may result in a very large collection.
   - **Restricted to**: To assemble a smaller collection, select the content types that you want to include. Select an item in the **Available Content Types** list and click **Select** to move it to the **Allowable Content Types** list. Repeat to add another content type. You can use **Remove** to remove a selected content type from the list, or **Clear List** to start over.

4. Click the **Save** button.

5. To populate the collection, use any of these methods:

   - Search for existing records, check one or more records found, then use the **Add to Category** button in the toolbar.
   - Click **Add to Category** when adding or editing a record.
   - Select a collection from the **Browse** menu, navigate to a category, and use the "**New**..." buttons under **Add to this Category** on the right side of the screen to create a record and add it to the selected category.

6. To organize the collection, select it from the **Browse** menu, then use the toolbars on the Browse page to organize the folders and content items that make up the collection. For more information, see Browse and Organize Collections.
7. To determine who can browse the collection, use **Configure>Roles>Collection Permissions**.

Allowed users can then select a collection from the **Browse** menu to browse through records, as an alternative to searching.

Related Topics

To remove a collection from the **Browse** menu without deleting the collection, use **Configure>Menus and Menu Bar**.

To permanently delete a content collection, choose **Configure>Content Collections**, click the **Delete** button next to the collection that you want to delete, then click **OK** to confirm.

Chapter 8: Adding and Editing Records

Adding Content

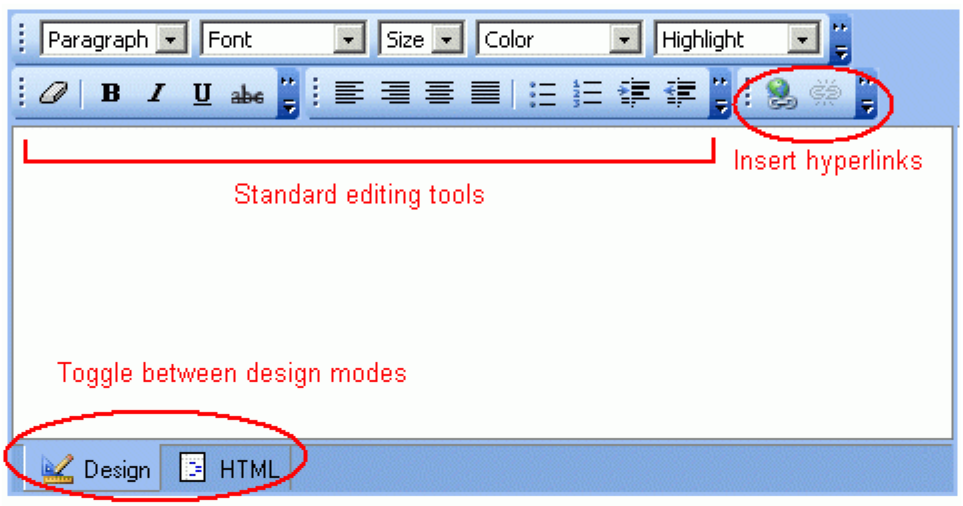
To add a new record, select a content type from the **Add** menu, then fill in the fields. The content types that are included on the **Add** menu were created specifically for your organization. Your login determines which content types you can see and act on. The fields that appear after you select an item from the **Add** menu depend on how the Add Screen was configured.

Note: To import content in XML or CSV format, use the **Configure** menu.

Using the Add Screen

Fill in required fields, which are indicated by an asterisk (*), as well as any optional fields. You must click the **Save** button to add your content. The controls that appear when adding content depend on the content type and how *Presto* has been configured. You may see some or all of the following:

- **Standard controls** such as check boxes, option buttons, drop-down lists, text fields, and so on. Use these as you would in any application.
- **HTML Editor**. Use the editor to apply formatting and add links and images. The **Design** tab displays content as it will appear. The **HTML** tab lets you encode HTML directly. For more information, see The HTML Editor.



- **Add to Category**. In some cases, you may be able to add the content to a collection. Click to open a pop-up window that lets you add this content to a particular category. This control appears for each collection to which the content type can belong.
- **Clear**. Click to remove a single item from the associated field.
- **Clear List**. Click to empty the list from the associated field (for example, if you want to start over).
- **Look up**. Click to open a value list (a predefined list of values for the field).
- **Remove**. Click to delete the item associated with or selected in a field.

- **Replace**. Click to replace a file or image associated with a field.
- **Select File**. Click to open the File pop-up window so that you can select and upload a file.
- **Test URL**. Click to test the validity of the URL you entered in the associated field. You can enter a full URL (http://www.inmagic.com) or a partial one (www.inmagic.com). **Note:** *Presto* automatically assumes "http://" if you enter a partial URL. If the URL is to a secure Web site, you must include "https://". If you are adding a Web link to an internal file, you should use the relative path so that if the file is moved, the link is not broken.

Copying a Record

To copy a record:

1. Browse or search to find the record you want.
2. Click the record link.
3. On the resulting page, choose **Copy** from the Act on Content toolbar.

The **Copy** option is available when displaying a single record (viewing content) after browsing or searching and then clicking a record, if your permissions allow copying.

Hiding Inactive Records

All records are visible by default (even Inactive records). If you want to hide inactive records, configure a Role that has a Record Filter of **active=True** (on the Content Permissions tab), ensure that the VIEW permission is selected, then assign that role to selected users (Members tab).

Editing Content

To edit a record:

1. Do a search.
2. On the Search Results page, check the box next to one item.
3. Select **Edit** from the Act on Content toolbar.
4. Use the Edit Screen to make changes, then click **Save**.

The fields on the Edit Screen depend on how the Edit Screen was configured. The controls that appear on the Edit Screen depend on the content type and how *Presto* was configured. You may see some or all of the following controls:

- **Standard controls** such as check boxes, option buttons, drop-down lists, text fields, and so on. Use these as you normally would.
- **HTML Editor**. Use this as you would use any standard editor to apply formatting and add links and images. The **Design** tab (available at the bottom of the editor) displays content as it will appear. The **HTML** tab lets you encode HTML directly. For more information, see The HTML Editor.

- **Add to Category**. Click to open a pop-up window that lets you add this content to a particular category. This control appears for each collection that the content type is allowed in and if your role has permission to organize content.
- **Clear List**. Click to empty the associated field (for example, if you want to start over).
- **Look up**. Click to open a value list (a predefined list of values for the field).
- **Remove**. Click to remove the item(s) selected in a field.
- **Select File**. Click to open the File pop-up window so that you can select and upload a file.
- **Test URL**. Click to test the validity of the URL you entered in the associated field. You can enter a full URL (http://www.inmagic.com) or a partial one (www.inmagic.com). **Note:** *Presto* automatically assumes "http://" if you enter a partial URL. If the URL is to a secure Web site, you must include "https://". If you are adding a Web link to an internal file, you should use the relative path so that if the file is moved, the link is not broken.

Deleting Content

To permanently delete a record:

1. Do a search.
2. On the Search Results page, select any item(s) that you want to delete.
3. Select **Delete** in the Act on Content Toolbar.
4. Confirm or cancel the deletion.

Importing XML or CSV Files

To load content into *Presto* from an XML file that conforms to the *Presto* schema or from a comma-separated value (CSV) file, choose **Configure>Administrator Tools>Import Content**. For instructions, please see Importing Content.

Setting Up an Approval Process for New Records

The following approach demonstrates how you can implement an approval process for new records by assigning users to one of three roles (using the **Configure>Roles** page). You can follow this recommendation or adapt it to your needs.

Role #1: Limited creation rights.

Configure a role that has limited creation rights. For this role, the only Create option on the Content Permissions tab should be CREATE INACTIVE. Users assigned to this role will be able to create Inactive records and perform any other operations that you allow.

Role #2: Ability to see Active (but not Inactive) records.

To hide inactive records, configure a Role that has a Record Filter of **active=True** (on the Content Permissions tab), check the VIEW permission, then assign that role to selected users (Members tab).

Role #3: Ability to approve records and make them Active.

Configure a role that has no Record Filter so users assigned to the role can see both Active and Inactive records. Also give this role the CHANGE STATUS permission. Users assigned to this role can look over any newly created Inactive records and, if they approve, they can activate the record by using the Activate button on the Act on Content Toolbar, or by editing the record and changing the Active field to True.

Value Lists

A value list is a list of items that users can select from when creating, editing, or searching. Value lists can facilitate data entry and ensure consistency. Typically, value lists are used for fields with a relatively limited number of specific entries, such as Name, State, Country, or Status.

Choose **Configure>Value Lists** to perform any of the following actions:

- To create a value list, click **Create new Value List**. Use the resulting page to assign a Name and Description, and populate the list by typing the values that you want to make available to users.
- To edit a value list, or view the settings for a value list, click an existing value list on the Configure Value Lists page. The resulting page is identical to the page for creating a value list.
- To delete a value list, click **Delete** next to the list name, then click **OK** to confirm. Note that you cannot delete a value list if it is used in a content type definition (if any fields in the User Defined Fields tab in Edit Content Type have the value list specified in the Value List drop-down list).

A value list can be applied to one or more Text fields, and can function as Strict (users must select an entry from the list) or Permissive (users can enter a value that is not on the list) on a per-field basis. For example, a Names value list could be strict for one field and permissive for another. You specify whether a value list should be strict or permissive when you assign it to a field, not when you create it.

Note: After configuring a value list, use **Configure>Content Types** to assign the value list to a field.

Assigning a Value List to a Field

A value list can be applied to one or more Text fields, and can function as Strict or Permissive on a per-field basis. For example, a Names value list could be strict for one field and permissive for another. Users can select values from the list when creating, editing, or searching. After configuring a value list, follow the instructions below to assign it to a field.

To assign a value list to a field

1. Choose **Configure>Content Types**.
2. Click the link for the content type you want to edit
3. Select the **User Defined Fields** tab.
4. Click the link for the field to which you want to assign a value list. It must be a Text field.
5. In the **Edit Field** pop-up, select the **Value List** that you want to use. Each value list appears twice, followed by the word (**Strict**) or (**Permissive**), as shown in the example below:

```
Countries (Strict)
Countries (Permissive)
States (Strict)
States (Permissive)
```

If you select a strict value list, users can select only an entry from the list. If you select a permissive value list, users can enter a value that is not on the list. The entry will be added to the field (but not to the validation list). Permissive lists are often used as "helpers" to show typical entries, while strict lists serve as validators.

6. Select the value list you want to use for the field, and click **Update** on the pop-up.
7. Click **Save** on the Edit Content Type page.

Chapter 9: Importing and Exporting

Importing Content

You can load content into *Presto* from either an XML file that conforms to the *Presto* format or from a comma-separated value (CSV) file, using **Configure>Administrator Tools>Import Content**.

Importing XML

Note: For detailed instructions, and information about the XML import format, see the *Import and Export Configuration Guide*.

You can import either an XML ImportRequest file or an XML Import file. The file can be one you created by hand that conforms to the *Presto* format for content import files, a file created by dumping data from an external database, or a backup file of content data from an existing *Presto* catalog.

Note that the maximum file size is 4MB. To import a larger file, use ContentLoader (see the *Import and Export Configuration Guide*).

An XML import file can include any combination of the objects listed below. Note that only Content Type records and Blogs can be modified during an import. The behavior of import for each object type is as follows:

- **Content Type records**: Records are added, modified, or deleted, according to the entries defined in the file. The values for properties in a new record are specified by the <PropertyValue> elements.
- **Blogs**: Same as Content Type records.
- **Value Lists**: The imported list *completely replaces* the existing list (existing values are cleared; then new values are added).
- **Content Collections**: The input format is hierarchically structured starting at the root of the taxonomy. This operation is most useful for creating an entire taxonomy all at once, because the structure in the file is *added* to the taxonomy (the original taxonomy is *not* cleared).
- **Relationships**: The new relationship instances in the import file are *added* to the database. No change to existing relationship instances occurs.

To import an XML file

1. Choose **Configure>Administrator Tools>Import Content**.
2. **XML Import file** is selected by default.
3. Use the **Browse** button to select an XML ImportRequest file or an XML Import file that conforms to the *Presto* format described in the *Import and Export Configuration Guide*.
4. Click the **Perform Operation** button.
5. When the import is complete, use **Configure>Administrator Tools>Monitor Jobs** to verify that the import was successful.

Importing CSV

Many applications (such as Microsoft Excel or Inmagic Genie) can export data to a text file in comma-separated value (CSV) format. You can import CSV files into *Presto* in order to create, modify, or delete records. Note that the importer ignores empty lines and strips leading and trailing spaces.

Note: When creating a CSV file for import, use the originating application to export data using the "First Row Contains Field Names" or equivalent option. If the field names or content include accented characters, save the file as Unicode (UTF-8). You may need to open and save the file in another application after you export the data.

To add, replace, modify, or delete records by importing a CSV file

1. Choose **Configure>Administrator Tools>Import Content**.
2. Use the **Browse** button to select a text file in CSV format, which has field names defined in the first row.
3. Select **Comma Separated Value (CSV) file**.
4. Specify the following options to determine what Content Type should be affected and to indicate which characters are used to delineate data in the CSV file.

   Note: For delimiters, you can either select a value from the list or type a keyboard character. Each delimiter value can be only a single character.

   - **Content Type**: Select the content type into which you are importing data.
   - **Field Separator**: Specify which character indicates where each field ends. The default is a comma. If a field in the import file contains a character that is specified as a field separator, surround the field information with the specified Quote Character. The following example uses double quotation marks to prevent the comma after 'Smith' from being interpreted as a field separator: "Smith, B.",Fly Fishing,2009
   - **Entry Separator**: Specify the character used between multiple (repeating) entries in a field. The default is a vertical bar, as shown in the following example: Bill Jones|Sue Smith|Tom Williams. The specified character will always be interpreted as an entry separator, even if it is inside the specified Quote Character. If your import file includes the Category field, you must specify a different Entry Separator, since the vertical bar is used to separate subfolders in categories.
   - **Comment**: Lines beginning with the specified character will be ignored during import. The default is {NONE}. If you specify a character, such as ! or #, be sure that it only appears at the *beginning* of lines or within quoted fields.

     Important: If a comment character is specified and that character is embedded in a line (i.e., is not the first character in a line) and is not within quotes, that record will "silently" be rejected but an exception file will *not* be created. Look at **Monitor Job**s after an import to ensure that all records were successfully imported. Also, the Errors.LOG file will include a message such as the following: `Message : Malformed Comma Separated Value detected error: The CSV appears to be corrupt near record '4' field '2 at position '277'`. One solution is to redo the import, specifying {NONE} as the comment character. Note that lines beginning with the previously specified comment character will be imported (added to the record), instead of being ignored. Another solution is to quote any fields that contain the specified comment character, then redo the import.

- **Quote Character**: Specify which character is used to enclose field information. The default is a double-quotation-mark ("), as shown in this example: "Jones, Bob","15 Elm Street","Smalltown","CA". If the data includes quote characters, double them in the CSV file, as in this example: "This is ""quoted text"" in the field","Grisham, John","1995"
- **Empty Value Token**: Specify the value used in the import file (by the originating application) to represent an empty field. This occurs in CSV files produced by some applications (notably SQL Server). If in doubt, leave it set to the default value of NULL.
- **Non-Unicode File**: If the field names or content include accented characters or other special characters (e.g., Greek symbols, smart quotes, trademark symbols, and so on), and the file has not been saved as Unicode (UTF-8), you can check this box. *Presto* will attempt to detect the encoding and convert it to Unicode so that the characters will be imported properly.

5. To modify or delete records, select **Check for Matching Records**, then use the matching options to control how records will be changed or deleted. (If you do not select this option, records will be added.) When a record in the import file matches one or more records in the database, that record is handled according to the specified Add/Replace options.
6. If you select **If Match is Found**, specify what to do if the import file contains a record that already exists:
   - **Reject New Record**: Add new records, avoiding duplicates. Use this option to avoid duplicating any existing records when adding new records. Records in the import file are rejected if they match an existing record. A match is determined by the field(s) in the Incoming Records Must Match list. Rejected records are copied into the exception file. If you want to, you can correct records in the exception file (using a separate editing program), then import the corrected exception file (see Working with Exception Files).
   - **Append Field Entries**: Merge fields in duplicate records. Use this option to add information to a record without changing any existing information. *Presto* adds information to records that match records in the import file. Field entries in the import file are appended after the last entries for those fields in the existing records. This is how you merge fields in duplicate records. If the existing record contains fields that are not in the import file, those fields remain unchanged. For single-value fields, Append Field Entries behaves like Replace Fields, so if the Match Field is a single value field, its contents will be replaced with the same value, and thus appear not to have changed (unless you changed the case or punctuation in the CSV file).
   - **Replace Fields**: Change field information in existing records. *Presto* modifies records that match records in the import file, by replacing the existing field contents with information in the import file. In other words, fields in the incoming record replace fields in the existing record. Fields that are not in the import file remain unchanged.
   - **Replace Old Record**: Replace existing field values with values defined in the import file. If multiple matching records are found, the record is rejected (see Working with Exception Files).
   - **Delete Old Record**: Delete existing records. *Presto* deletes records that match records in the import file. If the import file contains a record that does not already exist, it will be rejected. Deleted records are not placed in the exception file. They are permanently deleted and cannot be retrieved. Only rejected records are placed in the exception file.
7. If you select **If Match is Not Found**, select one of the following options to determine what to do if a match is *not* found for a record in the import file:
   - **Accept New Record**: The new record will be added.

