



SiteNOTE

Installation guide

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1 Introduction

Welcome to CrossFactory SiteNOTE installation guide, a simple and powerful solution to maintain web site content.

1.1 Audience

Content of this document is dedicated to :

- The system engineer, who installs and configure SiteNOTE on the test and production environments.
- The administrator, who defines the global site setup, templates, users and root permissions.

This document describes the concepts and instructions to install and initialize SiteNOTE.

1.2 Installation

As further described in this document, installing a SiteNOTE website mainly consists in copying the files structure and access rights, create a new website in the IIS console with the appropriate Host Header Name, and adjust some parameters in IIS and in configuration files of the site.

1.3 Initialization

Once the site has been installed, it has to be initialized so that users can start working with it. This mainly consists in creating these users and the associated groups. Interfaces that allow such functionalities are described furthermore in the second part of this document.

1.4 Content management

SiteNOTE does not require a database for storing content. SiteNOTE performs changes to the web site using advanced file processing techniques. SiteNOTE does not use a database, and the published pages are directly served from the files by the IIS web server, therefore using all standard optimization techniques available from ASP.NET and the underlying platform.

2 Installation

2.1 System configuration

2.1.1 Server

2.1.1.1 Minimum configuration

- Hardware : Intel Pentium IV 1.5GHz, 512 MB RAM, hard drive 5GB
- Operating system : Microsoft Windows Server 2003 SP2, .NET framework 2.0
- Web server: Internet Information Server (IIS) 6.0

2.1.1.2 Recommended configuration

- Hardware : Intel Dual Core 2GHz, 2 GB+ RAM, hard drive SSD 80GB+
- Operating system : Microsoft Windows Server 2008, .NET framework 3.5
- Web server: Internet Information Server (IIS) 7.5

2.1.1.3 Required server settings - constraints

For SiteNOTE to run properly, your server must comply with the following constraints:

- Session mechanism should be configured as "InProc". If your provider uses a session state server, SiteNOTE will not work properly.
- Application pools restart settings should be left as automatic. If your provider configures IIS to have the application pools restart frequently, for performance reasons for example, you will not be able to stay connected in the administration of SiteNOTE.
- If your provider modifies the default server's application Trust Level, due to security policies for example, SiteNOTE will not work.
- The application pool should operate under user account which has rights to create and modify files within the application directory. *Note:* if you try to use SiteNOTE on the local machine in the default directory (c:\inetpub\wwwroot), the application pool operates under IIS_IUSRS (IIS 7.0) and this user doesn't have rights to modify files. You should change application pool identity or edit security permissions for application folder before installing SiteNOTE.
- If you use IIS 7.0, please set the *Managed pipeline mode* setting to *Classic*.

2.1.2 Client (administrator)

2.1.2.1 Minimum configuration

- Hardware : Pentium III 1Ghz, 256 MB RAM
- Operating system : Microsoft Windows XP SP2 or later
- Web browser : Microsoft Internet Explorer 6sp2, Microsoft Internet Explorer 7, Microsoft Internet Explorer 8

When using SiteNOTE for the first time as site administrator or editor, deactivate popup blockers on the site to enable SiteNOTE to work properly.

2.1.2.2 Configuration for Microsoft Internet Explorer 7 and 8

Microsoft Explorer 7 and 8 are configured by default with a strong security profile that prevents the correct execution of some SiteNOTE functionalities. Follow this procedure to modify the profile:

- Access SiteNOTE administration by displaying the authentication screen.
- Choose *Tools* then *Internet Options*.
- In the *Security* tab, select *Trusted sites*, choose *Medium-low* for the *Security level*, and select *Enable protected content*.
- Click on the *Sites* button, then click *Add* to add the site in the list of *Trusted sites* (uncheck the "HTTPS required" box if necessary).
- Close all the windows and restart Internet Explorer.

