

# **Ektron CMS User Guide**



## Ektron CMS User Guide

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# Table of Contents

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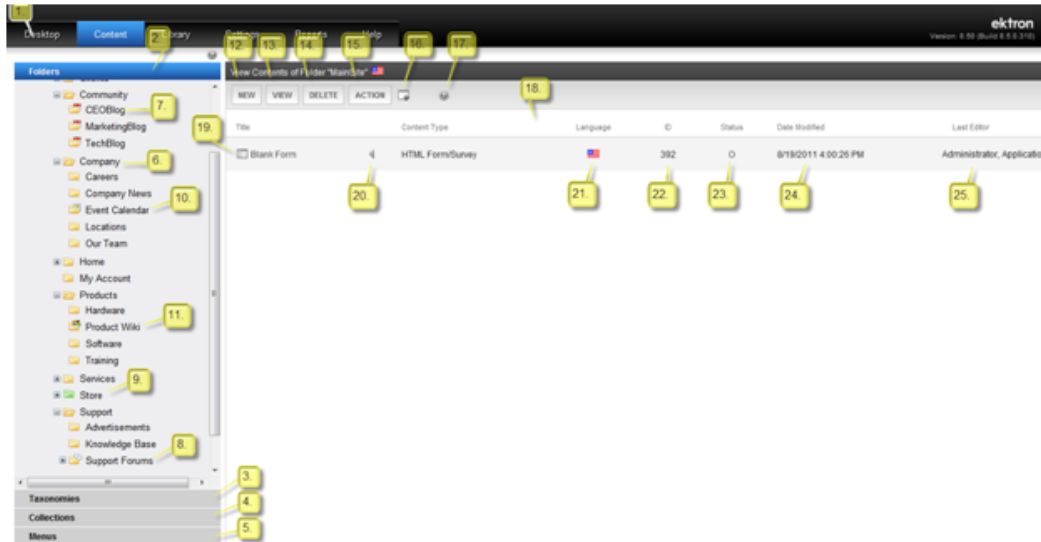
Ektron CMS User Guide .....	5
Workarea Quick Reference .....	5
Content Quick Reference .....	6
Content Types .....	6
Content Properties .....	7
Content Statuses .....	7
Other Content Information .....	8
Creating New Content .....	9
Editing in Ektron .....	10
Applying Styles .....	11
Removing Styling from Text .....	12
Working with Links .....	12
Viewing a Link .....	12
Inserting a Link to Text .....	13
Inserting a Link to an Image .....	13
Editing a Link .....	14
Removing a Link .....	14
Adding a Bookmark .....	14
Working with Tables .....	15
Inserting a Table .....	15
Applying Table Properties .....	16
Adding a Table Caption .....	16
Modifying Rows and Columns .....	17
Modifying a Table Style .....	18
Moving a Table .....	19
Deleting a Table .....	19
Working with Images .....	20
Inserting an Image using Drag and Drop .....	20
Inserting an Image Using the Library .....	20
Editing Images .....	21
Adjusting Image Size .....	23
Deleting an Image .....	24
Viewing and Editing HTML Source Content .....	24
Embedding External Content .....	25
Embedding a Google Map .....	28
Embedding a Vimeo Video .....	29
Removing External Content .....	29

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# Ektron CMS User Guide

This document describes essential operations for editing content through the Workarea. For complete information about the Ektron product, see the [Ektron Reference](#).

## Workarea Quick Reference



- **1—Workarea Tabs**

- Desktop—Smart personalization desktop.
- Content—Folders, contents, DMS, taxonomies, collections, and menus.
- Library—Content folder structure that organizes images, files, hyperlinks and quicklinks.
- Settings—Manage CMS settings based upon permissions.
- Reports—Content reports and site analytics.
- Help—Access to this document.

- **Content Tab Types**

- 2—Folder Tab—View folder architect structure of CMS.
- 3—Taxonomy Tab—View Taxonomy Structure and options.
- 4—Collections Tab—View Collections and options.
- 5—Menu Tab—View Menus and options.

- **Folder Types**

- 6—Content Folder—View contents in the selected folder.
- 7—Blog Folder—View the posts and comments on this blog.
- 8—Forum Folder—View the discussion forums, categories, topics, and replies.
- 9—eCommerce Folder—View the eCommerce items.
- 10—Calendar Folder—View and plan events on the calendar.

- 11—Community Folder—Folders for membership uses to edit content, select to view contents.
- **Drop-down Menus**
  - 12—New menu—Create new content, forms documents, Folders menus and collections.
  - 13—View menu—View Language, Properties and archived content and more.
  - 14—Delete menu—Delete multiple items. Administrators can delete folders.
  - 15—Action menu—Export for translation, search, move/copy content, eSync.
  - 16—DMS/ Add asset—Pop up the window for drag and drop documents from local machine.
  - 17—In Context Help—Context help.
  - 18—Content Organization Bar—Sort content by the title.
- **Content Types**
  - 19—Content Items—HTML Content, Forms, DMS, or Multimedia Content.
  - 20—Quick Edit Menu—For content editing, properties and content eSync.
  - 21—Language Flag—Indicate the content language version.
  - 22—Content ID—Automatically generated by system.
  - 23—Content Status—Current status of a piece of content.
    - (A) Approved, Published and on the website.
    - (O) Checked Out Only, available for editing by the content editor who checked it out.
    - (I) Checked In, Available for editing.
    - (S) Submitted, Currently in the approval chain. Waiting for acceptance.
    - (M) Deletion, Marked for deletion.
    - (T) Awaiting Tasks, Currently awaiting completion of tasks.
    - (P) Pending, Awaiting scheduled start date.
    - (D) Pending Deletion, Pending deletion but created with a future start date.
  - 24—Date Modified—Last modified date of the content.
  - 25—Last Editor—Person who made the last modification.

## Content Quick Reference

Types of content are described in this section. A website has pages with 1 or more *blocks* of content.

## Content Types

- **HTML content**—Content to be published on the World Wide Web.
- **XML Smart Forms**—Online forms, polls, or surveys to collect information from site visitors and save it in XML format.
- **HTML form/survey**—Online forms, polls, or surveys to collect information from site visitors and save it in HTML format.
- **DMS Documents**—Office documents, managed files, and multimedia files.
- **Office documents**—Microsoft Office files.

- **Managed files**—Files created outside of Ektron, such as PDF files. You cannot create or edit these files within Ektron—you can only store them.
- **Multimedia**—Files that run in a media player, such as audio and movie files.
- **Blogs**—A form of online information sharing for a group of people to share their thoughts.
- **Web Calendars**—Keeps visitors informed about upcoming events, displayed to all visitors to your website, and any authorized user can add events to a calendar.
- **Discussion Boards**—Allows topic discussions on your website. A site or membership user with Add Topic permission creates a topic and posts a starter question. Site visitors can then reply.
- **Content Imported from SharePoint®**—After an Ektron administrator sets up DxH to map SharePoint to Ektron, an end user only needs to place content in a SharePoint folder to update their Ektron-powered website; the content is automatically transferred to the Ektron Workarea. You also can manually import SharePoint content from the Ektron Workarea.














## Content Properties

- **Content Title**—The title assigned to the content.
- **Content ID**—The ID number assigned to the content to retrieve content from a database.
- **Content Language**—The language in which the content is written.
- **Status**—The current status of the content.
- **Last User to Edit**—The last user to edit the content.
- **Last Edit Date**—When the content was last edited.
- **Start Date**—When the content appears on the website.
- **End Date**—When the content is removed from the website.
- **Action on End Date**—What happens to the content when its end date and time occurs.
- **Date Created**—The date on which the content was created.
- **Approval Method**—Which approvers must sign off on content before it is published.
- **Approvals**—Users in the approval chain for this content.
- **Smart Form Configuration**—The Smart Form applied to the content (managed by the administrator).
- **Template**—The template currently assigned to the content (managed by the administrator).
- **Path**—The folder path to the content's folder. A slash (\) represents the Content folder.
- **Ranking**—If this feature is enabled for the content, the average numerical rating appears (1-10).
- **Content Searchable—True** appears if the content can be found when someone searches your website. However, even if content is *not* searchable, the Workarea Advanced search still finds it.


## Content Statuses

- **A** (Approved)—Through the approval chain and published on the website.
- **O** (Checked Out)—Currently being edited; has not been checked in.
- **I** (Checked In)—Checked in for other users to edit.
- **S** (Submitted for Approval)—Saved and submitted into the approval chain.
- **M** (Marked for Deletion)—Requested for deletion.
- **P** (Pending Go Live Date)—Approved but the publish date has not occurred yet.
- **T** (Awaiting Completion of Associated Tasks)—Tasks assigned to content are not complete.
- **D** (Pending Deletion)—Content was created with a future start date then checked in and deleted. This status only remains until the start date is reached when the content is deleted.

