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1 Overview of Template Creation

SiteExecutive allows users to build sites using templates. Templates contain common site elements like navigational features, footers, headers, etc. Templates enable the enforcement of a common look and feel for a website.

Unlike first-generation web content building tools, SiteExecutive allows integration into the template of a number of dynamic components including, but not limited to:

- Date/time
- Cookie trails/path to pages
- Site Search
- URL’s/page names
- Included global elements
- Style sheets for body content and templates
- SiteExecutive modules (event calendars, custom forms, etc.)
- Dynamic content

In SiteExecutive, templates can be created using the SiteExecutive editor just as pages are created. Templates created using other applications, such as Dreamweaver, may be imported. Once imported or created, the templates can then be applied to individual pages or all pages in a folder in SiteExecutive.

Using templates in SiteExecutive has various advantages, some of which include:

Templates function as pages: Templates are built dynamically. Changes to templates are valid upon publication. Templates also have versions and may have approval policies applied to them.

Templates use modules: Using the various modules it is possible to create a single set of templates that may serve large sites.

Content is separated from presentation: This allows modifications and global updates to be made affecting thousands of pages without broken links and other formatting problems.

1.1 Using Templates

In SiteExecutive, templates are built using the same tools used to build pages and in many cases are similar to pages. Templates provide consistency, while incorporating content in a designated area.

Templates may include:

- Body content area
- Template-level navigation (What’s Here, What’s New, and See Also modules)
- Included content for global elements (navigation, headers, footers, announcements)

Similar to pages, templates:

- Are subject to style definitions
- Are subject to approval policies and permission settings
♦ Have versions, which can be recalled
♦ Can be stored anywhere in the site tree
♦ Can be renamed, moved, copied or deleted

1.2 Separating Content from Presentation

SiteExecutive allows a designer to establish the framework for the web site, instead of relying on the content manager to maintain the look and feel and general functionality of the web site. Content editors may still contribute content and make changes to content as desired without worrying about general look and feel of the web site.

Instead of having to understand the peculiarities of HTML and the functions that may drive those pages, a user-friendly and familiar metaphor is provided for the creation of templates.

1.2.1 Designating a Body Content Area

The editor used to build pages is also used to build templates. The template editor is identical to the page editor in every way except that it allows for editing of styles and allows the designation of a body content area, which determines where the page content will appear.
1.2.2 Editing Templates

When previewing a template, it is possible to see the layout of the template.

In edit mode, it is possible to see the elements that define the template and the inclusion of the **Body Content Marker** that designates where content will appear on a published page.
1.3 Template Samples

The SiteExecutive editor allows, with practice, all the capabilities required to produce professional templates. The samples below demonstrate use of some of the features within SiteExecutive.

1.3.1 Training Sample

Templates rendered in training may be simple.

The left side of the page consists of the body area. The What's Here module is on the right side.
1.3.2 Johns Hopkins School of Public Health

http://www.jhsph.edu

The template is comprised of a series of embedded tables and content includes. It provides full site navigation and allows for interaction with various authors without providing access to the template directly.
1.3.3 Greater Baltimore Medical Center
http://www.gbmc.org

This template makes extensive use of the DHTML Link Menu module to create left and top navigation. As with other templates, it has a number of includes and embedded modules (The Source). These provide site-wide functions embedded in the template.
1.3.4 Maryland Department of Transportation

http://www.mdot.state.md.us

The MDOT site provides access to a wide-range of resources. The **DHTML Link Menu** module is used in multi-level mode to allow rapid navigation from the front page.
1.3.5 Baltimore County Government
http://www.co.ba.md.us/

The Baltimore County site provides a gateway for residents to find information regarding the various services provided by local government.

1.4 Key Elements of a Template

1.4.1 Body Content Area

The insertion of the body content marker is crucial in a template. The body content marker designates the body content area. If a template without a body content area is applied to a page, the content will not appear. While the template serves as the framework, the body content area will contain the content editor’s contributions to a page.

1.4.2 Style Sheets

Style sheets may be imported or created within SiteExecutive and applied to templates. Style sheets may be accessed while a template is in edit mode from the editor toolbar or within the Style Sheets folder in the site tree. Style sheets will define the appearance of text, links, etc.

1.4.3 Tables

To create a professional and structured template, a table should be used. A table allows the use of multiple modules, styles, objects, etc. Tables should be used as the foundations for templates.
1.4.4 Object Inclusion

The **Object Inclusion** module may be used to include elements, such as headers, footers, files, etc. on multiple pages that have templates assigned to them. Using the **Object Inclusion** module at the template level with the dynamic option checked allows content displayed to change at the folder level.

1.5 User Proficiency

Creating templates of any scale is necessarily complex. SiteExecutive hides the sophisticated process of creating a template from typical designers. With the knowledge of style sheets, modules, tables, and basic page creation skills, users will be able to fully develop a professional template.

1.5.1 Core Template Creation Skills

The average designer must be familiar with the following skills to create and maintain templates:

- Creating and using style sheets
- Adding templates
- Modifying templates
- Approving and publishing templates
- Applying templates to folders and pages
- Building tables to define templates
- Inserting dynamic headers
- Creating global links
- Creating advanced dynamic navigation
- Using the **Object Inclusion** module
- Importing templates

1.5.2 Additional Skills

Additional skills recommended for the creation and management of templates, which will not be taught are:

- Creating graphics (Photoshop, Dreamweaver, Image Ready, etc).
2 Style Sheets

In SiteExecutive, style sheets may be imported, created, edited, deleted and exported. Style sheets allow users to use a wide variety of styles and text types within pages and templates in SiteExecutive. For example, text for subscript and superscript may be defined in a style sheet. In addition, font sizes may be defined for text. The style sheet functionality provides fully configurable access to any CSS property. Most of the properties available within the CSS 2.0 specification are available out of the box, but other, more specific, properties can be added by modifying an XML configuration file. Likewise, deleting it from, or commenting it out, in the same configuration file, can remove access to any property. CSS can control everything from the size of font to layout of elements on a site. Using CSS capabilities, designers can change the entire look of a web site without making any changes to templates or pages.