- **Reject New Record**: The new record will be rejected during the import and the rejected record will be copied to the exception file. The rejected record count in Monitor Jobs will be increased by one for each rejected record.
- **Do Nothing**: The new record will be ignored (although the rejected record count in Monitor Jobs will be increased by one). The difference between Do Nothing and Reject New Record is that Reject New Record writes the record to the exception file.

8. Use the **Select** button to move one or more fields from the **Matchable Fields** list into the **Incoming Records Must Match** list. The field(s) that you select indicate which field information *Presto* will compare during the import to determine whether a record in the import file matches an existing record.

   To be considered a match, every entry in the matching field in the import record must match an entry in an existing record in the database, using a Term search (exact match). To ensure that you change only the intended records, use a non-repeating field that is likely to contain unique information. An ID field that contains unique values is ideal.

   You can request that a match be based on more than one field. For example, if you have multiple records for the same last name (Joe Smith and Bill Smith), you might want to match the last name, first name, and phone number to ensure that the correct record is modified.

   If you match on multiple fields, every entry in every matching field in the import record must match an entry in an existing record, to be considered a match. The order of fields in the Incoming Records Must Match list is not important.
9. Click the **Perform Operation** button.
10. When the import is complete, use **Configure>Administrator Tools>Monitor Jobs** to verify that the import was successful.

Monitoring and Troubleshooting Imports

To monitor the status of an import, use **Configure>Administrator Tools>Monitor Jobs**.

Information about the import task is appended to the end of the **Presto.log** file (`<install-path>\WebApps\Mercury\system\log\presto.log`).

Errors, if any, are written to the **Errors.log** file.

Working with Exception Files

If any records from an XML or CSV import file cannot be imported, they are written to an XML exception file. The purpose of an exception file is to make it easy to identify rejected records, so you can make corrections and then import the rejected records. The <Error> elements in the exception file can be deleted or left as is – the import operation will ignore them.

The default filename and location for the exception file is **C:\Program Files\Inmagic\Presto\ImportException\<name-of-import-file-with-timestamp>.xml**.

The exception file is an XML file. However, the records written to the file may be in either XML or CSV format:

- If records are written to the exception file in XML format, you can simply correct the records in the exception file, then reimport it.

- If records are written to the exception file in CSV format, you cannot simply edit and import the XML exception file. If you want to import the records, you must take the text inside the <![CDATA...]]>, copy it into a file, add the field names above it, save the file as CSV, then import it.

For instructions and examples, please see the *Import and Export Configuration Guide*.

Exporting Content

Note: For examples and detailed instructions, see the *Import and Export Configuration Guide*.

You can export Presto content to an XML file, which can be retained as a backup or imported into Presto. The resulting file is formatted as a Presto import object, but is fully transformable using an XSL transform. Prior to performing the export, you must construct an XML-formatted file (the input file) that contains the instructions specifying which data should be exported.

1. Choose **Configure>Administrator Tools>Export Content**.
2. Select an XML input file, which contains instructions about what data should be exported. Do this by entering the name of a file or using the **Browse** button. The XML file must contain an ExportRequest object, which specifies parameters for the export operation.
3. Click the **Perform Operation** button. This processes the XML input file that contains the ExportRequest object. The result is an XML output file, which will be written to the filename and location specified in the ExportRequest object.

Chapter 10: Social Features

Presto includes social features to allow authorized users to contribute and respond to content in the following ways. You may or may not be able to use some or all of the following features, depending on how permissions are set.

- Blogs: Users can create, view, and contribute to blogs, depending on how permissions are set.
- Forums: Users can create, view, and contribute to forums, depending on how permissions are set.
- Tags: A tag is a descriptive word or term that helps improve searches for the tagged item. For example, a post that talks about restaurants might be tagged with a chef's name or other content that was not specifically mentioned in the post itself. Depending on how *Presto* has been configured, tags may be displayed as a "cloud", with more frequent tags appearing more prominently, or as a read-only text area (which shows counts), or as a label (which does not show counts).
- Comments: A comment is a personal response to an individual content item or blog post. Users can also indicate whether they find a particular comment helpful.
- Ratings: A rating consists of a number of stars, from 1 (low) to 5 (high), which provides a way for users to rank content usefulness.
- Moderate Social Content: Allowed users can remove individual tags, comments, or ratings from a record. This is typically done to delete unhelpful or offensive content.

How to Set up Tags, Comments, Ratings

Tags, comments, and ratings are social features, which encourage interaction among users by allowing them to respond to records in ways that they find meaningful. *Tags* help users flag content so they can find records according to their own (and others') search terms; the tag clouds that result from multiple user tags provide a visual representation of the most frequently applied tags. *Comments* and *ratings* can help administrators determine which content is considered valuable by the wider community.

Administrators can control who is allowed to socialize and who is allowed to moderate content (remove undesirable tags, comments, and ratings). The result is an open yet controlled community.

To set up tags, comments, and ratings, follow the main steps below.

1. Configure screens

This step displays social features on selected screens. On the Configure Content Types page:

a. Click the **Configure Screens** link next to the content type that you just created or modified.

b. Click the **Detail Screen** tab.

c. In the **Controls** section, create a new control or edit an existing control for each social feature that you want to include. Populate the fields in the Edit Control or Create Control box as follows, depending on which social features you want to display on the Details screen:

	Tags	Comments	Ratings
Associated Field	[Tags]	[Comments]	[Rating]
Control Type	Tag Cloud* (or Text Area Read Only)**	Comment Listing	User Ratings
Other	Width, Height, etc.	As desired	As desired
*Tag Cloud shows tags as clickable links. Font size and color indicates how often the tag is used. **Text Area Read Only lists tags with the count in parentheses.			

d. Continue using the tabs to update the following screens, as desired:

- **Advanced Search Screen**: You can add individual controls to the advanced search screen that will allow users to search for any of the following: tags, comments, ratings. For more information, see Search for Social Content.
- **Print Friendly Screen**: This screen is used for Print/View, E-mail, Download as HTML, Download as PDF.
- **Edit Screen**: This screen is used when you click the **Edit** button on the search results or Detail screen.
- **Add Screen**: This screen is used when you select an option from the **Add** menu.

2. Configure roles

This step updates Content Permissions and/or Blog Permissions for selected users.

a. Choose **Configure>Roles**.

b. Use the **Content Permissions** and/or **Blog Permissions** and/or **Forum Permissions** tabs to allow or prohibit socialization features for the specified members:

- **Rate**: Users can click a number of stars to rate a record.
- **Comment**: Users can add comments to a record.
- **Tag**: Users can tag content.
- **Moderate Social Content**: Users can remove selected ratings, comments, or tags.

The social features are now ready for use, according to each user's permissions. For more information, see Social Features.

Commenting on Items

A comment is a personal response to an individual content item or post. A typical comment might indicate agreement with an author's opinion or point out errors or inconsistencies. The Comment control appears only if comments are enabled for the content type, and the control for the Comments field has been added to the Detail Screen. Comments can be seen by all users who can view the record.

When you view a content item or post, you can work with comments in the following ways, if your permissions allow:

- Click the **Comment** button to comment on this item or respond to a previous comment. Note that you cannot edit a comment after you add it.

- When a record with a comment is displayed, the comment may be followed by text asking "**Did you find this comment helpful?**". Click **Yes** or **No** to help rank the comment for other users. The record will subsequently indicate the number of people who found the comment helpful (for example: *3 of 5 found the following comment helpful*). Whether you've rated a comment using "Did you find this comment helpful? Yes | No" is stored in a cookie. *Presto* requires that cookies be enabled to support this and other functionality.
- Click the **Moderate Social Content** button then use the resulting screen to delete one or more existing comments, if your permissions allow.

When you perform a search, comments are also searched.

Rating Items

Content items (but not blog posts) can be rated with a number of stars. This helps other users judge whether the item is considered useful by the wider community. Ratings are indicated in each record when it is individually displayed. (The Ratings control appears only if ratings are enabled for the content type, and the control has been added to the Detail Screen.)

When you view an individual record, you can work with ratings in the following ways, if your permissions allow:

- Click a number of stars in the top row to indicate how valuable you found the content, from 1 star (low) to 5 stars (high). The display also indicates the Overall number of stars that have been applied by all users and the average (for example: *Average of 5 ratings: 3.0 stars*). You can only rate an item once. However, you can re-rate the comment later, if you change your mind. To remove a rating, click the removal button at the left of the rating control.
- Click the **Moderate Social Content** button and use the resulting screen to remove one or more ratings from the record, if your permissions allow.

Additionally, you can search by ratings if the Rating search control has been added to the Advanced Search Screen. For more information, see Searching for Social Content.

Tagging Items

A tag is a descriptive word or term that helps improve searches for the tagged item. Tags enable users to flag content so they can find records more easily. For example, a post that talks about restaurants might be tagged with a chef's name or other content that was not specifically mentioned in the post itself.

When you perform a search, tags are also searched.

Working with Tags

Depending on how *Presto* is configured, tags may be displayed as a "cloud", with more frequent tags appearing more prominently, or as a read-only text area (which shows counts), or as a label (which does not show counts). For example, when an individual record is displayed, its tags may appear as a tag cloud in a box at the right of the screen. A tag cloud shows all tags specified for the record in descending order by popularity (the number of users who have specified that tag for this record), subsorted alphabetically. The font and color also indicate the number of users. When you mouse over the tag cloud, each word or phrase is clearly indicated.

A tag cloud appears only if tags are enabled for the content type, and the control has been added to the Detail Screen.

When you view a record, you can work with tags in the following ways, depending on how *Presto* is configured:

- Add a tag: Click **Tag**, then type a word or phrase in the **Your Tags** box that you want to associate with this record, and press **Enter**. Each line that you enter is treated as a tag. For example, the following would result in 3 tags:

  Sushi <enter>
  Boston <enter>
  Miso Soup Recipe <enter>

  When adding a tag, you can click a tag in the **Everybody's Tags** cloud to add that tag to the list of **Your Tags**, if desired.

  Duplicate tags will be removed from the Your Tags list when you click **Save**. For example, if you enter "Sushi" three times, only one instance will be retained.

- Retrieve all items with that tag anywhere in the catalog by clicking a tag in the cloud. When you mouse over each tag, you can clearly see if it is a word or a phrase.
- Click **Show All Tags** to see tags assigned by all users to this post.
- Click **Show My Tags Only** to see only your own tags.
- To delete only *your* copy of the tag, click the **Tag** button and remove the tag from the **Your Tags** box.
- To delete one or more specific tags for *all users* (if your permissions allow), click the **Moderate Social Content** button, then use the resulting screen to select and delete tags.

Related Topics

- To see all tags that you have added to any record: Choose **My Account>View My Tags**.

View My Tags

Choose **My Account>View My Tags** to see all tags that you have added to any record. A tag is a descriptive word or term that helps improve searches for the tagged item.

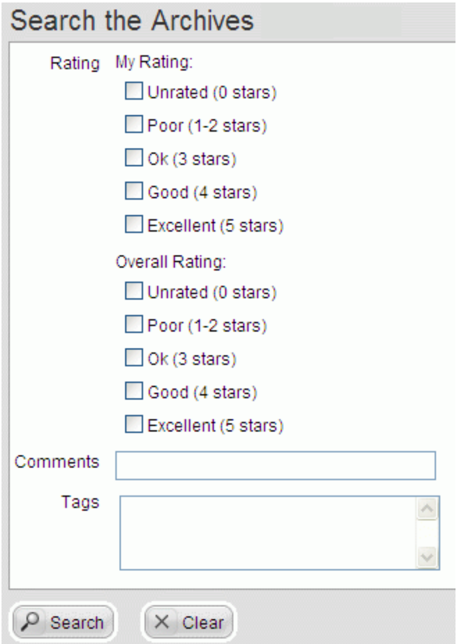
The size and color of each tag are related to the number of times you have used the tag. Click on a tag to perform a search for that tag in all records or blog posts that you have tagged.

In order for **View My Tags** to appear, you must have the Tag permission for at least one content type (Configure Roles).

Searching for Social Content

To search for social content, including tags, comments, or ratings, select an item from the **Search** menu, then use the fields that are available on the advanced search screen. The figure below shows an advanced search screen for the "Archives" content type that allows searching of Ratings, Comments, and Tags. For more advanced queries, you can use the Quick Search box, as described in Advanced Search Syntax.

Note: The search screen for each content type might include some, none, or all of these controls, depending on how *Presto* is configured. For more information, see How to set up Social Features (Tags, Comments, Ratings).



Moderating Social Content

Presto provides the ability to moderate social content in the ways described below.

The Moderate Social Content feature lets you remove tags, comments, or ratings from an individual content item, blog post, or forum topic. This is typically done to delete unhelpful or offensive content. For example, if a record indicates that *0 of 10 people found the following comment helpful*, you could delete that comment. You may also want to remove erroneous tags (for example, if a record was tagged with a word that is unrelated to the content), or remove social content contributed by users who are no longer with the company.

Note: You must have "Moderate Social Content" permission (in **Configure>Roles**) for the content type, blog, or forum. Blog Authors and forum moderators have this permission by default. Forum moderators are specified when the forum is created or edited. See Create or Edit Forum. Also see Approving Forum Posts.

To moderate social content:

1. Use one of the following methods:
   - Search or browse for records, then click a record to display the Detail Screen, OR
   - Choose a blog from the **Blogs** menu, then click the post title link to go to the Detail Screen, OR
   - Click **Forums** in the menu bar, click a forum, then click a topic.
2. Click the **Moderate Social Content** button OR click the **Moderate** link (for forums).

3. On the Moderate Social Content page, select a tab, then check the boxes next to any items you want to delete and click **Remove**.
   - The **Tags** tab lists the count, the tag, and the users who specified that tag.
   - The **Comments** tag lists the Title and Comment and the User who submitted the comment.
   - The **Ratings** tab lists the count, the rating, and the users who specified that rating. Note that Ratings do not apply to blogs.

   Note that you can click the column heading to change the sort order on any of the tabs.

Blogs

A blog (Web log) contains posts about a central topic, which others can read and respond to. Depending on your permissions, you can perform some or all of the following actions:

- View Blog. Display the blog.
- View Post. You must view a post in order to edit, delete, tag, or comment on it.
- Add or Edit Post. Add a post to a blog or change an existing post's title or content.
- Search Blogs. Search only blog content (one or multiple blogs) by specifying criteria on the Search Blogs page. If you prefer to search across all content, including blogs, use the Quick Search box.
- Tag or comment on blog posts.

Blog authors and administrators can typically perform additional actions:

- Create or Edit Blog. Create a blog or modify the settings for an existing blog (blog name, description, allowed authors, freeze blog).
- Edit Blog Settings. Change the blog name, description, blog header, blog header URL, and allowed authors.
- Configure (Set Up) Blogs

If you do not see a **Blogs** entry on the menu bar, either no blogs have been created or you do not have permission to view and use blogs. If you are unable to perform these actions, and you think you should be allowed to, contact your system administrator and request that your user role be adjusted. Also, you may need to choose **Configure>Menus and Menu Bar**, and move **Blogs** into the Displayed Menus list.

How to Set Up Blogs

For an administrator who wants to enable blogging, the general workflow is as follows. This topic is intended to get you started quickly and does not fully describe all blog features.

1. Decide who can configure blogs

By default, all Content Administrators have System Permissions to configure blogs (create, edit, delete a blog). If you want to allow other users to perform these actions, add those users to the Content Administrators role (**Configure>Roles**), or create a new role if you prefer.

2. Create a blog

Anyone with System Permissions to configure blogs can create a blog:

a. Choose **Configure>Blogs**.

b. Click **Create new Blog**.

c. Specify a blog Name, Description, and Authors, and click **Save**.

   Clicking **Save** does the following:

   It creates an empty blog. To populate the blog, Authors must post content (see below).

   It adds the new blog to the **Blogs** menu (and creates the **Blogs** menu if it does not yet exist).

3. Adjust blog permissions for authors (optional)

By default, all authors of a blog can view, use, create, edit, and delete posts; add comments and tags; moderate social content (remove comments, tags, and ratings); and edit blog settings. You may choose to disallow some of these permissions, such as **Delete** and/or **Moderate Social Content**. However, typically all authors should have full permission to work with their blogs.

Optionally, adjust permissions for the new blog:

a. Choose **Configure>Roles**.

b. Notice that a role was automatically added for the blog (when the blog was created). Click that blog role.

c. Click the **Blog Permissions** tab. Uncheck any actions you want to disallow.

d. If you want to add or remove authors for the blog, click the **Members** tab. Any changes will automatically be made to the Authors list in the blog (the specified members will be added or removed as Authors).