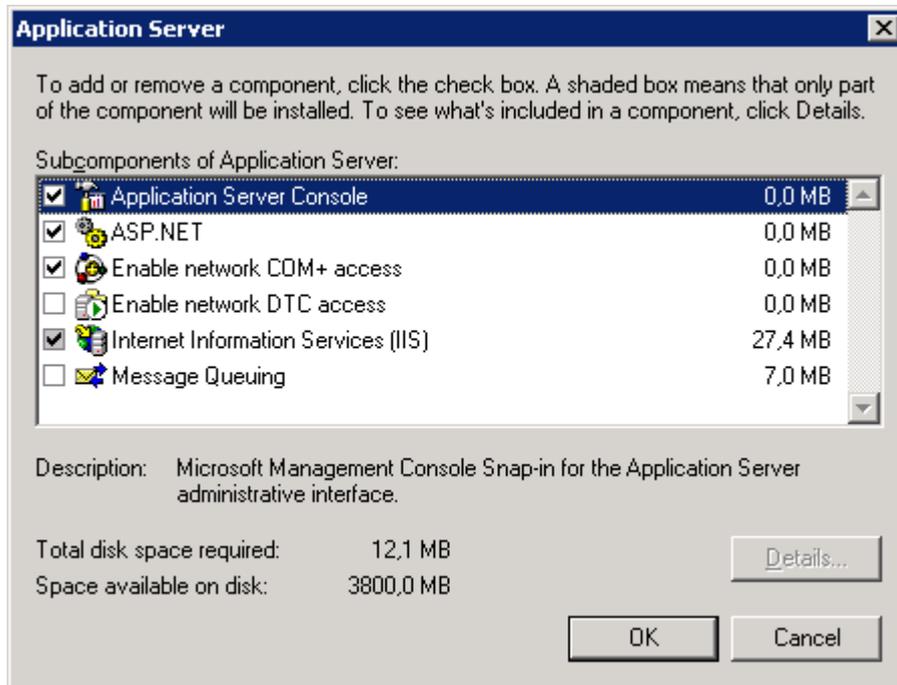
2.1.3 Client (visitor)

Web browser : all standard browsers are supported, such as Microsoft Internet Explorer 6+, Mozilla Firefox 2.0+, Safari

2.2 Before installing

2.2.1 IIS

The server must be configured as *Application Server*, this includes IIS installation. To check that it is installed, open the *Control Panel, Add/Remove programs, Windows components*. The following elements must be checked: *Application Server Console, ASP.NET, COM+ Access, IIS*.



2.2.2 ASP.NET

In addition to the standard ASP.NET installation that comes with the "Application Server" configuration, Dot Net Framework version 3.5 is required on the server. The installation package is available for download from Microsoft website. To check that this framework is installed, open the *Control Panel, Add/Remove programs*, the Microsoft .Net 3.5 Compact Framework is listed.

2.2.3 Server settings

SiteNOTE requires some specific settings on the server : Application Trust Level must be set to "Full" in Application.config file (default setting).

SiteNOTE requires also a session system that is "InProc" (and not State Server). Some hosters do not support this mode (reset of application pool is too frequent).

2.3 Running installation

2.3.1 Installation package - procedure

SiteNOTE is provided as an installation package, a zip file in fact, that contains the setup files. To use SiteNOTE, you need to have a web environment already setup, either on your own server where IIS 6 or higher should be installed including a new dedicated website already configured, or on your Internet Service Provider environment where you have FTP access. Domain name should already be configured on this website so that it can be used during SiteNOTE installation, which is required for SiteNOTE to run properly.

- Unzip installation file on your local disk.
- Upload all the unzipped files to the root directory of your website.
- Check that you are using Internet Explorer 6sp2 or higher, and that the security zone of your site is in "Trusted sites" or "Local Intranet" (See IE configuration settings chapter). You may have additional settings to adjust

depending on your configuration.

- In Internet Explorer, access the installation page: <http://www.mysite.com/default.aspx>. A Welcome screen is displayed.
- Click "Next" to start the setup wizard. This can take a few minutes for files to be expanded. You will then be prompted to login. Use "install" as login and password.
- Follow the wizard steps, referring to contextual help for use of the different parameters to configure.
- Login into SiteNOTE using the credentials that you just specified in the last step of the wizard. This user is part of the "administrators" group.
- You are redirected to the default page of your website (actually, SiteNOTE startup/demo website), in the backstage/offline (".off") version.
- If you intent to use SiteNOTE' search engine in your site, do not forget to trigger an initial full indexing of the site's content (via the dedicated screen in the website administration) and to setup re-indexing settings appropriately.

Once you're logged in your site's administration zone, have a look in the startup/demo site; it already contains sample pages with controls and some explanations, as well as a page that lists most of the objects you can use while editing content. This last page will be very useful when you will start implementing your design and CSS rules.

2 Important notices :

- The root page (/default.aspx) should never be deleted or SiteNOTE will not work anymore. The root page is set by default as a "group" page that redirects to the language-localized default homepage.
- The demo site is provided with an initial content in the "en-us" folder, under the "en-us.aspx" homepage, localized then in english. You may need to create your site in another language, or have several language versions of your site. We encourage you then to use the international locale conventions for naming your folder/homepage (en-us, fr-fr, fr-be, nl-be, etc.) that you would create under the root page.

