

Site Studio Installation Guide
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INSTALLING SITE STUDIO

Site Studio is used with Content Server to design, build, and maintain web sites. Content Server is the main repository for storing and managing your web site. As a standalone component uploaded to Content Server, Site Studio employs many of the built-in services of Content Server, such as Idoc Script, metadata attributes, security, and workflow.

If you are installing and configuring Site Studio for the first time, this chapter provides you with everything you need to know. If you are upgrading from a previous version of Site Studio (version 7.2 or earlier), you will also want to read Chapter 2. It explains how to upgrade all of the web sites you created with the previous version of the product. This is necessary because of the significant architectural changes in version 7.5 and higher (including 10gR3) that continue into this version.

SYSTEM REQUIREMENTS

Site Studio consists of a component and two applications, each with its own set of system requirements. To install Site Studio, you need to:

- ❖ Upload and enable the **Site Studio component** on the content server.
- ❖ Install the **Designer application** on the machine that will be used to create and design web sites.
- ❖ Download and install the **Contributor application** on each machine that will be used to contribute content to the web site.

You can install all three on the same machine, but you will likely use a dedicated server for the content server (and therefore the component) and multiple machines for contribution.

Site Studio Component

The Site Studio component requires Content Server version 7.5.2 or higher. Site Studio works in tandem with three other components:

- ❖ **Dynamic Converter**, which converts native documents and adds them to your web site (it is available on Windows, Solaris, AIX and Linux).
- ❖ **Check Out and Open**, which allows contributors to check native documents out of the content server from Site Studio and open them for editing.
- ❖ **Content Tracker / Content Tracker Reports**, which allows contributors to view site reports that show how many times files on the site were viewed and who viewed those files.

If you are using either component, the version must be compatible with the version of your content server. (For more information on these components, see the Content Server documentation.)



Note: The first time you install the Site Studio component on the content server, you will need to rebuild the index (see [Rebuilding the Content Server Index](#) on page 1-13).



Note: The Folders component is not required by Site Studio. If, however, you are upgrading from version 7.2 or earlier, you will need folders present in order to upgrade folder-based sites to project-based sites. After upgrading the sites, you can then disable folders (assuming you are not using Check Out and Open, which relies on folders).

If you want to continue using folders with your site, you need to assign different metadata to them so that the content added there is recognized as part of your site (see [Assigning a Website Section to Your Folders](#) on page 2-14).



Important: The ExtranetLook component does not work if the Site Studio component is installed and enabled.

Designer Application

System requirements for the Designer application:

- ❖ Microsoft Windows 2000 or Windows XP operating system.
- ❖ Access to the content server containing the Site Studio component.
- ❖ Microsoft Internet Explorer 5.5 or higher.

You can use Microsoft Internet Explorer 5.5 or higher, Mozilla Firefox 1.0.7 or higher, or Netscape Navigator 7.0 or higher to view the resulting web pages.

- ❖ 800 by 600 VGA display or better. Recommended: color display with 256 or more colors.

Manager Application

System requirements for the Manager application:

- ❖ Microsoft Windows 2000 or Windows XP operating system.
- ❖ Access to the content server containing the Site Studio component.
- ❖ Microsoft Internet Explorer 5.5 or higher, Mozilla Firefox 1.0.7 or higher, or Netscape Navigator 7.0 or higher.
- ❖ 800 by 600 VGA display or better. Recommended: color display with 256 or more colors.

Contributor Application

System requirements for the Contributor application:

- ❖ Microsoft Windows 2000 or Windows XP operating system.
- ❖ Access to the content server containing the Site Studio component.
- ❖ Microsoft Internet Explorer 5.5 or higher.

You can use Microsoft Internet Explorer 5.5 or higher, Mozilla Firefox 1.0.7 or higher, or Netscape Navigator 7.0 or higher to view the resulting web pages.

- ❖ 800 by 600 VGA display or better. Recommended: color display with 256 or more colors.

INSTALLING THE SITE STUDIO COMPONENT

The Site Studio component is installed on the content server. You must perform certain tasks before and after installing the component so that Site Studio functions properly.

Before Installing the Component

Before installing the component, you should ensure that:

- ❖ The content server meets the system requirements for the component (see [System Requirements](#) on page 1-1).
- ❖ If upgrading from version 7.2 or earlier, the previous component has been uninstalled (see [Uninstalling the Previous Component](#) on page 1-5).

After Installing the New Component

After installing the new component, you should ensure that:

- ❖ If using Microsoft IIS as your web server, the ISAPI filter for Content Server has been updated (see [Installing the New ISAPI Filter](#) on page 1-6).
- ❖ Default Project Document Information is set. This is necessary for the new project-based hierarchy to work. (See [Setting Default Project Document Information](#) on page 1-7.)
- ❖ If upgrading from version 7.2 or earlier, then upgrade all of the web sites you created with the previous version (see [Upgrading Your Content Servers](#) on page 2-2).
- ❖ If upgrading from version 7.5 or higher, then update the site navigation, which can be done in Designer and on the Manage Web Sites page.
- ❖ If using Apache as your web server, the server is configured so that Site Studio can handle path-based URLs. (See [Configuring Apache Web Server](#) on page 1-8.)
- ❖ If using Sun ONE as your web server, the server is configured to include the web id in its NameTrans configuration entry. (See [Configuring Sun ONE Web Server](#) on page 1-10.)
- ❖ “SSUrlMapPlugin” is updated, if necessary. The component will replace the SSUrlMapPlugin file during installation, but there are still a number of cases when you need to manually update it. See [Installing SSUrlMapPlugin](#) on page 1-10.

- ❖ If using JavaServer Pages with Site Studio, JSP is enabled on the content server. (See [Enabling JavaServer Pages on the Content Server](#) on page 1-12.)
- ❖ If using Active Server Pages with Site Studio, ASP support is enabled on IIS and the server is configured to use relative paths. (See [Configuring Active Server Pages on the Content Server](#) on page 1-13.)

Uninstalling the Previous Component

If upgrading from version 7.2 or earlier, you need to uninstall the previous component before installing the new component.

To uninstall the previous component

1. Click the **Admin Server** icon under Administration Pages for <Content Server>. The Content Admin Server page displays.
2. Click <Content Server> to access the server Options.
3. Click **Component Manager**.
4. Under Enable Components, select **SiteStudio**.
5. Click **Disable**.
6. Restart the content server.
7. Under Install Components, select **SiteStudio**.
8. Click **Uninstall**.
9. Restart the content server.