4. Configure Screens and Views (optional)

Default views and screens are generated for blogs. You can modify the Views and the Advanced Search Screen, Print-Friendly Screen, and E-mail Screen for blogs. Scroll to the bottom of the **Configure>Content Types** page, and click the appropriate links. **Note**: The Detail Screen, Edit Screen, and Add Screen are hard-coded for blogs and cannot be edited. The tabs for those screens will be blank when you use Configure Screens.

5. Make the blog available to users

Follow the steps below to let non-authors view (and optionally comment and tag) the new blog:

a. Choose **Configure>Roles**.

b. Add a new role or modify an existing role for non-authors:

   - Use the **Blog Permissions** tab to specify what non-authors can do. Typically, you would check View Post, Use Post, Comment, and Tag.
   - Use the **Members** tab to add the users who should have these permissions.

For example, you can modify the Viewer role that comes with Presto. By default, the Blog Permissions for the Viewer role are set to allow View Post, Use Post, Comment, and Tag, so you can simply click the Members tab to add users.

6. Add blog-related items to menus

Optionally, you can add blog-related items to the following menus: Search, Add, Configure.

a. Choose **Configure>Menus and Menu Bar**.

b. Click **Search Menu**, move **[Blog]** from Available Menus to Displayed Menus, and click **Save**.

This will add a "Blog" menu item to the Search menu, so users can search blog posts explicitly by choosing **Search>Blog**. If you skip this step, users will not be able to perform blog-only searches. However, any searches they do in the Quick Search box will include blog posts.

Note: The **Blog** item will not appear on the **Search** menu and the **Blogs** menu itself will not appear in the main *Presto* toolbar until at least one blog has been created.

c. Optionally, on the Configure Menus and Menu Bar page, click **Add menu** and move **[Blog]** into the Displayed Menus list and click **Save**.

d. Optionally, on the Configure Menus and Menu Bar page, click **Blogs menu** and populate the Displayed Menus list to determine which specific blogs will appear on the **Blogs** menu. Click **Save**.

7. Post blog content

Any blog author can now post content to the blog. A newly created blog does not contain any content, so you or another author should add the first post:

a. Choose a blog from the **Blogs** menu.

b. Click the  **New Post** button.

In addition to adding new posts, blog authors can edit settings for an existing blog (to change the name, description, blog header, and allowed authors), and they can edit existing posts.

8. Use and moderate the blog

Users can now view the blog and read whichever posts interest them. Authors can contribute to the blog by adding posts. Users with the appropriate permissions can add comments and tags. From time to time, moderators should review the tags and comments and remove offensive or irrelevant material. (A moderator is any user whose role allows the ability to Moderate Social Content.)

9. Edit, freeze, or delete the blog

If you want to edit, delete, or freeze a blog, choose **Configure>Blogs** to access a page that lists the name and description of all existing blogs. You can:

- Edit an existing blog's settings (name, description, authors, freeze blog) by clicking the blog name. For more information, see Create or Edit Blog.

- Prevent changes to the blog by freezing it (click **Freeze or Unfreeze Blog**). As long as the blog is frozen, authors cannot create, edit, or delete posts or edit blog settings; and no one (except System Administrators) can tag, comment, or moderate social content. The View Blog page will indicate if a blog is frozen.
- Permanently delete a blog, including all posts and comments, and automatically delete the role associated with this blog: Click **Delete**, then confirm the deletion.

Creating or Editing Blogs

Administrators and others with appropriate permissions can create or edit blogs by choosing **Configure>Blogs**. To edit an existing blog, click the link for the blog you want to edit. To create a new blog, click **Create new Blog**. To access these options, you must have the "Configure Blogs" System Permission (Configure Roles).

You can specify the following settings:

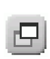
- **Name**. The title of the blog (required)
- **Description**. A brief explanation of the blog's purpose or content
- **Freeze Blog**. Check this box to prevent changes to the blog. As long as the blog is frozen, authors cannot create, edit, or delete posts or edit blog settings; and no one (except System Administrators) can tag, comment, or moderate social content. When a blog is frozen, the View Blog screen will indicate "*This blog is frozen*".
- **Authors**. Click the **Add** button to add authors. The specified users will be allowed to modify blog content by adding or editing posts. The list of available users is determined by their assigned roles. Note that Administrators can always add or edit posts and do not have to be added explicitly.

Click **Save** to save your changes. When you first create a blog, clicking **Save** does the following:

- It creates an empty blog. To populate the blog, Authors must then add posts.
- It adds the new blog to the **Blogs** menu.

Editing Blog Settings

Blog authors can modify the settings for an existing blog, if they have the "Edit Blog Settings" Blog Permission (Configure Roles) for the blog. By default, all Authors of the blog can Edit Blog Settings.

1. Select a blog from the **Blogs** menu.
2. Click the  **Edit Blog Settings** button on any blog or post screen.

Each blog setting is described below.

- **Name**. The title of the blog (required)
- **Description**. A brief explanation of the blog's purpose or content
- **Blog Header**. The content that appears in this box will appear at the top of the blog. By default, the content includes the blog Name and Description. You can add or replace this content to include text, links, and images. For more information, see Using the HTML Editor.

- **Blog Header URL**. The URL to the main page for the blog, defined in the blog header HTML as an HREF. By default, this URL is already defined in the HTML. If you edit the HTML, be sure to retain the HREF. This ensures that users can click the blog header from any post to return to the main page for the blog.

  For example, if the Blog Header URL for "Corporate Blog" looks like this (where "PrestoInstanceName" is your own *Presto* virtual directory name):

```
/PrestoInstanceName/blog/default.aspx?blID=[[BlogId]]
```

  The HTML would look like this:

```
<A class=bloglargeprinthplnk
href="/PrestoInstanceName/blog/default.aspx?blID=[[BlogId]]">Corporate
Blog</A>
```

  Note that the HTML shows [[BlogId]], which is a variable that will be replaced at runtime by the actual blog ID.

- **Authors**. Populate the Included Authors list to indicate who is allowed to modify blog content by adding or editing posts. The list of Available Authors is determined by the currently assigned roles. Administrators can always edit blog content and do not have to be added explicitly.

  If you add or remove an Author, that user is automatically added or removed as a Member for this blog role (under **Configure>Roles**). Likewise, if you make changes to the Members tab for a blog role, the Authors list will be updated automatically.

  Use **Configure>Roles** if you want to adjust Blog Permissions.

Viewing a Blog

To display the main blog page, select a blog from the **Blogs** menu, or click a blog name in the header. You must have the "View Post" Blog Permission for the blog (Configure Roles). Note that the View screen for blogs is supplied by *Presto* and is not configurable.

The main blog page shows the most recent posts for the selected blog, in descending order. To see older posts, or return to newer posts, click the navigation buttons in the blog header bar.

You must view a blog in order to perform any of the following actions:

- Add a new post to the blog (click the **New Post** button). Only blog authors or users whose Role allows them to create posts can add a post.
- Change the blog name, description, header, or allowed authors (click the **Edit Blog Settings** button). Only blog authors can edit blog settings.
- Subscribe to this blog as an RSS feed (click the **Subscribe to RSS Feed** button), then copy the link to subscribe. For example, an Administrator could add the feed to an RSS Feed Web Part on the *Presto* home page.
- View and work with a specific post by clicking its title. This takes you to the View Post page, where you can see existing tags and comments. If your role allows it, you can tag or comment on the post. Authors can also edit or delete the post.
- View comments on a *specific* post by clicking the "Comments" link on the "Posted by" line below the post title.

Note: If the blog is frozen (**Configure>Blogs**), you cannot perform any of these actions.

Working with Posts

Adding or Editing a Post

Authors can contribute content to a blog by adding or editing a post. To add or edit a post, you must be specified as an Author of the blog or your role must have the appropriate Blog Permissions (Configure Roles). By default, any author for the blog can edit any post.

- To add a post, choose a blog from the **Blogs** menu, then click the **New Post** button.
- To edit a post, choose a blog from the **Blogs** menu, click the post name, then click the **Edit Post** button.

Use the following controls to provide the content for the post:

- **Title**. Provide a short description of the post.
- **Post**. Type and format the content of the post, which may include text and images. For more information, see Using the HTML Editor.

Blog authors and other users can view, edit, delete, moderate, comment, or tag a post, according to their permissions (defined in Configure Roles). In order to perform actions on a post, you must view it first.

Viewing a Post

There are two ways to view a post:

- Select a blog from the **Blogs** menu, then click the post title.
- Do a search, then click a post title on the search results screen. The following additional buttons are available: Back to Search Results, Search Again, Next Search Item.

The View Post screen shows the selected post, including all comments or tags that have been assigned.

Editing a Post

Any author, or any users with Edit Post privilege on the blog, can edit any post to change its title or content. To edit a post, click the **Edit Post** button in the toolbar when viewing a post, or click **Edit** from Search Results screen.

Note: The image associated with a post is determined by the user profile (**My Account>Update My Profile** or **Configure>Users**).

Deleting a Post

Any author can delete a post by clicking the **Delete Post** button in the toolbar.

Moderating Social Content

Click the **Moderate Social Content** button in the toolbar if you want to remove tags or comments from an individual post. This is typically done to delete unhelpful or offensive content.

Adding or Deleting Comments

When you view a post, you can work with comments in the following ways:

- Indicate whether an existing comment was helpful: Click **Yes** or **No** to help rank the post.

- Click the **Add Comment** button to comment on this post or respond to a previous comment. Note that you cannot edit a comment after you add it.
- Click **Moderate Social Content** to delete an existing comment.

Adding or Viewing Tags

A tag is a descriptive word or term that helps improve searches for the tagged item. For example, a post that talks about restaurants might be tagged with a chef's name or other content that was not specifically mentioned in the post itself. Tags that have been applied to a post are displayed as a "cloud", with more frequent tags appearing more prominently. When you view a post, you can add a tag by clicking **Tag**, then typing a word or phrase. You can also click existing tags to retrieve records, and perform similar tasks. For more information, see Working with Tags.

Toolbar Buttons for Viewing a Post

The following buttons are available on the toolbar when viewing a post:

- Display the next or previous post
- Delete the current post (requires confirmation)
- Add a new post to the blog
- Edit the post
- Moderate social comment (remove selected tags or comments from a post)
- Edit blog settings

The following additional buttons are available if you view a post after doing a search:

- Back to Search Results: Return to the original search results.
- Search Again: Return to the search page with your search criteria filled in.
- Next / Previous Search Item: Display the next or previous item found by the search.

Searching Blogs

To search a blog, select **Blog Post** from the **Search** menu. You must have "View Post" Blog Permission (Configure Roles). If the "**Blog Post**" item does not appear on the Search menu, an administrator can add it by selecting **Configure>Menus and Menu Bar**. After selecting **Search>Blog Post**, fill in one or more of the supplied fields to specify the query. For instructions on how to search, see Basic Search Syntax.

If you prefer to search across all content types, including blogs, use the **Quick Search** box, which usually appears on the home page and the **Search** menu.

Forums

A forum is an online discussion site, where allowed users can read and respond to topics on a particular subject.

To access a forum:

- Click **Forums** on the menu bar. (If you do not see a **Forums** entry on the menu bar, either no forums have been created or your roles do not have permission to view and use forums. Also, you may need to choose **Configure>Menus and Menu Bar**, and move **Forums** into the Displayed Menus list.)

The **Discussion Forums** page lists one or more forums, organized by Forum Group:

- The **Unread** column (to the left of each listed forum) displays an icon if you have not read any of the messages in that forum.
- The **Forum** column shows the title and description of the forum.
- The **Topics** column indicates how many topics the forum contains.
- The **Posts** column indicates the total number of posts in all topics in the forum.
- The **Last Topic** column displays the title of the most recently added topic, along with the date and time and author.

To participate in a forum:

- Click any link in the **Forum** column. The resulting page includes controls that let you add a new topic, reply to a topic, subscribe via e-mail alert or RSS feed, or return to the forum listing page.
- Click any post in the **Last Topic** column to participate in that discussion thread.

Configuring Forums

Forums have the following hierarchy:

Forum Group: The parent "container", which may include one or more forums.

Forum: An area for discussion on a particular subject.

Topics: Discussion threads (topics and responses).

Posts: Individual messages in a topic (responses/replies to topics)

For example, a Forum Group called "Sports" could contain forums for Football, Baseball, and Tennis. Allowed users could then create topics and posts in those forums. Follow the steps below to configure a forum.

1. Create a Forum Group.

a. Choose **Configure>Forums**.

b. Click **Create new Forum Group**.

c. Enter a **Name** and **Description** for the group, which will serve as the "container" for one or more forums, and click **Save**.

2. Add forums to the group.

If you followed the steps above, you should now be on the Edit Forum Group page.

a. On the Edit Forum Groups page, click the **Add** button to add a forum.

b. Use the Create New Forum page to define the forum, and click **Save**.

c. Continue adding forums, if desired.

d. To update the forum order, drag and drop the forum elements to the desired order, then click **Save**.

e. Click **Exit** to return to the Configure Forum Groups page.

3. [Optional] Configure screens and views.

Presto includes default screens and views for forums that are already configured. If you want to change them, follow the steps below.

a. Choose **Configure>Content Types**.

b. Scroll down until you see System Content Types.

c. Click the desired link next to **Forum Topic**:

- **Configure Screens**. You can modify the Advanced Search Screen, Print Friendly Screen, or E-mail Screen. The other screen types (Detail, Edit, Add) do not apply to forums.
- **Configure Views**. You can modify the Citation View or Alert View.

d. Save your changes.

4. Confirm that permissioning and menus are configured to support forums.

- To set permissions for the forum, choose **Configure>Roles**, click a role, then use the **Forum Permissions** tab.
- If users do not see a **Forums** entry on the menu bar, either no forums have been created or their roles do not have permission to view and use forums. Also, an administrator may need to choose **Configure>Menus and Menu Bar**, and use **Re-Order Menu Bar** to move **Forums** into the Displayed Menus list.

5. Use or modify forums.

- Users with correct permissions can now click **Forums** in the menu bar, to begin contributing to forums. For instructions, see Using Forums.
- If you want to modify a forum group or forum, choose **Configure>Forums** and use the appropriate links or controls.

Configuring Screens and Views for Forums

Presto includes default screens and views that are already configured. If you want to change them, you can follow the steps below.

1. Choose **Configure>Content Types**.
2. Scroll down until you see System Content Types.

3. Next to **Forum Topic**, click **Configure Screens** if you want to modify the Advanced Search Screen, Print Friendly Screen, or E-mail Screen. The other screen types (Detail, Edit, Add) do not apply to forums.
4. Next to Forum Topic, click **Configure Views** if you want to modify the Citation View or Alert View.
4. Save your changes.

Create or Edit Forum

You can create or edit a forum at any time. A forum is always associated with a Forum Group.

1. Choose **Configure>Forums**.
2. On the Configure Forum Groups page:
   - Click **Add Forum** next to the Forum Group that will contain the new forum, or
   - Click the name of a forum group, then click **Edit** next to an existing forum in the group.
3. On the Create New Forum or Edit Forum page, specify the following options:
   - **Name**: The name of the forum.
   - **Description**: A description that will appear when the forum is listed.
   - **Intro Wording**: Instructional or explanatory text for the top of the screen.
   - **Move Forum To** <Choose Group>: This option appears only when editing, not creating, a forum, and only if there is more than one Forum Group. Use it to move an existing forum from one forum group to another.
   - **Freeze**: Make the forum read-only, by not allowing any new posts or replies.
   - **Is Hidden**: Hide the forum from the listing page. This essentially makes the forum "inactive".
   - **Post Approval**: All topics/replies within this forum will need approval from any one of the listed moderators before they will display within the forum.
   - **Moderators**: Click **Add** to add a moderator. Repeat if you want to assign multiple moderators. Moderators have more rights than the average user. Moderators can perform all operations on topics and replies, can remove Tags and Ratings, and can Approve Posts within a forum. If **Post Approval** is checked, a moderator will be required to approve a topic or reply before it is displayed in the forum. Any one moderator can approve a topic. Without moderator approval, the post will not appear in the forum. Note that moderators are not required; a forum can exist without moderators. If you want to remove a moderator from the forum, click **Remove**.

   Note: If the forum is set as "**Post Approval**" but no moderators have been added, the *Presto* Administrator will be the only user with the ability to approve the forum posts/topics.
4. Click **Save**, then click **Exit**.

Note: To set permissions for the forum, choose **Configure>Roles**, click a role, then use the **Forum Permissions** tab. If you do not see a **Forums** entry on the menu bar, either no forums have been created or your roles do not have permission to view and use forums. Also, you may need to choose **Configure>Menus and Menu Bar**, and move **Forums** into the Displayed Menus list.

Create or Edit Forum Group

A Forum Group is a "container" for grouping similar discussions (forums). For an overview, see Configuring Forums.

To create a Forum Group:

1. Choose **Configure>Forums**.
2. Click **Create new Forum Group**.
3. Define the Forum Group, which will serve as the "container" for one or more forums, by entering a **Name** and **Description**.
4. Click **Save**.
5. After you click **Save**, the page changes to include a **Forums** entry with an **Add** button. Click the **Add** button to define a discussion forum and add it to the Forum Group.