SiteExecutive allows means of storing and accessing style information, versioning of style sheets, management of styles and many more advanced style sheet functionality. While style sheets are subject to permissions, they are not subject to any workflow process. Style sheets are stored within the site tree under the style sheets folder but may also be created in and moved to other folders. Style sheets are assigned to templates and as templates are applied to pages, styles become available to content editors at the page level. For some of the links, navigational modules and core modules, there is a **Class:** field available allowing users to select a style created in the style sheet associated with the template used.

The following terminology is useful when using style sheets:

**Style sheet:** Refers to a group of related styles.

**Statement:** A CSS style sheet, for any version of CSS, consists of a list of statements. CSS allows for two kinds of statements: at-rules and rule sets. Within SiteExecutive only rule sets may be used. A rule set (or “rule”) consists of a selector followed by a declaration block. Example: \td \{ color:black; \}.

**Selector:** The selector consists of everything up to, but not including, the first left curly brace ("{" ) of a statement. In the example statement above, \td is the selector.

**Declaration Block:** A declaration block starts with a left curly brace ("{" ) and ends with the matching right curly brace ("}" ). In between there must be a list of zero or more semicolon-separated (; ) declarations. In the example statement above, \{" color: black; \}" is the declaration block.

**Declaration:** A declaration within a declaration block may be empty or may consist of a property, followed by a colon (":"), followed by a value. The declaration in the example above is “color: black” where “color” is the property and “black” is the value.

**Type Selector:** A type selector matches the name of a document language element type. A type selector matches every instance of the element type in the document tree.
**Class Selector**: A class selector applies style information to one or more HTML elements that are assigned a given class name.

**ID Selector**: A selector that references a specific HTML element by its ID attribute.

**Descendent Selector**: A descendent selector that matches a relationship between HTML elements. For example, the following style would be applied to any EM element, which is contained within an H1 element: h1 em { color: #ff0000; }.

**Child Selector**: A child selector matches when an element is the child of another element. A child selector is made up of two or more selectors separated by ">".

**Attribute Selector**: An attribute selector allows authors to match elements based on the existence of an attribute or the value of an attribute. The following style definition would apply to an A element whose target URL is http://www.cnn.com: a[href="http://www.cnn.com"] { font-size: x-large; }.

**Pseudo-classes**: Pseudo-classes classify elements on characteristics other than their name, attributes or content in principle characteristics that cannot be deduced from the document tree. Pseudo-classes may be dynamic, in the sense that an element may acquire or lose a pseudo-class while a user interacts with the document (e.g. a:hover).

**Pseudo-elements**: Pseudo-elements create abstractions about the document tree beyond those specified by the document language. For instance, document languages do not offer mechanisms to access the first letter or first line of an element's content. CSS pseudo-elements allow style sheet designers to refer to this otherwise inaccessible information.

### 2.1 Creating a New Style Sheet in SiteExecutive

#### 2.1.1 Creating a New Style Sheet

*Note: Users must have write permissions to the folder or site where the style sheet will be created.*

To create a new style sheet:

1. Select the desired folder in the site tree.
2. Select the **General** tab.
3. Double-click **Create Style Sheet** in the information area.

The **Create Style Sheet** dialog box will appear.
4. Enter a name for the style sheet in the Name: field.

5. Click Save.

The site tree will refresh with the created style sheet selected.

2.1.2 Viewing the Style Sheet

Once a style sheet is created, it may be viewed.

To view a style sheet:

1. Select the desired style sheet in the site tree.

2. Select the Preview/Edit tab.

The style sheet will appear with an editor tool bar.
2.1.2.1 The Editor Tools

While in edit mode, an editor toolbar is available.

These tools allow designers to perform necessary functions within the style sheet.
The tools are defined as follows:

<table>
<thead>
<tr>
<th>Tools:</th>
<th>Description:</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Style Definition</td>
<td>Allows the creation of selectors for different types of styles. The style sheet must be in edit mode for this tool to become active.</td>
</tr>
<tr>
<td>Edit Selector</td>
<td>Allows revisions to an existing selector or type of style. The selector must be selected.</td>
</tr>
<tr>
<td>Delete Style</td>
<td>Deletes a style completely from a style sheet so it is no longer available.</td>
</tr>
<tr>
<td>Version</td>
<td>Shows active and editable versions of a style sheet.</td>
</tr>
<tr>
<td>Usage</td>
<td>Indicates the templates and pages currently using the selected style sheet.</td>
</tr>
<tr>
<td>Edit Style Sheet</td>
<td>Allows revisions to be made to a style sheet. Places the style sheet in edit mode.</td>
</tr>
<tr>
<td>Save</td>
<td>Commits all changes and additions completed.</td>
</tr>
<tr>
<td>Close</td>
<td>Closes the edit mode of the style sheet. Shows a preview of the finished style sheet.</td>
</tr>
<tr>
<td>Publish</td>
<td>Allows the style sheets to become active and available for use on templates.</td>
</tr>
</tbody>
</table>

### 2.1.3 Editing the Style Sheet or Selector

Once a style sheet is created, it may be edited. New styles may be added into the style sheet at any time.

**To edit a style sheet or selector:**

1. Select the desired style sheet in the site tree.
2. Select the **Preview/Edit** tab.
3. Click the **Edit Style Sheet** tool.

The style sheet screen will split in three sections. The code window is the top section and will display all style properties and values. The preview window on the bottom will display a preview of the styles as defined in the code window. On the right, a pane will list all the statements, which display formatting properties and values.
4. Click the **New Style Definition** tool to add a new style.

The **New Selector** dialog box will appear.

5. Select a type of selector from the **Type:** field.

The dialog box will display different options depending on the type of selector chosen.
The types of selectors are defined as follows:

**Class:** Defines a unique property that will be available to all text, content, elements, etc. If this is selected, a class name must be entered in the **Class:** field. These names will appear in the **Font Style:** field for content editors and may also be accessed in most module properties, table properties and link properties. Tags defined using the Class type will be available for all content elements.

**Tag:** Defines a unique property to an entire element. For example, designers may define all links, all lists, all table borders, etc. These styles will define the element on all pages and templates to which the style sheet is assigned. If this is selected, a tag must be selected from the **Tag:** field.

**Advanced:** Classifies elements on characteristics other than their name, attributes or content in principle characteristics that cannot be deduced from the document tree. If this is selected, the appropriate tag or selector must be entered in the **Selector:** field. Tags not available via the Tag type may be created using the Advanced type.