Installing and Enabling the New Component

Once you have uninstalled the previous Site Studio component and updated the ISAPI filter, you are ready to install the new component.

To install and enable the new component

1. Click the **Admin Server** icon under Administration Pages for <Content Server>. The Content Admin Server page displays.
2. Click <Content Server> to access the server Options.
3. Click **Component Manager**.
4. Click **Browse** beside the **Install New Component** option.

5. Browse to **SiteStudio.zip** in the Site Studio software distribution package.
6. Click **Open** to add the path to the Install New Component field.
7. Click **Install**.
A message displays showing what will be installed.
8. Click **Continue**.
9. On the Install Settings screen, select a content type for the fragment libraries, custom properties, custom elements, and custom validation.
10. Enter an initial value to be used to name the web site sections.



Note: This value will be used to create unique IDs for the nodes (sections) of your web site. If you are installing the component on a single content server, you can accept the default. If you are installing the component on more than one content server, you may want to use different initial values to distinguish between the web sites stored in the different servers.

11. Choose **Click here to enable the component and restart the service**.

12. Restart the content server and the web server.



Note: All of the fragments and sample files you need to run Site Studio are automatically checked into the content server during installation. New metadata fields specific to Site Studio are also added to the content server (see [Metadata Introduced by Site Studio](#) on page 1-14).



Note: If you plan to view your site using a proxy server, you need to install the component on the master instance of the content server as well.

Installing the New ISAPI Filter

If you are using Microsoft Internet Information Server (IIS) as your web server, you need to update the ISAPI filter to version 5.1.1.62. If you have a newer ISAPI filter or are not using Microsoft IIS, skip to the next topic.

Content Server uses an IIS ISAPI filter, which is installed in the default web server when the content server is installed. It is located in the <install_dir>\idcplg\ directory and is named idc_cgi_isapi-<instance-name>.dll (where <instance-name> is your content server instance).

After installing Site Studio, you need to replace the ISAPI filter on the content server with version 5.1.1.62. The new version of the filter makes it possible to run Site Studio web sites on the content server.

To install the new ISAPI filter on the content server

1. Stop the content server and the web server.
2. Browse to the following location:
`<install_dir>/custom/SiteStudio/support/win32`



Note: The folder is created when you install the Site Studio component.

3. Rename the file **idc CGI isapi.dll** to **idc CGI isapi-<instance-name>.dll** (where <instance-name> is your content server instance).
4. Copy this file to `<install_dir>\idcplg\` to overwrite the existing ISAPI filter (which has the name “idc CGI isapi-<instance-name>.dll”).
5. Restart the content server and the web server.



Note: In a clustered environment, the updated idc CGI isapi-<instance-name>.dll file is required on each of the servers in the cluster.

Setting Default Project Document Information

When you create a new web site in Site Studio, a new project file is created and checked into the content server for you. Thus, before you can create web sites, you need to specify the metadata that will be assigned to the new project files.

You do this on the “Set Project Default Document Information” page in the content server.

To set the default metadata used for project files

1. Log onto the content server as an administrator, open the **Administration** page, and then the **Site Studio Administration** page.
2. Click **Set Default Project Document Information**.

On this screen you assign the default metadata for new projects generated by Site Studio (see figure).

3. Once you select the metadata values, click **Update**.

This returns you to the Site Studio Administration page.

Configuring Apache Web Server

If you are using an Apache web server for your web server, you should update the configuration file to take advantage of the path-based URLs in Site Studio. (If you are not using Apache as your web server, skip to the next section.)

To edit the Apache web server configuration file:

1. Open the configuration file, which is typically located in:

```
<apache-server>/conf/httpd.conf
```

2. Locate the entries, which look something like this:

```
LoadModule IdcApacheAuth
C:/stellent/idcml/shared/os/win32/lib/IdcApacheAuth.dll
IdcUserDB stellent c:/stellent/idcml/data/users/userdb.txt
Alias /stellent "c:/stellent/idcml/weblayout"
<Location "/stellent">
    DirectoryIndex portal.htm
    IdcSecurity stellent
</Location>
```



Note: For Apache 1.x servers, the LoadModule line refers to IdcApacheAuth.dll (or IdcApacheAuth.so on Unix); and for Apache 2.x servers, it refers to IdcApacheAuth2.dll (or IdcApacheAuth2.so on Unix).

3. Add the following lines:

```
<Location "/">
    IdcSecurity stellent
</Location>
```

4. Then locate the “UseCanonicalName” configuration variable and make sure it is set to **Off**.
5. Save the configuration file and restart Apache HTTP Server.

Notes

Please note the following:

- ❖ In all of these steps, the name of the Content Server instance is ‘stellent’. If you named your Content Server something else, then there will be slight differences. For example, if your Content Server is named “cherokee,” then Step 3 would be as follows:

```
<Location "/">
    IdcSecurity cherokee
</Location>
```

All code examples use “stellent” as the Content Server name.

- ❖ If you wish to use Site Studio domain-based sites, then you need to use the <Location “/”> entry (in Step 3).
- ❖ If you prefer not use the <Location “/”> entry (in Step 3), then you need to use a separate entry for each of the web sites that the server should recognize. For example, if you have two sites with the addresses “http://<domain>/site1/index.htm” and “http://<domain>/site2/index.htm,” then you could set up two location entries as follows:

```
<Location "/site1">
    IdcSecurity stellent
</Location>
<Location "/site2">
    IdcSecurity stellent
</Location>
```

For information on changing web site URLs in Site Studio, see “Site addressing” in the Designer Guide.

Configuring Sun ONE Web Server

If you are using a Sun ONE web server for your web server, you should update the configuration file to take advantage of the path-based URLs in Site Studio. (If you are not using Sun ONE as your web server, skip to the next section.)

To edit the Sun ONE web server configuration file:

1. Go to the Sun web server software directory, and open the `https-[host_name]/config` subdirectory (where `[host_name]` is the name of the system on which the software is installed), for example:
`/https-server7/config`
2. Open the file `obj.conf` in a text editor.
3. Inside the `<Object name="default">` section, add the web id to the NameTrans entry:
`NameTrans fn="pfx2dir" from="/[Site_ID]" dir="[Weblayout_Dir]"`
 where `[Site_ID]` is the web id of your website (for example `"/Xalco,"` and `[Weblayout_Dir]` is the full path to the web-viewable file repository (for example, `/ul/stellent/idcm1/weblayout`).
4. Apply the changes that you just made to the `obj.conf` file on the web server's administration page.
5. Stop and restart the web server.

