

What do you *want* your *website* to do?



# *PROJECT MANAGEMENT STARTER SITE DEVELOPER'S GUIDE*

*VERSION 1.1*

*REVISION 2*

Ektron® Inc.  
542 Amherst St.  
Nashua, NH 03063  
Tel: +1 603-594-0249  
Fax: +1 603-594-0258  
Email: [sales@ektron.com](mailto:sales@ektron.com)  
<http://www.ektron.com>

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# Ektron Project Management Starter Site

## *Overview*

### **What is a Starter Site?**

With version 6.1 of CMS400.Net, Ektron released a Software Development Kit (SDK) and a revised Application Programming Interface (API). These tools significantly enhanced CMS400's ability to provide a foundation for enterprise-class, Web-based content management initiatives.

To demonstrate the effectiveness of these tools, Ektron set out to develop an application proof-of-concept, based on a real-world use case. The resulting application had to demonstrate how CMS400.NET plus the SDK and revised API could be used as a development *platform*.

Thus was born an initiative to create a *Starter Site* – a fully-functional application that addresses a real-world problem using CMS400.NET as a development platform. An Ektron *Starter Site* is open-source application included with a CMS400.NET purchase. You are free to use starter sites as they ship, or customize them to suit your needs.

### **What is the *Project Management Starter Site*?**

The Project Management Starter Site (PMSS) addresses a common use case at Ektron: managing communication between Ektron and our clients.

Ektron routinely opens initiatives with clients that require ongoing management. These initiatives are not always contract-based – the PMSS is not a time-tracking application used for billing purposes. From a content deliverables perspective, these initiatives resemble a professional-services engagement. Ektron's initiatives comprise

- Stakeholder communications
- Status/Progress reporting
- Milestones
- Ongoing discussions – both internally and with clients
- Deliverable definition/specification documentation

The PMSS application provides a central place for initiative-based teams to communicate and store initiative-specific documentation.

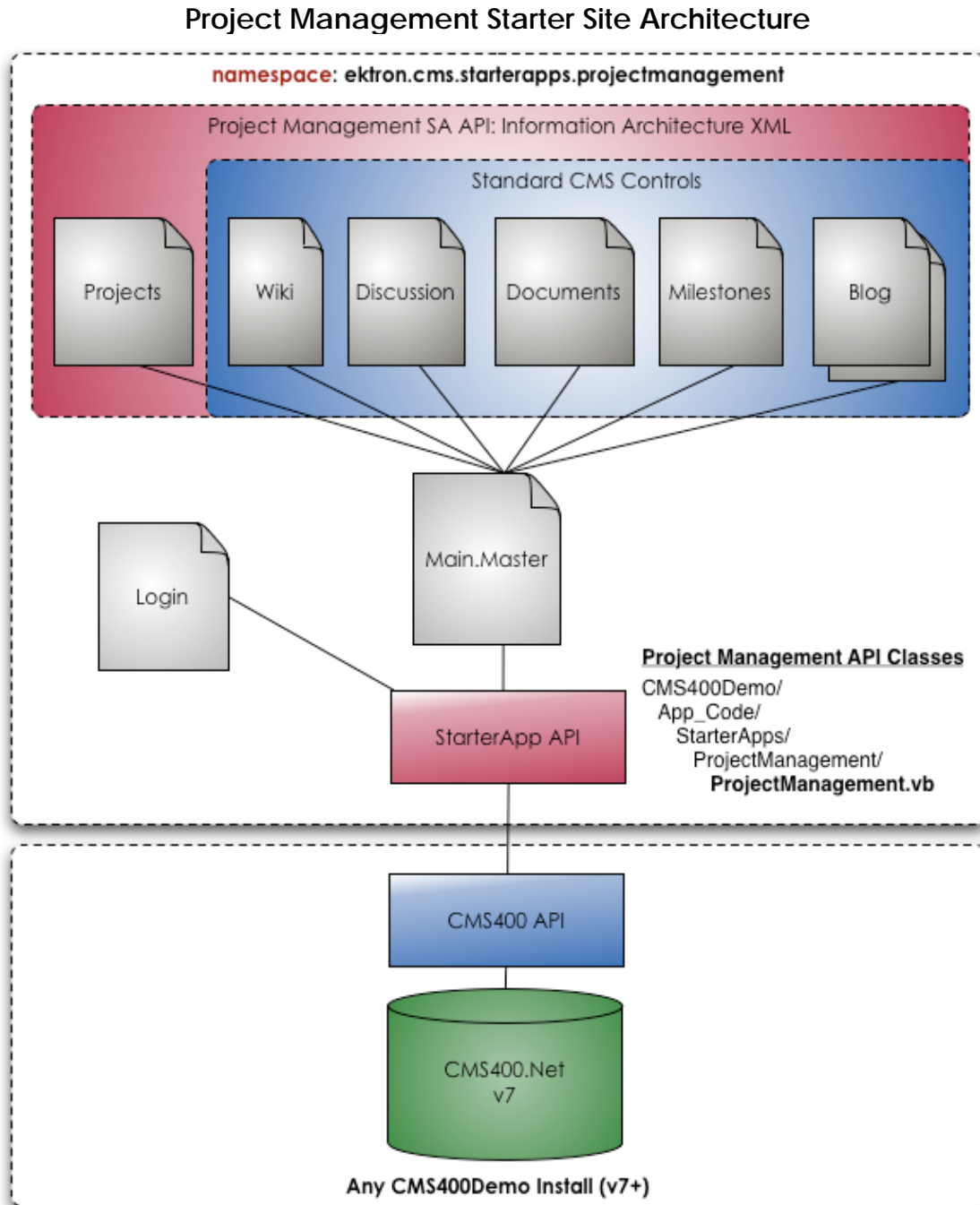
Specifically, the PMSS provides a permissions-based