**Note:** Similar to the hierarchy in CSS, styles in SiteExecutive function in a hierarchical manner. For example, if the li tag (lists) is used to determine general list properties, etc. and the ul and ol tags (specific to unordered lists and ordered lists) are used to determine other properties for specific kinds of lists, unordered and ordered lists will inherit properties not defined at the individual level but defined at the general list level with the li tag.

6. Click **Save.**

The selector name will appear on the left side followed by a declaration block. A list of formatting-type statements will appear on the right side.
7. Click on the down arrow beside each formatting statement to add declarations to the style. A window will appear with options for each specific formatting option.

8. Select declaration statements for each style. Declarations will appear in the declaration blocks under each style.
9. Repeat all steps to add additional styles in the selected style sheet.

2.1.4 Saving and Closing the Style Sheet

When revisions are made to a style sheet, the sheet must be saved in order for revisions to be committed. The style sheet should also be closed when saved.

To save a style sheet:

- Click the Save tool, while the style sheet is in edit mode.

To close the style sheet:

- Click the Close tool.

If changes were not saved, a warning message will appear allowing the user to cancel if saving is desired.
2.1.5 Publishing a Style Sheet

To publish a style sheet:

1. Click the Publish tool.

The Publish Style Sheet dialog box will appear.

2. Click OK.

This may take several seconds.

The style sheet will be published and may be applied to a template once it has been published.
2.1.6 Deleting a Selector

To delete a style selector within a style sheet:

1. Select the desired style sheet in the site tree.
2. Select the Preview/Edit tab.
3. Click the Edit Style Sheet tool.
4. Select the style desired for deletion.
5. Click the Delete Style tool.

The Delete Style Definition dialog box will appear. A warning message appears.

6. Click OK to delete the style.

2.1.7 Editing a Selector

Once a selector is created in a style sheet, it may be edited.

To edit a selector:

1. Select the desired style sheet in the site tree.
2. Select the Preview/Edit tab.
3. Select the desired selector for changes.
4. Click the Edit Selector tool.

The Edit Selector dialog box will appear allowing revisions.
5. Make necessary changes to the selector.
6. Click Save.

2.1.8 Viewing Style Sheet Usage

The Usage tool is available to view the templates and pages that are using a specific style sheet. This allows designers to verify the use of the style sheet before deleting it.

To view which templates and pages are using a style sheet:

1. Select the desired style sheet in the site tree.
2. Select the Preview/Edit tab.
3. Click the Usage tool.

The Style Sheet Usage window will appear.
4. Select **Pages** or **Templates**.

A list of templates or pages (depending on the option selected) will appear. This list may be printed.

**Note:** The Usage tab also displays the templates and pages using the selected style. Placing the mouse pointer on the name of the object displays the path to that object.
2.2 Importing a Style Sheet

In addition to creating style sheets, users may also import style sheets.

To import a new style sheet:

1. Select the desired folder in the site tree.
2. Select the General tab.
3. Double-click Create Style Sheet in the information area.

The Create Style Sheet dialog box will appear.

4. Select Import From File by clicking in the check box.

A Style Sheet: field will become available.

5. Click Browse in the Style Sheet: field.

The Choose file dialog box will appear.
6. Select the desired style sheet file to import.

7. Click **Open**.

8. Enter a name in the **Name:** field if renaming is desired.

9. Click **Save**.

The site tree will refresh with the imported style sheet selected.
2.3 Renaming, Copying, Moving and Deleting a Style Sheet

A style sheet may be renamed, copied, moved and deleted within SiteExecutive. These processes are very similar to renaming, copying, moving and deleting folders, pages and other objects. When a style sheet is selected, the General tab displays the following icons:

- Rename Style Sheet
- Copy Style Sheet
- Move Style Sheet
- Delete Style Sheet

To rename, copy, move or delete a style sheet:
1. Select the desired style sheet in the site tree.
2. Select the General tab.
3. Click on the desired icon (Rename Style Sheet, Copy Style Sheet, Move Style Sheet or Delete Style Sheet) in the information area.

2.4 Applying the Style Sheet to an Existing Template

Once a style sheet is created, the style sheet can be assigned to a template. Pages using the selected template will inherit the style sheet selectors created.

To apply the style sheet to an existing template:
1. Select the desired template.
2. Select the Properties tab.
3. Click Edit.
4. Click the Select Link icon in the Style Sheet: field to select the desired style sheet for the template.

5. Click Select.

6. Click the Select Link icon in the Content Style Sheet: field to select the desired style sheet for the page contents.

7. Click Select.

8. Click Save.

Changes on the template will not appear until the template is republished. All pages using the selected template will have the style sheet styles available.

2.5 Exporting a Style Sheet

Style sheets may be exported in SiteExecutive. This allows style sheets to be opened or saved as necessary.

To export a style sheet:

1. Select the desired file in the site tree.

2. Select the General tab.

3. Double-click Export Style Sheet in the information area.

The File Download dialog box will appear.

4. Select the desired option.

The style sheet may be opened or saved. Clicking Save will open the Save As window. This provides users with the capability of saving the style sheet to any desired location.
3 Designing a Template

3.1 Creating an Initial Template

To create a template, the designer must have read and write access to the folder in which the template will be created. For example, if the template will be created in the Templates Collection folder in the site tree, the designer must have read and write access to the Templates Collection folder.

To create a template:

1. Select Templates Collection in the site tree.

*Note: Templates can be created in any folder and, like other objects can be renamed, moved, or copied. This restricts templates to users with permissions to given folders.*

2. Select the General tab.

3. Double-click Create Template in the information area.

The Create Template dialog box will appear.
4. Enter information in the available fields.

   **Note:** << indicate that these fields require information.
   SiteExecutive will not allow designers to proceed without completing these fields.

   The fields are defined as follows:

   **Name<<:** Refers to the title for the template. Only spaces, letters, numbers, hyphens and underscores are allowed in template names. This field is limited to 255 characters. The name of the template will appear in the site tree.

   **Default Language<<:** Allows the selection of a language for specific items. The language selected determines the default dictionary the system will use when spell checking. This default dictionary may be changed at the individual page level.