## Other Content Information

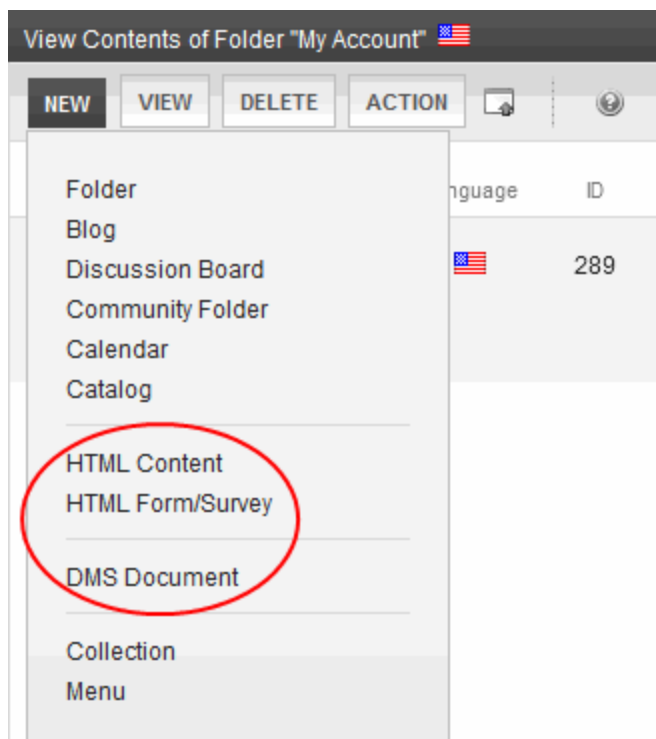
- **Properties** tab—View the content's properties.
- **Content** tab—Display and edit content.
- **Summary** tab—Edit content's summary.
- **Metadata** tab—Edit content's metadata.
- **Alias** tab—View and edit the content item's primary alias, or view all secondary aliases.
- **Comment** tab—View comments on changes made when editing content. This comment also appears on the View Content and Content History screens. Use it to help distinguish one version from another.
- **Tasks** tab—Add or edit tasks for this content.
- **Web Alerts** tab—Add or edit Web Alerts for this content.
- **Templates** tab—The template currently assigned to the content.
- **Category** tab—Any taxonomy categories currently assigned to the content. Only appears if at least 1 taxonomy is applied to the folder in which the content resides.
- **Edit**—Open content for editing.
- —View older versions of content; restore older version.
- —Toggle display between published and staged versions
- —Compare current and earlier versions of content.
- —Delete content.
- —View and edit permissions for content.
- —View and possibly edit the content's approval chain.
- —Find all content with Quicklinks to this content.
- —Attach a task to content.
- —View Analytics for this content.
- —Displays the content item's rating and reviews, messages, and flags.
- —View and edit content's **Content Searchable** check box and flagging definitions.
- —Go back to previous menu
- —Determines if content will be included when an .xlf file is created.








- —Copy content to XLIFF files that can be submitted to a translation agency.
- **View** (language)—If you can view content in more than one language, select a language from the drop-down list.
- Add-select language—Lets you copy current content into a new item and translate it to selected language.

## Creating New Content

1. In the Workarea, go to the folder in which you want to create a new content item.
2. Choose a type of content from the New menu. (For example, choose **New > HTML Content**. The Edit Content screen appears.



3. Specify a title and begin creating your new content item.
  - **Title**—Enter a title for the content. It cannot include these characters: \ / \* > < |
  - **Content Searchable**—(Administrators) Check this box if this content should be found when someone searches your website.
  - **Publish** or **Submit**—Publish the content to the website. This action updates the content in the database and exits the editor.  
Only the last approver in the approval chain sees the **Publish** button. Other users see **Submit**. If no approval chain is assigned to the content's folder, every authorized user sees **Publish**.
  - —**Check In**—Save and check-in the content. This action updates the content in the database and exits the editor. It does *not* submit the content into the approval chain. Rather, it allows you and other users to continue changing it.
  - —**Undo Checkout**—Close without saving changes. Return content to its state prior to checkout.

- —**Save**—Save content without leaving the editor. It is a good idea to save your work frequently. But, if you later click **Cancel** and exit the editor, you lose changes saved by clicking this button.
- —**Cancel**—Close editor without saving changes. Leave content in *checked out* state.
- —**Preview**—Preview current content within its template in a new browser.

## Editing in Ektron

In some Workarea locations, the editor toolbar "floats," and you can drag it to any screen location. In other locations, the toolbar is fixed at the top of the editor. When you hover the cursor over editable content, a yellow border appears. When you click the content, the border turns blue, and a floating editor toolbar appears.

You can edit content only for which you have permission and in one of the following statuses:

- checked out by you
- checked in
- published
- submitted for your approval

You can edit HTML content, HTML forms, XML Smart Forms, add information about content (summary, metadata, and so on), check in, submit, and publish content.

1. From the Workarea, click **Content** and navigate to the folder that contains content you want to edit. If you do not know the folder location, you can find content using **Action > Search** from the root folder.
2. Click the content you want to edit.
3. Click **Edit**. The editor appears.



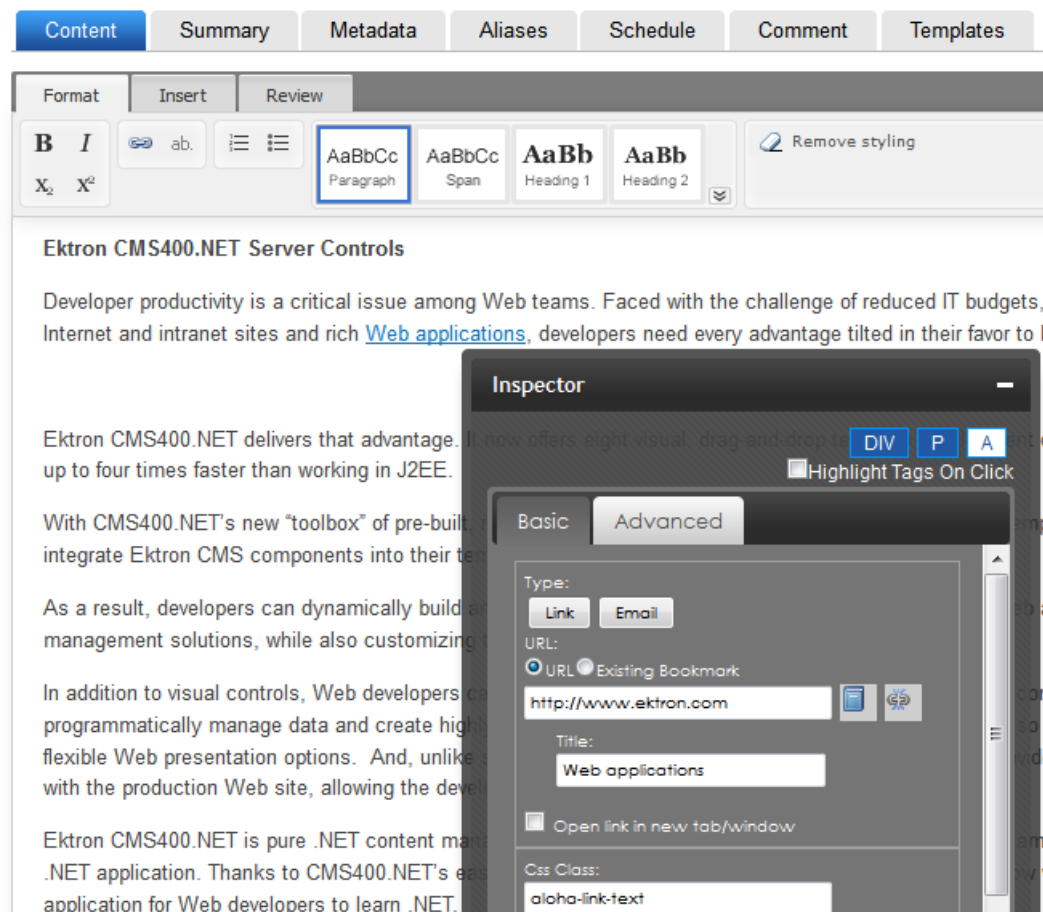
### Editor Notes

- Cut, copy, and paste are accessible through your browser. Right-click to choose them or use keyboard shortcuts. The editor may modify pasted content, depending on tags that

an administrator sets in `StyleConfig.js`. For example, headings, bullets, and bolded fonts may be maintained during a paste operation but the actual font may not.

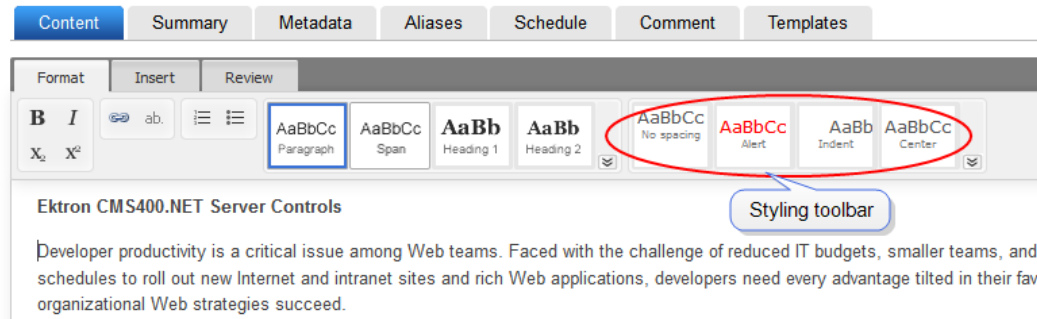
**IMPORTANT:** When you paste content from another application, the editor formats that content into valid, minimal HTML and retains as much formatting and styling as possible. However, results are browser-dependent.