To edit a Forum Group:

1. Choose **Configure>Forums**.
2. Click one of the listed Forum Groups to edit it (change the group Name or Description, add forums to the group, reorder forums).
3. Click **Save**.

Other operations:

You can perform the following additional operations after choosing **Configure>Forums**:

- If there are multiple Forum Groups, you can use **Set Listing Order** to determine the order in which the groups are listed on the Discussion Forums page that appears when users click **Forums** in the menu bar.
- Click **Add Forum** next to a listed group to define another forum and add it to the group.
- Click **Delete** next to a listed group to permanently delete the forum group (*including all of its forums and posts*). You will have a chance to confirm or cancel.

Set Forum Group Listing Order

If you have multiple forum groups, you can specify the order in which the groups appear on the Discussion Forums page.

1. Choose **Configure>Forums** and click **Set Listing Order** from the Configure Forum Groups page.
2. Select a Forum Group in the list, then click **Move Up** or **Move Down**.
3. Click **Save**.

Add or Edit Forum Topic

There are multiple ways to access the page to add or edit a topic in a forum. Typically, you would choose **Forums** from the title bar, click the link for an individual forum, then click a link for an existing topic or click **Add new Topic**.

You may want to:

- Add the first post to start a new thread (Add New Topic)
- Edit a topic or reply. (Only system administrators or forum moderators can edit any post. Other users can edit the posts they created, if they have the "Edit Topic" permissions and the topic is not Locked.)
- Reply to other posts in the topic.

To use this page: Type a **Title** for the post, then use the HTML editor to specify the **Post** content. Click **Save**.

Approving Forum Posts

Forum moderators or administrators can click **Approve Posts** on the Discussion Forums page to approve, edit or delete topics and replies that are awaiting approval. The **Approve Posts** button only appears if the forum has Post Approval checked, and there are posts awaiting approval.

- **Approve**: Approves the post so users can view it, and removes it from the Approve Posts page.
- **Edit**: Opens the Edit Post page so you can make changes to the post prior to approving it.
- **Delete**: After confirmation, deletes a reply or a topic and all replies to that topic.

Click **Exit** when you are done.

Related Topics

To assign moderators, see Create or Edit Forum.

To remove tags, comments, or ratings, see Moderating Social Content.

Display Topics in a Forum

The Forum page lists all of the topics in the selected forum. To access this page, click **Forums** on the menu bar then click a forum link; or click **Back to Topic Listing** from any page where it is available.

Moderators (if any) are listed at the top of the page.

The table lists each topic (beginning of a discussion thread) in the forum:

- The table includes **Normal** topics (all topics except featured topics). It may also include a **Featured Topics** section at the top, if any topics have been marked as Featured. For example, an administrator may have marked a FAQs topic as Featured, so it would remain at the top of the list and be prominently displayed.
- If you see a **Lock** icon next to a topic, it indicates that the thread has been locked by an administrator or moderator.
- The **Unread** column (the second column) displays an icon if you have not read any of the posts in that topic. For example, you may have read the original post, but several people have replied since then, and you have not viewed the topic since they replied.
- The **Topic** column lists the topic title.
- The **Topic Starter** is the name of the user who started the thread (added the original topic).
- The **Replies** column indicates the number of replies in the thread.

- The **Views** count indicates how many times the topic title has been clicked (total number of views, not unique views).
- The **Rating** column shows the number of stars on the first post in this thread.
- The **Last Post** indicates the date, time, and user name of whoever made the most recent post.

You can perform the following actions on this page:

- Act on a topic: Click a topic link and use the resulting Forum page to participate in the thread and perform any actions allowed by your role (reply, lock or unlock, feature a topic or set it back to normal, tag, subscribe, RSS, print, e-mail, edit, delete, moderate, rate). For more information, see Display all Topics in a Thread.
- Click **Add New Topic** to start a new discussion thread (add a new topic to the forum). Use the HTML Editor on the resulting page to enter a title and content for the post, and click **Save**.
- Click the **Subscribe** button at the top of the page to follow this topic by getting e-mails with the latest replies. Use the resulting dialog box to specify an e-mail address and set the frequency of the alerts. Subscriptions use the *Presto* Alert system using the "Content added" event.
- Click **Approve Posts** to approve, edit or delete topics and replies awaiting approval. This button only appears if the forum has Post Approval checked, and there are posts awaiting approval.
- Click the **RSS** button to subscribe to this forum as an RSS feed (retrieve the RSS feed for the forum).
- Click **Show All** or **Show Only Approved** to control which topics are displayed. These options appear only if the forum has Post Approval checked and there are topics awaiting approval, and the user is a moderator or a system administrator.
- Click **Back to Topic Listing** to return to the main forums page.

Display All Topics in a Thread

To display all of the topics in a thread, click **Forums** on the menu bar, then click any forum link (or click the link for the Last Topic in an individual forum). Depending on your permissions, you can perform some or all of the actions described below.

Use controls at the right of each post:

- Click a number of stars to the right of a topic to rate the original topic or any of the replies. The rating for the original topic appears on the main forum page. You can press the minus (-) button next to the rating stars to remove your rating from the post.
- Click **Print** to print that post (not the whole thread).
- Click **E-mail** to open a dialog that allows you to e-mail that post, in HTML or Plain Text format.
- Click **Edit** to open the post in the HTML Editor. Only System Administrators or Moderators can edit all posts. Most users can only edit posts they created.
- Click **Delete** to delete the post (you will have a chance to confirm the deletion). If you delete the original post, all replies are also deleted.
- Click **Moderate** to remove Tags or Ratings from an individual post.

Use controls at the top of the page:

- Click **Post Reply**, use the HTML Editor to compose a reply, and click **Save**. Unless the post needs to be approved by a moderator, the reply will be listed immediately.

- Click **Lock** to disallow replies to the thread. A lock symbol will appear next to the topic in the topic list. Click **Unlock** to unlock the thread. These options appear only if the user is a moderator or system administrator.
- Click **Make Featured Topic** to promote a topic into the "Featured Topics" section, which will appear at the top of the listing page. You may want to do this for instructional topics such as "How to Use this Forum" or FAQs. To revert the topic to unfeatured status, click **Make Normal Topic**. These options appear only if the user is a moderator or a system administrator.
- Click **Tag** to assign tag(s) to this topic. For more information, see Working with Tags.
- Click **Subscribe** to follow this topic by getting emails with the latest replies. Use the resulting dialog box to specify an email address and set the frequency of the alerts. Subscriptions use the *Presto* Alert system using the “Content Added” event.
- Click **RSS** to retrieve the RSS feed for an individual topic so you can follow the replies.
- Click **Show All** or **Show Only Approved** to control which posts are displayed. These options appear only if the forum has Post Approval checked and there are replies awaiting approval, and the user is a moderator or a system administrator.
- Click **Back to Topic Listing** to return to the list of topics.

Chapter 11: Creating and Using Web Reports

You can create reports from within *Presto* by choosing **Configure>Reports** to access the Stimulsoft Web Report Generator.

Stimulsoft documentation is available from their website (www.stimulsoft.com), where you can click the Documentation link then download the PDF and/or help file (CHM) for the **Stimulsoft Reports.Web** product. *Presto* only uses a subset of available features, so some of their documentation may not pertain. For additional information, see Creating Web Reports.

To access reports, use **Reports>View Reports**, or perform a search, click **Report On Content**, and select a report from the list. Reports can also be added to a *Presto* Home page or displayed on a SharePoint site that includes a Presto Reports Web Part.

Note: Avoid creating extremely long reports (300 pages or more), as this may result in a warning message that the report may not display correctly. Instead, you can filter a report to determine what information is included.

Terminology

- **Public Reports**: User-created reports
- **System Reports**: Reports supplied with *Presto*
- **Event Log Reports**: Event log reports supplied with *Presto*

Setting Report Permissions

Permissions to Access Reports

Administrators can show or hide report-related menus and options. Note that reports are not accessible to users until they are permissioned using Configure Roles.

- To control access to specific reports: Choose **Configure>Roles**, select a role, and click **Report Permissions**. Check VIEW REPORT to control access to a specific report. This determines whether the report appears for that role on the View Reports page (if it's a Public or System report), in the drop-down list on the Report On Content page if it's a Public report, or in the Show drop-down list on the View Event Log page (if it's an Event Log report).
- To ensure that the **Reports** menu appears: Choose **Configure>Menus and Menu Bar**, click **Re-Order Menu Bar**, and add the **Reports** menu.
- To control access to the **View Reports** choice on the **Reports** menu: Choose **Configure>Roles**, select a role, click **System Permissions**, and check or clear VIEW REPORTS.
- To determine whether the **Report On Content** option appears on the action menu bar for a Content Type: Choose **Configure>Roles**, select a role, and click **Content Permissions**. Add or update the row for a Content Type, and check VIEW REPORT. You can also check VIEW REPORT for specific blogs and forums (on the **Blog Permissions** and **Forum Permissions** tabs).

Permissions to Create Reports

- To create reports, your *Presto* role must have the **System Permission** CONFIGURE REPORTS (in **Configure>Roles**).
- It is recommended that you also have the **System Permission** VIEW REPORTS, which controls whether the **Reports** menu appears.

Confidential Field Data

If the person creating the report does not have permissions to view certain fields, the data in those fields will not be visible to the report creator. However, the fields themselves will be available, so the report creator can build the report. For example: You are creating a report that shows everyone's salary. You can successfully create the report (add the Salary field to a band), but when you preview or run the report, the Salary field will be blank unless you have permission to view that field.

Creating Web Reports

The key concept when creating reports in Stimulsoft is to add bands, then put data and text in bands. Use the icons on the left side of the screen to define bands. Data comes from fields listed on the Dictionary tab in the right pane. This list is pre-populated with fields from the Content Type that was selected when you began creating the report. Drag and drop fields into bands in the report area.

Note: For complete information, go to www.stimulsoft.com, click the Documentation link, and download the PDF and/or help file (CHM) for the **Stimulsoft Reports.Web** product.

Note: Images within content types cannot be displayed as images within a report; only the image filename will be displayed.

Prerequisites

To create reports:

- A supported Web browser with Flash Player 10 is required.
- Your role's System Permissions must allow you to configure reports. Choose **Configure>Roles**, click a role, and check CONFIGURE REPORTS under **System Permissions**. You should also check VIEW REPORTS, to ensure that the **Reports** menu appears.
- It is recommended that you have some experience with report generation applications.

Instructions

A. Open the Report Designer.

1. In *Presto*, choose **Configure>Reports**.
2. Click **Create new Report**.
3. Select a Content Type from the list and click **Create Report**. This opens the Stimulsoft Report Designer.

B. Name the report.

1. Open the list at the top of the **Properties** tab at the right of the screen, and select **<Report Name>: Report**.
2. Specify a unique **Report Name** (which ties together the same report for different locales, and therefore should never be localized). Users will never see this name.
3. Specify a unique **Report Alias** to identify the report within *Presto*. Recommendation: Incorporate the Content Type name into the Report Alias so users will know which report(s) go with which Content Type when using Report on Content.
4. Specify a **Report Description** to describe the report within *Presto*.

   Note: Always move the cursor off the field control (on the Properties tab at the right of the screen) after making an edit in Stimulsoft. Otherwise, the change may not be detected.

C. [optional] Add a title.

1. Click the **Bands** icon at the top of the toolbar at the left of the screen, and select **Report Title**.
2. Click on the report to add the band.
3. Click the **Text** icon in the left toolbar.
4. When the Expression Editor opens, type the title for the report, then click **OK**. (If the Editor does not open, use another method to add text. For example, try double-clicking in the Report Title band.)
5. Resize the title box if needed, and use the controls to format the text.

D. [optional] Group the data.

To create a report with grouping, use the **Group Header** and/or **Group Footer** band. The **Group Header** band is output once at the beginning of every group. Use it to define the grouping condition. For example, companies whose names start with A are in the first group; companies whose names start with B are in the second group, etc. The condition for these groups is the first letter of the company name.

Position the **Group Header** band over the Data band that outputs data rows. Typically, this is the first Data band that is positioned under the **Group Header** band. When the report is rendered, the report generator binds the group header and the specified Data band. Also, you may specify the sorting of rows in the Data band.

For more information, please see the documentation supplied by Stimulsoft.

E. Add a Data band and populate it with fields.

Note: You can add fields to either a **Data band** or a **Group band**. If you added Group bands in the previous step, you can adapt the instructions below to add fields to them as well.

1. Click the **Bands** icon in the toolbar at the left of the screen, and select **Data**.
2. Click on the report to add the band.
3. In the Data Setup dialog, expand NewDataSet, select the Content Type (which starts with ct), and click **OK**.
4. To populate the Data band with a field, click the **Dictionary** tab in the right pane.
5. Expand **Data Sources** until you see the list of fields for this Content Type.

6. Drag and drop fields from this list onto the Data band in the report area.

   Tip! Each field consists of two components, which you can edit separately: a Label and a field name (such as ctAuthor). You may want to select and then delete the label.

7. Use the controls on the **Properties** tab in the right panel to format each field.

   Tip! To render HTML text (instead of displaying HTML tags in the report), select **Allow Html Tags** in the right panel.

F. [optional] Sort the data.

Sorting can be set for each Data band, by using the Sort property for that band.

1. Double-click the Data band to open the Data Setup dialog.
2. Select **Sort** on the left side of the dialog.
3. Use the controls to specify the sort, as described in the Stimulsoft help file.

G. [optional] Define page numbers.

1. Add a Footer band (or a Header band).
2. Add System Variables (from the right pane) to the band.

H. Preview and save the report.

1. Click the **Preview** tab at the top left of the page. You'll see one row for each record, for the first 100 records.
2. If you are satisfied with the report's appearance, click **Save** to make the report available in *Presto*.

   Note: If you save a report with the same name or alias as another report with the same Locale, the Stimulsoft designer displays "Error at saving. Error code: 1". If you see this message, change the Report Name or Report Alias, and Save again.

3. To return to *Presto*, click the round Application button in the upper left corner of the Report Designer and click **Exit**.

I. Test the report.

Verify that the report works properly with the number of records specified in the MaxReportRecordsWithoutPrompt setting in Application Settings. If you get a Report Too Large alert or an error (e.g., A timeout), use Specify Filter to add a filter before exposing it to end users. The filter is only used on View Reports. Other areas of the product use the search criteria, category contents, or cart contents, so there is no downside to always specifying a filter, except that you do not get all records.

J. Grant permissions.

Reports are not accessible to users until they are permissioned using Configure Roles. See Setting Report Permissions.

Saving Reports Locally

Advanced users may want to save a report locally for backup purposes or so they can manipulate the .MRT file directly by modifying the XML, instead of using the UI, then open and save the report.

- If you create a report and choose **Save As**, the report is saved locally, with the extension .MRT.
- To open a locally-saved report in the Designer, go to *Presto* and choose **Configure>Reports**, **Create new Report**, and click **Create Report** (it does not matter which content type you select, because you are not going to use this report; you are just accessing the Report Designer). In the Report Designer, click the round Application button, choose Open Report, and open the saved .MRT file. Edit and preview, and test the report, then click **Save**. When you are ready to make the report public, use **Configure Roles** to include it in the Report Permissions for the appropriate roles. See Setting Report Permissions.

Editing Web Reports

To use the Report Designer, you need a Web browser with Flash Player 10, and your role's System Permissions must allow you to configure reports.

For detailed help: Click the **help icon** in the Report Designer. When the **About** box appears, click the link to the Stimulsoft web site, then click the Documentation link. From there, download a PDF and/or help file (CHM) for **Stimulsoft Reports.Web**.

1. Choose **Configure>Reports**.
2. Click one of the listed reports to open the Stimulsoft Report Designer.
3. Use the controls to make changes to a band. For additional information, see Creating Web Reports.

- Double-click a band, then use the pop-up controls.
- Select a band, then use the **Properties** and **Dictionary** tabs.
- To change the Report Alias, Author, and similar properties, select the report from the drop-down list at the top of the Properties tab. The **Report Name** is used to tie together the same report for different locales, so you should avoid changing or localizing it. The **Report Alias** and **Report Description** identify the report within *Presto*.

  Note: Always move the cursor off the field control (on the Properties tab at the right of the screen) after making an edit in Stimulsoft. Otherwise, the change may not be detected.

4. Preview the report by clicking the **Preview** tab at the top left of the page.
5. Click **Save** within the designer.
6. To return to *Presto*, click the round Application button in the upper left corner of the Report Designer and click **Exit**.

Filtering a Report

Filtering determines what information is included in a report. There are two ways to filter a report. You can either Report on Content or use Specify Filter.

Report on Content

You can limit which records are displayed in a report by performing a search then using **Report On Content** (instead of accessing the report using View Reports). For more information, see Report on Content.

Specify Filter

You can specify a filter that will be used when a report is accessed from the View Reports page. Filters are only used when the report is accessed using **Reports>View Reports**. (**Report On Content** ignores the filter and uses the search criteria, category, or cart information to determine which records to display.)