- Wiki (HTML content)

- Discussion Area (Forums)
- Document repository
- Date-based "Milestones" repository
- Issue Tracker
- Open and Private Blogs

## PMSS Architecture

### Diagram



## PMSS Architecture Detail

The PMSS has two main template types. These types and their associated .NET aspx templates are described below.

Template Type	Template Name(s)	Description
Navigation-based	Projects.aspx	The user's <i>landing</i> page upon logging-in. Provides clients and projects the user is authorized to view and interact with.
Ektron server control-based	Wiki.aspx	Displays Wiki content for each project
	Discussion.aspx	Displays discussion forums available for each project
	Documents.aspx	Displays document repository for each project
	Milestones.aspx	Displays calendar milestones for each project
	Issues.aspx	Open, track and close issues that arise in the project
	Blog.aspx	Displays two blogs per project <ul style="list-style-type: none"> <li>• An "open" blog - viewable by any user authorized to view the project</li> <li>• A "private" blog - viewable only by certain users</li> </ul>

## PMSS's Relationship to CMS400.NET

The PMSS is built on top of the CMS400 SDK and API. This means it is entirely *forwards-compatible* with any version of CMS400.NET version 7.0 and above. So, you may independently upgrade your CMS400.NET installation with point releases without disturbing the PMSS.

## PMSS Installation

Since the PMSS is built on top of CMS400.NET, no separate installation is required. When you install CMS400.NET, the following files are moved to the locations specified below.

File Type	Location	Contains
Visual Basic .NET class file	<siteroot/> / App_Code / VBCode/ StarterApp / ProjectManagement / ProjectManagement.vb	Object classes used by the PMSS
PMSS application files	<siteroot/> / StarterApps / ProjectManagement	The main files of the PMSS

## Logging In

Logging in to the PMSS means entering admin credentials to the PMSS login template, which is normally “installed” at the following address:

<http://localhost/CMS400/StarterApps/ProjectManagement/login.aspx>

In addition, CMS400.NET’s default home page has a link to PMSS.

## PMSS Initialization

An initialization process occurs upon your first login to PMSS. The process performs several tasks, such as

- creates the “StarterApps” and “ProjectManagement” folders in the CMS400 database
- creates CMS400 usergroups
- creates metadata definitions
- registers display templates (see PMSS Architecture Detail above)

You will notice additions to your CMS400 Workarea after you copy the PMSS files to their proper locations and log in.