- Paste HTML content into the Source Viewer.
- Your browser checks spelling. If your browser does not support it, find and install a plug-in to do it.
- Use the Inspector to perform advanced actions on content items (images, hyperlink, paragraphs, and so on). If enabled, the Inspector appears at the bottom of the editor. Click to open, set values, then click the minimize button.



## Applying Styles

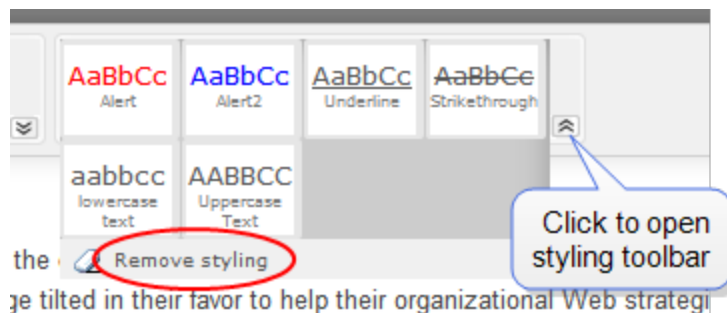
To apply inline styles and classes to text, use the styling toolbar.



You can select paragraphs or individual words, then use styling toolbar buttons to style the selected text. Click the down arrow in the toolbar's lower right to view additional buttons. Styling buttons are context-sensitive, so they vary according to cursor location, which format toolbar button is selected, and whether any text is selected. For example, within the editor, select the text **critical issue** and click **Span** (AaBbCc Span). Next, open the styling toolbar, and click one or more buttons to apply styling.

## Removing Styling from Text

1. Select the text to which the styling is applied.
2. Click the down arrow in the toolbar's lower right.
3. Click **Remove styling**.



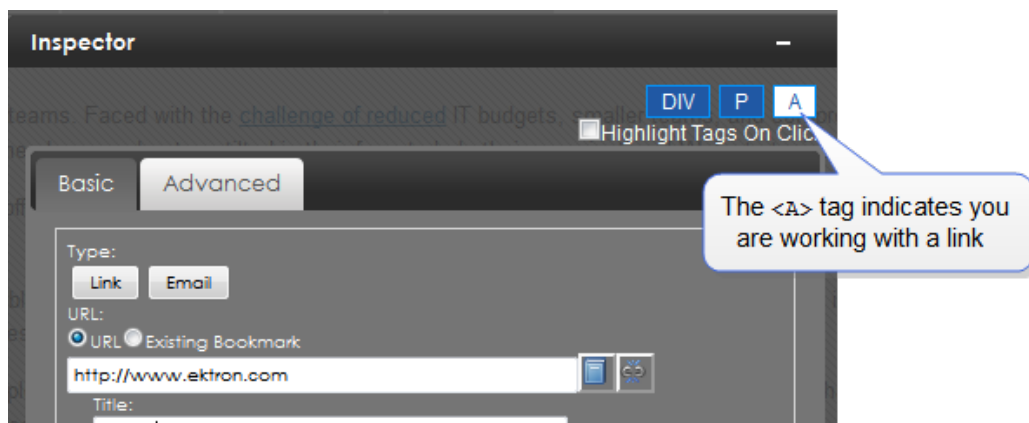
## Working with Links

This section shows you how to view, insert, or delete a link in content.

### Viewing a Link

1. Click the cursor on the linked text or image.
2. Open the Inspector (🔍) on the Review tab to view the link's properties.

3. Use the dialog to modify the link's properties.

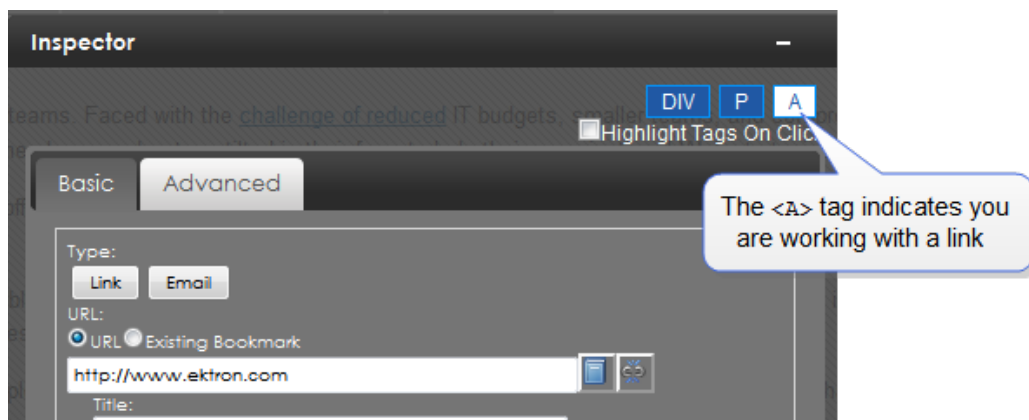


## Inserting a Link to Text

1. Highlight text that you want to become a hyperlink.
2. Click **Link** (🔗) on the Format tab. (If you click **Link** on an empty space, a link appears in the content as **New Link**.)



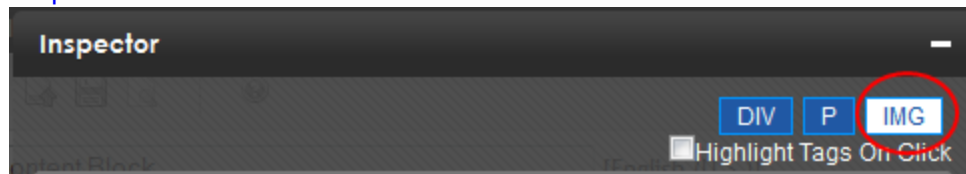
3. In the link field, enter the desired URL and press **Enter**. The selected text becomes a hyperlink.
4. To enter additional link properties, select linked text and open the **Inspector** (🔍) on the Review tab.



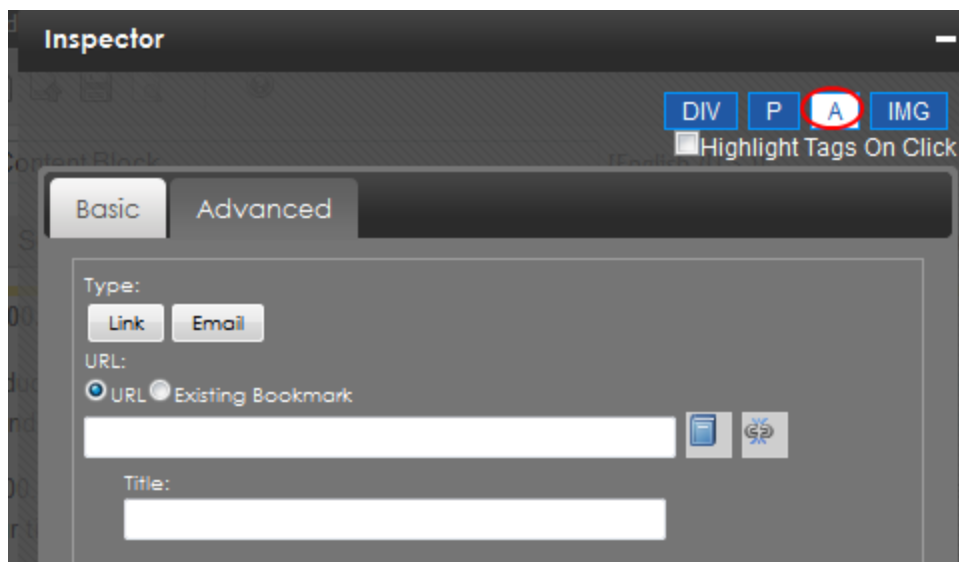
## Inserting a Link to an Image

1. Click an image that you want to become a hyperlink.

**NOTE:** You know that you selected an image if you see an <IMG> tag in the Inspector.



2. Open the **Inspector** (S) on the Review tab.
3. Click **Add hyperlink to Image**.
4. Click the <A> tag.



5. Enter hyperlink information.

## Editing a Link

1. Click the linked item. The link destination appears in the toolbar.
2. Edit the link text as needed.

## Removing a Link

1. Click the linked item. The link destination appears in the toolbar.
2. Click **Break Link** (S). The link is removed.

## Adding a Bookmark





Use a bookmark to let a site visitor go from any word or phrase to another place in the same content block. On your Web page, text appears in a different color to indicate the bookmark.