Note: The Specify Filter feature is not available for System Reports or Event Log Reports. They are filtered using the Calendar control at the top of the page when viewing the report.

1. Choose **Configure>Reports**.
2. Click **Specify Filter** next to a report.
3. Type *Presto* search criteria in the Filter box. You can omit the Content Type name, if desired. For example: Title:(florida).
4. Click **Test Filter** to verify that the search retrieves approximately the number of records you expect and does not cause any errors.
5. Click **Save**.

To see if a report is filtered, choose **Configure>Reports** and click **Specify Filter**. If the box is populated, a filter has been applied.

Set Report Listing Order

To specify the order in which reports are listed within *Presto*:

1. Choose **Configure>Reports**.
2. Click **Set Listing Order** on the Configure Reports page.
3. Select a report in one of the available sections:

   Public Reports: Affects the order of user-created reports on the View Reports, Report on Content, and Configure Reports pages.

   System Reports: Affects the order of reports supplied with *Presto*, on both the View Reports and Configure Reports page.

   Event Log Reports: Affects the order of Event Log reports in the **Show** list for **Reports>View Event Log**.
4. Use **Move Up** or **Move Down** to reorder the reports.
5. Click **Save**.

Application Settings for Web Reports

Choose **Configure>Administrator Tools>Application Settings** to adjust the **Reporting** settings listed below. **Note**: Only the settings listed below pertain to Web reports. The other settings are for SQL reports, which have been deprecated.

- **EnableNavigationInfoRecording**: Enable or disable the recording of user navigation information (a list of *Presto* users and which pages each user has visited). The default is **False**, so information is not saved and the User Navigation Information report is empty. If set to **True**, the information is saved in the *Presto* database and reported in the User Navigation Information report. To periodically clear the information from the Presto database, choose **Configure>Administrator Tools>Database Cleanup>Remove All Navigation Information**.
- **MaxReportRecordsWithoutPrompt**: The maximum number of records that can be viewed in a report before the user is prompted to Continue, Cancel, or Download. This serves as a warning that a report is long and may result in delays. If the report contains fewer records, the report will be displayed automatically when selected.

Localizing Reports

Public reports can be localized so that the text appears in the language specified by the current locale. **Note**: For this example, French is used as the localization language.

1. Choose **Configure>Reports**.
2. Choose **Français – Canada** from the **Selected Locale** drop-down list.
3. Under Public Reports, click the report that you want to localize. This creates a [French] version of the report.
4. In the report designer, change the appropriate text to [French]. For example:

- **Report Alias**: The name shown in *Presto*.
- **Report Description**: The description shown in *Presto*.
- **Report Title**: The title at the top of the report.
- **GroupHeader Label**: The label for a group header.
- **GroupFooter Label**: The label for a group footer.
- Do **not** localize the Report Name! This ties together the same report for different locales.
- Do **not** localize variables or content type names! For example, do not change identifiers such as ctSample_CD_View Year.

5. Preview the report, and save it when you are done.
6. If multiple Locales are enabled in Application Settings, you can make another localized version of the report by selecting a different Locale from the **Selected Locale** drop-down list at the top of the Configure Reports page, and repeating steps 3 through 5.

Report on Content

You can limit which records are displayed in a report by performing a search then using **Report On Content** (instead of accessing the report using View Reports). For example, you could search for “rock” and get results for two content types: Sample CDs and Archives. If there is at least one report for either of those content types, the Report on Content option will appear. When you click **Report On Content**, the **Select Report** list at the top of the page lists the reports that match the content types displayed by the search. Pick the appropriate report (ex: Sample CD). Only the records in the Sample CD content type will be included in the report.

Prerequisites

- Reports must exist for the content types that you are searching, to determine what information goes in the report. Recommendation: When the report is created, incorporate the content type name into the Report Alias so users will know which report to select.
- The **Report On Content** option appears only if an administrator has configured it for this content type and role: Choose **Configure>Roles**, select the **Content Permissions** tab, add or update the row for a content type, and check VIEW REPORT. You can also check this option for specific blogs and forums (on the Blog Permissions and Forum Permissions tabs).

To report on content

1. Access one of the following pages:
    - Search Results
    - Detail Screen
    - Browse Collection
    - InfoCart
2. Select **Report On Content**.
3. Select a report from the list.
4. Use the controls at the top of the page to navigate, print, or save the report in one of the available formats.

Using the Presto Reports Web Part

You can use the Presto Reports Web Part to add reports to an Inmagic *Presto* Home page or a Microsoft SharePoint site.

Using Reports on a Presto Home Page

To add a report to a *Presto* Home page, choose **Configure>Home Page** and add the Presto Reports Web Part to a zone. Then select the report from the drop-down list and adjust its height. For more information about using the Home Page Editor, see Configuring the Home Page.

Using Reports on a SharePoint Site

If you have Microsoft SharePoint installed, you can add one or more Presto Reports Web Parts to the SharePoint Web site. Each Presto Reports Web Part can display a different report. The basic steps are:

1. Run the Inmagic Web Parts Setup program to deploy the Inmagic SharePoint Web Parts to your SharePoint farm.
2. In SharePoint, activate the Reports Web Part on the Site Collection Features page, then add the Web Part to a zone.
3. Use the SharePoint editing controls to select a report, adjust the Height and Width, and make other adjustments.
4. Save your changes. The report should now appear on your SharePoint site.

For more information, see *Integrating Presto with SharePoint Configuration Guide*.

View, Print, or Save Report in Another Format

You can display a report, print it, or save it in another format.

1. Navigate to the report. For example:
   - Select **Reports>View Reports**, then click a report name.
   - Perform a search, click **Report On Content**, and select a report from the list.
   - Choose **Reports>View Event Log**.
   - Choose **Configure>Administrator Tools>Monitor Jobs**.
2. When a report is displayed, you can:
   - Use the **Print** icon to select a print format.
   - Use the **Save** icon to save the report in any available format (Adobe Pdf, Microsoft Word 2007, etc.).
   - Use the **navigation controls** to go to another page in the report.
   - Use the **Zoom** icon to zoom in or out.
   - Use the **One Page/Whole Report** icon to change the view.

Note: The User Navigation Information report lists *Presto* users and indicates where they have navigated within *Presto*. Recording of data for this report is turned off by default. To turn it on, set **EnableNavigationInfoRecording** to **True** in Application Settings.

View SQL Reports

Select **Reports>View SQL Reports** to display a list of SQL reports that were created for your organization for use with an earlier version of *Presto*. This menu option appears only if both of the following are true:

- You upgraded from 3.3 or 3.2, and

- There were non-provided SQL reports specified in **ReportNames** in Application Settings before the upgrade (i.e., anything other than NavigationInfo)

In this case, the **Reports** menu has an additional option called **View SQL Reports**, and the upgrade process adds a new Application Setting called **SqlReportNames**, listing the existing non-provided SQL reports.

Chapter 12: Events, Alerts, and RSS Feeds

Overview of Events, Alerts, and RSS Feeds

Events are actions that occur in *Presto*, such as a record being created or modified. Administrators can request that the Event Log be updated whenever a particular event occurs.

An **alert** is an e-mail or RSS feed notification that an event has occurred. Users can set up alerts, if they want to be notified whenever a specific event occurs. Alerts are restricted to the content types, collections, and events that a specific user has permission to view.

To ensure that multiple users are notified of events, administrators can set up **global alerts**. A global alert is an RSS feed notification that an event has occurred. Global alerts affect all users with the "Subscribe to Global Alerts" System Permission.

To determine how alert e-mails and RSS feeds appear, configure the Alert View and/or RSS Feed View for each content type (**Configure>Content Types>Configure Views**).

Types of RSS Feeds

Presto supports several types of RSS feeds:

- **Search RSS feeds**. Click the **RSS** button in the upper right corner of any Search Results page.
- **User Alert RSS feeds**. Click the **Subscribe** button next to any Alert on the My Account>Manage My Alerts page.
- **RSS feeds for Forums or Forum topics.** Click the **RSS** button at the top of the Forum or Forum Topic page.
- **Blog RSS feeds**. Click the **RSS** icon on the blog toolbar.
- **Global Alert RSS feeds**. Click the **Subscribe** button next to any Alert on the My Account>Subscribe to Global Alerts page. (To create global alerts, choose Configure>Global Alerts.)

RSS Feed Security

There are two settings that allow you to control security for RSS feeds:

- When editing a user, select **Reset User ID** to reset the user IDs for the selected user(s). This will cause all RSS feeds already specified in feed readers to use the Guest account privileges instead of that user's privileges until a new feed URL is specified. This may be necessary if someone has provided RSS feed URLs to users who should not have them.
- To lock down RSS feeds even more securely, choose **Configure>Administrator Settings>Application Settings**, and set the **RSSMode** option to **guestonly** (which uses Guest privileges for all RSS feeds even if the user ID in the URL is correct) or **disabled** (which turns off RSS feeds completely, for all users). By default, RSS feeds are **enabled**. Note that this setting affects all RSS feeds, including the Inmagic Presto SharePoint Federated Search Web Part, which relies on an RSS feed.

Manage My Alerts

Choose **My Account>Manage My Alerts** to create, modify, or delete alerts that inform you if a specified event occurs. Your role must allow the "Manage Alerts" System Permission. Alerts can be sent to you via e-mail or an RSS feed. The alerts you receive will be restricted to the content types, collections, and other events that you have permission to view.

- To create an alert, click the **Create new Alert** button. Provide a unique name and description. New alerts are activated by default. Then fill in the other controls on the page as appropriate. The controls you see depend upon your permission level and the choices you make on the screen.
- To edit an alert, click its name in the list of alerts.
- To delete one or more alerts, select the check boxes for the alerts you want to delete, then click the **Delete** button.
- To activate or deactivate alerts, check the box next to one or more alerts, then click **Activate** or **Deactivate**. Deactivated alerts will no longer be sent.
- To subscribe to an RSS feed for an alert that has been created, click the **Subscribe** button in the **RSS** column on the Manage My Alerts page.

Create New Alert

You can specify which events should generate alerts and specify whether you want to receive alerts immediately or on a fixed schedule. Alerts are sent by e-mail. If you would prefer an RSS feed, click the **Subscribe** button on the **Manage My Alerts** page after you save the new alert.

To Create and View Alerts

Users can create alerts that will them when a specified event occurs.

To create an alert, choose **My Account>Manage My Alerts**, click **Create new Alert**, then use the options described below to define the alert. Remember to click **Save** when you are done. To perform this step, your role must have the "Manage Alerts" System Permission.

When you create the alert, you can specify whether you want to be alerted via e-mail (either when the event occurs or at a scheduled time) and/or an RSS feed.

Only events that have been activated (enabled) by an administrator (**Configure>Events**) will generate alerts. If you do not receive any alerts, it is possible that the selected events were never activated.

Administrators with appropriate permissions can configure views to determine how alerts appear (**Configure>Content Type>Configure Views**).]

Alert Settings

Alert Name and Description

Provide a unique **Alert Name** and optional **Description**, then fill in the other controls on the page as appropriate. The controls you see depend on your permission level and the choices you make on the screen. Note that new alerts are activated by default. If you uncheck the **Active** Status box, the alert (or RSS feed for a global alert) will not be sent.

Event Types

Alerts are triggered when specific events occur, such as new content being created about a topic of interest. Users can only receive alerts about events that are have been activated by the system administrator using **Configure>Events**.

You can request that you will receive alerts for the following types of events. If enabled, the following events are available to most users:

- **Content events**. Select the content type(s) for which you want alerts, optionally enter keywords of interest (all listed keywords must be present for the alert to occur, unless a Boolean expression is entered), and specify the event(s) that will trigger alerts. For example, select `Content added` to be alerted when qualifying items are added to the catalog. Note that keywords are ignored for Content Deleted events, as the keyword filter is applied after the event has been triggered.
- **Collection events**. Select a collection from the drop-down list, optionally select specific categories of interest, optionally enter keywords of interest, and then select the event(s) to watch.

Only system administrators can receive alerts for the following events:

- **User login/logout events**. Specify whether to track login and/or logout activity for any user or a specific user.
- **User profile events**. Specify whether to track addition, deletion, and/or modification of a user profile for any user or a specific user.
- **System events**. Specify whether to track any of the following system events: Import started, Import completed, Critical error occurred, Content archived.

Note: In addition to creating alerts from the Manage My Alerts screen, you can create one based on a search you have performed by clicking **Save as an Alert** on the Search Results screen. This screen then appears with default values appropriate for that search already supplied. Modify them as needed, then save the new alert. An alert created in this way is always content-related, and is triggered by the Content Added and Content Modified events, by default.

Alert Delivery

Deliver alert to. Specify an e-mail address where the alert should be sent.

Run this alert. Select **When an Event Occurs** to receive an alert message as soon as the event occurs; and each message will describe a single event. Select one of the other choices (Every Hour, Day, Week, or Month) to receive alerts on a fixed schedule, if any selected events occurred in that interval. Each message will describe one or more events that occurred during the interval, up to a maximum which is controlled by the system configuration.

Edit Alert

An *alert* is an email or RSS feed notification that an event has occurred. Alerts are restricted to content types, collections, and other events that a specific user has permission to view. To edit an existing alert, choose **My Account>Manage My Alerts**, and click a listed alert. See the Create New Alert topic for information about the available options.

Subscribe to Global Alerts

To subscribe to an RSS feed based on a Global Alert, choose **My Account>Subscribe to Global Alerts**, then click the **Subscribe** button in the **RSS** column. Global Alerts are created by a system administrator for events of general interest to multiple users, such as content items being added. For related information, see Overview of Events, Alerts, and RSS Feeds.

Configuring Global Alerts (RSS Feeds)

Use the **Configure>Global Alerts** page to create, modify, or delete alerts that will be used to generate RSS feeds available to all users with the "Subscribe to Global Alerts" System Permission. To access this page, you must be a System Administrator or your role must allow the "Configure Global Alerts" System Permission.

Use Global Alerts when several people want RSS feeds for the same information (for example, when content items are added to a content type or to a "hot" category). The RSS feed for a Global Alert is generated once at a specified interval, then accessed by individual users. This is more efficient than multiple users generating individual RSS feeds or subscribing from individual Manage My Alerts pages.

To Configure Global Alerts

Follow the steps below to set up global alerts to ensure that users are notified of events. A *global alert* is an RSS feed notification that an event has occurred.

1. Choose **Configure>Global Alert**.
2. Do one of the following:

   Create a global alert by clicking **Create new Global Alert**.

   Edit a global alert, by clicking the alert name link.

   Make an INACTIVE alert active, by checking it and clicking **Activate**.

   Make an alert INACTIVE, so it will no longer be sent, by checking it and clicking **Deactivate**.

   Delete an alert, by checking it and clicking **Delete**.

   Click **Refresh** to immediately update the RSS feeds for the selected global alerts. For example, you may have recently changed the RSS view or triggered an event and want to verify the appearance of the feed without waiting until the next time the feed updates automatically.

2. Specify who can subscribe to the alert. Use **Configure>Roles** to allow the "Subscribe to Global Alerts" System Permission.
3. Optionally, create an RSS View (**Configure>Content Type>Configure Views**).

   Tip! If no RSS View is specified, global alerts use the Alert View. However, the Alert View is also used for the Event Log and Alert e-mail messages. To avoid a large Event Log, the Alert View should generally include only a few fields. The RSS View can include more fields without affecting the size of the Event Log.

4. To subscribe to an RSS feed based on a global alert, authorized users (step 2 above) can choose **My Account>Subscribe to Global Alerts**, and click the **Subscribe** button in the **RSS** column.

Create New Global Alert (RSS Feed)

Choose **Configure>Global Alerts**, and click **Create new Global Alert** to create a global alert that will generate a cached RSS feed page at specified intervals. A global alert is available to any user whose role has the "Subscribe to Global Alerts" System Permission, and who chooses to subscribe to global alerts. Remember to click **Save** when you are done.

The controls that you see on the Create new Global Alert page depend on your permission level and the choices you make on screen. To create a global alert, you must be a System Administrator or your roles must include the "Configure Global Alerts" System Permission.

Alert Name and Description

Provide a unique **Alert Name** and optional **Description**, then fill in the other controls on the page as appropriate. The controls you see depend on your permission level and the choices you make on the screen. Note that new alerts are activated by default. If you uncheck the **Active** Status box, the alert (or RSS feed for a global alert) will not be sent.

Event Types

Alerts are triggered when specific events occur, such as new content being created about a topic of interest. Users can only receive alerts about events that are have been activated by the system administrator using **Configure>Events**.

You can request that you will receive alerts for the following types of events. If enabled, the following events are available to most users:

- **Content events**. Select the content type(s) for which you want alerts, optionally enter keywords of interest (all listed keywords must be present for the alert to occur, unless a Boolean expression is entered), and specify the event(s) that will trigger alerts. For example, select `Content added` to be alerted when qualifying items are added to the catalog. Note that keywords are ignored for Content Deleted events, as the keyword filter is applied after the event has been triggered.
- **Collection events**. Select a collection from the drop-down list, optionally select specific categories of interest, optionally enter keywords of interest, and then select the event(s) to watch.