Remark: In SEO (Search Engine Optimization) context, SiteNOTE is provided with a *robots.txt* file, in which a reference to an automatically generated XML Sitemap is inserted. Depending on configuration settings, major search engines are "pinged" with this sitemap reference each time content is published on the site, to help in reindexing the content in search engines catalogs. Such "ping" system should be disabled while developing the site, by simply removing the sitemap ping references from the configuration settings.

2.3.2 Installation Results

2.3.2.1 Files

the SiteNOTE website is installed in its folder on disk. By default it contains the following files/folders structure:

- *_SiteNote*: SiteNOTE functionalities
- *App_Browsers*: navigation specific
- *App_Code*: custom code
- *App_Data*: Dot Net specific
- *App_GlobalResources* Dot Net specific
- *Bin*: executable - DLL (custom code + SiteNOTE)
- *Controls*: Site specific controls
- *Default*: site content. "Modify" right must be given to the Windows user that is configured as the owner of the application pool of the website in IIS.
- *Design*: stylesheets
- *Flash*: specific + gallery component
- *Images*: common and forms images
- *ProtectedFiles*: db+logs+SiteNOTE specific data files. "Modify" right must be given to the Windows user that is configured as the owner of the application pool of the website in IIS.
- *Templates*: site page structure
- *XmlEditorFiles*: SiteNOTE specific
- *UltimateSearchInclude*: (optional) Search component. Rem: this folder contains the UltimateSearch.config file in which site settings should be adapted if search engine is used.
- *UltimateSpellInclude*: (Optional) search component specific
- *Default.aspx*: root page of the site
- *Default.off.aspx*: offline (edit) version of the root page

- *GenericPage.aspx*
- *Global.asax*: Dot Net Specific
- *web.config*: Configuration file. This file includes references to the following files for specific configuration parts:
 - *SiteNOTE.config*: SiteNOTE specific configuration (LogDirectory, Approval Enabled, ...). See below.
 - *Errors.config*: custom error pages definition (403, 404, ...)
 - *Website.config*: website specific configuration (websitename, websiteURL, SMTPServer, Form_DefaultEmail, ...). See below.

2.3.2.2 IIS

Website properties are as follows:

- website / website identification / Advanced : the host header name (www.mysite.com) should be setup and the DNS should be resolved on the server itself (it means that it should be possible to open the URL in a browser on the server)
- ASP.NET / Version : must be set to 2.0.xxx
- Documents / Default document : Default.aspx must be part of the list of default documents
- Home Directory / Execute Permissions : must be configured as "scripts only"
- Home Directory / Application pool : It is better (but not mandatory) that the website is set up to use its own application pool, to be isolated of other applications running on the same server.

If the site is installed as a sub-folder of a main site (ex: www.myhoster.net/mysite), the site folder should have its own *application* in IIS.

2.3.2.3 Configuration file

The following configuration files, that are referenced in the global *web.config* file, are modified while installing. The main parameters that are defined in these files can be edited using the configuration settings page in Website Administration.

- *SiteNOTE.config*: SiteNOTE specific configuration
 - *Approval*: boolean indicating if the approval mechanism is activated or not. Default value is False".
 - *SaveAndPublish*: Enable/disable the Save and Publish button in page content edition and page layout edition screens
 - *NbBackupSaveVersion*: The number of backup versions to keep per page (between 0 and 10)
 - *PurgeLogFiles*: The number of days application logs files are kept.
 - *LogChanges*: Activate/Deactivate the logging of the pages modifications.
 - *LocalTimeZone*: Default value is "(GMT) Casablanca".
 - *LocalDateFormat*: The local date format used for the date display. Default value is "dd/MM/yy".
 - *SearchIndexOnPublish*: Enable/Disable Search engine reindexing of content when publishing pages.
 - *SiteMapUrl*: Filename for Sitemap. Default value is "sitemap.axd" which corresponds to SiteNOTE's automatically generated sitemap.
 - *SiteMapPingTargets*: list of sitemap ping entries per search engine. Default value is "<add name="Google" targetUrl="http://www.google.com/webmasters/tools/ping?sitemap=" />"
 - A section about *HTMEditor* lists dedicated parameters for this component, as maximum file size for uploads, default height of the editor in pages, and options that enable or not the functions to strip <script> and <iFrames>tags in HTML code.
- *Website.config*: website specific configuration
 - *websitename*: the name of the site (the sub-folder name if the site is installed as sub-folder of the main website)
 - *websiteURL*: the host header name (e.g.: www.mysite.com)
 - *form_SMTPServer*: If the SMTP Server requires authentication, *form_SMTPUser* and *form_SMTPPass* should be filled in.
 - *Form_DefaultSender*: The sender of emails that are generated by forms
 - *Form_DefaultEmail*: the default recipient (ex: webmaster) of emails generated by forms (e.g.: contact)

- *SearchIndexerCron*: Definition of period according which Search engine reindexes content of website, defined as CRON expression. Default value is "0 0 12 * * ?". (See Wikipedia for CRON references)

2.4 Website backup

As SiteNOTE is mainly file-based, backuping a website simply consists in creating a file archive (ZIP) of the site folder. Additionally, IIS settings can be exported to a config file that can be added to the package (see IIS documentation for exporting settings to a file).