Bookmarks are particularly helpful on a long page. For example, your Web page contains minutes from several meetings, and the top of the page lists meeting dates. You could assign a hyperlink to each date, and a bookmark to each set of minutes. A site visitor can click any date to go to those minutes (using the bookmark).

To use a bookmark, you create 2 things:

- a source—text a user clicks to jump to the bookmark
- a destination—the location to which the cursor jumps when the source is clicked

For example, place the text [ **Top** ] [ **Bottom** ] at the top and bottom of a content block. The following procedure shows how to create bookmarks so that clicking [ **Top** ] at the bottom of the page jumps to the top of the page, and clicking on [ **Bottom** ] at the top of the page jumps to the bottom of the page.


1. Create the bookmark's (destination).
  - a. At the bottom of the page, insert then highlight the destination text, in this case [ **Top** ].
  - b. On the editor toolbar, choose **Insert > Bookmark** (). A bookmark icon displays next to the source text but does not show up on the Web page.
  - c. Click the bookmark icon then the **Inspector** () on the Review tab. A dialog displays the bookmark options.
  - d. Specify the title, `PageTop`.
  - e. Repeat steps a through d for [ **Bottom** ] at the bottom of the content, and give it the Title of `PageBottom`.
2. Create links to the bookmarks.
  - a. Highlight the source text. In this example, [ **Top** ] at the bottom of the content.
  - b. Choose **Format > Insert Link** (). The text is selected.
  - c. Double click the selected text.
  - d. Open the **Inspector** () on the Review tab.
  - e. Choose **Existing Bookmark**. A drop-down list appears from which you can select a bookmark.
  - f. Choose **PageTop** from the drop down list.
  - g. Repeat steps a through d for [ **Bottom** ] at the top of the content, and choose **PageBottom** from the drop-down list.

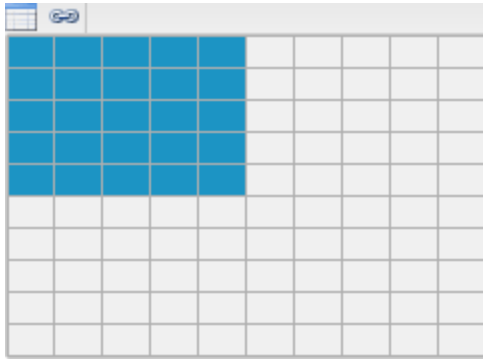
## Working with Tables

This section describes how to insert and edit tables.

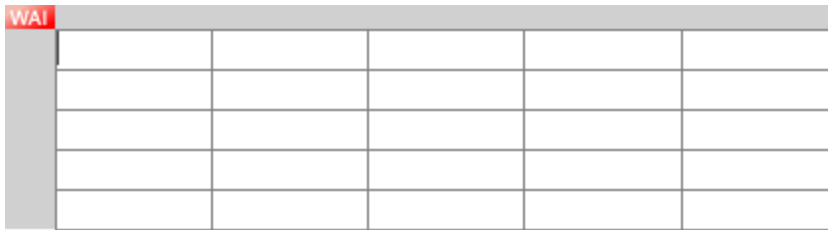
You can use **Tab** to move from one cell to the next. If you are on the last cell, **Tab** creates a new row. Use **Shift/Tab** to move backwards.

### Inserting a Table

1. From the toolbar's **Insert** tab, click **Table** (). A table dialog box appears.
2. Drag the cursor over rows and columns to indicate the table size. The following example shows 5 columns and 5 rows.

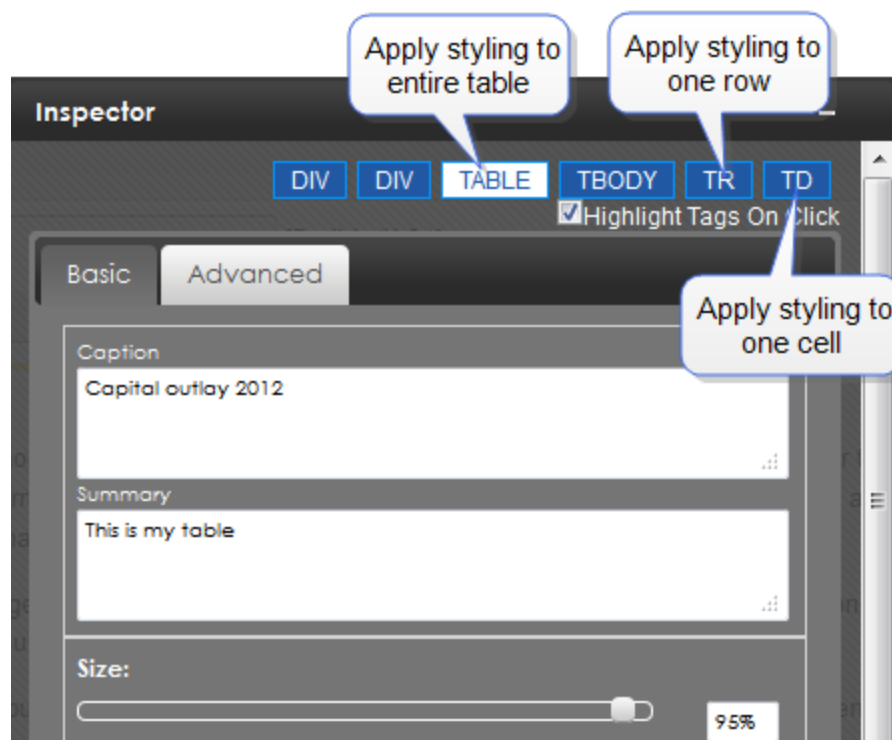


3. Click the mouse. The table is inserted.



## Applying Table Properties

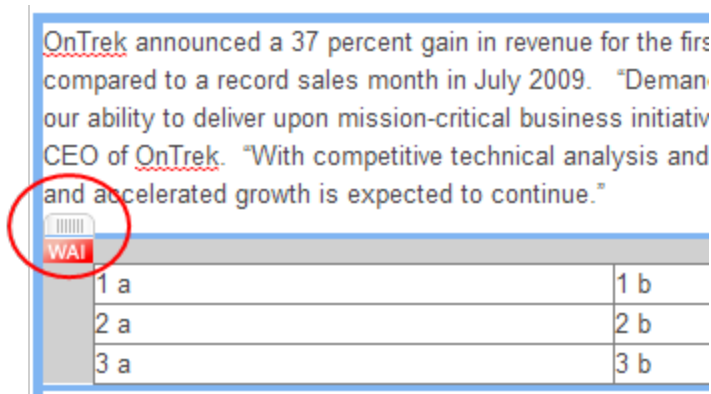
Use the **Inspector** (🔍) on the Review tab to apply properties to a table, a table row (TR), or a single cell (TD).



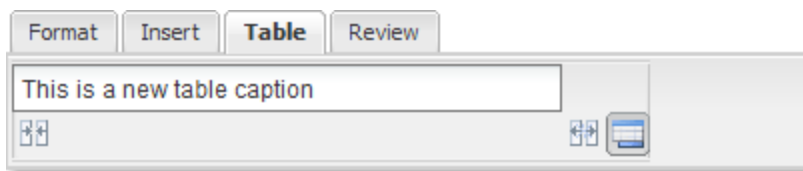
## Adding a Table Caption



1. Hover the cursor over the top left corner and click the table handle.



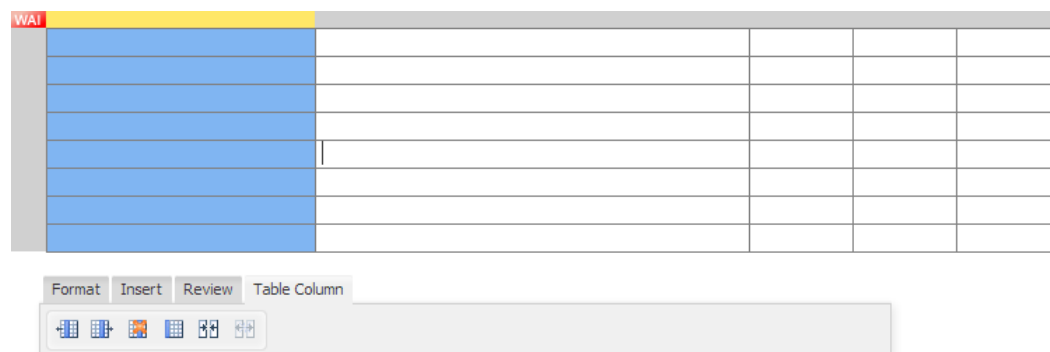
2. In the toolbar, the **Table** tab is selected.
3. Enter the caption in the text box and click the **Table caption** button (📄).



Alternatively, you can enter a table caption in the Inspector.




## Modifying Rows and Columns

Click the gray area beside a table row or above a table column. Your selection is highlighted.