   **Style Sheet:** Allows a style sheet to be assigned to the overall template.

   **Content Style Sheet:** Allows a style sheet to be assigned for the body content.

   **Description:** Allows the entry of descriptive text.

5. Click **Save**.

   The site tree will refresh and the template will appear selected.
3.2 Modifying Template Properties

Once the template is created, the template may be modified and the properties may be established.

To establish the template properties:

1. Select the desired template in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Template.

The selected template will appear.
4. Right-click on the template window.

Template options will appear.

Template Properties

Copy
Cut
Paste
Paste External Data

5. Select **Template Properties**.

The **Update Template** dialog box will appear.
6. Enter information in the available fields.

   The fields are defined as follows:

   **Template Style**: Applies a style sheet to the template.

   **Page Style**: Applies a style sheet to the page content (designated by the body content area).

   **Margin Width**: Defines the position of the template in relationship with the top, bottom and sides of the page. This value is in pixels.

   **Background Color**: Refers to the color of the background. If this field is left blank, the background will default to white.

   **Link Color**: Defines all link colors.

   **Visited Link Color**: Defines the color of the links that have been visited.

   **Active Link Color**: Defines the color of the links to sites that are still currently open.

   **Hover Link Color**: Defines the color of all links when the mouse pointer is placed on the link.

   **Note**: The properties determined on a style sheet will override the property settings entered in the Update Template dialog box. Deprecated properties may be removed in future versions of SiteExecutive and defining these properties on a style sheet is recommended.

7. Click **Save**.

   The **Update Properties** dialog box will close and the template properties will be established.
3.3 Modifying a Template

Once the template properties are established, the template may be modified and the body content marker inserted to designate where the content will appear upon publication. To modify the template, the editor tools should be used. The editor toolbar in templates is almost identical to the editor toolbar in pages.

3.3.1 The Editor Tools

While in edit mode, processor-like tools are available on the editor toolbar, allowing template designers to format text and perform other functions within the template.

<table>
<thead>
<tr>
<th>Tools:</th>
<th>Description:</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Bold, Italic, Underline" /></td>
<td>Provides formatting options; these attributes may be applied to any text entered on the page.</td>
</tr>
<tr>
<td><img src="image" alt="Left Flush Text, Center Text, Right Flush Text" /></td>
<td>Aligns selected text and paragraphs to the left, center or right of the page.</td>
</tr>
<tr>
<td><img src="image" alt="Indent Paragraph, Outdent Paragraph" /></td>
<td>Moves selected paragraph approximately ½” to the right or left of the page.</td>
</tr>
<tr>
<td><img src="image" alt="Ordered List, Unordered List" /></td>
<td>Creates numbered lists and bulleted lists.</td>
</tr>
<tr>
<td><img src="image" alt="Find, Replace" /></td>
<td>Allows the search and replacement of specified text.</td>
</tr>
<tr>
<td><img src="image" alt="Undo, Redo" /></td>
<td>Undo reverses the last editing action and Redo annuls the last Undo action performed.</td>
</tr>
</tbody>
</table>

*Note: The Undo and Redo tools should be used with caution, especially with tables. The tool will undo or redo individual tags. Users may have to click Undo or Redo several times before it will completely undo or redo the last performed function.*
**Tools:**

<table>
<thead>
<tr>
<th>Description:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Spell Check</strong></td>
</tr>
<tr>
<td>Provides a spell check for page contents based on the default dictionary.</td>
</tr>
<tr>
<td><strong>Note:</strong> While the spell check tool checks spelling in modules, it does not save changes made to spelling in modules.</td>
</tr>
</tbody>
</table>

| **Page Dictionary and Spell Check** |
| Displays multi-language dictionaries available and allows the changes of the default dictionary options for the selected page. |
| **Note:** Multiple dictionaries must be selected each time the spell check will be performed. |

| **Edit Styles/Stylesheets** |
| Displays the current style sheet applied to that template and allows revisions to the style sheet. Revisions made to style sheet via this tool will display after the template is exited. |

| **Insert Special Characters** |
| Inserts special characters into the page content. |

| **Insert Horizontal Rule** |
| Inserts a horizontal rule. The alignment, width, color, size and shading of the rule may be specified. |
| **Note:** This should be used to separate objects or text. When inserted, the rule will display with space before and after it, therefore it cannot be used to underline text. |

| **Insert a Table** |
| Inserts an HTML-based table. |

| **Insert an Image** |
| Inserts a graphic on the page from the site tree. |

| **Insert a Link** |
| Creates HTML links from text or objects to other pages or elements in the site tree. Allows the creation of Internal, External, MailTo and Anchor links. |

| **Insert an Anchor** |
| Creates a target location within a page that can be referenced to point to a specific part of a page. |
3.4 Inserting the Body Content Marker

To designate the body content area:

1. Select the desired template in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Template.
4. Click in the template where the content marker will be inserted.
5. Click the Insert Body Content Marker tool.

The body content marker will occupy the entire space in which it is inserted. For example, if the body content marker is inserted in a table cell, it will occupy the entire cell.
3.5 Saving and Closing a Template

When a template is edited, revisions are only committed when that template is saved. If no changes are made to the template, designers may navigate to other areas in SiteExecutive. However, if changes are made to the template, all changes must be saved before exiting.

3.5.1.1 Saving a Template

To save a template:

♦ While the template is in edit mode, click the Save tool.

This will commit the changes to the database. The template will appear in edit mode for further editing.

3.5.1.2 Closing a Template

To close a template:

♦ While the template is in edit mode, click the Close tool.

This will close the edit session. The template preview will appear. If the template was edited but not saved, the system will prompt the user to save changes or close the template without saving changes.
3.5.1.3 Saving and Closing a Template

To simultaneously save and close a template:

- While the template is in edit mode, click the **Save and Close** tool.

This will commit changes to the database and will close the edit session. The template preview will appear.

*Note: In many instances, a template must be saved for revisions to be visible.*

3.6 Approving and Publishing a Template

Approving and publishing a template makes the template available to be assigned to a page.

*Note: The template must be saved before approval can take place.*

To approve and publish a template:

1. Select the desired template in the site tree.
2. Select the **Approval** tab.
3. Click **Publish Document**.

The **Publish Document** dialog box will appear.

