


Roxen CMS 5.4

Insite Editor Manual

 Roxen Internet Software AB
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Contents

1	Introduction	6
2	Insite Editor	7
2.1	Concepts	7
2.2	Before you start	8
3	Edit mode	9
3.1	Entering edit mode	9
3.2	The edit toolbar	9
3.3	Navigating the site while in edit mode	10
3.4	Selecting among available page languages	10
3.5	The sidebar	10
3.6	Publishing a changed page	11
3.7	Leaving edit mode, and publishing changed pages	12
3.8	Edit mode vs invisible pages	12
3.9	Link management	12
4	Creating a new page	13
4.1	Page titles	13
4.2	Stationeries	14
5	Editing a page	15
5.1	The page editor	15
5.2	Working with a component	16
5.3	The clipboard	16
5.4	Exiting the page editor	17
5.5	Conflict resolution	17
5.5.1	Understanding conflicts	17
5.5.2	An overview to resolving conflicting changes	17
5.5.3	Resolving metadata conflicts	19
5.5.4	Resolving content conflicts in the page editor	19
5.6	Editing page metadata & properties	22
5.6.1	What are page metadata and properties?	22
5.6.2	Accessing metadata commands	22
5.6.3	Accessing page properties	23

5.7	Keywords	24
5.7.1	Assigning page keywords	24
5.8	Description	24
5.8.1	Providing a page description	24
5.9	Author	24
5.9.1	Setting page author	24
5.10	Category	24
5.10.1	Categorizing web pages	24
5.11	Menu	25
5.11.1	Menu editing overview	25
5.11.2	Relationship between pages and menu entries	25
5.11.3	Using the menu editor	26
5.12	Permissions	27
5.12.1	Inherited versus explicit page access permissions	27
5.12.2	Assigning permissions to groups	27
5.12.3	Indirect membership	28
5.13	Languages	28
5.13.1	Several language variants of the same page	28
5.13.2	Adding a page language	28
5.13.3	Removing a page language	28
5.14	Visibility	28
5.14.1	Setting up time-controlled visibility of pages	28
5.15	Notification	30
5.15.1	Configuring e-mail notification for expired or changed pages	30
6	Workflow	31
6.1	Workflow processes and activities	31
6.2	Users and to-do lists	32
6.3	Actions	32
6.4	User interface	32
6.5	Workflow status	34
6.6	Publishing pages	35
6.7	Deleting pages	36
6.8	E-mail notifications	36
7	Versions	37
7.1	Displaying version information	37
8	Tools	38
9	Components	39

9.1	Component types	39
9.2	Header and footer	39
9.3	Text and Picture component	40
9.3.1	Editor fields	40
9.3.2	Note about incompatible browsers	42
9.4	Table component	43
9.4.1	Rows and columns	43
9.4.2	Pasting tables from Microsoft Excel	44
9.4.3	The text editor	44
9.4.4	Note about incompatible browsers	44
9.5	File component	44
9.6	Link component	45
9.7	Forum component	45
9.8	Poll component	46
9.9	RSS component	46
9.10	Flash video component	47
9.10.1	Developer note	47

1 Introduction

This manual describes how to create and edit content using the Roxen CMS Insite Editor. The users of the Roxen CMS Insite Editor is required only to be familiar with basic text formatting, such as bold and italic text, and with basic web terms such as links and URLs (Internet addresses). It demands no technical knowledge of the user, and the interfaces are simple and procedures often self-evident. The name Insite Editor comes from the fact that the editing tools are integrated into the site itself.

Note!

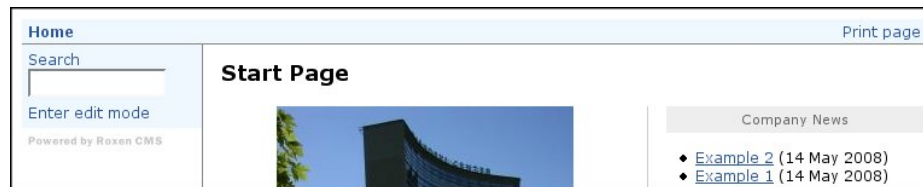
Roxen CMS is a highly customizable product. The example images used in this manual depicts the standard look of pages and interfaces. Your installed version of Roxen CMS may differ in design, but the functionality of buttons and interfaces are the same.