Only system administrators can receive alerts for the following events:

- **User login/logout events**. Specify whether to track login and/or logout activity for any user or a specific user.
- **User profile events**. Specify whether to track addition, deletion, and/or modification of a user profile for any user or a specific user.
- **System events**. Specify whether to track any of the following system events: Import started, Import completed, Critical error occurred, Content archived.

RSS Feeds

Use the settings at the bottom of the page to specify the following information.

Update cached RSS page: Indicate how often the RSS feed should be refreshed: Every Hour, Every 5 Minutes (default), Every 15 Minutes, Every Half Hour, Every Hour.

Maximum items on RSS page: Indicate the maximum number of messages to include in the RSS feed. The default is 10.

Edit Global Alert (RSS Feed)

A *global alert* is an RSS feed notification that an event has occurred. Global alerts are set up by an administrator and are available to all users with the "Subscribe to Global Alerts" System Permission. To edit a global alert, choose **Configure>Global Alerts**, and click on a listed alert. For information about the available options, see Create New Global Alert.

Configuring Events

Choose **Configure>Events** to activate or deactivate events. Your System Permissions (Configure Roles) must allow you to configure events.

Activating and Deactivating Events

By default, events are not activated, which means they are not logged and alerts cannot be received for them.

- **To log an event**: Activate the events you want to track, by checking them on the **Configure>Events** page. Activating an event enables users to set up alerts using **Manage My Alerts** or **Global Alerts**. Unless an event is activated, no one (including System Administrators) will be able to receive alerts for the event. Activate only the events that you actually want to track, or for which users will want to set up alerts. If you will not be looking for those events in the Event Log or alerting users, there is no reason to activate the events.
- **To stop logging an event**: Deactivate (uncheck) it. Existing entries will remain in the log, but no future entries will be written, and no future alerts will be sent.
- **To view the event log**: Choose **Reports>View Event Log**, then use the **Show** drop-down list. The Event Log cannot be deleted or edited. However, a system administrator can use advanced configuration methods to cause *Presto* to automatically delete events older than a specified number of days.

To Configure Event Logging

Users with the System Administrator role can set up event logging as described below.

1. **Determine which events should be logged.**

   Choose **Configure>Events**.

   Activate *only* the events that you actually want to track, or for which users will want to set up alerts. Simply checking all of the boxes is not recommended:

   - Activate events so they will be written to the Event Log (available via the **Reports** menu). For example, for Content Events, you might want to check the "Content deleted" box so you know who deleted content items and when. If end-users do not have the ability to delete content items, it is probably not necessary to track this event.
   - Activate events so users can set up Alerts or RSS feeds. For example, you may want to check the "Content added to Category" box for Collection Events, so users receive alerts when content is added to categories.

Tip! Do not simply check all of the boxes. If you will not be looking for those events in the Event Log or alerting users, there is no reason for *Presto* to record the events.

2. **Modify the Alert View to prevent disclosing sensitive information.**

   Whenever you create a new Content Type, use the **Configure Views** button (**Configure>Content Types**) to modify the **Alert View** so it only includes a few fields that are appropriate for all end-users to see.

   The Alert View should contain the minimum information required to identify the item, and/or indicate that the record would be of interest when seen in an Alert. If you include an HTML Text or other long field, use the Maximum Visible Characters feature to display only part of the text.

   Note: The default Alert View for a new Content Type contains all of the fields that are available when the Content Type is initially saved. This has the potential of retaining (and indexing) much more data in all Content-related events for this type than is expected or desirable – either from volume, or because it is possible that sensitive information will be present in viewed Events, Alerts, or RSS feeds.

3. **[Optional] Permit other users to view the Event Log.**

   If you want to permit users other than those with the System Administrator role to view the event log, use **Configure>Roles** to assign the "View Event Log" System Permission to a role, then use the Members tab to assign users to the role. Users assigned to that role can then use **My Account>View Event Log**.

   Normally, only System Administrators, or roles who can view content in *all content types and collections* should be allowed to view the event log, because the log shows the old and new information in edited records, and it shows all of the information in the Alert View for all other Content Events.

   Note: It is not recommended to permit users to view the Event Log. Instead, end users can be notified of events in the following ways:

   - **Global Alerts**. RSS feeds set up by the administrator, but available to all users with the "Subscribe to Global Alerts" System Permission.
   - **My Account>Manage My Alerts**. RSS or e-mail, restricted to content types and collections and other events they have permission to view.

4. **View the Event Log.**

   To view logged events, choose **My Account>View Event Log**.

Content Events

Check the box for each Content Event that you want to write to the Event Log. You can individually activate or deactivate each of the following Content Events:

- Content added, modified, deleted, activated, deactivated, viewed, e-mailed, downloaded, or printed, and whether an attached document was viewed
- Tags modified
- Rating modified
- Comments modified
- Social Content moderated

Note that *Presto* automatically updates this section whenever a content type is added or removed. By default, all of the Content Events for a new content type are deactivated.

For each selected Content Event, the following information is written to the Event Log: Date/Time, Presto User name, User full name, Event name, Content Type name, and Alert view defined for the content. If content is modified, the log also records the original values and the new values, for all fields modified for that content type. If an attached document is viewed, the document name is recorded.

Note: You can configure an Alert View to determine which fields will be included in the Event Log and determine the appearance of the alert messages that will be sent for Content Events. For more information, see Configuring Views.

Note: Content Type Configuration Events (creation, modification, and deletion of Content Types, Screens, and Views) are activated by default and cannot be deactivated. Therefore, they do not appear on this page. However, they are written to the Event Log and can be seen by choosing **Reports>View Event Log** and selecting **Content Type Configuration Events** from the **Show** drop-down list.

Collection Events

Check the box for each Collection Event that you want to write to the Event Log. *Presto* automatically updates this tab whenever a collection is added or removed. By default, all of the events associated with a collection are deactivated. Collection Events include the following:

- Category added
- Category modified
- Category deleted
- Content added to Category
- Content removed from Category

For each selected event, the following information is written to the Event Log: Date/Time, Presto User name, User full name, Event name, Collection name, and Category name. If a category is modified, the log also records the new category name and whether the category was renamed, activated, or deactivated. If content is added to a category, the log includes the new content type name and the alert view defined for the content added. If content is removed from a category, the log includes the content type name and the alert view defined for the content removed.

User Login/Logout Events

The following events, if activated, are logged when they occur:

- User login
- User logout
- Session Timed Out

For each selected event, the following information is written to the Event Log: Date/Time, Presto User name, User full name, and Event name.

User Profile Events

The following events, if activated, are logged when they occur:

- User Profile added

- User Profile modified
- User Profile deleted

For each selected event, the following information is written to the Event Log: Date/Time, Presto User name, User full name, Event name, Name of the Presto user modified/added/deleted, Roles of the Presto user modified/added/deleted.

System Events

The following system events, if activated, are logged when they occur:

- Import started
- Import completed
- Critical error occurred
- Content archived

For each selected event, the following information is written to the Event Log: Date/Time, Presto User Name, User full name, Event name, Job ID, Job status, Job message (for completed actions).

Working with the Event Log

The Event Log provides a history of the actions that occurred in *Presto*.

To view logged events, choose **Reports>View Event Log**. Your role must have the "View Event Log" System Permission.

- Use the **Show** drop-down list to select an Event Log report. (To adjust the order in which reports appear in the list, use **Configure>Reports**, **Set Listing Order**.)
- Use the controls at the top of the page to navigate, adjust the zoom, or search the report. If an arrow appears next to a column heading, you can click it to change the sort order. **Note**: Some reports show a username of **Presto$System**, which indicates that an individual username is not applicable or available.
- To print or export the report, select a format from the list at the top of the page, then click the **Print** or **Save** icon.

The following Event Log reports are available in the **Show** list:

Event Log Report	Description
User Login/Logout Events	Provides information about User Login/Logout Events that were activated using **Configure>Events**. For example: User logins, logouts, and session timeouts.
User Profile Events	Provides information about User Profile Events that were activated using **Configure>Events** (user profiles added, modified, or deleted). For example, you may see information about accounts created at login time and changes made using **My Account>Update My Profile**.
Content Type Configuration Events	Provides information about events related to the creation, modification, and deletion of Content Types, Screens, and Views. (In previous versions, this was controlled using UpdateMetadata Jobs on the Monitor Jobs page.)
Content Events	Provides information about Content Events that were activated using

	Configure>Events. Examples include records or blog posts being viewed, deleted, or modified, tags or ratings being modified, and similar content-related events. Note that the Alert View determines which fields are included in the Content Events portion of the Event Log, for events that have been activated.
Collection Events	Provides information about Collection Events that were activated using **Configure>Events**. Examples include categories added, modified, or deleted, and content added to or removed from categories.
System Events	Provides information about System Events that were activated using **Configure>Events**. Examples include import start and completion times, critical errors, and content archived.

Determining Which Events are Logged

By default, events are not logged. If you want an event to be logged, activate it using **Configure>Events**. To stop writing events to the log file, deactivate the events. For additional information, see Overview of Events, Alerts, and RSS Feeds.

Deleting Events from the Log

The Event Log cannot be deleted or edited. However, a system administrator can use advanced configuration methods to automatically delete events older than a specified number of days.

Chapter 13: Users, Roles, and Authentication

Users

Choose **Configure>Users** to configure *Presto* user profiles. By default, this page is only available to users with a system administrator role. Use the navigation controls at the top and bottom of the viewing pane to move from page to page. Use the **View** drop-down list to change the number of users per page. Use the **Sort by** drop-down list to re-order the list.

Built-in User Accounts

Presto supplies three built-in user accounts, which can be modified but not deleted:

- **Administrator**: The Administrator account is assigned the System Administrator and Everyone roles, with System Administrator being the primary role. The Primary Role determines which home page the user will see. You can assign a different primary role and change some characteristics of the account, such as the password.
- **Guest**: The Guest account is assigned the Everyone role and has a password of "guest." You can assign additional roles and change some characteristics of the account, such as the password. **Note**: The Guest account should provide restrictive rights, because it is used for all self-created user accounts (created at login), as well as accounts that *Presto* automatically creates for Active Directory accounts.
- **WCFServices**: The Windows Communication Foundation Services account is used by *Presto* for blog-related tasks and Set Listing Order in Configure Content Types. It can also be used to enable an external application to access Inmagic Presto Services via the *Presto* Web Services API.

To determine which fields are included in user profiles, use **Configure>Content Types** to edit the User Profile content type. To determine the appearance of user profiles, you can configure screens and configure views.

Creating and Editing Users

- To create a *Presto* user account, choose **Configure>Users**, click the **Create User** button on the Configure Users page, and define the user account by filling in the Create User page.
- To edit an existing account, choose **Configure>Users**, click a link on the Configure Users page, and use the Edit User page.
- You can also create users by importing Active Directory user profiles.

Important: Users can create their own accounts at login time (if that feature has been enabled), by clicking **Create Account** on the Login page. User-created accounts have the same Role as the Guest account. Therefore, you should ensure that the Guest account is configured appropriately (with restrictive rights). Administrators can modify user-created accounts to provide additional roles or change the primary role (which determines which home page the user will see).

Setting or Resetting a Password

To set or reset a user password, choose **Configure>Users**, click a user account, and click the Set Password link (not available for Active Directory accounts). This can be done for security reasons, or it may be necessary if a native user is locked out of *Presto*. A locked-out user is one who has typed an invalid password a certain number of times (default 5) within the interval specified in the Presto Web.config file. Note that users can also click the Reset Password link on the Login page to reset their own passwords. (The Reset Password link appears only if **ShowForgotPasswordLink** is enabled in Application Settings.)

Resetting a password only pertains to native Presto users. For Active Directory users, the change must be made in the SQL database, as explained in the Advanced Configuration Guide.

Act on this Listing of Users

To find a user or filter the list of users, choose **Configure>Users**, then enter a query in the **Filter** box under **Act on this listing of Users**, using standard search syntax. To clear the search and redisplay all users, click the **Remove Filter** link.

Act on Users

After choosing **Configure>Users**, use check boxes to select users and perform the following operations.

Activate or Deactivate Users

To activate or deactivate users, go to the Configure Users page, check the box next to a user name, and click the **Activate** or **Deactivate** button. Users are activated by default, meaning they can log in to *Presto*. If you deactivate a user, that account cannot log in to *Presto*. A deactivated user account can be viewed only by content and system administrators (and it will be identified by an "Inactive" label next to it).

Log in as Another User

Administrators can log in as another user without having to know that user's password. This can be useful in troubleshooting situations, to help diagnose issues that a particular user may be having. To log in as another user, go to the Configure Users page, check the box next to a user name, then click the **Log in As** button. When you click the button, *Presto* goes to the home page for that user. Remember to log out when you are done, then log back in as yourself.

Delete User

To permanently delete a user account, go to the Configure Users page, check the box next to the user name, click the **Delete** button, then confirm the deletion. Note that this action is visible only if your login allows it and if it is relevant for the selected item. Some users are not allowed to delete items; and no one can delete the built-in Administrator, Guest, or WCFServices user accounts. If your permissions allow, select one or more items then choose **Delete** and click **OK** to confirm the deletion request and *permanently delete* the item.

Reset User ID (RSS feed security)

Use **Reset User ID** to affect the selected user(s). This will cause all RSS feeds already specified in feed readers to use the Guest account privileges instead of that user's privileges until a new feed URL is specified. This may be necessary if someone has provided RSS feed URLs to users who should not have them.

Note: To lock down RSS feeds even more securely, set the **RSSMode** option in Application Settings to **guestonly** (which uses Guest privileges for all RSS feeds even if the user name ID in the URL is correct) or **disabled** (which turns off RSS feeds completely, for all users). By default, RSS feeds are **enabled**. This setting affects all RSS feeds, including the Inmagic Presto SharePoint Federated Search Web Part, which relies on an RSS feed.

Using the Create or Edit User Page

Administrators can create or edit *Presto* user accounts by choosing **Configure>Users**, and clicking an existing account, or clicking **Create User**. Use the **Overview** and **Roles** tabs to define the account information, then click **Save**.

Note: Users can create their own logins by clicking **Create Account** on the Login page (if that feature has been enabled). User-created accounts have the same Role as the built-in Guest user account. Therefore, *Presto* System Administrators should ensure that the Guest account is configured appropriately (with restrictive rights). Administrators can modify user-created accounts to provide additional roles or change the primary role (which determines which home page the user sees).

Overview tab

Define the user account by filling in the fields on this tab. The fields that appear depend on how the User Profile content type is defined. Typically, the fields listed below are included. **Note**: The **Password** link does not appear when editing an Active Directory user account, since authentication for non-native users is handled by Windows.

- **User Name**: The login name (cannot be changed once a user account has been saved). Do not use punctuation as the first character of the user name. Any spaces in the user name are removed on Save.
- **Password**: Click the password link, then enter and confirm a New Password and optionally specify a **Security Question** and a **Security Answer**. If you ever forget your password, you can supply the Security Answer exactly as it was entered here, including any capitalization and punctuation. Click **Save** (or Cancel) to close the overlay. **Note:** The password is not actually saved until you click **Save** in the main window.
- **First Name**: The user's first name.
- **Last Name**: The user's last name.
- **E-mail**: The user's e-mail address, which will be used as the From address when sending e-mail from *Presto*, and will be visible to other users who can see the E-mail field in the user profile.
- **Address**: The user's street address (optional).
- **City**: The user's city (optional).
- **State**: The user's state (optional).
- **Zip**: The user's postal code (optional).

- **Country**: The user's country (optional).
- **Phone**: The user's telephone number (optional).
- **Locale**: The locale identifies regional and language settings, to determine the appearance of numbers, dates, time, language, and home page for the logged-in user. The available choices depend on how *Presto* was configured, and the default value depends on how the Profile content type is configured.
- **Time Zone**: Select the appropriate time zone from the list. The default value depends on how the Profile content type is configured.
- **Profile Image**: You can select an image to appear next to Blog Posts, Comments, and in the user profile. If an image has not yet been selected, click **Select File**. In the pop-up window, click **Browse**, select a file, and click **Upload Selected File**. After a file has been uploaded, controls will appear next to the image to enable you to **Replace** or **Remove** the image.

Roles tab

Roles determine the user's permissions. When you create a new user, *Presto* assigns the Everyone role. You can change the role or assign additional roles. Every user must have at least one assigned role (see the List of Roles).

- Select a Primary Role from the drop-down list. The primary role determines which home page will be displayed.
- To add another role to this user, click **Add Role To User**. Select one or more roles from the **Add Roles** pop-up window and close that window when you are done. For descriptions, see the List of Roles.
- If multiple roles are assigned, you can remove one or more of those roles, as long as at least one role remains: Check a role, then click **Remove Role From User**. Note that you cannot remove the Everyone role because it is the default role for all users.
- To modify an existing role, click the role link, which will open the set of tabs for editing a role.