Installing SSUrlMapPlugin

The SSUrlMapPlugin is a web filter plugin used for mapping Site Studio URLs. The component automatically updates this file during installation.

However, you may need to manually update the file if you're using Microsoft Internet Information Server, and you're upgrading from Site Studio 7.5 (or later). Microsoft IIS typically locks this file and prevents it from being overwritten.

The SSUrlMapPlugin can be found in the "SiteStudio" component installation directory as follows:

Operating System	Installation Directory
Windows	<install-dir>\custom\SiteStudio\support\win32\ SSUrlMapPlugin.dll

Operating System	Installation Directory
Solaris	<install-dir>\custom\SiteStudio\support\solaris\ SSUrlMapPlugin.so
AIX	<install-dir>\custom\SiteStudio\support\aix\SSUrlMapPlugin.so
Linux	<install-dir>\custom\SiteStudio\support\linux\ SSUrlMapPlugin.so

To install SSUrlMapPlugin, perform these tasks:



Note: In the steps below, replace “win32” and “.dll” with the appropriate abbreviation and extension (depending on the operating system you are running).

1. Stop the content server and the web server.
2. Add the **SSUrlMapPlugin.dll** to the <install-dir>\shared\os\win32\lib\ directory.
3. Rename the file **SSUrlMapPlugin-<instance-name>.dll** (where <instance-name> is your content server instance).



Note: If there is an existing *SSUrlMapPlugin.dll* file, replace it with this version.

4. Start the content server and the web server.



Important: The content server must be started before the “World Wide Web Publishing” service.



Note: When installing Site Studio in a clustered environment, you will also need to manually update the SSUrlMapPlugin on each server in the cluster.

Configuring Search Engine

Site Studio is compatible with Content Server, which provides search through Oracle text. In addition, it can integrate with other leading search technologies (for example, Verity and FAST).

Configuring Site Studio Metadata as Zone Fields

This ensures they are full-text indexed.

1. Open the content server **Administration** page.

2. Click **Zone Fields Configuration**.
3. Designate **Web Sites** and **Exclude From Lists** as Zone Text Fields.

Adding a Setting to the General Configuration File.

1. Open the content server **General Configuration** page.
2. Add the following line to the **Additional Configuration Variables** field:
`SSUseUniversalQueryFormat=1`
3. Optionally, you can add the following line:
`SSEnableDBSearchShortcut=1`



Note: This will improve the responsiveness of queries performed by Designer and Contributor.

4. Click **Save**.
5. Restart the content server.

Enabling JavaServer Pages on the Content Server

If you plan to use JavaServer Pages in Site Studio, you need to enable JSP on the content server. This allows you to access and modify content and services (personalization, security definitions, predefined variables, etc.) on the content server. For more information on enabling JavaServer Pages, see “Getting Started with the Developer’s Kit” for Content Server.

If you enable any JSP groups after you enable the Site Studio component, you must configure the JSP support so the JSP fragments function properly.

Configuring JSP Support for a New JSP Group

If you install the Site Studio component and then add a group to the list of JSP Enabled Groups in the content server, you must redeploy the JSP support files for that group to allow Site Studio JSP fragments to work correctly.

To configure JSP support, perform these tasks:

1. Log onto Content Server as an administrator.
2. Under Administration, click **Site Studio Administration**.
3. Click **Manage Fragment Libraries**.

4. Click the **Configure JSP Support** button.

The JSP support files are extracted to the required directories on the content server.

Configuring Active Server Pages on the Content Server

If you plan to create ASP sites in Site Studio, you need to do the following after you install the component:

- ❖ Install IdcCommandX on the content server. IdcCommandX (version 7.0.0.7 or above) can be downloaded from the support site.
- ❖ Install the SOAP component if you are running a version of Content Server earlier than 7.5. The component is available from the support site. (This functionality is built into version 7.5 of Content Server.)
- ❖ If you are using Microsoft Windows Server 2003, enable ASP support and configure the server so that it allows Site Studio to use parent paths such as `..\..\websites\`. (For more information, see the documentation related to “Enable Parent Paths” in the Microsoft Internet Information Server Help.)
- ❖ Enable the “Websites” folder in Microsoft Internet Information Server (IIS) to execute scripts and to create an application object (see next).

To enable the Websites folder, perform these tasks:

1. From the **Control Panel**, open **Administrative Tools** and then **Internet Information Services**.
2. Right-click the **Websites** folder and choose **Properties**.
3. In the Websites Properties dialog box, on the Home Directory tab, select **Scripts only** from the **Execute Permissions** drop-down list.
4. In the **Application name** text box, type **websites**.
5. Click **Apply** and then click **OK**.

Rebuilding the Content Server Index

If you are installing Site Studio for the first time, or you are upgrading from a previous version, then you need to rebuild the content server index after enabling the component and configuring the content server.

This step is necessary to take advantage of the new metadata introduced by Site Studio (see the next topic). The time it takes to rebuild the index depends on the size of the collection.

For more information on rebuilding the index, see the Content Server documentation.



Important: If you plan to upgrade web sites created in version 7.2 or earlier (see [Upgrading Your Content Servers](#) on page 2-2), you will need to rebuild the content server index at that time. Therefore, to prevent rebuilding the index more than once, you may want to skip this step until after you have successfully upgraded your sites.

METADATA INTRODUCED BY SITE STUDIO

When you install the Site Studio component, four metadata fields are added to the content server:

- ❖ [Websites](#) (page 1-14)
- ❖ [Website Section](#) (page 1-15)
- ❖ [Website Object Type](#) (page 1-15)
- ❖ [Exclude From Lists](#) (page 1-16)

Websites

The Websites metadata (actual name is “xWebsites”) contains a list of web sites that a particular file in the content server belongs to. These files include layout pages, contributor data files, native documents, scripts, and more. Each web site has its own ID, and each time you add a new piece of content to a web site, the web site ID is automatically added to this metadata field for that piece of content.

The Websites metadata is needed for dynamic lists and searches to function properly. You can also use this metadata to quickly view all of the web sites that a particular file is associated with.