2.5 Test (Staging or QA) and Production configurations

To be able to test the update of functionalities, it is recommended to have two versions of the site. The Production one is published for internet visitors (ex: www.mysite.com) and the Test (or QA, or Staging) one is a simple independent copy of the site on another URL (ex: qa.mysite.com) (see Website Copy here before). It is also possible to configure a Pre-Production version that would be used for editing content, while the Production version would only allow publication without editing functionalities. In that later case, it is possible to remove the *_sitenote* folder from the Production version so that administration functionalities are not accessible anymore.

3 Initialization

3.1 Concepts

3.1.1 Site structure

3.1.1.1 Hierarchy

The web site appears to the user as a hierarchy of pages, such as what is displayed on a sitemap. The splash page (usually a language selection page) is the root of the hierarchy (level 0), and contains the locale-specific home pages (level 1), which contain themselves section entry pages (level 2). Each level 2 page can contain level 3 pages, without depth limit. This hierarchy will be used to build the menu navigation automatically. SiteNOTE handles all the pages and files of the site in this way. The site visitors see the menus, the sitemap and the page addresses (URLs) according to the hierarchy. The editors and administrators create the pages and manage the permissions according to the same hierarchy.

In order to handle specific cases in the site navigation, SiteNOTE allows pages to be hidden, offline, redirecting pages, or to be considered as page groups (containing other pages, and whose role is to be displayed as menu entries)

3.1.1.2 Modules

All the pages of the web site are built using modules that can be changed or rearranged by the administrator in design mode. These modules are either ASP.NET server controls provided by SiteNOTE, either custom ASP.NET server controls provided by the developer. Here are the controls currently available in SiteNOTE :

- Editable controls: structured content (XML), free content (HTML), forms (XML), shared content (the content is fed from a content located in another page).
- Navigation controls: menu, path (breadcrumb), sitemap.
- Other controls: search engine, authentication.

3.1.1.3 Site localization

SiteNOTE treats localized sites (several versions of the site in different language) as subsites that can be different -if needed- in terms of content, structure or design. They can be considered unrelated, except regarding the following :

- Users and groups are common across localized sites.
- The "splash" page at the root of the site let the user select the language/locale.
- The page templates, content structure, stylesheets and design images are common and available to all localized sites.

3.1.2 How to access administration

3.1.2.1 Address

To access the site administration, you have to be authenticated. You will have to start Internet Explorer and type in the address of the administration web site. The address has to end with "admin.aspx" :

So if your web site address is <http://www.mysite.com/>, the address of the administration site can be <http://www.mysite.com/admin.aspx> or <http://www.mysite.com/default/en-us/admin.aspx>.

3.1.2.2 User name and password

The user name and password are created by the site administrator. The user name is not case sensitive, but the password is case sensitive.

The user name and password of the demo web site are respectively admin/admin.

3.1.3 Administration toolbars



When you access the site administration, after entering your user name and password, the web site is displayed in your browser. The top of the window shows the toolbar, which allows you to perform administration tasks.

The left part of the toolbar groups the "page" actions: create, edit content, design, delete, change sort order, properties, permissions. The other icons let you access general-purpose functionalities: publication, site administration, logout. The right part of the toolbar shows information about the page currently displayed, and controls the navigation appearance through the "offline" and "hidden" filters.



Clicking on the "website administration" icon of the main SiteNOTE toolbar opens the administration. On top of that screen a toolbar is displayed that contains the following elements: Users administration, Groups administration, Templates Design, All Pages View and Status page (monitoring). Templates Design is reserved to developers and will not be explained in this document.

In each of these toolbars, the icons may be available or not, depending on the page permissions defined for the current authenticated user.

3.2 Access rights management

3.2.1 Users categories

Content creation and management tasks are handled by different user categories. The following roles are usually defined :

- Creator, who starts the page creation process.
- Writer, who changes page content.
- Publisher, who approves and publishes changes online.
- Security manager, who manages users, groups and permissions.