4. Click **OK** to publish the template.
The **Approval** tab will appear listing the **Approval Workflow History**. **Approval Workflow History** will display the time and date of publication and the username of the publisher.

Note: Templates are subject to permissions just like pages.
4 Applying Templates to Folders and Pages

Once a template is created, it can be assigned to folders and pages. There are two ways to apply templates to folders and pages. Templates can be applied to folders or pages using the Properties tab or using the Template Administration tool. Via the Properties tab, content editors with read/write permissions may assign templates to folders or pages. The Template Administration tool requires administrative access.

4.1 Using the Folder or Page Properties

At the folder or page level, the Properties tab may be selected to view the template assigned. If the template is changed at the folder level, the new template selected will be assigned to pages created in the folder by default.

To apply a template using the Properties tab:

1. Select the desired folder or page.
2. Select the Properties tab.
3. Click Edit.
4. Click the Select Link icon in the Template: field to select a different template.

The Explorer window will appear.
5. Select the desired template in the site tree.
6. Click **Select**.
7. Click **Save**.

The properties will display with the selected template.

### 4.2 Using the Template Administration Tool

If administrative rights are available, the **Template Administration** tool can be used to apply a template to all pages within a folder.

**To apply a template using the Template Administration tool:**

1. Select the desired folder.
2. Select the **General** tab.
3. Double-click **Template Administration** in the information area.

The **Template Administration** dialog box will appear.
4. Click the **Select Link** icon in the **Template:** field to select a different template.

The **Explorer** window will appear.

5. Select the desired template in the site tree.

6. Click **Select**.

7. Select **Apply to this folder and all subfolders** if desired. This will assign the template to all existing subfolders. If this is not selected, only pages created from this point forward will inherit the template.

8. Click **Save**.

A confirmation message will appear.

9. Click **OK**.

The new template will be applied immediately.

**Note:** This process does not require approval, nor does it create versions. The new template directly modifies the current active pages and overrides any dynamic settings. This feature should be used with caution as it will not require the re-publication of pages before modifying the active versions.
5 Using Tables as a Foundation for Templates

Tables provide structure to templates. In addition, tables allow for the insertion and use of multiple modules and other elements in an organized layout.

Before using tables to create the foundation for the template, some crucial points to consider include:

Inserting a table: A new table will have no alignment as the default, which will cause an extra line under the table. If only one table is being inserted, the extra space may not be visible, although it is there. However, if inserting a table into a table cell (embedded table), the space will be visible. The space is generated by the editor itself. Because a table is a block tag, users should not be able to add text right after the table. If the table is set to left alignment, the space will be removed. The table will become a floating object since the block tag rule is broken.

Aligning items in a table cell: In previous versions of SiteExecutive (prior to the introduction of cascading style sheets functionality), the alignment in a cell was controlled by three levels of settings. They are indent/outdent buttons (adding blockquote tag), alignment buttons (adding align attribute to p tag) and cell’s alignment property (setting align attribute to td tag). Indent/outdent buttons are the most influential, followed by the alignment buttons, then followed by a cell’s alignment property.

All levels of control on a cell would be applied as follows:

```html
<td align="right">
<blockquote>
<p align="left">text</p>
</blockquote>
</td>
```

On the browser, the text will appear aligned to the left with one block indent (the “right” property for td will have no effect).

In addition, a new p tag will have no align attribute (add a new table, and a new p tag will appear). In this case, a cell’s alignment property will take effect (if not indented), but once an alignment option is selected on the editor, the p tag’s align attribute will get set and cannot be removed anymore. The cell alignment property will not take effect either. The whole paragraph and the hidden blank p tag must be removed.

With the introduction of style sheets in SiteExecutive version 3.5, a style can be applied to a cell and to the text in the cell, which means there are now five levels of control on alignment. The order from most influential to least influential is indent/outdent buttons (adding blockquote tag), alignment buttons (adding align attribute to p tag), cell’s style (setting class attribute to td tag with the text-align property in the corresponding style sheet set), cell’s alignment property (setting align attribute to td tag) and the text’s style in the cell with the text-align property in the corresponding style sheet set).
Applying a style to the text in a table cell: A style can be applied to either a cell or text in the cell. The text in the cell will vary in style depending on the properties defined for each style. For example: style 1 is applied to a cell and style 2 is applied to the text in the cell as follows:

```html
<td class="style1">
<span class="style2">text</span>
</td>
```

The result will depend on how the style sheet is defined. In general, if there are any properties defined in style1 but not defined in style2, the text will inherit style1’s property, otherwise, style2 will be effective.

5.1 Inserting a Table

To create a table within the template:

1. Select the desired template.
2. Select the Preview/Edit tab.
3. Click Edit Template.
4. Click in the template where the table will be inserted.
5. Click the Insert a Table tool.

The Insert Table dialog box will appear.

6. Enter information in the available fields.

   The fields are defined as follows:

   - Columns
   - Rows
   - Width
   - Cell Spacing
   - Cell Padding
   - Background Color
   - Border Type
   - Caption Text
   - Caption Class
   - Caption Align
**Columns/Rows:** Determines the number of horizontal and vertical cells desired. These are expressed as whole numbers.

**Class:** Allows the selection of a font type, which was created via a style sheet and assigned to the template.

**Width/Height:** Determines the size of the table. These values can be expressed in pixels or points and in percentages. One inch equals 72 points (For example, 288 points would result in a 4 inch width). These values can also be expressed as percentages of the enclosing area (use the % character). A row will expand to the largest height specified for any of the cells in that column. A column will expand to the largest width specified for any of the cells in that column.

**Cell Spacing:** Controls the space between cells in a table. This value is expressed in pixels.

**Cell Padding:** Controls the space between the inside of a cell and any enclosing information. This value is expressed in pixels.

**Align:** Relates to the surrounding text or objects in a page. If no alignment is selected or center alignment is selected, text or objects in the page will be automatically placed underneath the table. The table will be inserted in a div tag to prevent text and objects from wrapping around the table.

*Note:* Alignment attributes assigned to the table affect how the table will interact with elements around the outside of the table. Alignment applied to individual cells affect solely what is contained within the cell. Furthermore, the alignment of a table may not be reflected in the editor alignment tool. The table or cell alignment should be used over the editor alignment tool.