Important: The Websites metadata was introduced to accommodate content re-use. It replaces the WebsiteID metadata (a deprecated field that provides support for older versions of Site Studio fragments). If you are upgrading from a previous version of Site Studio, you should customize your fragments that currently use the WebsiteID value, even if you don’t intend to take advantage of content re-use. (See [Performing Additional Steps Manually](#) on page 2-9.)

Website Section

The Website Section metadata (actual name is “xWebsiteSection”) is populated automatically when you install the new Site Studio component on the server. The Website Section indicates where a document is stored on a web site (unless a target section is explicitly specified in the original hyperlink).

For existing content on a web site (created with a previous version of Site Studio), the Website Section value is derived from the “Collection ID” value. (Collection IDs were a part of Folders component, which are no longer used by Site Studio.) All of this is handled automatically when you upgrade a site (see [Upgrading Sites on a Single Content Server Instance](#) on page 2-3).



Note: When you complete the site upgrade, you will want to start using Website Sections instead folders. (If you want to continue using folders, see the steps in [Assigning a Website Section to Your Folders](#) on page 2-14.)

Website Object Type

The Website Object Type metadata (actual name is “xWebsiteObjectType”) is added automatically when you enable the Site Studio component on the content server. Each metadata value represents a type of file you can use in Site Studio. These file types are described in more detail in the Designer Guide.

This metadata has the following values:

- ❖ Data File
- ❖ Layout File
- ❖ Native Document
- ❖ Fragment
- ❖ Image
- ❖ Script
- ❖ Stylesheet
- ❖ Project
- ❖ Custom Element Form
- ❖ Manager Settings
- ❖ Properties Form

- ❖ Validation Script
- ❖ Other

Exclude From Lists

The Exclude From Lists metadata (actual name is “xDontShowInListsforWebsites”) lists the web sites for which a contributor has specified, through the user interface, that a contributor data file or native document should *not* display in dynamic lists on the web site.

When a contributor excludes a file from a dynamic list, the web site ID is added to this value. If the contributor later re-includes the content in dynamic lists for the web site, the web site ID is removed from this metadata field and the content becomes available to the dynamic lists again.



Note: If a web site value displays in this metadata field for a particular data file or native document, then that piece of content will not display in any lists on the site; however, it will still display in search results for the site.

INSTALLING DESIGNER

You need administrative rights to the computer to install Designer.

1. On the computer that will be used to create and manage web sites, open the Site Studio software distribution package.
2. Open the **Designer** folder.
3. Double click **Setup.exe** and follow the instructions on the screen.



Note: When upgrading Site Studio, the Designer application installs alongside the previous version. (The previous version is not removed.)

Opening Designer

Once you install Designer, you can open the application as follows:

- ❖ Clicking **Start > Programs > Stellent Site Studio > Site Studio Designer**.

You can also double-click the Designer icon in Windows Explorer or My Computer. Or, you can add a shortcut to the Windows Taskbar and click the Designer icon there to run the application each time.

The first time Designer opens, it displays an empty site workspace, with the Site Connection Manager dialog box already open (so that you can set up a connection to your first web site). Thereafter, Designer will open the last web site you worked on (you can change this setting, if you like).

INSTALLING CONTRIBUTOR

You need administrative rights to the computer to install Contributor. Once installed, however, Contributor will be available even when you log on as a different user.

Contributor is downloaded and installed the first time you enter Contributor mode (a special view of the web page that displays the available contribution regions on the web page).

You enter Contributor mode using a keystroke combination. The default is CTRL+SHIFT+F5 (hold down the **Ctrl**, **Shift**, and **F5** keys at the same time). This keystroke combination is used by all designers and contributors to enter Contributor mode. (You can change the default combination if you like. See [Changing the Default Keystroke Combination](#) on page 1-18.)



Once in Contributor mode, you can click a contribution icon to open Contributor, where you have access to the contents of your web page in an editable form.




Note: When upgrading Site Studio, the Contributor application installs alongside the previous version. (The previous version is not removed.)

Opening Contributor

To open Contributor, first browse to the web page containing a contribution region. (The designer of the web site will direct contributors to this page, perhaps by sending them the URL.) Then switch to the Contributor mode, using a combination of keys on your keyboard. The default is CTRL+SHIFT+F5 (hold down the **Ctrl**, **Shift**, and **F5** keys at the same time).

In Contributor mode, you see one or more contribution icons () . Click this icon to open Contributor (you will be prompted to enter your logon credentials before Contributor will load). You will then be able to edit the content of the web page. If the contribution icon displays a locked status () , it means another contributor is currently making changes to the file.



Note: If you have set up a workflow for the files on the site, you see the workflow icon () instead.

CHANGING THE DEFAULT KEYSTROKE COMBINATION

You can change the default keystroke combination (Ctrl+Shift+F5) for entering Contributor mode. To do so, you need access to the “custom” directory on the content server where Site Studio is installed. You should inform the designers and contributors of the site if you change this value.


To change the default keystroke combination, perform these tasks:

1. Browse to the following directory (where <CS_Dir> is the name of your content server):

C:\<CS_Dir>\custom\SiteStudio\resources\

2. Open **ss_contributor_resources.htm** in a text editor.
3. Locate the function definition **SSContributorMode.KeyCommandHandler**.
4. Change the implementation of this function to use a different keystroke combination that will call **SSContributorMode.Toggle**.

Note: This function uses virtual key codes to determine the key combination entered by the user. An explanation of virtual key codes along with examples and HTML code used to create a test page are provided as commented text in this file.

5. Save and close **ss_contributor_resources.htm**.
6. Click **Update Navigation** () on the toolbar in Designer, which makes the changes “live” on the web site.



Note: The next time you upgrade Site Studio or install a patch, you may need to perform these steps again to retain your keystroke combination.

BLOCKING ACCESS TO THE CONSUMPTION SERVER

A contributor gains access to the content of a web site by using a keystroke combination to enter Contributor mode and then clicking a contribution icon to open Contributor.


While such access is necessary on the server used for building the web site, it is not desirable for the consumption server—the server used to run the live web site. To block contributor access to the consumption server, create the following server configuration variable:

```
DisableSiteStudioContribution=true
```

If the variable is not present or is set to “false,” contributor access is allowed.

DOCUMENTATION

The documentation for Site Studio is available with the Site Studio component, the Designer installation directory, and in the distribution package.