You can use the following table functions on selected rows/columns:

- 📄—Add column to the left
- 📄—Add column to the right
- 📄—Add row below
- 📄—Add row above
- 🗑️—Delete column
- 🗑️—Delete row
- 📄—Format column as header (create a 508-compliant table without modifying the source)
- 📄—Format row as header (create a 508-compliant table without modifying the source)

- —Merge cells
- —Split cells
- —Table caption; when you click on this, **Table caption** appears above the table. Modify text as desired.
- Text Box—Add a summary that visually impaired users can access with a screen reader. The summary does not appear in the editor or on a Web page.

**IMPORTANT:** When you save and publish your content, your site styling is applied. Therefore, a table in the Workarea may appear differently from a table you edit in context.

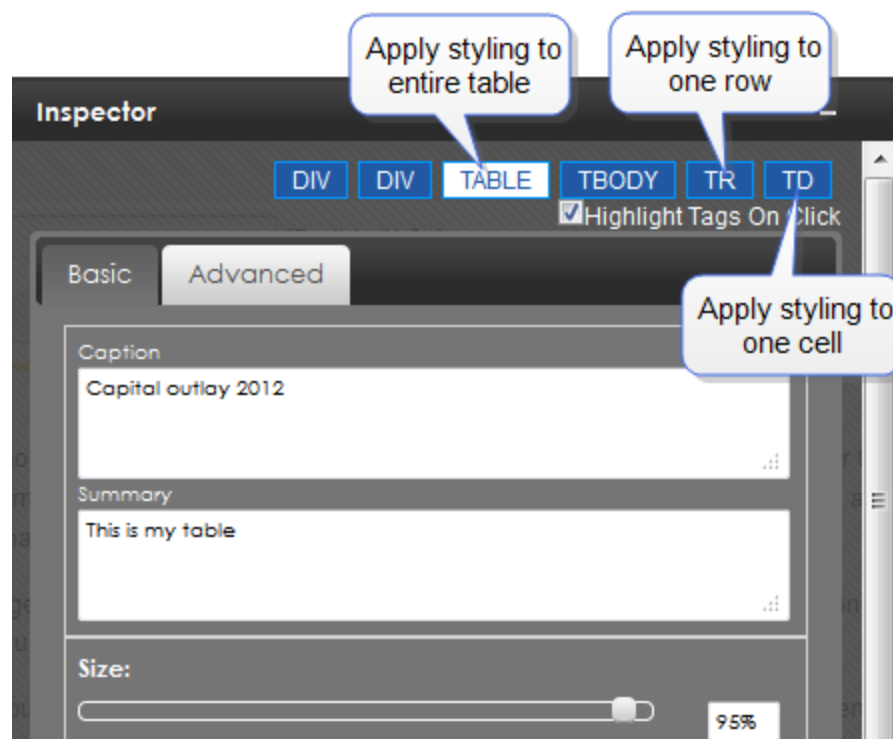
Table with merged cells:

WAI				

**NOTE:** To split a merged cell, select the column or row of the merged cell before clicking **Split**.

## Modifying a Table Style

With the Inspector open, click anywhere in a table to view styles and advanced properties you can apply.



In the following example, a 3x3 table was created. Clicking in a cell, the nested tag structure shows the following:

**DIV** **DIV** **TABLE** **TBODY** **TR** **TD** **DIV**

Click any tag to see styles you can apply to it. For example, click **TABLE** to see table properties. The following image shows the table size reduced to 25%.

Ektron CMS400.NET delivers that advantage. It now offers eight visual, drag-and-drop template development tools to assemble Web sites up to 100% width.

With CMS400.NET's new "toolbox" of pre-built controls, developers can rapidly integrate Ektron CMS400.NET into existing .NET applications working in Visual Studio .NET to rapidly integrate Ektron CMS400.NET into existing .NET applications.

As a result, developers can dynamically build Web sites that are more powerful than with other content management solutions.

In addition to visual controls, Web developers can programmatically manage data using XSLT to data returned by the controls, supporting the Ektron CMS provides a "virtual development environment" to work from a remote development station.

1a	1b	1c
2a	2b	2c
3a	3b	3c

Productivity

Ektron CMS400.NET is pure .NET content management system for enterprise-size organizations to choose a development environment, and now with developer-friendly

The Inspector window shows the following settings for the selected TABLE tag:

- Basic** tab is active.
- Size:** A slider is set to 25%.
- Table Styles:** A list of styles is shown, including "AaBbCc - Clean 100% width (style)", "AaBbCc - Clean 75% width (style)", and "AaBbCc - Clean 50% width (style)".

## Moving a Table

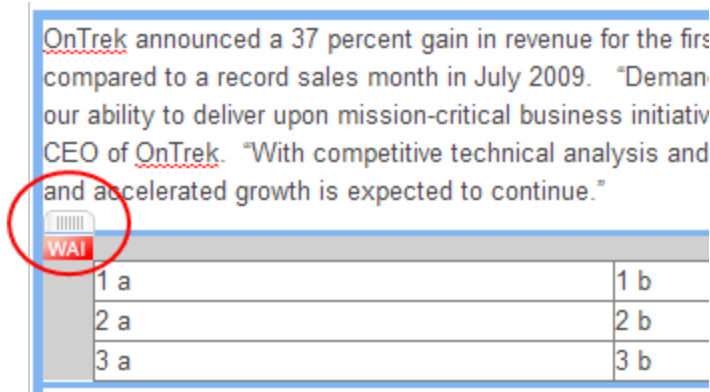
When you make a table the content focus (a colored bar appears around the table), a tab appears above the table's left top corner. Use the tab to drag the table to another place in your content. You can also move a table in Source Viewer.

OnTrek announced a 37 percent gain in revenue for the first quarter compared to a record sales month in July 2009. "Demand for our ability to deliver upon mission-critical business initiatives is expected to continue." CEO of OnTrek. "With competitive technical analysis and accelerated growth is expected to continue."

1 a	1 b
2 a	2 b
3 a	3 b

## Deleting a Table

1. Select the table.
2. Click the handle.



3. Press **Delete**.

You can also delete a table from Source View, and easily collapse the entire table to delete it in one line of HTML.

## Working with Images

The easiest way to insert an image into content is by dragging and dropping it from a Windows Explorer window. You can also

- insert an image that has been saved to the Library or as an asset, or
- add a new image to the Library while inserting it into content

### Inserting an Image using Drag and Drop

You can drag-and-drop an image from your computer into Ektron content using a file browser. Dropped images are added to the Library for future reuse. Dropped images must have one of these extensions: .jpg, .gif, or .png, and cannot exceed 5 MB.

When dragging and dropping, the file name becomes the item's title, and no other library information is collected (for example, its summary and metadata). Once the content is saved, use the Edit Library screen to add information for the new library item.

### Inserting an Image Using the Library

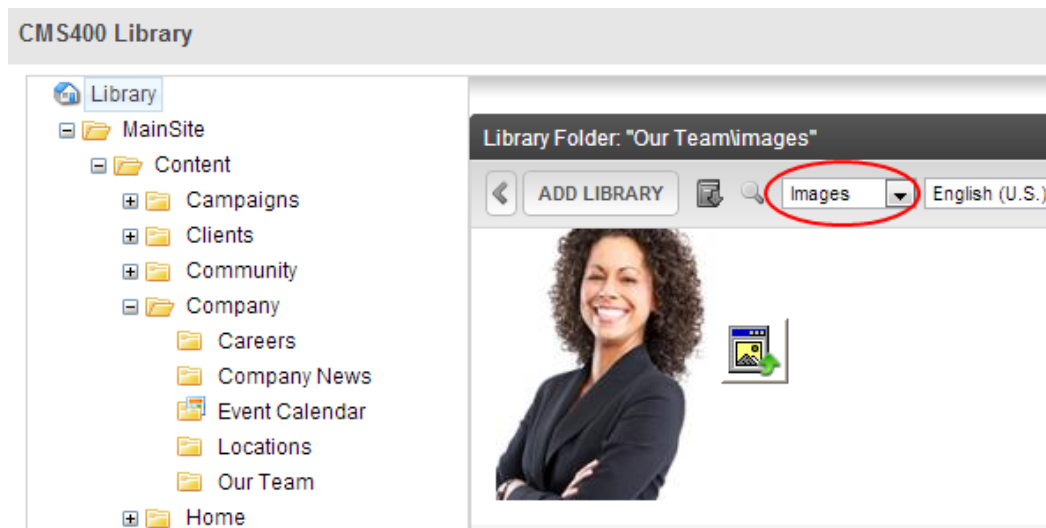
1. Place the cursor where you want the image to appear.
2. Click **Library** (📁) in the Insert menu. The Library screen appears.
3. From the left panel, navigate to the folder containing the image you want to insert. If you do not know its folder, use **Search** (🔍) to find an image by title, description, or internal file name.

---

**NOTE:** If the file is not in the library, you can insert it by clicking the **Add Library** button > **Browse** and navigating to the file. Then, enter a title and optionally a description and metadata information. The file is inserted into the content and added to the library.

---

4. Select **Images** from the content type drop-down.
5. Select an image and click **Insert** (📎). The image is inserted into the content. (You can also double-click the image.)