Create Account at Login

The Create Account link on the Login page allows any user to log in to *Presto* with limited rights provided by the built-in Guest account. (The link appears only if **ShowCreateNewUserLink** is set to **True** in Application Settings.)

After clicking the link, fill in the fields on the **Register New Account** page, then click **Create Account** to create an account and log in to *Presto*, or **Cancel** to return to the Login page without creating an account.

The **Register New Account** page may include some or all of the fields listed below, along with any other fields specific to your organization.

- **User Name**: The login name (cannot be changed once a user account has been saved). Do not use punctuation as the first character of the user name. Any spaces in the user name are removed on Save.
- **Password**: Click the password link, then enter and confirm a New Password and optionally specify a **Security Question** and a **Security Answer**. If you ever forget your password, you can supply the Security Answer exactly as it was entered here, including any capitalization and punctuation. Click **Save** (or Cancel) to close the overlay. **Note:** The password is not actually saved until you click **Save** in the main window.

- **First Name**: The user's first name.
- **Last Name**: The user's last name.
- **E-mail**: The user's e-mail address, which will be used as the From address when sending e-mail from *Presto*, and will be visible to other users who can see the E-mail field in the user profile.
- **Address**: The user's street address (optional).
- **City**: The user's city (optional).
- **State**: The user's state (optional).
- **Zip**: The user's postal code (optional).
- **Country**: The user's country (optional).
- **Phone**: The user's telephone number (optional).
- **Locale**: The locale identifies regional and language settings, to determine the appearance of numbers, dates, time, language, and home page for the logged-in user. The available choices depend on how *Presto* was configured, and the default value depends on how the Profile content type is configured.
- **Time Zone**: Select the appropriate time zone from the list. The default value depends on how the Profile content type is configured.
- **Profile Image**: You can select an image to appear next to Blog Posts, Comments, and in the user profile. If an image has not yet been selected, click **Select File**. In the pop-up window, click **Browse**, select a file, and click **Upload Selected File**. After a file has been uploaded, controls will appear next to the image to enable you to **Replace** or **Remove** the image.

Update My Profile

If your role permits, you can choose **My Account>Update My Profile** to change your profile settings, including your password. Note that you cannot change your user name and authentication type. To change those attributes, ask your *Presto* system administrator to delete your current user profile and create another one for you with a new user name and/or authentication type.

Depending on how profiles are defined for your organization, you may see some or all of the following fields, as well as additional fields.

- **User Name**: The login name (cannot be changed once a user account has been saved). Do not use punctuation as the first character of the user name. Any spaces in the user name are removed on Save.
- **Password**: Click the password link, then enter and confirm a New Password and optionally specify a **Security Question** and a **Security Answer**. If you ever forget your password, you can supply the Security Answer exactly as it was entered here, including any capitalization and punctuation. Click **Save** (or Cancel) to close the overlay. **Note:** The password is not actually saved until you click **Save** in the main window.
- **First Name**: The user's first name.
- **Last Name**: The user's last name.
- **E-mail**: The user's e-mail address, which will be used as the From address when sending e-mail from *Presto*, and will be visible to other users who can see the E-mail field in the user profile.
- **Address**: The user's street address (optional).

- **City**: The user's city (optional).
- **State**: The user's state (optional).
- **Zip**: The user's postal code (optional).
- **Country**: The user's country (optional).
- **Phone**: The user's telephone number (optional).
- **Locale**: The locale identifies regional and language settings, to determine the appearance of numbers, dates, time, language, and home page for the logged-in user. The available choices depend on how *Presto* was configured, and the default value depends on how the Profile content type is configured.
- **Time Zone**: Select the appropriate time zone from the list. The default value depends on how the Profile content type is configured.
- **Profile Image**: You can select an image to appear next to Blog Posts, Comments, and in the user profile. If an image has not yet been selected, click **Select File**. In the pop-up window, click **Browse**, select a file, and click **Upload Selected File**. After a file has been uploaded, controls will appear next to the image to enable you to **Replace** or **Remove** the image.

To save changes: Click **Save** (the window remains open), then click **Exit** to close the window.

To close the window without saving changes: Click **Exit**.

Roles and Permissions

A role is a set of permissions that you can apply to a user to specify the actions that the user can perform. Every user must have at least one assigned role. By default, when you create a new user, *Presto* assigns that user to the Everyone role. You can assign more than one role to a user. If you assign multiple roles, one role must be designated as the Primary Role, to determine which home page the user will see.

Note: For an example of how roles can be used, see Setting Up an Approval Process for New Records.

List of Roles

The **Configure>Roles** page lists all existing roles, including the following built-in roles:

- **Content Administrator**: This role can be changed or deleted. By default, this role is allowed to configure Content Types, Content Collections, and Value Lists.
- **Everyone**: All users are members of the Everyone role. By default, this role provides no permissions. This role can be changed but not deleted.
- **System Administrator**: This role provides full access to all *Presto* operations. This role cannot be changed or deleted.
- **Viewer**: Can be changed or deleted.

Note: To hide fields from a role, or to make individual fields viewable or editable, set Field-level Permissions.

Configuring Roles

When configuring a role (**Configure>Roles**), you can perform the following actions. Changed settings will take effect the next time a user with this role logs in to *Presto*. Note that you cannot change the settings for the System Administrator role, which is designed to allow full access.

- **Create a role**: Click Create new Role on the **Configure>Roles** page then use the Edit Role page to define the role.
- **Edit a role**: Click a role on the **Configure>Roles** page, use the Edit Role page to make any desired changes, then click **Save**.
- **Adjust field-level permissions**: Click Permission Fields. This is typically done after setting the role permissions, to fine-tune permissions (Edit, View, None) on a field-by-field basis.
- **Copy a role**: On the Configure Roles page, check the role you want to copy, then click **Copy this Role**. Copying a role may take several minutes; it will then appear at the end of the list of roles, with the name "Copy of...". Click the new role to change permissions and assign users. (Note that users assigned to the original role are not included in the copied role.)
- **Delete a role**: To delete a role, check the box next to the role you want to delete, click **Delete this Role**, and confirm the deletion. If the deleted role was assigned as the primary role for a user, the Everyone role will automatically be reassigned as the primary role. You cannot delete the System Administrator or Everyone role. To delete a Blog role, delete the associated blog (you cannot delete a Blog role from this page).

To Adjust Permissions for Roles

To learn how to adjust permissions for roles, see Setting Field-level Permissions, which explains all of the following steps in detail:

1. Choose **Configure>Roles**, then click an existing role or create a new role.
2. Use the **Overview** tab to set the **Default Field Permission** to Edit, View, or None.
3. Use the **Content Permissions** tab to add or edit permissions for each Content Type.
4. Save your changes.
5. On the Configure Roles page, check the box next to a role, then click **Permission Fields**.
6. Use the Permission Fields page to allow this role to view or edit individual fields, or to hide the field(s) altogether.

Creating or Editing a Role

A role identifies the functions that a user can perform. A role is defined as a set of permissions that you can apply to a user. Every user must have at least one assigned role. By default, when you create a new user *Presto* assigns that user the Everyone role. You can assign more than one role to a user. Each user must have one Primary Role, which determines which home page that user will see. You can create roles, in addition to the built-in roles provided with *Presto*.

To create a role

Choose **Configure>Roles**, then click **Create new Role**. This opens the Edit Role page, where you can define the role by using the settings described below. In addition to specifying the role permissions described below, you can also adjust field-level permissions. You must click the **Save** button to save the new role. The settings will take effect when a user with this role logs in to *Presto*.

To edit a role

Choose **Configure>Roles**, then click the link for the role you want to edit. After making changes, be sure to click the **Save** button. Optionally, check the box next to a field and use the Permission Fields button to access a page where you can adjust field-level permissions. The settings will take effect the next time a user with this role logs in to *Presto*.

Overview Tab

Name: Enter a unique role name (required).

Description: Optionally, enter a description for the role.

Default Field Permission: Specify whether users with this role should be able to view, edit, or not have access to fields for this content type. This option sets the default behavior, but you can adjust permissions at the field-level by using **Configure>Roles>Permission Fields**.

Content Permissions Tab

This tab controls the ability to work with content in content types, blogs, and user profiles. You can change content permissions for any role except System Administrator.

- The **Content Type** column lists the items that have Content Permissions assigned.
- The **Record Filter** column indicates whether there are any restrictions for this role within a Content Type. Record filters are defined by specifying any valid query when adding or editing permissions, to filter the records for this role within a Content Type. For example, type **active=true** in the Record Filter box to affect all active records for that Content Type.
- The **Permissions** column shows which Content Permissions are currently allowed (see list below).
- The **Command** column lets you Edit or Delete existing permissions. See below.
- Click Run in the **Filter Test** column to confirm that you get the results you wanted. This runs the query against that content type and displays a message showing how many records were returned. If the Record Filter column is blank, the message will show the count of all the records in the content type.

To add content permissions: Click the **Add** button, select one or more content types (you can use Ctrl+Click and/or Shift+Click), then check the boxes for the permissions you want to enable (see list below). For example, click **Add**, select the "Sample" Content Type, check VIEW and PRINT, then **Save**. You can also define a **Record Filter**, as described above. Be sure to click **Save**. When you return to the Edit page, you can continue defining permissions, then click **Save** to commit your changes.

To change content permissions: Click the **Edit** link, then use the controls to make any changes. Be sure to click **Update** when you are done. When you return to the Edit page, you can continue defining permissions, then click **Save** to commit your changes.

To delete a permission: Click its **Delete** link.

List of Content Permissions

When adding or editing permissions, check or clear the following boxes to allow or deny the actions for this role. The content type, blog, or user profile that you select determines which Permissions you can assign.

- ALL: Check this box to select all permissions.
- CREATE ACTIVE: Allow this role to add Active records.
- CREATE INACTIVE: Allow this role to add Inactive records. This is useful when you want to implement an approval process for new records. Users with *only* the CREATE INACTIVE permission will *only* be able to create Inactive records, which can be hidden from sets of users by specifying a Record Filter in a Role definition.

  Note: If only *one* of the **Create** options is checked, users who are assigned this role will not see the **Active** field even if it appears on the Add Screen, and the record's status for the Active field will default to the allowed Create value (Active or Inactive).
- EDIT: Allow this role to edit existing content for the specified item.
- VIEW: Allow this role to view existing records or posts for the specified item. You must check View if you plan to allow operations (such as Use or Edit) that depend on seeing existing records. View provides the ability to see existing content items in search results and when browsing (if the Collection Permissions permit browsing), and to use the **Print/View** and **Add to Cart** buttons. Without this core permission, users will not be able to see or browse search results, and therefore will not be able to perform operations that depend on seeing the record. Note that selecting any permission other than View or Create will automatically select the View Permission. This is because these permissions assume that the user has View Permissions.
- DELETE: Allow this role to delete existing content, records, posts, or user profiles.
- CHANGE STATUS: Allow this role to make an item active or inactive. For related information, see Setting Up an Approval Process for New Records.
- RATE: Allow this role to rate content for records of the specified content type.
- COMMENT: Allow this role to add comments to a record or blog post for the specified content type or blog.
- TAG: Allow this role to tag records or posts for the specified content type or blog. Note that at least one Content Type must have the Tag permission selected in order for users with this role to be able to see the View My Tags option on the My Account menu.
- MODERATE SOCIAL CONTENT: Allow this role to remove selected tags, comments, and ratings.
- ADD TO CART: Allow this role to add items to the cart for the specified content type or blog.
- EMAIL: All this role to use the E-mail button when acting on content.
- PRINT: Allow this role to print content.
- DOWNLOAD: Allow this role to download content as PDF, HTML, or XML.
- CATEGORIZE: This setting controls whether **Add to Category** appears on the Search Results, Detail Screen, and InfoCart pages for this role.
- VIEW REPORT: Control whether the **Report On Content** menu choice appears for this content type for this role.

Blog Permissions Tab

This tab controls the ability to work with blogs. You can change blog permissions for any role except System Administrator.

To add blog permissions, click the **Add** button, select one or more blogs (you can use Ctrl+Click and/or Shift+Click), then check the boxes for the permissions you want to enable (see list below). Click **Save**. When you return to the Edit page, you can continue defining permissions, then click **Save** to commit your changes.

To change blog permissions, click the **Edit** link, then use the controls to make any changes. Be sure to click **Update** when you are done. When you return to the Edit page, you can continue defining permissions, then click **Save** to commit your changes.

To delete a permission, click its **Delete** link.

List of Blog Permissions

When adding or editing permissions, check or clear the following boxes to allow or deny the actions for this role.

- ALL: Check this box to select all permissions.
- CREATE POST: Allow this role to add posts to blogs.
- EDIT POST: Allow this role to edit existing posts.
- VIEW POST: Controls the ability to access the blog via the Blogs menu, search for blog posts, see posts in search results, and use the **Print/View** and **Add to Cart** buttons. You must check View Post if you plan to allow operations (such as Use or Edit) that depend on seeing existing posts. Without this core permission, users will be unable to see (and therefore work with) existing posts.
- DELETE POST: Allow this role to delete posts.
- COMMENT: Allow this role to comment on posts.
- TAG: Allow this role to add tags to posts.
- MODERATE SOCIAL CONTENT: Allow this role to use the Moderate Social Content option to remove tags, comments, or ratings.
- ADD TO CART: Allow this role to add posts to the Cart from Search Results.
- EMAIL: Allow this role to email blog posts from Search Results.
- PRINT: Allow this role to print posts from Search Results.
- DOWNLOAD: Allow this role to download posts as HTML, PDF or XML from Search Results.
- EDIT BLOG SETTINGS: Allow this role to use the Edit Blog Settings button to change the blog name, description, blog header, and allowed authors.
- VIEW REPORT: Determines whether the **Report On Content** option appears on the action menu bar for a specific blog.

Forum Permissions Tab

This tab controls the ability to work with forums. You can change these permissions for any role except System Administrator.

If a forum is already listed, you can check or clear each individual permission (you may need to click the **Edit** link first), then click the **Update** link. Click **Save** to commit your changes.

If a forum is not listed, click the **Add** button, select one or more forums (you can use Ctrl+Click and/or Shift+Click), check the boxes for the permissions you want to enable (see below), and click **Save**. When you return to the Edit page, click **Save** to commit your changes.

To delete a row, click its **Delete** link.

List of Forum Permissions

When adding or editing permissions, check or clear the following boxes to allow or deny the actions for this role.

- ALL: Check this box to select all permissions.
- EDIT TOPIC: Allow this role to edit existing posts. Only System Administrators or Forum Moderators can edit all posts in a forum. Other users can only edit their own posts.
- VIEW TOPIC: This is a core permission that allows users to see (and therefore work with) existing topics. It controls the ability to access the forum via the **Forums** menu, search for topics, and see topics in search results. You must check this permission if you plan to allow any operations that depend on seeing existing topics, such as EDIT TOPIC.
- DELETE TOPIC: Allow this role to delete existing topics.
- CHANGE STATUS: Allow this role to change the status of a topic.
- RATE: Allow this role to rate topics.
- TAG: Allow this role to add tags to topics.
- MODERATE SOCIAL CONTENT: Allow this role to use Moderate Social Content to remove tags or ratings.
- ADD TO CART: Allow this role to add topics to the Cart from Search Results.
- EMAIL: Allow this role to e-mail posts from forum topic listing pages or Search Results.
- PRINT: Allow this role to print topics from Search Results.
- DOWNLOAD: Allow this role to download posts as HTML, PDF or XML from Search Results.
- CREATE TOPIC: Allow this role to add topics to the forum.
- REPLAY TO TOPIC: Allow this role to reply to topics posted on the forum.
- VIEW REPORT: Determines whether the **Report On Content** option appears on the action menu bar for a particular forum.

Collection Permissions Tab

This tab controls the ability to work with collections. Whenever a content collection is created, it is automatically added to this tab. You can change the Collection Permissions for any role except System Administrator. By default, there are three privilege groups. Depending on how *Presto* was set up for your organization, you may see additional groups:

- BROWSE. Controls the ability to browse a content collection. Users who do not have rights to browse a collection will not see the collection on the **Browse** menu.
- CATEGORIZE. Controls the ability to categorize content in a collection. A user with this permission can copy or move content into a category and remove content from categories.
- ORGANIZE. Controls the ability to organize and edit a content collection. **Note:** Organize is a high-level permission that overrides the Content Permissions.

For convenience, you can use the **All Content Collections** row to check or clear all boxes in a column.

Report Permissions Tab

Use VIEW REPORT to control access to specific reports for the role that is being created or edited. VIEW REPORT controls whether the report appears:

- on the View Reports page (if it's a Public or System report)
- in the Show drop-down list on the View Event Log page (if it's an Event Log report)
- in the drop-down list on the Report On Content page if it's a Public report. (**Note**: Public reports are the reports users create.)

System Permissions Tab

This tab provides permissions to perform the system operations listed below, and makes the appropriate menus or menu options appear for any user(s) assigned to this role. For the System Administrator role, all boxes are checked and cannot be cleared. For the Everyone role, no boxes are checked (and best practices dictate that this role should not be given system permissions).