**Background Color:** Determines the color of the table. The background color is expressed in six character sets made up of three hexadecimal numbers. SiteExecutive provides a standard spectrum of colors through the interface. Colors can also be entered in RGB values (Red/Green/Blue), which are provided through the image editors built into windows. RGB values are converted into hexadecimal codes automatically if entered. If no color is selected and no table background color is defined in the style sheet, the table will be transparent, therefore displaying cells in the background color of the template. If no color is selected and a table background color is defined in the style sheet, the table will retain the background color defined in the style sheet.
Summary: Refers to a description for the table. The table summary is used for Section 508 compliance and can be interpreted by non-visual media. The summary content is searchable and is limited to 255 characters.

Type: Refers to the border and creates a rim around the table. When a border is selected, the options to select a border style, border color and border width become available.

Text: Refers to the caption properties. Displays a title above the table. This field is limited to 255 characters. The caption is not visible while the page is in edit mode.

Class: Allows the selection of a font type, which was created via a style sheet and placed on the template assigned to the page.

Align: Refers to the position of the caption relative to the table.

7. Click Save.

The table will appear on the template.
8. Enter desired information in the table cells.

5.2 Accessing Table and Cell Modifying Features

Table and cell properties are available to designers while the template is in edit mode. Depending on where the cursor is placed, table and cell property menus may vary.

The following two menus may appear depending on the action performed. If the table is selected (the cursor is placed on the table border), a condensed menu will appear.

<table>
<thead>
<tr>
<th>Table Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Table</td>
</tr>
<tr>
<td>Template Properties</td>
</tr>
<tr>
<td>Copy</td>
</tr>
<tr>
<td>Cut</td>
</tr>
<tr>
<td>Paste</td>
</tr>
<tr>
<td>Paste External Data</td>
</tr>
</tbody>
</table>

If a cell is selected, the extended table menu will appear.
To access the complete table and cell modifying features:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click inside the desired table or cell.
5. Right-click on the cell.

The table and cell modifying features will appear.
These features include:

**Table Properties**: Allows the modification of the entire table’s properties.

**Cell Properties**: Allows the modification of individual cells.

**Row Properties**: Allows updates to an entire row starting with the selected cell.

**Column Properties**: Allows updates to an entire column starting with the selected cell.

**Merge Cell Horizontally**: Allows cells to join horizontally and displays the number of cells that are available for the merge.

**Merge Cell Vertically**: Allows cells to join vertically and displays the number of cells that are available for the merge.

**Split Cell Horizontally**: Splits the selected cell horizontally.

**Split Cell Vertically**: Splits the selected cell vertically.

**Add Column Left**: Inserts a column to the left of the column selected.

**Add Column Right**: Inserts a column to the right of the column selected.

**Delete Column**: Removes the column selected.

**Add Row Above**: Inserts a row above the row selected.

**Add Row Below**: Inserts a row below the row selected.

**Delete Row**: Deletes the row selected.

**Align Top**: Positions information to the top of the selected cell.
Align Middle: Positions information in the middle of the selected cell.

Align Bottom: Positions information to the bottom of the selected cell.

6. Select the desired option for modifications.

5.2.1 Modifying Cell Properties

To modify cell properties:

1. Select the desired page in the site tree.
2. Select Preview/Edit tab.
3. Click Edit Page.
4. Select the desired cell.
5. Right-click on the cell.

The Table Cell Properties dialog box will appear.

7. Enter information in the available fields.

The fields are defined as follows:

Class: Allows the selection of a font type, which was created via a style sheet and assigned to the template.

Width/Height: Refers to the size of the cell. If there are two or more cells in a row or column, this is expressed as either a fixed number in pixels or a percentage of the overall table size.

Alignment: Refers to the horizontal position of the text or object within a cell.

Vertical Alignment: Refers to the vertical position of the text or object within a cell.

No Wrap: Keeps text or objects from wrapping in the cell. It is used frequently to keep images in line within a cell.
Background Color: Determines the color of cells and overrides background color selected in table properties.

Select Image: Allows the selection of an image uploaded into SiteExecutive as a background.

Deselect Image: Removes background image selected.

Advanced>>: Used for Section 508 compliance only. When selected, other properties become available. The ID and Axis properties are visible in the source code, although they do not display on the web site. The Table Header allows for a cell to be depicted as a header. Subsequent cells can then be associated with appropriate headers. Information entered in the advanced properties can be read or interpreted by screen reader tools.

8. Click Save.

The cell will appear with the changes.

*Note: Additional tools or features may be defined at the style sheet level. For example, border colors may be established in a style sheet. Such properties will become available to editors/designers if defined on the style sheet assigned to the selected template.*
5.2.2 Multiple Rows and Columns

Using tables with multiple rows allows for the creation of headers, navigation areas, footers, navigational trails, etc. Each row can be used to display a different element. If a one row table is created, pressing [Tab] creates additional rows while maintaining the properties of the previous cell, referred to as the base cell. In addition, row or column properties may be accessed to modify an entire row or column.

Note: Like pages, when templates are revised, they must be approved and published before changes will appear on the pages using the templates.
6 Dynamic Headers in Template Design

Adding dynamic elements to the template allows users to identify their location within a site at all times. The headers appear in all pages using the template.

To insert a dynamic header and/or trail:

1. Select the desired template in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Template.
4. Click in the cell within the template where the module will be inserted.
5. Click the Insert a Module tool.

The Insert Module dialog box will appear.


7. Click Insert.

The Module Properties dialog box will appear.

8. Enter information in the available fields.

The fields are defined as follows:
Display: Allows the display of the navigational trail, current filename, current page title, parent folder’s name, parent folder’s title or a qualified URL. If the display of the navigational trail is selected, additional options become available.

Show as Link: Displays information as dynamic links.

Style: Refers to the text type of the display.

Separator: Allows the selection of a separator.

Suppress Home Page: Avoids displaying a dynamic link to the home page of the site. This is useful when displaying the navigational trail on the site’s home page.

Suppress Folder Index Page: Avoids displaying a dynamic link to the home page of the folder. This is useful when displaying the navigational trail on the folder’s home page.

Suppress Current Page: Avoids displaying a link to the page the module will appear on.