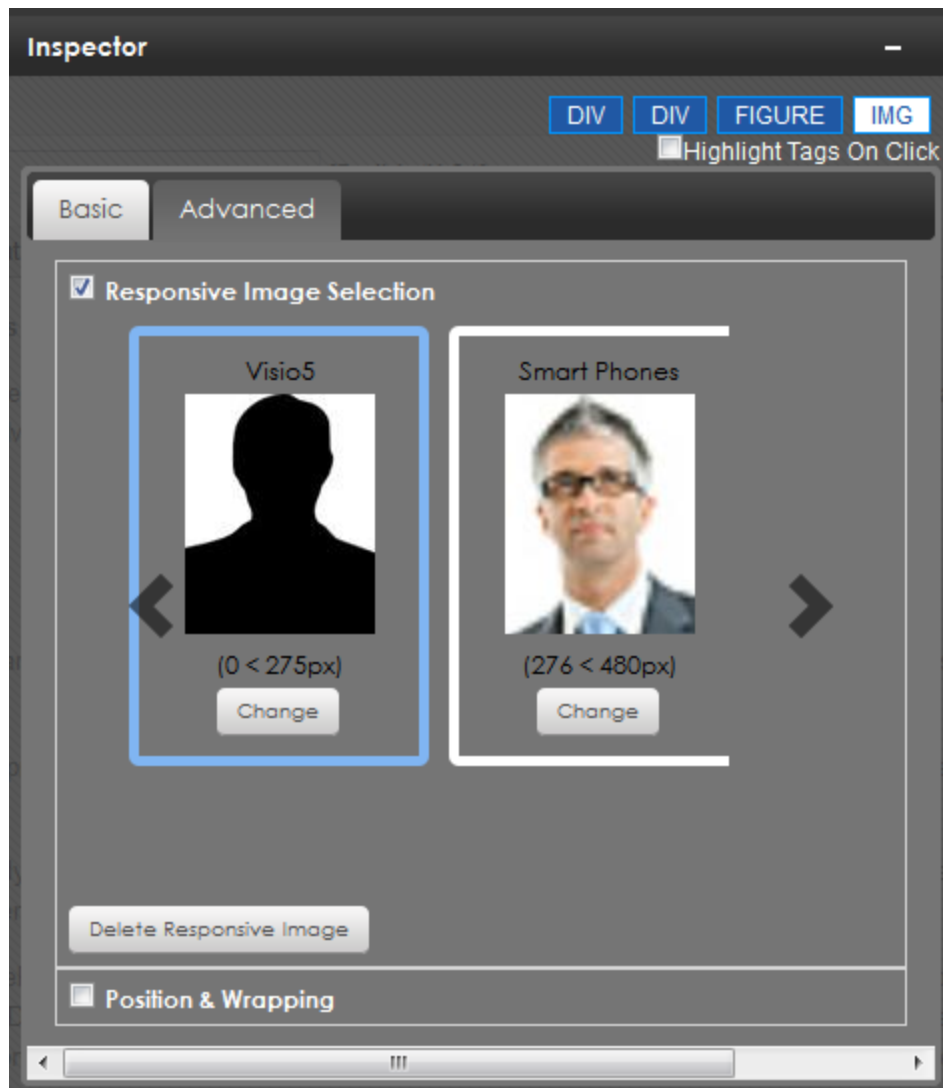


Alternatively, you can insert a miniature version of the image, called a *thumbnail*, by clicking the thumbnail button (🖼️). When the thumbnail appears on a Web page, a site visitor clicks it to view a full-sized image.

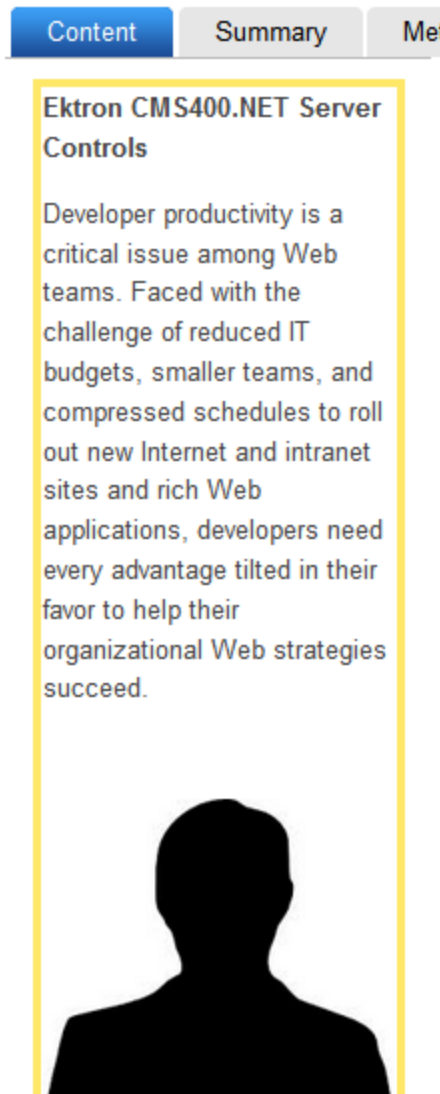
## Editing Images

After inserting an image, you can adjust its properties by opening the **Inspector** (🔍) on the Review tab.

The Inspector's **Advanced** tab lets you modify the image size, position, wrapping, and so on, and lets you select images that change based on breakpoints for viewing modes of your users. For example, click **Responsive Image Selection > Change** and select an image to display when screen resolution is 275 pixels or fewer.

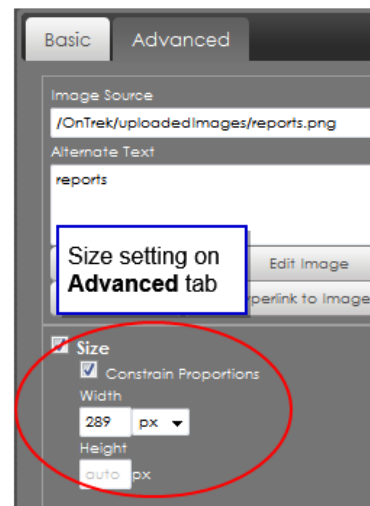
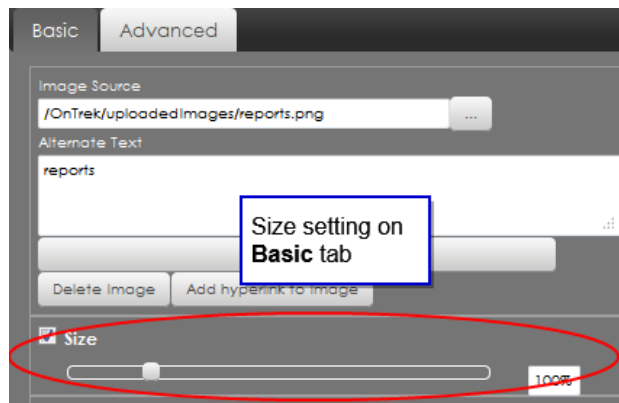


If you reduce the size of the editing window to under 276 pixels, the editor automatically switches to the smaller picture.



## Adjusting Image Size

In the Inspector, the Basic and Advanced tabs have a field for adjusting image size.



- **Basic** tab—Use the **Size** slider to specify a percentage of the original image. The **Size** is calculated as pixels and stored in the `<img>` tag as a style attribute.
- **Advanced** tab—the **Size > Width** field represents a percentage of the parent container. This number is stored in the `<img>` tag as is.

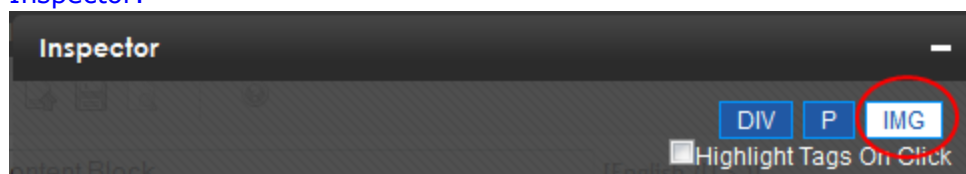
## Deleting an Image

1. Select the image.
2. Open the **Inspector** (🔍) on the Review tab.

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**NOTE:** You know that you selected an image if an `<IMG>` tag appears in the Inspector.

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3. Click **Delete image**.