Documentation	Format	Availability
Release Notes	PDF	Available on the Site Studio installation distribution media.
Installation Guide	PDF	Available in the Documentation folder of the Designer installation directory and the distribution media.
Designer Guide	Help, PDF	<p>Available from the Help menu in Designer and the Help menu on the Site Studio Administration pages.</p> <p>The PDF version (useful for printing the documentation) can be opened from the navigation frame in Help. It is also available in the Documentation folder of the Designer installation directory and the distribution media.</p> <p> Note: The “What’s New” and “Getting Started” are both part of the Designer Guide.</p>
Manager Guide	Help, PDF	<p>Available from the Help menu in Manager.</p> <p>The PDF version (useful for printing the documentation) can be opened from the navigation frame in Help. It is also available in the Documentation folder of the Designer installation directory and the distribution media.</p>

Documentation	Format	Availability
Contributor Guide	Help, PDF	Available from the Help menu in Contributor. The PDF version (useful for printing the documentation) can be opened from the navigation frame in Help. It is also available in the Documentation folder of the Designer installation directory and the distribution media.
Quick Start for Contributors	PDF	Available in the Documentation folder of the Designer installation directory and the distribution media.
Technical Guide	PDF	Available in the Documentation folder of the Designer installation directory and the distribution media.
Reference Guide	PDF	Available in the Documentation folder of the Designer installation directory and the distribution media.
Tutorial	Help, PDF	Available in the Documentation/RVH_Tutorial folder on the distribution media.
Tutorial Setup	PDF	Available in the Documentation/RVH_Tutorial folder on the distribution media.



Note: For more information on the Documentation, see the Designer Guide.

UNINSTALLING SITE STUDIO

To uninstall Designer or Contributor from a client machine, use Add/Remove Programs from the Windows Control Panel.

You may want to disable (or uninstall) the new component. (Disabling a component instead of uninstalling it leaves open the option of enabling it again later, without the need to reinstall.)

To disable or uninstall the Site Studio component, perform these tasks:

1. Click the **Admin Server** icon under Administration Pages for <Content Server>. The Content Admin Server page displays.
2. Click <Content Server> to access the server Options.
3. Click **Component Manager**.
4. Under Enabled Components, select **SiteStudio**.
5. Click **Disable**.
6. Restart the content server.
7. If you want to uninstall the component, return to the Component Manager, select **Site Studio** from the Uninstall Component drop-down list, and click **Uninstall**. Then restart the content server.

UPGRADING YOUR WEB SITE

If you are upgrading from version 7.2 or earlier, you need to upgrade both Site Studio and the web sites you created with Site Studio. You have to upgrade the web sites because of the following features introduced in Site Studio version 7.5 that continue into the current version:

Key architectural changes introduced in version 7.5 (included in version 10gR3):

- ❖ The site hierarchy is stored in a project file and no longer relies on folders. As a result, the Folders component is no longer required.
- ❖ The web site URLs display as a logical path and suffix instead of as a Cgi-based address displaying the SS_GET_PAGE service. As a result, you see friendlier, path-based URLs.
- ❖ Layout pages no longer use the <base> tag. Therefore, hyperlinks and references that rely on the base tag need to be modified.
- ❖ The “siteId” and “root node id” are no longer synonymous.

For more information on these, and other, new features, see “What’s new in this version” in the Designer Guide.

WHAT THE AUTOMATED UPGRADE DOES

When you upgrade Site Studio and your web sites, the following tasks are performed automatically.

Action	Description
Folders-based sites upgraded to project-based sites	The existing hierarchy in the folder structure is reproduced in the project file. The root “dCollectionName” is used as the “siteLabel,” the root “dCollectionID” is used as the “siteId,” the “originalCollectionID” project attribute is set, and the site type is transferred from the root section to the project.
Custom section properties in new sites updated	The custom section properties of type “siteid” and “url” are updated (adding friendly URLs, where necessary).
Fragment instance parameters in layout pages updated	Parameters of type “managedurl” and “url” are updated.
Metadata populated	If the Create Project Files option is enabled, the “xWebsiteSection” values are populated (derived from “xCollectionID”).
Links in layout pages and data files updated	If the Upgrade Layouts and Upgrade Data Files options are enabled, the weblayout links in layout pages and contributor data files are updated to include the HttpRelativeWebRoot token; optionally, the javascript links are updated.
Navigation updated	The navigation files for the web site are regenerated.

UPGRADING YOUR CONTENT SERVERS

The task of site upgrade begins with upgrading the Site Studio component on each of the content servers you are using, and then upgrading the web sites stored on the content servers.

Although the Folders component is not used in version 7.5 or later, you will need to retain folders during the upgrade of your web sites so that each site can be migrated from a folders-based hierarchy to a project-based hierarchy.

You can then disable the Folders component (assuming you are not using the Check Out and Open component, which requires folders). If you want to continue using folders, you need to configure them with the appropriate metadata (see [Assigning a Website Section to Your Folders](#) on page 2-14).



Note: When you follow the upgrade steps, every web site on the server is upgraded. If you want to upgrade only selected sites, then you will need to create a copy of the other sites on another server.

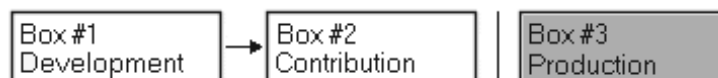
Upgrading Sites on a Single Content Server Instance

If your web sites are stored on a single content server, the upgrade consists of:

1. **Installing the new Site Studio component** (having first uninstalled the old component) — see [Installing the Site Studio Component](#) on page 1-4.
2. **Performing a *full* upgrade on the content server** — see [Performing a Full Upgrade](#) on page 2-5.
3. **Performing additional steps manually** that are not handled by the automated upgrade — see [Performing Additional Steps Manually](#) on page 2-9.

Upgrading Sites on Multiple Content Server Instances

You may have sites on multiple content servers, each serving a different purpose, such as a development server, a contribution server, and a production server (see figure).



The content on each server (source server) gets copied to the next server (target server) using Archiver / Replicator. As such, it is important to carefully plan and upgrade the sites on each server without encountering replication problems.

On the First Two Instances of the Content Server

(Box 1 and Box 2 in the illustration above.)

- ❖ **Stop replication between the content servers**, then...
- ❖ **Install the new Site Studio component** — see [Installing the Site Studio Component](#) on page 1-4.

On the Source Instance of the Content Server

(Box 1 in the illustration above.)