Display samples are provided below:

<table>
<thead>
<tr>
<th>Navigational Trail</th>
<th>Home &gt; SE Training Areas for New York &gt; Sam Smith's Folder &gt; Modules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Filename</td>
<td>modules.html</td>
</tr>
<tr>
<td>Current Page Title</td>
<td>Modules</td>
</tr>
<tr>
<td>Parent Folder's Name</td>
<td>SamSmith</td>
</tr>
<tr>
<td>Parent Folder's Title</td>
<td>Sam Smith's Folder</td>
</tr>
<tr>
<td>Fully Qualified URL</td>
<td><a href="http://base.train.nylaptop.com/SETraining/SamSmith/modules.html">http://base.train.nylaptop.com/SETraining/SamSmith/modules.html</a></td>
</tr>
</tbody>
</table>

9. Click Save.

The module will appear on the template.
7 Global Links

Within a template, navigation can be created with the insertion of links. When inserted on a template, these links will appear on all the pages using the template.

To insert links:
1. Select the desired template in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Template.
4. Select the desired text or image for the link.
5. Click the Insert a Link tool.

The Create Link dialog box will appear.

6. Enter information in the available fields.

   Note: Fields may vary based on the type of link inserted.

   The fields are defined as follows:

   Type: Allows the insertion of Internal, External, MailTo or Anchor links.
   Link: Allows the selection of the desired link.
   Class: Allows the selection of a font type, which was created via a style sheet.
   Title: Displays text when the mouse pointer is placed on the link.
Open link in a new window: Forces the linked web site to open in a new browser window. When this option is selected, additional window options become available. Users have the ability to define the width and height in pixels of the new window. If width and height values are not entered, the new window will open in the web browser’s default size. Users may also choose to display a toolbar for the new window.

7. Click Save.

The link will appear on the template.
8 Embedded Tables

Embedded tables are used to create complex structure and tight layout within a site. They allow for advanced dynamic navigation. Embedded tables should be used over row/column spans. Inserting a nested table within the existing table allows for the modules to co-exist in the midst of all the other elements in the template. Most importantly, embedded tables create easier-to-manage elements that will not affect other elements when changes are made.

Some general guidelines and tips for embedding complex tables are:

♦ Embedded tables should have a width of 100%, if filling of the cell is desired. If filling of the cell is not desired, the embedded table should have a fixed width.

♦ Column width should be a percentage unless a fixed width is required. A width should be applied so that the table does not appear as a line.

♦ Tables can be embedded infinitely, but it is not recommended that tables exceeding seven levels be used.

♦ Embedded tables can be used to create horizontal or vertical borders with text space.

♦ Embedded tables can be used to create predictable margins.

♦ If the embedded table is to appear as a table, borders can be chosen. To avoid making the embedded table appear as a table, no borders should be used.

♦ Summaries may be used when tables are inserted to assist with identification of embedded tables.

To embed a table:

1. Select the cell where the embedded table will be inserted.
2. Click the Insert a Table tool.
3. Enter information in the available fields.
4. Click Save.

The embedded table will appear.
<table>
<thead>
<tr>
<th>Training</th>
<th>Marketing</th>
<th>Professional Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>HERE</strong></td>
</tr>
</tbody>
</table>

**Body Content**

<table>
<thead>
<tr>
<th>IMAGE OF COMPANY STAFF</th>
<th>Systems Alliance 34 Loveton Circle Sparks, MD 21152</th>
</tr>
</thead>
</table>

**SEE ALSO HERE**
9 Advanced Dynamic Navigation

Advanced dynamic navigation on a page can be achieved by inserting the \textit{What's Here}, \textit{What's New} and \textit{See Also} modules. These modules are formatted and activated at the template level. To establish the layout of the modules, the advanced dynamic navigation modules should be placed in an embedded table.

9.1.1 Establishing the Modules on a Template

To set up the \textit{What's New} module in a table cell:

1. Select the desired cell where the module will be inserted.
2. Click the \textbf{Insert a Module} tool.

The \textbf{Insert Module} dialog box will appear.


4. Click \textbf{Insert}.

The \textbf{Module Properties} dialog box will appear.
5. Enter information in the available fields.
   The fields are defined as follows:
   - **Text**: Refers to the title of the module, as it will appear on the published page.
   - **Style**: Selects the text type for the header.
   - **Alignment**: Refers to the position of the header.
   - **Background Color**: Defines the color of the header background.
   - **Style**: Refers to the text type for the title.
   - **Description Font Style**: Refers to the text type for the descriptions.
   - **Module Width**: Refers to the horizontal size in pixels.
   - **Outline Width**: Refers to the outline size in pixels.
   - **Background Color**: Defines the color for the header’s background.
   - **Outline Color**: Defines color for the outline.
   - **Show Bullet**: Lays out the links in bulleted lists.

6. Click **Save**.
   The **What’s New** module will appear in the selected cell.

*Note: The What’s New, What’s Here and See Also modules are established in the same manner. Each module can only be inserted once on a template. Once inserted, the module will not be listed in the Module: drop-down list.*
Tip: If the modules have been inserted in the embedded table but not on a page, the width and height of the table should be set at 1 pixel each. When the modules are inactive, the table will not appear to take up any space. Table cells take up the space of the largest object in that cell.

9.1.2 Establishing the Modules on a Page

To insert the What's New module:

1. Select the desired page in the site tree, which has the template assigned to it.
2. Select the Preview/Edit tab.
3. Select the General tab.

The What's New window will appear.
5. Click **Add**.

The **What's New Administration** dialog box will appear.

6. Enter information in the available fields.

   The fields are defined as follows:
Title: Refers to a readable title, which will display on the page as a link. This field is limited to 255 characters.

Link: Allows insertion of internal or external links. The Select Link icon displays the Explorer window and allows a SiteExecutive page to be selected. The Link to Another Site icon displays the Explorer window, which allows entry of a qualified URL. The Remove Link icon removes a link once it has been selected or entered.

Description: Displays information regarding the link. This information will appear on the page and is an optional field.

Release Date/Expire Date: Allows content editors to determine a date when the link will appear and disappear.

Active: Allows content editors to deactivate a link without deleting it.

Open in New Window: Forces the link to open in a new browser window.

7. Click Add What’s New Item.

The What’s New window will remain open, allowing users to enter subsequent What’s New links.