Ektron Extranet

Login

Username:

Password:

[Register](#) [Recover Password](#)

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## ***PMSS Navigation***

### **Overview**

The PMSS manages navigation by instantiating an XML-based information architecture for every user, on every page-load. The PMSS generates InformationArchitecture.xml by looping through each client folder, checking to see if the user making the request has been invited to projects belonging to each client.

Thus, InformationArchitecture.xml contains a list of all clients and projects the user can view and interact with, and all information necessary to generate navigation widgets.

The methods used to create InformationArchitecture.xml check to see if the user has been invited to a client. If so, he may view and interact with all of that client's projects. However, he cannot see nor interact with clients to which he is not invited.

### **User Types**

CMS400.NET and the PMSS have three user types

- CMS400.NET Administrator group members
- CMS users
- Membership users

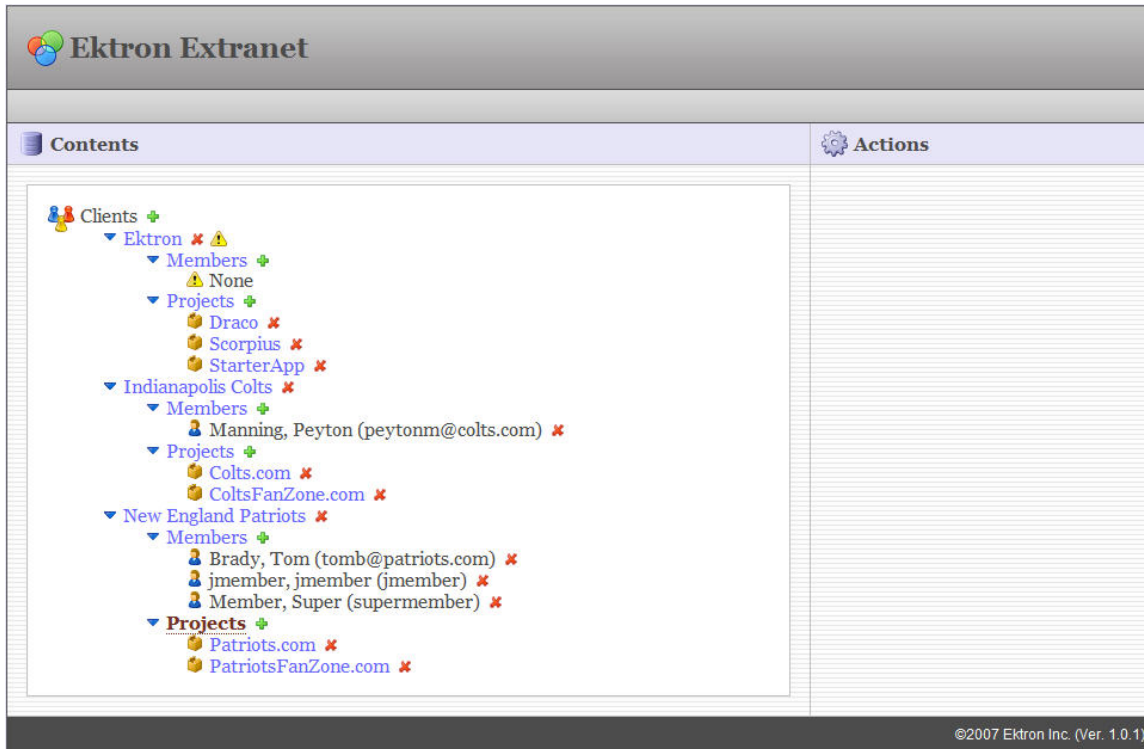
Administrator group members have view/add/remove rights to all clients and projects. They don't need to be invited to any clients.

Any Ektron CMS400.NET CMS user may log in. If you add a CMS400.NET user to the PMSS CMS usergroup ("starterapps.pm") in the Workarea, he can view/add/remove clients and projects, and invite members to projects. starterapps.pm members have "admin"-level rights to the PMSS.

Membership users are authenticated "guests" of PMSS. Any Membership user may log in. However, Membership users can only view and interact with clients and projects to which they have been invited. Membership users are invited to projects at the client level. That is, they are added to a user group set up for each client ("starterapps.pm.<clientName/>").

## The Projects Template

The projects template (project.aspx) is the landing page for users after log in.