## Viewing and Editing HTML Source Content

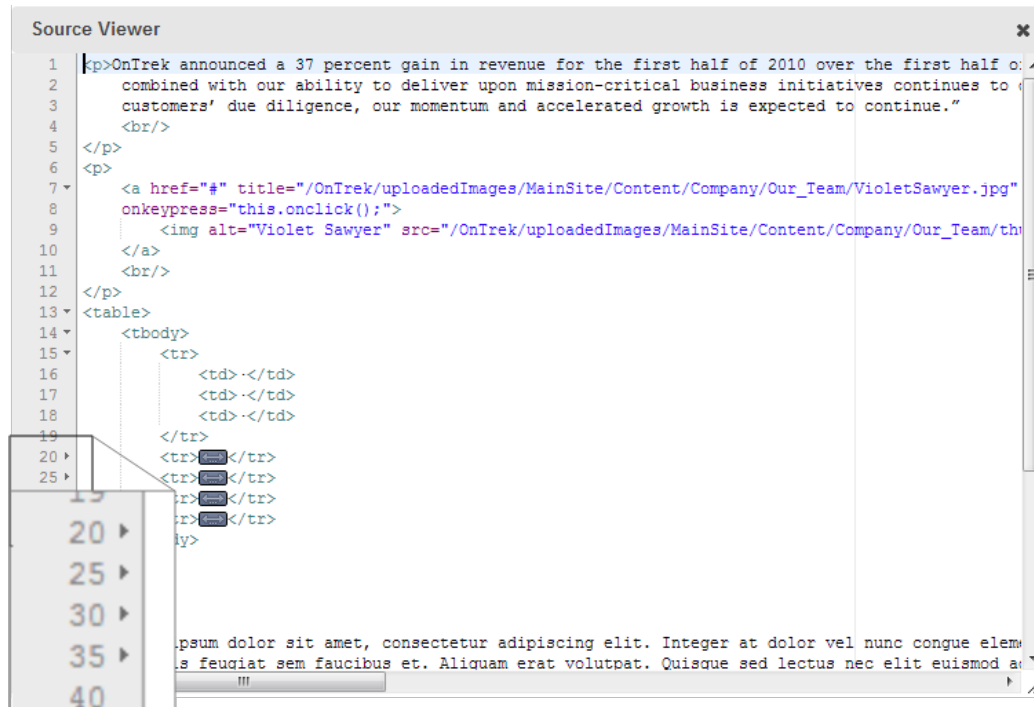
To view and edit the HTML source, click **View Source** (🔍) on the **Review** tab. The Source Viewer appears. As you edit the HTML, the content window dynamically updates with your changes.

When you finish editing in the Source Viewer, click the **X** in the top right corner.

The Source Viewer supports tag completion. For example, if you type `<p>`, the Source Viewer automatically adds a closing `</p>` tag.

The Source Viewer supports collapsing and expanding tags. For example, if a table is in the content, a small arrow appears next to the line numbers. Click the arrow to expand or collapse the nested tags.





## Embedding External Content

You can embed the following types of external content into the editor.

- YouTube
- Vimeo
- DailyMotion
- Google Maps

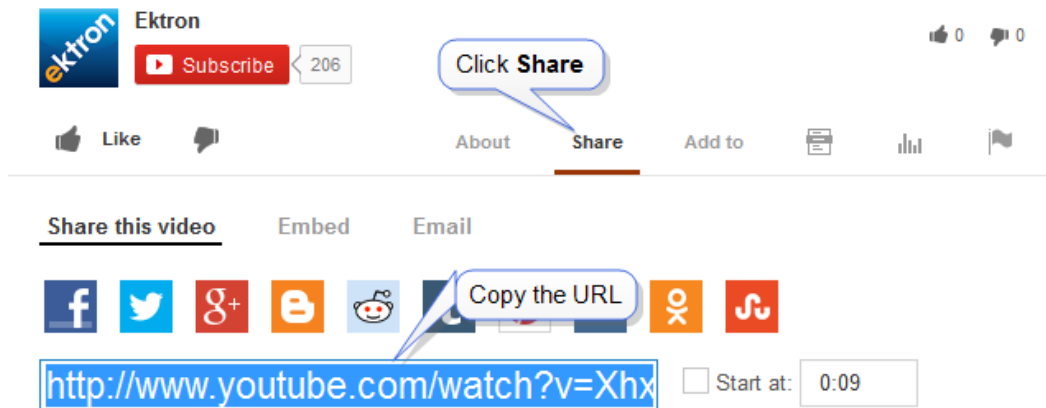
You can also insert content using its `<embed>` or `<object>` code.

Embedded elements are treated *responsively*. This means that a video or map is sized according to the device on which it is viewed.

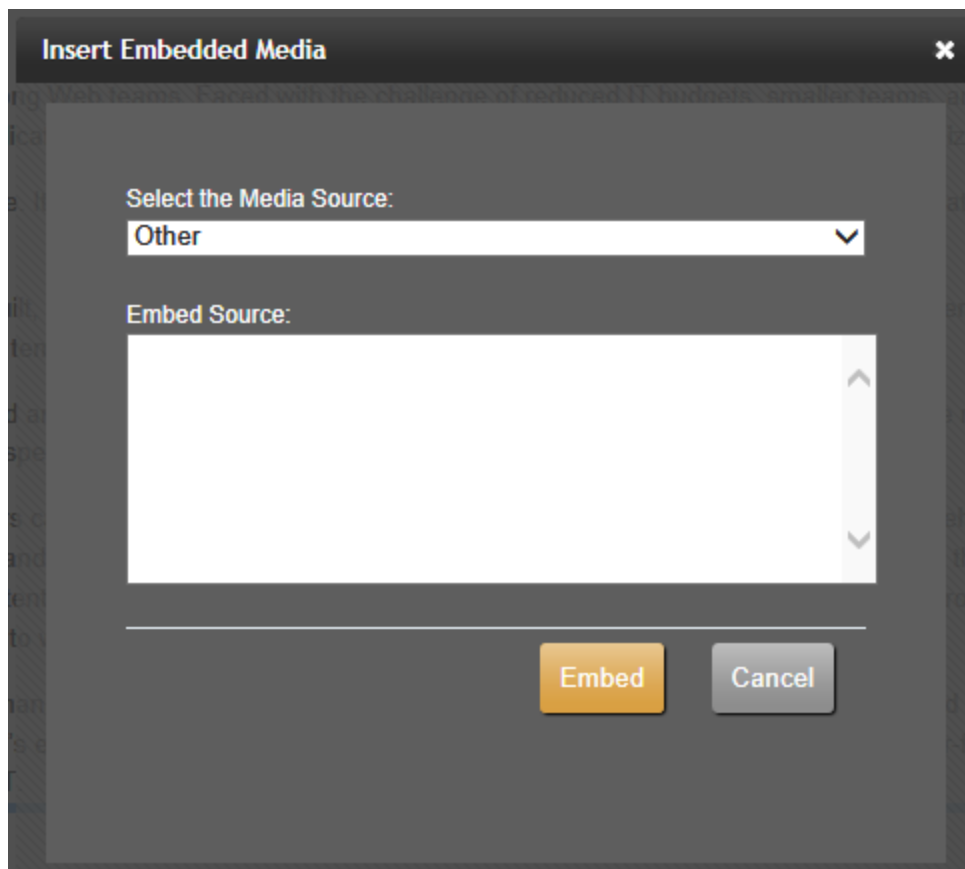
### PREREQUISITE

You need the URL of the media item that you want to embed. Content providers typically supply an easy way to find the content's URL. For example, to find a YouTube video, click **Share**, then copy the URL.

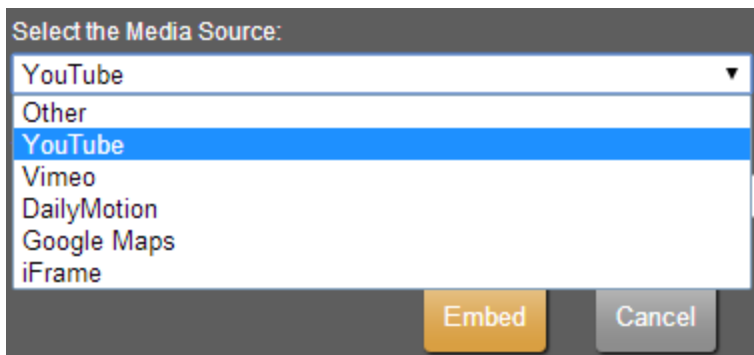
## Search Capabilities in Ektron 9 - Developer Office Hours



1. On the editor toolbar, click the **Insert** tab then **Insert Embedded Media** (📎). The Insert Embedded Media screen appears.



2. Use the **Select the Media Source** pulldown to select a media source.



Select the Media Source:

YouTube

Other

YouTube

Vimeo

DailyMotion

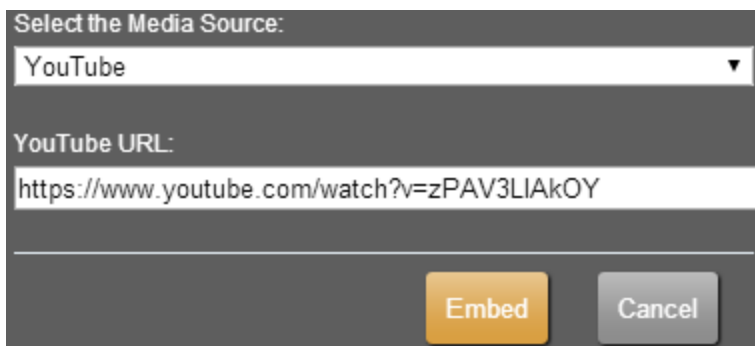
Google Maps

iFrame

Embed

Cancel

3. Insert the URL for the content that you want to embed.  
To embed content from another source, choose **Other** in the **Select the Media Source** pulldown, then insert the code.