8. Add subsequent links (optional).

9. Click Save.

Note: The What’s New, What’s Here and See Also modules are established on a page in the same manner.
10 Object Inclusion

The **Object Inclusion** module allows users to assign dynamic areas to templates that can change at the folder level. The module can also be used to simply include objects on a template.

10.1 Identifying and Creating Dynamic Components

To use the **Object Inclusion** module to assign dynamic areas to templates, which will change at the folder level, it is crucial to identify the dynamic areas within pages or sites and then create the dynamic components, which will change from folder to folder.

When the **Object Inclusion** module is used to display content, pages rather than images are recommended for inclusion. This allows the page to behave as a container for a range of items and may be updated with versions and control.

10.2 Inserting the Object Inclusion Module on a Template

Once the dynamic components have been created, designers can insert the **Object Inclusion** module on a template.

To insert the **Object Inclusion** module on a template:

1. Select the desired template in the site tree.
2. Select the **Preview/Edit** tab.
3. Click **Edit Template**.
4. Click in the template where the module will be inserted.
5. Click the **Insert a Module** tool.

The **Insert Module** dialog box will appear.

6. Select **Object Inclusion** from the **Module**: drop-down list.

7. Click **Insert**.

The **Module Properties** dialog box will appear.
8. Enter information in the available fields.

The fields are defined as follows:

**Object**: Allows the inclusion of an object within SiteExecutive. Once the object is selected, several Display Settings will become available. Some fields are required depending on the object selected.

**Module Name**: Provides a title for the dynamic content.

**Dynamic**: Allows the selected object to be dynamic so that it may be swapped at the folder level. This must be selected if the module is used at the template level to display dynamic content at the folder level.

*Note: Depending on the object selected, other fields may become available. If the Dynamic check box is not selected, the Object Inclusion module will function solely to embed objects. It will allow the inclusion of a selected file or object and will display it on all pages using the template.*

9. Click **Save**.

The Object Inclusion module will appear on the template. The template must be published for the dynamic object to become available at the folder level.
10.3 Managing Dynamic Content for Folders

To display dynamic content at the folder level:

1. Select the folder that contains the pages, which will display the dynamic content.
2. Select the General tab.
3. Double-click Manage Dynamic Content in the information area.

The Manage Dynamic Content dialog box will appear.

4. Enter information in the available fields:

   The fields are defined as follows:

   **Template**: Refers to the templates that contain the dynamic object.

   **Inclusion Module**: Refers to and is limited to the dynamic object(s) that are included on the selected template.

   **Visible**: Allows for the dynamic object to appear at the folder and subfolder level. This box should be unchecked if the appearance of the dynamic object is not desired.

   **Object**: Allows the selection of an object to be displayed on the pages within the folder.
Note: Depending on the object selected, other fields may become available. Object refers to the dynamic object that will appear on the pages in the folder. The object will vary for each folder depending on the dynamic components that are desired for display. For example, if an image is selected the fields that become available include: Link To, which allows the image to be linked and Alt Text, which displays text when the mouse pointer is placed on the image.

5. Click Save.

If Dynamic is not selected, the Object Inclusion module can still be inserted on a template to embed objects at the template level. These objects will appear on all the pages using the template.

Changes to the object selected as the placeholder may affect dynamic content modified by authors at the folder level. Designers must be careful when making changes to dynamic objects on the template. Specifically the following modifications will reset the object at the individual folder level:

- Changing the object type selected for dynamic inclusion at the main template level.
- Deleting the dynamic object at the main template level. This occurs even if the object is re-inserted on the template with the same object name before saving.
- Deleting the dynamic object at the main template level.
11 Template Import Capabilities

Template import capabilities are available to SiteExecutive users. The Import Template icon is available at the site, folder and template collection level in the General tab and allows for templates created in Dreamweaver to be uploaded into SiteExecutive. Administrative-level permissions are required for the folder in which Dreamweaver files will be imported.

At the site or the folder level, the user is asked to provide a .dwt, .html, .htm or a .zip file for importing. At the template collection level, the user can only import a .dwt, .html or .htm file using the Template Import tool. The Import Template tool will import all files as templates and allow the templates to be applied to pages.

To import a template:

1. Select the desired site or folder in the site tree.
2. Select the General tab.
3. Double-click Import Template in the information area.

The Import Template dialog box will appear.

4. Click Browse in the File: field.

The Choose file dialog box will appear.
5. Select the desired Dreamweaver file or template. If files were zipped, then the zipped file may be selected.

6. Click **Open**.

The file will appear in the **File:** field in the **Import Template** dialog box.

7. Check the **Overwrite existing objects** if desired.

8. Click **Import**.

The uploading and conversion process will start. While the import is taking place, a processing bar will appear.
The import may take several minutes, depending on the number of templates, images and style sheets being imported. Throughout the process, the processing bar will display information regarding the status of the import.

Upon completion of the import, a result report will appear in the Import Template window.

9. Select the available tabs to view the Templates, Images/Files, and Style Sheets that were imported.

Under each tab, the files imported are listed. They may be selected to view a detailed report.

10. To print a copy of the results report, click Printable Version.
A print-friendly screen of the results will appear.

11. Click **Print**.

12. Close the report when printing and viewing of the report is completed.

The imported files will appear in the site tree.

*Note: The body content marker must be inserted in the imported templates and the templates must be published.*

When imported into SiteExecutive, the Dreamweaver templates become SiteExecutive templates and can be treated as such. If changes are made to a template in Dreamweaver, the updated template may be re-imported to replace the existing template in SiteExecutive. Re-importing an updated version of the template will create an editable version of the template (if only an active version existed).
12 Renaming, Copying, Moving and Deleting a Template

A template may be renamed, copied, moved and deleted within SiteExecutive. These processes are very similar to renaming, copying, moving and deleting folders, pages and other objects. When a template is selected, the General tab displays the following icons:

To rename, copy, move or delete a template:

1. Select the desired template in the site tree.
2. Select the General tab.
3. Click on the desired tool (Rename Template, Copy Template, Move Template or Delete Template) in the information area.
4. If Rename Template was selected, the system will allow a new name to be entered. If Copy Template or Move Template were selected, the site tree will appear, allowing the desired location to be chosen. If Delete Template was selected, the template may be deleted.