- ❖ **Perform a *full* upgrade of your sites** — see [Performing a Full Upgrade](#) on page 2-5, then...
- ❖ **Perform additional steps manually** (steps not handled by the automatic upgrade) — see [Performing Additional Steps Manually](#) on page 2-9.

On the Target Instance of the Content Server

(Box 2 in the illustration above.)

- ❖ **Perform a *minimal* upgrade of your sites** — see [Performing a Minimal Upgrade](#) on page 2-7.

On Both Instances of the Content Server

(Box 1 and Box 2 in the illustration above.)

- ❖ **Start replication again between the content servers.**

Once the new component has been installed on all instances of the content server and web sites have been upgraded as indicated above, you can begin replicating your sites again.

You can use the replication feature in Site Studio (see “Replicating your site” in the Designer Guide). Or, if you have been using Archiver/Replicator and want to continue using it, you can do so as long as you modify the archive query to include Site Studio project files.

On the Next Target Content Server (Downstream in Replication)

(Box 3 in the illustration above.)

- ❖ **Stop replication between the source and target content servers, then...**



Note: In this case, your source server (Box 2) was the target server in the previous steps, and your target server (Box 3) is the next server down the line (downstream) in your replication.

- ❖ **Install the new Site Studio component** — see [Installing the Site Studio Component](#) on page 1-4, then...
- ❖ **Perform a *minimal* upgrade of your sites** — see [Performing a Minimal Upgrade](#) on page 2-7, then...
- ❖ **Start replication again between the source and target content servers.**

Repeat Step 5 for each target instance of the content server downstream in your replication.

Performing a Full Upgrade

A full upgrade of the content server is required in the case of single-server setup. It is also required for the source server in the case of a multi-server setup. (All other servers in a multi-server setup require a minimal upgrade.)

When you upgrade your site, Site Studio turns your existing folder-based site into a project-based site. When it does this, it creates a project file as a managed item in the content server. As such, you need to identify the metadata that you would like assigned to the project file that will represent each web site.

During the upgrade process, the content server will attempt to index content that gets changed, which could take considerable time and resources. You may want to temporarily disable automatic indexing before you begin the upgrade process and then re-enable it when you are done. (See “Configure Automatic Update Cycle Screen” in the Content Server System Administration Guide.)



Note: You should have already installed and enabled the new Site Studio component on the server before you start a full upgrade (see [Installing the Site Studio Component](#) on page 1-4).

To perform a full upgrade, perform these tasks:

1. Log onto the content server as an administrator, open the **Administration** page, and then the **Site Studio Administration** page.
2. Click **Set Default Project Document Information**.

On this screen (see figure) you assign the default metadata to the new projects you will create in Site Studio.

The screenshot shows a web form titled "Set Project Default Document Information" with a "Help" link in the top right. Below the title is the instruction: "Specify default Document Information that will be applied to Site Studio projects." The form contains the following fields:

- Type: A dropdown menu with "ADENG - Acme Engineering Department" selected.
- Security Group: A dropdown menu with "Public" selected.
- Hidden: A dropdown menu with "FALSE" selected.
- Inhibit Propagation: A dropdown menu with "FALSE" selected.
- Read Only: A dropdown menu with "FALSE" selected.
- Trash Delete Date: An empty text input field.
- Trash Delete Location: An empty text input field with a "Browse..." button to its right.
- Trash Delete Old Name: An empty text input field with a dropdown arrow on its right.
- Trash Deleter: An empty text input field.
- Folder: An empty text input field with a "Browse..." button to its right.
- Comments: An empty text input field with a dropdown arrow on its right.
- Website Object Type: A dropdown menu with "Project" selected.
- Release Date: An empty text input field.
- Expiration Date: An empty text input field.

At the bottom of the form are two buttons: "Update" and "Reset".

3. Once you have selecting the metadata values, click **Update**.
This returns you to the Site Studio Administration page, where you can begin the upgrade process.
4. Click **Manage Web Sites**.
5. Click **Go to Web Sites Update Page**. (This option displays only when older web sites are detected.)
6. Click **Advanced Options** to specify site upgrade options (see figure).



7. Choose the following for a full upgrade:

- ❖ Select **Create Project files**.
- ❖ Select **Upgrade Layouts**.
- ❖ Select **Upgrade Data Files**.
- ❖ Select **Convert Hyperlinks** and choose a link format:

To Server-Side Links: Links contain the coded identity of the target location using server-side script.

To Path-Based URLs: Links contain the full path to the target location.

8. Click **Set Options** to return to the Upgrade Legacy Web Sites page.
9. Click **Start Upgrade**.

You will see the individual files that need to be upgraded on this page. Wait until you see the message “The upgrade process has completed.”



Note: The site upgrade automatically updates the site hierarchy and its many links, and the Websites menu in the content server now lists your sites.



Note: For more information on hyperlink formats, see the Designer Guide and the Technical Guide.

Performing a Minimal Upgrade

A minimal upgrade is required in the case of a multi-server setup and applies to all target servers; that is, the server that has web sites being replicated to it.

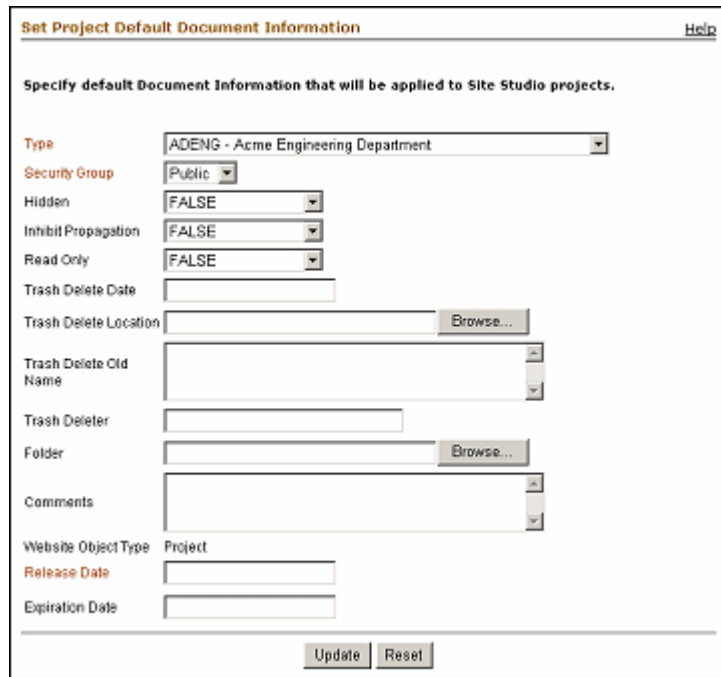


Note: You should have already installed and enabled the new Site Studio component on the server before you start a minimal upgrade (see [Installing the Site Studio Component](#) on page 1-4).