Using InformationArchitecture.xml as its data source, the projects template displays all clients and projects the user can view and interact with. If the user is the CMS400.NET Administrator or a starterapps.pm members, he also sees remove buttons next to clients, projects and members.

## Adding, Removing and Inviting

Three main actions a user can take from the Projects template are described below.

Action	Glyph	Notes
Add		<ul style="list-style-type: none"> <li>CMS400.NET Administrators and CMS400.NET users may add Clients and Projects</li> <li>Membership users may add Projects</li> </ul>
Remove		<p>CMS400.NET Administrators and CMS400.NET users may remove Clients, Projects, and Members</p> <p><b>Note:</b> Removing a member does not delete the membership account</p>
Invite		CMS400.NET Administrators , CMS400.NET users, and Membership users may invite membership users to clients



## *PMSS Ektron Server Control-Based Templates*

### *Overview*

The following templates are based mainly on Ektron Server Controls

- Wiki
- Discussion
- Documents
- Milestones
- Issue Tracker
- Blog

## WIKI Template

The PMSS Wiki is the project's landing page.

The screenshot shows the Patriots.com Wiki interface. At the top is the Ektron Extranet logo and a navigation bar with links: home, new england patriots, patriots.com, wiki, discussion, documents, milestones, blog, private blog, and search. The main content area is titled "Patriots.com Wiki" and features a paragraph about the team's history, a list of categories, and a search box. The left sidebar includes "Recent Updates", "Search", and "Content Categories".

**Recent Updates**

- [add item](#)
- free agents**  
application administrator  
3/9/2007
- patriots.com wiki**  
application administrator  
3/9/2007

**Search**

Keywords:

**Content Categories**

Selected Category:  
📁 Top

Available Categories:  
📁 **General**  
📁 **Stakeholders**

Available Articles:

**Patriots.com Wiki**

Professional football arrived in New England on November 16, 1959, when a group of local businessmen, led by former public relations executive William H. "Billy" Sullivan, Jr. was awarded the eighth and final franchise in the new American Football League. One week later, Northwestern University running back Ron Burton was selected as the franchise's first draft choice and Syracuse running back Gerhardt Schwedes was selected as the team's first territorial choice.

- Hall of Fame
- Anniversary Teams
- Historical Dates
- All-Time Draft/Trade
- All-Time Player Lists
- Free Agents
- Super Bowl XXXVIII
- Super Bowl XXXVI
- Super Bowl XXXIX
- Past Rosters

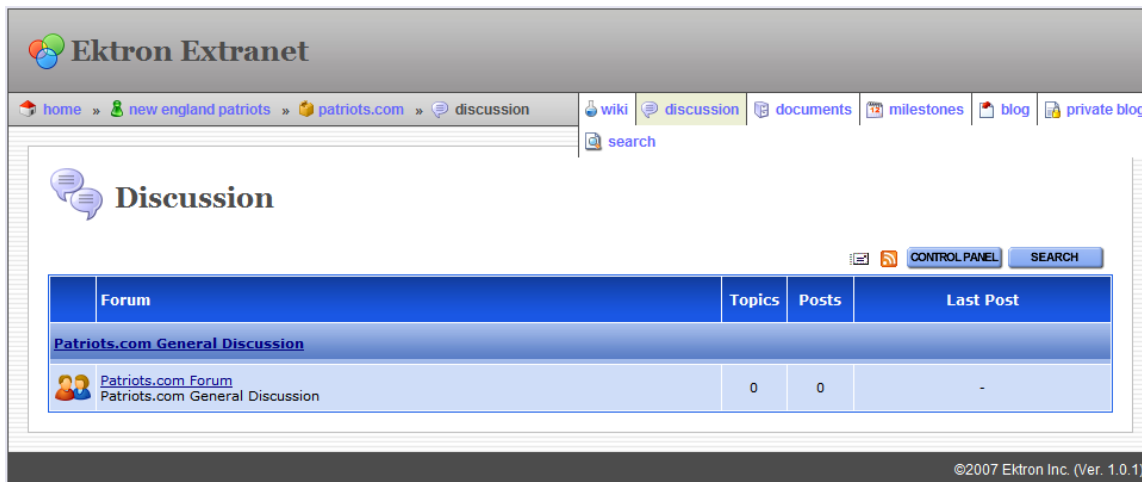
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This template provides an interface to Ektron Wiki capabilities (see CMS400 documentation for more information). This template is based on three Ektron Server Controls, described below.