- CONFIGURE ACCESS CONTROL: Users with this role will see the **Users** option and the **Roles** option on the Configure menu. This should only be allowed for the System Administrator role.
- CONFIGURE BLOGS: Users with this role will see the **Blogs** item on the Configure menu, so they can create, edit, freeze, and delete blogs.
- CONFIGURE CONTENT: Users with this role will see the following items on the Configure menu: **Content Types**, **Content Collections**, **Value Lists**. Typically, you would check this box for a Content Administrator role.
- CONFIGURE EVENTS: Users with this role will see the **Events** option on the Configure menu. This should only be allowed for the System Administrator role.
- CONFIGURE FORUMS: Users with this role can control forums (add, update, delete, assign moderators).
- CONFIGURE FORUM GROUPS: Users with this role can control forum groups (add, update, delete).
- CONFIGURE GLOBAL ALERTS: Users with this role will see the **Global Alerts** option appear on the Configure menu. Typically, you would check this box for a Content Administrator role.
- CONFIGURE REPORTS: Users with this role will be able to configure reports by choosing **Configure>Reports**. This should only be allowed for the System Administrator role.
- CONFIGURE UI: Users with this role will see the following items on the Configure menu: **Home Page**, **Menus and Menu Bar**. This should only be allowed for the System Administrator role.
- MANAGE ALERTS: Users with this role will see the **Manage My Alerts** menu item appear on the **My Account** menu. Typically, you would check this box for end users. **Note:** If a user does not have this privilege, the "Save as an Alert" button does not appear on the Search Results page.
- PERFORM ADMIN FUNCTIONS: Users with this role will see the **Administrator Tools** option on the Configure menu. They will also be able to see the serial number on the **Help>About** window. This should only be allowed for the System Administrator role.

- PERFORM FEDERATED SEARCH: Provides access to all search adapter tabs that have been configured for search providers such as Google, Bing, or Wikipedia. After a Quick Search is performed, the Search Results page will include an additional tab for each configured provider. Any user who is a member of a role with the “PERFORM FEDERATED SEARCH” permission will be able to see and use the additional tab(s). Note that it is not possible to specify a permission for a specific search adapter; the permission applies to all configured search providers. **Note**: To enable Federated Search, an administrator must configure search adapter settings in Presto Application Settings. Further configuration is required for Google, SharePoint, and certain other search adapters. See the *Presto Advanced Administrator's Guide* for instructions.
- PERFORM SERVICE CALLS: Provides the ability to call Inmagic Presto Services from an external application, via the *Presto* Web Services API.
- SUBSCRIBE TO GLOBAL ALERTS: Users with this role will see the **Subscribe to Global Alerts** option on the My Account menu. Check this box only for roles that should be able to view the content in any of the Global Alerts. Do not check the box if there are Global Alerts for Content Types to which the role does not have View access.
- UPDATE PROFILE: Users with this role will see the **Update My Profile** option on the My Account menu. Check this box if you want the user associated with this role to be allowed to change his or her own password and e-mail address. Note that a user will not be able to change his or her user name or type of login. Only a System Administrator can change a user name, by deleting the current user profile and creating another one for the user with a new user name. This means that any settings associated with the old user name will be deleted as well, and those settings must be reset for the new user name, if needed.
- VIEW EVENT LOG: Users with this role will see the **View Event Log** option on the My Account menu. This should only be allowed for the System Administrator role.
- VIEW REPORTS: Users with this role will have access to the **View Reports** option on the **Reports** menu.

Members Tab

The specified users will be members of this role, and will have the permissions you have allowed. You can add a user to any role except the Everyone role. To add a user, click **Add User To Role**, then select one or more users from the **Add Users** pop-up window. If there is a long list of names, you can use the Search box to find the user name you are looking for, or use the page links to navigate the list. Close that window when you are finished adding users to the role.

By default, all users are given the Everyone role. Therefore, once you create a user, *Presto* automatically adds the user to this tab for the Everyone role.

To delete a user from this role, click **Delete** next to the user name. If a user is deleted from a role membership and that role was selected as the primary role for the user, *Presto* will assign the Everyone role to the user who lost his or her original primary role.

Note: If this role is associated with a blog, then adding or removing a member also adds or removes the user as an Author of the blog.

Setting Field-level Permissions

You can adjust role permissions at the field-level, to fine-tune permissions for this role on a field-by-field basis. To perform this function, you must have the appropriate System Permissions. The complete set of steps for assigning permissions is described below. If you have already done steps A and B, you can go directly to step C.

A. Set default field permissions. [optional]

It is most efficient to set the default field permissions for a role prior to making field-level adjustments.

1. Choose **Configure>Roles**.
2. Click the role that you want to edit (or create a new role).
3. On the **Overview** tab, set the **Default Field Permission** to Edit, View, or None. The option you select determines the default permissions that you will see when you adjust field-level permissions.
4. Keep the Edit Role page open and continue to Step B, below.

B. Define Content Permissions.

1. On the Edit Role page, click the **Content Permissions** tab.
2. Click **Add**, then use the Content Permissions overlay to select a Content Type and specify permissions. For example, select the "Sample" Content Type and check VIEW and PRINT. You can also define a **Record Filter**, by specifying specify any valid query to filter the records for this role within a Content Type. For example, type **active=true** in the Record Filter box to affect all active records for that Content Type. Click **Save** in the overlay.

   (If Content Types have already been added, you can click Edit to adjust permissions. Be sure to click **Update**, then Save.)
3. Click **Save** on the Edit Role page.

C. Adjust field-level permissions (hide fields, or allow users to Edit or View them)

Use Permission Fields to adjust permissions for individual fields. For example, if you created a role that allows users to VIEW all fields, you can then use Permission Fields to hide just the Salary field by setting it to None.

1. If you have not already done so, choose **Configure>Roles** to access the Configure Roles page.
2. Check the box next to a role, then click the **Permission Fields** button.
3. On the Permission Fields page, select a **Content Type** from the drop-down list at the top of the page. The list of Fields will then show all the fields for that Content Type. The Permissions column will be set to the Default Field Permission that you set in step A.

   The available Content Types depend on how Content Permissions are configured for this role (step B, above). For example, if this role has certain permissions allowed for the "Sample" Content Type, then "Sample" is the only Content Type that will appear in the Content Type list on the Permission Fields page.

   A note about user profiles: The **Profile** content type allows you to set permissions for user profiles, and the **'My Profile' Only** content type affects the My Profile page only.
4. For each field for the selected content type, specify one of the following **Permissions**:

- **Edit**: Users with this role will be able to make changes to the field content.
- **View**: Users with this role will be able to see (but not change) field content.
- **None**: Users with this role will not be aware that this field exists.

5. Click **Save**.

Changed settings will take effect the next time a user with this role logs in to *Presto*. Note that you cannot change the settings for the System Administrator role, which is designed to allow full access.

Hiding Inactive Records

All records are visible by default (even Inactive records). If you want to hide inactive records, configure a Role that has a Record Filter of **active=True** (on the Content Permissions tab), ensure that the VIEW permission is selected, then assign that role to selected users (Members tab).

Single Sign On (SSO)

External SSO

External Single Sign On (SSO) allows users to sign into an external/corporate site and then navigate seamlessly between that site (where they were authenticated) and *Presto*. External SSO can be used in addition to Active Directory as well as Native Login, if desired.

To configure External SSO, follow the instructions in the documentation provided with the Inmagic Presto API toolkit. The toolkit is available from Inmagic, Inc. Sample code provided in the kit can be used as a starting point.

Additionally, you should choose **Configure>Administrator Tools>Application Settings** and specify the necessary **Authentication** settings (ExternalSSOEnabled, EnableNativeLogin, SSOFailedRedirectURL, SSOLogoutRedirectURL, SSOTokenExpiration, SSOCreatedUserPassword). **Note**: Application Settings are explained in the *Presto Advanced Administrator's Guide*.

Active Directory and Single Sign On (SSO)

Presto can be configured to authenticate against Microsoft Active Directory via LDAP, in addition to using *Presto* Native Database authentication. Active Directory support (and the Single Sign On option) are typically configured as part of the *Presto* installation. If these features were not enabled at installation time, you can enable them after the fact.

Note: Active Directory and Single Sign On (as well as the External SSO and Remember Me options), are explained in the *Advanced Configuration Guide*.

Enabling Active Directory Support

Active Directory support is typically configured at *Presto* installation time. If it was not enabled, you can enable it by configuring a "PrestoADProvider" and "ADCONNSTRING" in the *Presto* Web.config file. This is explained in the *Advanced Configuration Guide*. If Active Directory support is enabled, the **Import Active Directory Users** option will appear on the **Configure>Administrator Tools** page.

If Active Directory support is *not* enabled, users can create their own account at login time (if that feature has been enabled), by clicking **Create Account** on the Login page. In this case, the account will have the same Role(s) as the Guest account. The *Presto* system administrator should make sure that the Guest account is configured with restrictive rights.

Account Creation

If Active Directory support is enabled, and a user account does not exist in *Presto*, it will be created automatically after the Active Directory user is authenticated. The new *Presto* user account will be based on the built-in Guest user, which by default is assigned the Everyone role and has a password of "guest." Administrators should modify any automatically-created accounts to adjust the User and Role settings, by selecting **Configure>Users**. Note that the **Password** fields are not available when editing an Active Directory user, since authentication is handled by Windows.

Note: It may be more efficient to import Active Directory user accounts, rather than waiting for each account to be created by *Presto* at authentication time.

Authentication and Single Sign On

For Active Directory accounts, *Presto* relies on Windows credentials for authentication, when the user accesses *Presto*:

- If **Single Sign On** is *not* enabled, users will see the *Presto* Login page, where they can enter their Windows login (username and password). By default, the simple form of the username is required (for example, `jdoe`), unless *Presto* has been configured to request the form username@DOMAIN.local (for example, `jdoe@INMAGICINC.local`).
- If **Single Sign On** (SSO) is enabled (**Configure>Administrator Tools>Application Settings)**, *Presto* bypasses the Login page and uses Windows Authentication to authenticate Active Directory users. **Note**: If users report seeing a pop-up window prompting for a Windows login, they can adjust the browser settings to add the *Presto* site to the "Local intranet" Sites list to avoid this pop-up.

Importing Active Directory User Profiles

Choose **Configure>Administrator Tools>Import Active Directory Users** to load Active Directory user profiles into *Presto*. Importing Active Directory accounts is an alternative to waiting for *Presto* to create each account automatically when the Active Directory user logs in to *Presto*. Importing users is more efficient because administrators can assign the appropriate role permissions in batches, rather than having to edit each user account individually after it is created by *Presto*.

Note: If the **Import Active Directory Users** option does not appear on the Administrator Tools page, it indicates that Active Directory support is not enabled.

When using the Import Active Directory Users tool, you can perform the following operations:

- Create a new import configuration: Click **Create New Import Configuration**.
- Edit an import configuration: Click an import configuration on the Import Active Directory Users page.
- Import a configuration: Click **Import** next to the configuration that you want to import. Follow the prompts to import the profiles. When the import is finished, a message indicates how many users were added, rejected, and updated, and provides other information about the job.

- Delete an import configuration: Select the configuration that you want to delete, click **Delete**, then confirm your action.

Note the following important points before importing Active Directory users:

- The user names being imported should be unique.
- You cannot import an Active Directory user that has the same user name as a native user that already exists in *Presto*.
- The import process only imports accounts from the top-level AD group specified. It does not import accounts from subgroups. For example, if the COMPANY group contains the groups SALES and SUPPORT, each of which contains a list of users, but there are no users listed directly in the COMPANY group, no users will be imported. The workaround is to create a new group specifically for *Presto*, then add the desired users to this group.
- If a *Presto* required field (such as First Name, Last Name, E-mail) is not populated in the Active Directory account, the user will not be imported. To define required and optional fields, use **Configure>Content Types>Profile**.
- To specify the number of user entries to read from Active Directory when importing Active Directory users, choose **Configure>Administrator Tools>Application Settings** and adjust the **ActiveDirectoryBlockSize** (1000 by default).
- The attributeMapUsername setting in **Web.config** determines the username format that will be used. For example, attributeMapUsername="sAMAccountName" results in usernames in the simple form (for example, `jdoe`). The form attributeMapUsername="userPrincipalName" results in the UPN form (`jdoe@INMAGICINC.LOCAL`).

Create New Active Directory User Import Configuration

To create a new user import configuration, choose **Configure>Administrator Tools>Import Active Directory Users**, click **Create New Import Configuration**, then follow the steps below. A user profile import configuration allows you to import users from Active Directory into *Presto*. If the Import Active Directory Users option does not appear on the Administrator Tools page, it indicates that Active Directory support is not enabled.

On the Create New Active Directory User Import Configuration page:

1. Type a file name for this import configuration.
2. Type a description that clearly identifies this import configuration.
3. Select an Available Active Directory Group and click **Select** to move it to the Selected Groups list. Repeat as appropriate.
4. For the group(s) selected in step 3, select a role from the Available Roles list and click **Select** to populate the Selected Roles list. Repeat to add additional roles, as appropriate. Note that the Everyone role is a system role that is automatically assigned to each user, and is already in the Selected Roles list, and cannot be removed.
5. The first role in the Selected Roles list will be used as the Primary Role for the users being imported. If necessary, reorder the list so the desired Primary Role is at the top. You can assign more than one role to a user, but each user must have one primary role. The primary role determines which home page users will see.
6. Click the **Save** button.

To do an import, go to the Import Active Directory Users page (**Configure>Administrator Tools>Import Active Directory Users**), and click **Import** next to the configuration you want to import. You will have a chance to confirm or cancel the import.

Edit User Profile Import Configuration

To edit a user import configuration, choose **Configure>Administrator Tools>Import Active Directory Users**, click an import configuration, then follow the instructions below. An import configuration allows you to import users from Active Directory into *Presto*. If the Import Active Directory Users option does not appear on the Administrator Tools page, it indicates that Active Directory support is not enabled.

On the Edit Active Directory User Import Configuration page:

- You can edit any of the fields, except for the Configuration Name.
- You can change the description of a configuration, change the selected groups and/or selected roles, and change the primary role.
- You can select an item in the **Selected Groups** or **Selected Roles** list, then use the following controls:

  Remove. Click to remove the selected item.

  Clear List. Click to clear the list so you can start over.
- You must click the **Save** button to apply your changes.

Chapter 14: Glossary

active content
Active content refers to all records that are actively available as part of the catalog.

alert
An *alert* is an e-mail or RSS feed notification to an individual that an event has occurred. A *global alert* is an RSS feed notification to all users with the "Subscribe to Global Alerts" System Permission. Administrators typically set up global alerts to ensure that multiple users are notified of events.

blog
A blog (Web log) contains posts about a central topic, which others can read and respond to.

collection
A collection is a set of information that users can browse in a hierarchical list of folders. For example, a pharmaceutical company might have one collection organized by brand name and another by scientific name. Each collection contains one or more content types, such as articles, photographs, and so on.

content type
A content type may be a Book, Photograph, Blog Post, user Profile, or other "object" that describes a specific type of content for your organization. Content types are listed on the Search menu, as well as the Add and Configure menus, and each one has its own set of screens and views.

inactive content
Inactive content is not generally available. This gives administrators the ability to retain records for historical purposes or to delay making new records available until they have been approved. Records can be deactivated by using the Act on Content toolbar, or by deactivating the category in which the content resides using the Browse Collection page, or by setting the Active field to false when the record is created. Users with only the CREATE INACTIVE permission automatically create Inactive records when they Add records. Users who are allowed to view Inactive content will see the records grayed out and identified by the word "INACTIVE" in red. As with any other field, you can prevent access to Inactive records for certain users by specifying a Record Filter (active=true) on the Content Permissions tab in the Role definition.

locale
The locale identifies regional and language settings, to determine the appearance of numbers, dates, time, language, and similar information.

OPAC
Online Public Access Catalog (a term used by libraries). If *Presto* has been configured to enable the OPAC option, Guest users can be authenticated without logging in to *Presto*.

profile
A user profile defines the user name, password, and other information for login. See also user.

role
A role is a set of permissions applied to a user. Users can be members of more than one role. The Primary Role determines which home page the user will see.

term
A term is a complete entry in a field. A term search requires an exact match with the entire value in a field. For example, this search finds all Movies that contain the exact complete term "Seven Samurai" in the "Title" field (partial matches will not be found): `movies.title=seven samurai`.

user
A user is a unique entity that can be authenticated at login, and whose characteristics are maintained in a profile. A *native user* is one whose profile (name, password, and locale) is created and maintained in *Presto*. Non-native users are maintained in Active Directory and are authenticated through Windows.

value list
A value list is a list of items that may be entered into a field when creating, editing, or searching. The list may be strict (a value must be selected from the list) or permissive (a value can be typed in a field or selected from a list). The content of the list is managed by an administrator.

Web Part
A Web Part is a configurable set of controls that administrators can use to modify the content, appearance, and behavior of Web pages directly in a browser. *Presto* Web Parts can be used on the *Presto* Home Page or added to a SharePoint site.