To perform a minimal upgrade, perform these tasks:

1. Log onto the content server as an administrator, open the **Administration** page, and then the **Site Studio Administration** page.
2. Click **Set Default Project Document Information**.

This brings you to a screen where you assign the default metadata to the new projects that will be created by Site Studio.



The screenshot shows a web form titled "Set Project Default Document Information" with a "Help" link in the top right corner. Below the title is the instruction: "Specify default Document Information that will be applied to Site Studio projects." The form contains several fields:

- Type:** A dropdown menu with "ADENG - Acme Engineering Department" selected.
- Security Group:** A dropdown menu with "Public" selected.
- Hidden:** A dropdown menu with "FALSE" selected.
- Inhibit Propagation:** A dropdown menu with "FALSE" selected.
- Read Only:** A dropdown menu with "FALSE" selected.
- Trash Delete Date:** An empty text input field.
- Trash Delete Location:** An empty text input field with a "Browse..." button to its right.
- Trash Delete Old Name:** An empty text input field with a dropdown arrow on its right.
- Trash Deleter:** An empty text input field.
- Folder:** An empty text input field with a "Browse..." button to its right.
- Comments:** An empty text input field with a dropdown arrow on its right.
- Website Object Type:** A dropdown menu with "Project" selected.
- Release Date:** An empty text input field.
- Expiration Date:** An empty text input field.

At the bottom of the form are two buttons: "Update" and "Reset".

3. When finished choosing metadata values, click **Update**.

This returns you to the Site Studio Administration page where you can begin the upgrade process.

4. Click **Manage Web Sites**.
5. Click **Go to Web Sites Update Page**. (This option displays only when older web sites are detected.)
6. Click **Advanced Options** to specify site upgrade options (see figure).

7. Select **Create Project files**.



Note: This will upgrade project files and populate the “Website Section” metadata value.

8. Click **Set Options** to return to the Upgrade Legacy Web Sites page.

9. Click **Start Upgrade**.

Wait until you see the message “The upgrade process has completed.”

The Websites menu in the content server now lists your sites.

PERFORMING ADDITIONAL STEPS MANUALLY

Once you have upgraded your web sites, there are still a number of steps that you need to perform manually, including the following:

- ❖ [Updating the Site Navigation](#) (page 2-9)
- ❖ [Rebuilding the Content Server Index](#) (page 2-10)
- ❖ [Updating Your Custom Fragments](#) (page 2-10)
- ❖ [Assigning a Website Section to Your Folders](#) (page 2-14)
- ❖ [Updating JSP Code](#) (page 2-15)

Updating the Site Navigation

You need to update the navigation files for the site after you upgrade to the latest version of Site Studio. You can do this in Designer (using the **Update Navigation** button) or on the Site Studio Administration page (specifically, the Manage Web Sites page). This step is necessary for Contributor to function correctly on the site.

Rebuilding the Content Server Index

After upgrading a web site from version 7.2 or earlier, you need to rebuild the content server index. This step is necessary because Site Studio updates the xWebsiteSection metadata field for all content items residing in folders on your site. The time it takes to rebuild the index depends on the size of the collection.

For more information on rebuilding the index, see the Content Server documentation.

Updating Your Custom Fragments

Most of the manual updates you will have to perform after upgrading your site involves modifying your custom fragments. If you are currently using the fragments that came with Site Studio, you do not have to do this because an updated version of each fragment is included in the latest version of the product.

Most likely, you have customized the fragments or introduced new ones to meet a specific purpose for your organization. The next three topics explain what you will have to do with the fragments so that they work in the latest version.

Modifying Links That Rely on the <base> Tag

The <base> tag that points to the weblayout directory is no longer used. During the site upgrade, Site Studio updates the necessary code in your layout pages and data files, but you will need to perform this step manually in your custom fragments and scripts.

You can do this by re-authoring hand-coded links that are relative to the URL in the <base> tag and use the “HttpRelativeWebRoot” server-side variable, instead.

Example

If you have a link to a graphic that looks similar to this:

```

```

You will replace it with the following:

```

```

Modifying Legacy SS_GET_PAGE / JavaScript Links

If any existing fragments use SS_GET_PAGE, javascript:link, or javascript:nodelink style hyperlinks, you may want to change them to path-based URLs to take advantage of their many benefits. (For more information, see “Hyperlink formats” in the Designer Guide.)

Example

If you have a link that looks similar to this:

```
<a href="javascript:nodelink(42);">link</a>
```

You will replace it with the following:

```
<a href="<!--ssServerRelativeSiteRoot-->products/servers/index.htm">link</a>
```

Update GET_SEARCH_RESULTS

Any fragment that used the GET_SEARCH_RESULTS service will continue to work, but will not take advantage of the newer features (found in version 7.5 or later) until it is upgraded to use the new SS_GET_SEARCH_RESULTS service.

There are a number of advantages when using the new service:

- ❖ **limitscope logic** (now provided by the service and not required in the fragment):
This limits the search results to only those items within the current web site.
- ❖ **dontshowinlists logic** (now provided by the service and not required in the fragment):
This limits the search results to only those items that have not been removed from lists by contributors.
- ❖ **ssUrl**: This new column provides a friendly URL for each row in the search results.

Fragments that use the GET_SEARCH_RESULTS service are typically dynamic list fragments and search results navigation fragments. The updates required will differ depending on the version of the Site Studio product that you are upgrading from:

- ❖ If you have been using version 6.5 of Site Studio, and you have customized dynamic lists or search results fragments using that version (for example, by copying a Site Studio fragment and adding custom code to it), you will have used code that performs limitscope logic using the old xWebsiteID metadata field.
- ❖ If you have been using version 7.2 of Site Studio, and you have customized dynamic lists or search results fragments using that version (for example, by copying a Site Studio fragment and adding custom code to it), you will have used code that performs limitscope logic using the new xWebsites metadata field. In addition you will have used code that performs dontshowinlists logic using the new xDontShowInListsForWebsites metadata field.

In both cases above, you need to update those fragments in order to remove the old limitscope and dontshowinlists logic from them and to use the new SS_GET_SEARCH_RESULTS service which now provides this functionality internally.