Control	Notes
ListSummary	Uses EKML for presentation (<sitepath/> / StarterApps / ProjectManagement / ekml / Wiki.ekml)
Directory	Uses EKML for presentation (<sitepath/> / StarterApps / ProjectManagement / ekml / Taxonomy.ekml)
ContentBlock	

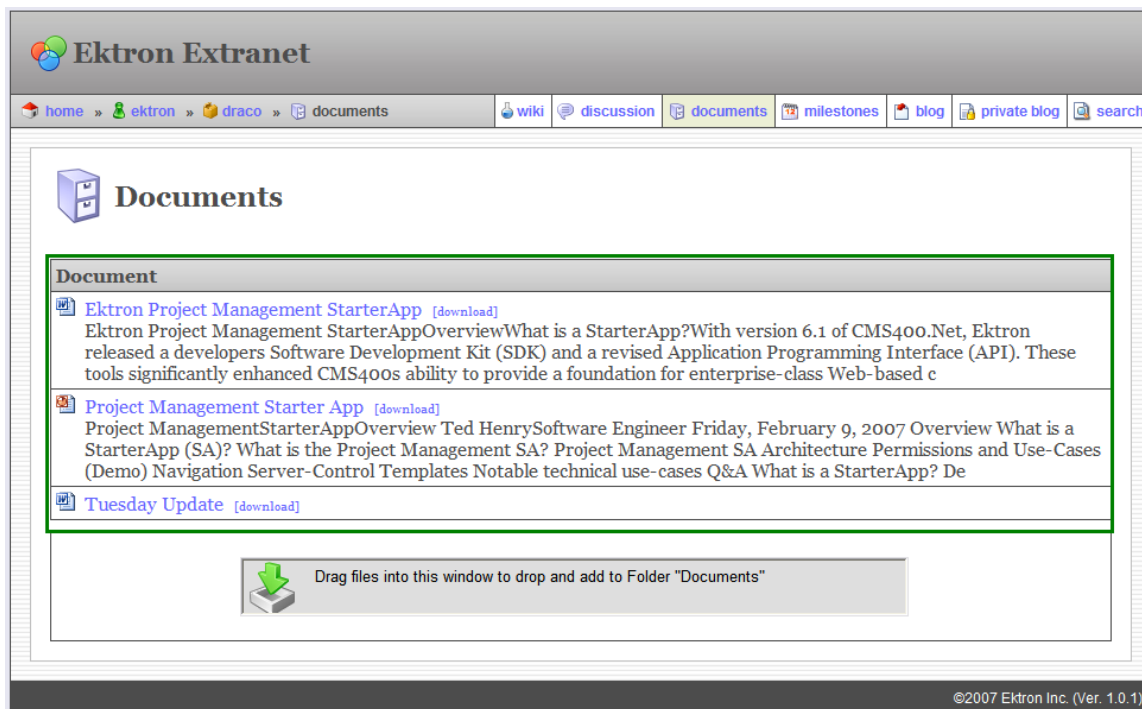
## Discussion Template

The PMSS discussion template provides an interface to Ektron's Discussion Forum (see CMS400 documentation for more information). This template does not modify the discussion control's feature set.



## Documents Template

The Documents template provides an interface to CMS400.NET's document management features.