Select the Media Source:

YouTube

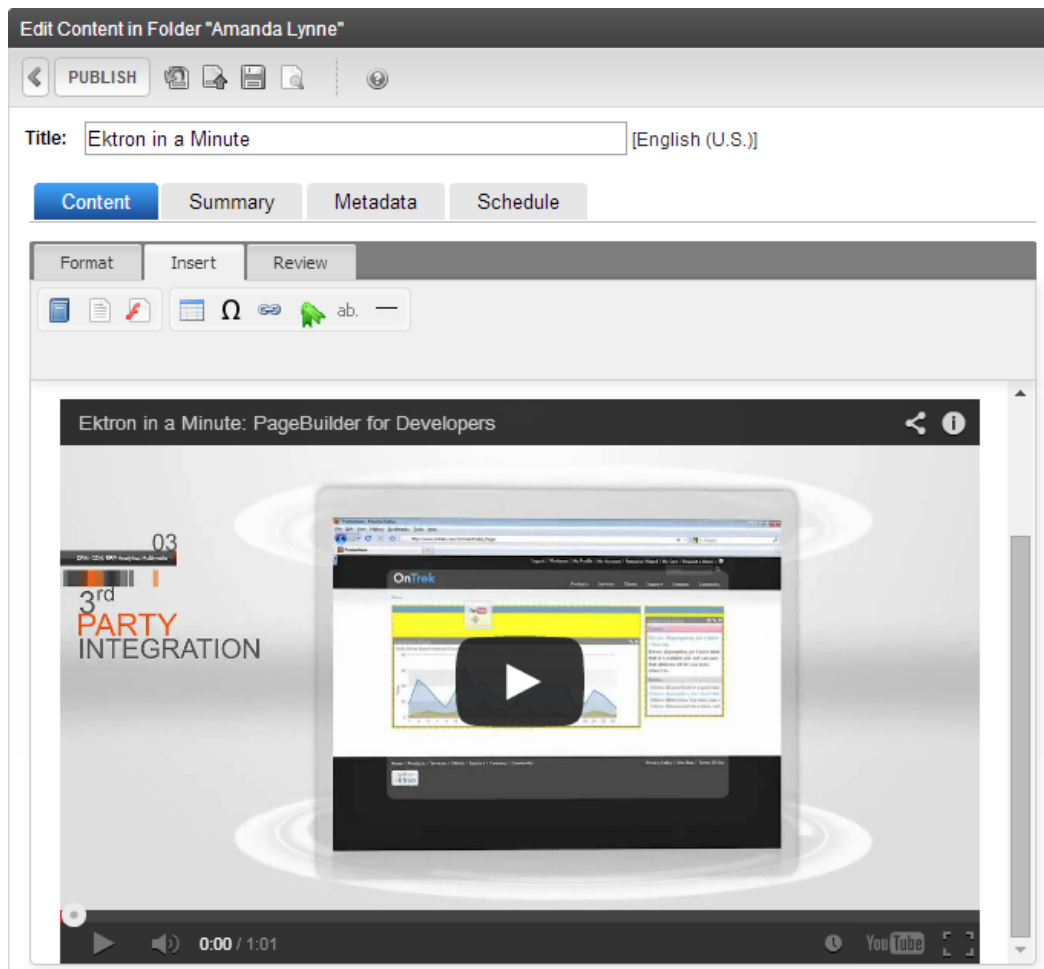
YouTube URL:

<https://www.youtube.com/watch?v=zPAV3LIaKOY>

Embed

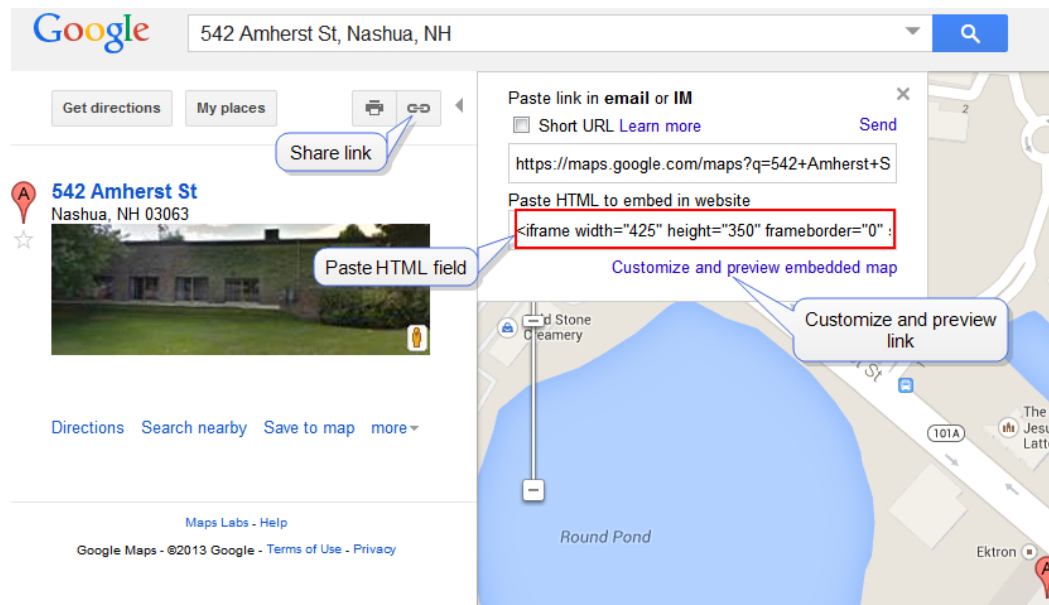
Cancel

4. Click **Embed**. The media is embedded in the content.



## Embedding a Google Map

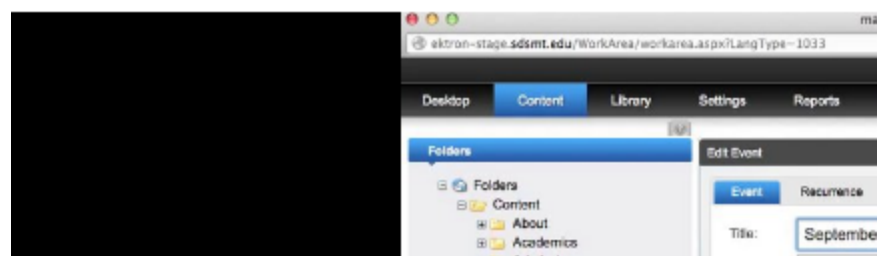
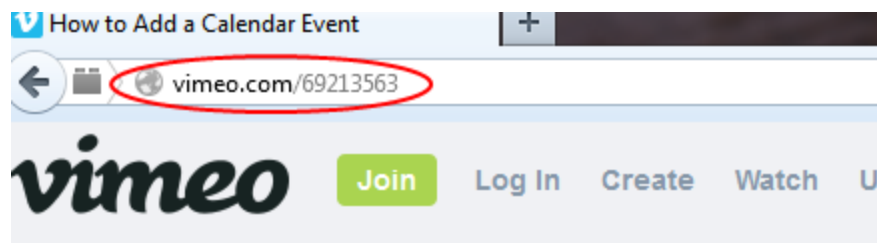
Click the **Share** link. Then copy the text in the **Paste HTML to embed in website** field and paste it into the **Embed Source** field.



To modify the map before inserting it, click the **Customize and preview embedded map** link. You can change the size, view, and zoom. When finished, copy the HTML from the bottom of the screen and paste it to the **Embed Source** field.

## Embedding a Vimeo Video

When embedding a Vimeo video, use the URL in the browser address bar.



## Removing External Content

1. On the **Review** tab, click the **View Source** button (🔍). Source Viewer appears.
2. Find and delete content between the opening and closing `<div class="embed-container">` tags that surround the video. An example is below.

```
<div class="embed-container">
<iframe marginheight="0" marginwidth="0"
```

```
src="https://maps.google.com/maps?f=q&source=s_q&hl=en&geocode=&q=542+Amherst+Street,+Nashua,+NH&aq=0&oq=542&sll=42.752811,-71.49671&sspn=0.203443,0.308647&ie=UTF8&hq=&hnear=542+Amherst+St,+Nashua,+New+Hampshire+03063&t=h&ll=42.796156,-71.573181&spn=0.120922,0.219727&z=12&iwloc=A&output=embed"
frameborder="0" height="480" scrolling="no"
width="640"></iframe>
<br/><small><a href="https://maps.google.com/maps?f=q&source=embed&hl=en&geocode=&q=542+Amherst+Street,+Nashua,+NH&aq=0&oq=542&sll=42.752811,-71.49671&sspn=0.203443,0.308647&ie=UTF8&hq=&hnear=542+Amherst+St,+Nashua,+New+Hampshire+03063&t=h&ll=42.796156,-71.573181&spn=0.120922,0.219727&z=12&iwloc=A"
style="color:#0000FF;text-align:left">View Larger Map</a></small>
</div>
```