Site initialization requires the use of a Security manager user (usually, or by default the administrator user), using which a set of users (creators, writers, ...) can be created, and associated to user groups. Roles of each group are then defined per section or even per page in the site, using the permissions management screen.

3.2.2 Users

The users management can be accessed from the administration screen, by clicking the **Website administration**  button, then the **Website users administration**  link.

On the user management screen, you can create, delete or modify user information: (1) a user name (can contain letters (a-z, A-Z) or numbers (0-9)), (2) a password and (3) the email address. The email address is used by SiteNOTE when the system is configured to use a two-steps page approval process, requiring to send an email to publishers. This email address is also used for the password reminder functionality available in the login screen, and in the publish window for users that have submitted pages for publishing. NB: the email address can be used as alternative login.

While SiteNOTE has its own user management system, it is possible to configure SiteNOTE to use other Authentication providers, like Microsoft Active Directory. Such provider can be useful for intranet configurations. SiteNOTE even handles automatic authentication (no need to login anymore) with such systems. For more information on this, please contact CrossFactory.

3.2.3 Groups

Each group of users contains one or more users. A single user can belong to multiple groups.

The groups management can be accessed from the administration screen, by clicking the **Website administration**  button, then the **Website groups administration**  link.

On the groups management screen, you can create, delete or modify group information: (1) a group name (can contain letters (a-z, A-Z, accents), spacing, or numbers (0-9)), and (2) a list of users belonging to the group.

There are 3 predefined groups: *Authenticated Users*, *Unauthenticated Users*, *Everyone*. These groups are automatically populated by SiteNOTE; they do not appear in the groups management screen.

Additionally to these 3 predefined groups, SiteNOTE creates the *Administrators* group and insert in this group the default user that is created during the installation of the site.

As an example, the way groups are defined can be based on different schemas:

- Based on administration roles: an "Editors" group for users who will update the contents, and a "Publishers" group for those who approve and publish content online.

- Based on your organization's departments: a "Human resources" group, a "Marketing" group, ...
- Based on site visitors, when the site is an extranet: a "Customers" group, a "Suppliers" group, an "Employees" group.

4 Monitoring

Your are in : Website administration > Status page [Back to website edition](#)

| | |
|-----------------------|------------------------------|
| Framework Version | 2.0.50727.1433 |
| SiteNote Version | 3.1.1.1 |
| Website Version | 0.0.0 |
| Log Directory | \\ic\ProtectedFiles\Logs |
| User Application Pool | NT AUTHORITY\NETWORK SERVICE |

| Test | Test Detail | Test Result | Status |
|--------|--|---|-----------|
| Access | Read and update all the pages of the website | All pages were opened and saved with success | ✔ Success |
| Access | Access security files | Access to the path 'C:\Documents and Settings\virtual\My Documents\Visual Studio 2008\WebSites\IC\ProtectedFiles\PermissionsSet.xml' is denied. | ✘ Error |
| Access | Log Directory | Log File created and deleted | ✔ Success |
| Access | Create new page | New Page created and deleted | ✔ Success |

| Test | Test Detail | Test Result | Status |
|-----------|---------------------------------|-----------------------|-----------|
| SMTP | Send an E-mail | Failure sending mail. | ✘ Error |
| MSXML 4.0 | Check if MSXML 4.0 is installed | Msxml 4.0 installed | ✔ Success |
| Search | Perform a search test | No indexed pages | ⚠ Warning |

| Test | Test Detail | Test Result | Status |
|----------------|----------------------|---------------------------|-----------|
| Stats Database | Check File Existence | File not found | ✘ Error |
| Stats Database | Stats File readable | No Stats File | ✘ Error |
| Stats Database | Stats File updatable | No Stats File | ✘ Error |
| Forms Database | Check File Existence | Forms File exists | ✔ Success |
| Forms Database | Forms File readable | Read successful | ✔ Success |
| Forms Database | Forms File updatable | Table creation successful | ✔ Success |

In case of malfunction of a feature of the site, a **status page** ([i Status Page](#)) available via the "Website Administration" toolbar can help the administrator identifying the cause of the problem. The sections on this page show the following information:

- Used platforms versions (Dot Net Framework, SiteNOTE, etc.) and environment variables.
- Check tests on access to pages, security information and logs.
- Installation tests on Mail, MSXML and Search components
- Check tests on stats and forms features.

5 Additional resources

In case you do not find the information you're looking for in this guide nor in other specific SiteNOTE documents, check www.SiteNOTE.net website, especially the FAQ section. If you still do not have the required information, get in touch with CrossFactory.