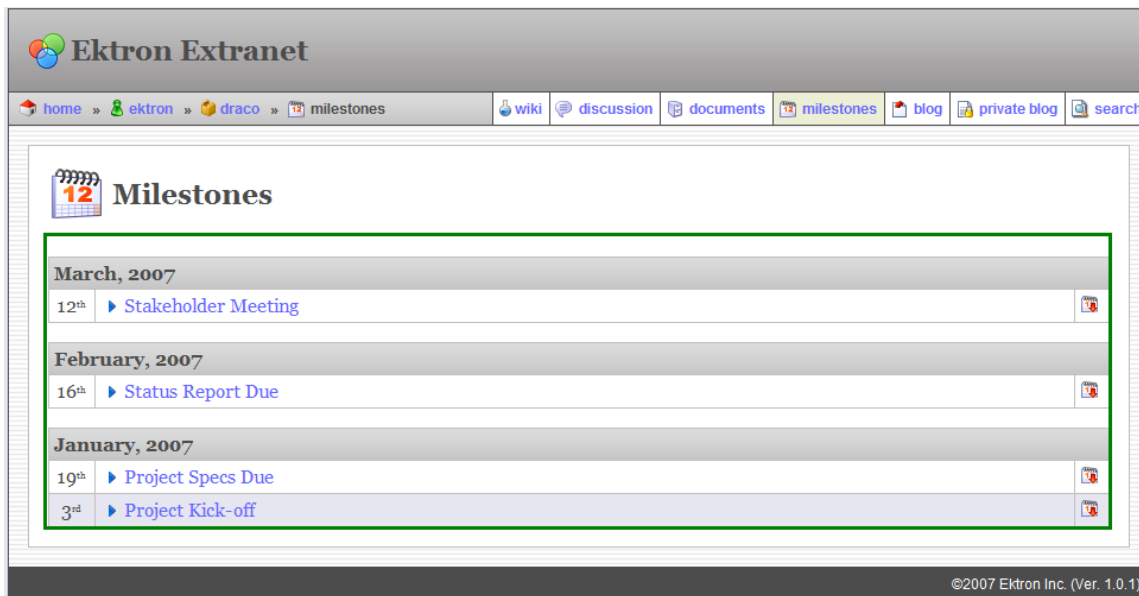


Using the Directory and ListSummary controls, users may drag-and-drop documents within this page, and have them listed for display.

This ListSummary control uses an EKML file to control the display. This file resides at `<site root> / StarterApps / ProjectManagement / ekml / Documents.ekml`.

## Milestones Template

The Milestones template provides an interface to collect and display important calendar dates (Milestones) for the project.

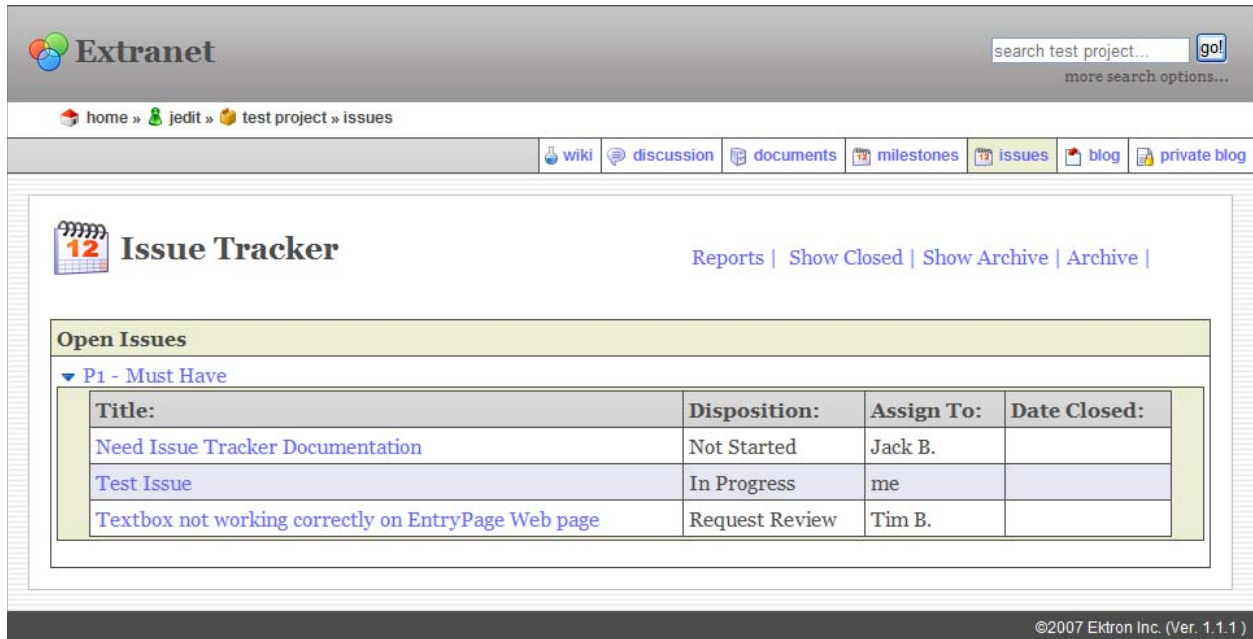


This template is based on the ListSummary control and uses an XSLT as its presentation medium. The control is data-bound, and the XML is extracted via code-behind in .NET.