Example

In Site Studio 6.5, the Standard Dynamic List fragment includes the following code for the `SSLimitScope` parameter. This should be removed:

```
<!--$QueryText=eval(ssQueryText)-->
<!--$if ssLimitScope like "true"-->
<!--$if strEquals(QueryText, '')-->
<!--$QueryText='xWebSiteID=' & siteId-->
<!--$else-->
<!--$QueryText=(' & QueryText & ') and (xWebSiteID=' & siteId & ')-->
<!--$endif-->
<!--$endif-->
```

In Site Studio 7.2, the Standard Dynamic List fragment includes the following code for the `SSLimitScope` parameter. This should be removed:

```
<!--$QueryText=eval(ssQueryText)-->
<!--$if ssLimitScope like "true"-->
<!--$if strEquals(QueryText, '')-->
<!--$QueryText='xWebsites &lt;contains&gt; ' & siteId-->
<!--$else-->
<!--$QueryText=(' & QueryText & ') and (xWebsites &lt;contains&gt;' & siteId & ')-->
<!--$endif-->
<!--$endif-->

<!--$if strEquals(QueryText, '')-->
<!--$QueryText='not(xDontShowInListsForWebsites &lt;contains&gt; ' & siteId & ')-->
<!--$else-->
<!--$QueryText=(' & QueryText & ') and not(xDontShowInListsForWebsites &lt;contains&gt; ' & siteId & ')-->
<!--$endif-->
```

Once the old `limitscope` logic is removed from the fragment, change the `GET_SEARCH_RESULTS` service call to use `SS_GET_SEARCH_RESULTS`. Before you invoke the `SS_GET_SEARCH_RESULTS` service, however, you should set the following parameter values:

Parameter	Description
ssLimitScope	Specifies that the limitscope logic should be applied by the SS_GET_SEARCH_RESULTS service. Typically this true/false value will be supplied by a fragment parameter value.
ssDontShowInLists	Specifies that the dontshowinlists logic should be applied by the SS_GET_SEARCH_RESULTS service. Typically this true/false value will be set to “true” in all fragments.
ssTargetNodeId	Specifies the node ID that is used to display the search results. The “ssTargetSiteId” can also be used to generate links to other web sites on the content server. If the “ssTargetSiteId” is not specified, the generated link will assume the same site that originated the link.
ssTargetSiteId	Specifies the site ID that is used to display the search results. The “ssTargetNodeId” parameter must also be used to fully qualify the target node.
ssSourceNodeId	Indicates the node ID for the current page containing the link.
ssSourceSiteId	Indicates the site ID for the current page containing the link.
ssWebsiteObjectType	Specifies that the search results should be limited to a specific Website Object Type. Typically you will leave this value empty.
ssUserSearchText	Specifies any user text to perform a full text search. Typically, this only applies to Search Results fragments where the value is provided by a consumer entering a value in a Search Box fragment.

When looping through the results of the SS_GET_SEARCH_RESULTS service call, you will typically use the new “ssUrl” column of the resultset if you wish to create hyperlinks to that item. This ensures that full path-based URLs are used instead of cryptic ID-based URLs.

Additionally, these URLs should be appended with parameters that describe the source location of the link. This allows error pages to be generated properly when there are invalid links.

The following parameters should be affixed to the URLs.

Parameter	Description
ssSourceNodeId	Declares the source node ID. Used to generate friendly URLs if both ssTargetNodeId and xWebsiteSection are blank.
ssSourceSiteId	Declares the source site ID. This allows the error page to be displayed in the event that the target page cannot be found.

Here is a simplified example using Idoc Script:

```
<!-- New params for SS_GET_SEARCH_RESULTS -->
<!--$ssLimitScope="true"-->
<!--$ssDontShowInLists="true"-->
<!--$ssTargetNodeId=" "-->
<!--$ssTargetSiteId=" "-->
<!--$ssSourceNodeId=nodeId-->
<!--$ssSourceSiteId=siteId-->
<!--$ssWebsiteObjectType=" "-->
<!--$ssUserText=" "-->

<!--$executeService("SS_GET_SEARCH_RESULTS")-->

<!--$loop SearchResults-->
  <a href="<!--$ssUrl-->?ssSourceSiteId=<!--$siteId-->&ssSourceNodeId=
<!--nodeId-->">
    <!--$dDocTitle-->
  </a><br><br>
<!--$endloop-->
```

For more details, refer to the dynamic list and search results fragments that are provided with the Site Studio product.

Assigning a Website Section to Your Folders

Site Studio no longer uses folders (Folders component) to organize and manage your site hierarchy. If a web site from Site Studio 7.2 or earlier is upgraded, content that resides in a folder will have a new metadata value (“Website Section”) assigned to it so that it is recognized as part of the site in the latest version.

Any new content added to the folder, after the upgrade, will not receive this metadata value. As such, if you want to continue using folders to add content to your site, you must assign a “Website Section” value to each folder.

To assign an “Website Section” value, perform these tasks:

1. Log onto the content server as a user with **WRITE** access to the folder you want to update.
2. Select **Browse Content > Websites**.
3. Select the website to want to update.
4. For the particular folder you want to change, click **Folder Information**.
5. Select the **Update** action.
6. For Website Section, click **Browse**.
7. Choose the corresponding Website Section.
8. Click **OK**.
9. Click **Update**.
10. Repeat these steps for each folder that you want to map to a Website Section in Site Studio.

Updating JSP Code

If you have created JSP code based on `SiteStudio.SSNavigationBean` and `SiteStudio.SSNavigationNode` objects, references to these objects need to be changed so that “sitestudio” is all lower case, as follows:

- ❖ “sitestudio.SSNavigationBean”
- ❖ “sitestudio.SSNavigationNode”



THIRD PARTY LICENSES

OVERVIEW

This appendix includes a description of the Third Party Licenses for all the third party products included with this product.

- ❖ [Apache Software License](#) (page A-1)
- ❖ [W3C® Software Notice and License](#) (page A-2)
- ❖ [Zlib License](#) (page A-4)
- ❖ [General BSD License](#) (page A-5)
- ❖ [General MIT License](#) (page A-5)
- ❖ [Unicode License](#) (page A-6)
- ❖ [Miscellaneous Attributions](#) (page A-7)

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ZLIB LICENSE

* zlib.h -- interface of the 'zlib' general purpose compression library
version 1.2.3, July 18th, 2005

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