Only CMS users can add Milestone content. Membership users may only view Milestones. Milestones are added via a CMS400 "SmartForm." After a Milestone is created, it may be imported into Microsoft Outlook's calendar.

## Issue Tracker Template

The Issue Tracker template provides an interface for members of the project to track issues with a project. See *A/so*: Ektron CMS400.NET Project Management Starter Site User Manual



The screenshot displays the Extranet Issue Tracker interface. At the top, there is a search bar with the text "search test project..." and a "go!" button. Below the search bar, there is a navigation path: "home » jedi » test project » issues". A secondary navigation bar contains links for "wiki", "discussion", "documents", "milestones", "issues", "blog", and "private blog". The main content area is titled "Issue Tracker" and includes a "12" icon. Below the title, there are links for "Reports", "Show Closed", "Show Archive", and "Archive". The "Open Issues" section is expanded to show a table of issues. The table has four columns: "Title", "Disposition", "Assign To", and "Date Closed".

Title:	Disposition:	Assign To:	Date Closed:
<a href="#">Need Issue Tracker Documentation</a>	Not Started	Jack B.	
<a href="#">Test Issue</a>	In Progress	me	
<a href="#">Textbox not working correctly on EntryPage Web page</a>	Request Review	Tim B.	

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This template is based on the ListSummary control and uses an XSLT as its presentation medium. The control is data-bound, and the XML is extracted via code-behind in .NET.

CMS users can add, edit, close and archive Issues. Membership users may only view Issues. Issues are added via a CMS400.NET "SmartForm."

## Blog Template

The Blog template uses the standard CMS400 Blog control.

Ektron Extranet

home » nfi » patriots » blog

wiki discussion documents milestones blog private blog search

### Patriots Blog

all client members may view and contribute to this blog

add post

#### Project Kick-off

edit permanent link

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras augue erat, egestas et, tincidunt sed, imperdiet elementum, odio. Pellentesque eget lorem vel tellus accumsan malesuada. Suspendisse a metus at urna semper pellentesque. Quisque sollicitudin purus vitae erat auctor aliquet. Mauris quis nisi. Integer ac elit. Nam neque pede, interdum in, accumsan eu, tincidunt ac, turpis. Aenean tincidunt. Nulla interdum, lectus vel tristique pharetra, felis pede ullamcorper enim, eget mattis libero dui sit amet erat. Praesent nibh neque, pulvinar a, ultricies id, pellentesque aliquam, pede. Nam imperdiet pellentesque sem. Proin rhoncus aliquet erat. Nulla facilisi. Ut posuere. Vivamus dictum nunc a arcu. Etiam convallis. In ligula ipsum, lobortis non, ultricies sit amet, varius non, nunc.

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Morbi ullamcorper sapien a est. Suspendisse potenti. Sed id leo et eros gravida iaculis. Nunc nec nulla. Etiam a nisl. Donec nulla lacus, rutrum eget, condimentum a, lobortis in, turpis. Ut gravida. Aenean vitae ipsum. Etiam commodo. Nam et libero vel nunc bibendum ornare. Sed vulputate felis quis diam.

Posted by Ted Henry at 3/12/2007 5:09 PM Comments (0)

subscribe

<< march 2007 >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Blogroll

Archive

- march 2007

Categories

- status
- questions

Recent Posts

- project kick-off

The control renders two types of blogs per project.

- a public blog - all project members can view and interact with
- a private blog - only CMS users can view and interact with

Based on the requesting user's type (CMS user or Membership user), the navigation methods that retrieve the Information Architecture (see PMSS Navigation above) will include a link to the private blog.

Only a CMS user can view and interact with the private blog. Membership users do not see the link to "Private Blog."