Roxen CMS is a modular product, and you may not have every available feature installed on your particular site. The editor features that may or may not be available are:

- Workflow
- Multi Language Support
- Forum component
- Poll component
- Categories

2 Insite Editor

This part of the manual describes the Insite Editor. The Insite Editor enables non-technical content managers to create and change content and pages in a fast and component-based manner. It requires only experience from editing text in a word processor, and knowledge of basic web terms, such as links and URLs.



2.1 Concepts

Following are explanations of important Roxen CMS terms used in the remainder of this manual.

Page

A page contains a number of content components (see below) and has a place in the site hierarchy. You navigate to a page by using the compass (see below).

Editing a page

When you edit a page you insert new content components or remove or change existing components. In the context of this manual, editing always refers to changing the information on a page, and never its design or visual features.

Publishing a page

To publish a page means that you make it available for viewing by visitors to the site. While you edit the page, the changes are only visible to you, until you decide to publish it.

Reverting a page

When you revert a page, you undo all the changes you have made to the page since it was last published.

Page components

A Page component can contain either text, with or without an image, a table, a link to a file, or a link to another page. One page can contain any number of these components, in any order. There are also header and footer components, of which there can only be one each on any page. News pages can only contain news components, a header, and a footer.

Access control

The access control system handles access rights for different users. It ensures that you can only access those parts of the site for which you are authorized. You identify yourself to the access control with your personal user name and password. These are your personal key to the site, and should never be shared, and immediately changed if you suspect that someone else may be aware of what they are.

2.2 Before you start

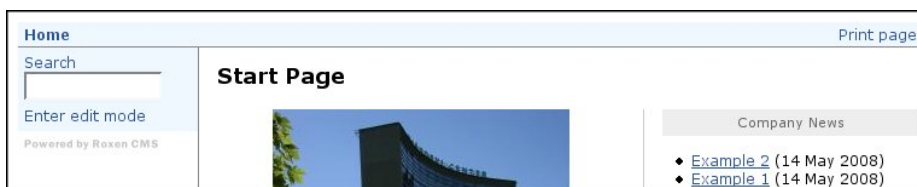
Before you can create and edit content on your site, some preparations have been made.

The site administrator has created a user account for every person that will have access to the site's restricted parts, such as editing of content and creation of new pages. You must receive your personal user name and password from the site administrator before you can create and edit content on the site.

The site developers have created the necessary design templates for the site, so that the correct design can be applied to the content you create. As a content editor, you work only with the information on the site, and not with its design or visual aspects.

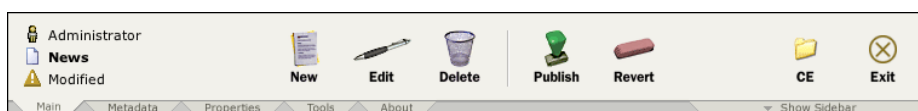
3 Edit mode

3.1 Entering edit mode



When you enter the site, the first page will be displayed, together with the web page navigation menu used to navigate around the site (to the left in the image above). To begin any kind of editing on the site, including creating new pages, click the “Enter edit mode” button in the web page navigation.

3.2 The edit toolbar



Clicking on the “Enter edit mode” button in the web page navigation will take you to the edit mode, and give you a new toolbar at the top of the page. The toolbar contains the following information.

- Your user name.
- The name of your currently chosen page.
- The page’s status. This can be “Published”, in which case the page in the edit mode is the same as the one site visitors see, or it can be “Modified”, in which case the page has been changed in the editor since it was last published, or “New”, which indicates a page which has not yet been published.

At the bottom there is a set of tabs for accessing different commands and information for the current page.

Main

The basic editing commands.

Metadata

Settings for page metadata such as keywords and author.

Properties

A set of buttons for controlling properties such as multilingual content, visibility, page versions and more.

Tools

Lets you change interface language and read product documentation among other things.

About

Description of the Roxen CMS product name and version.

The main toolbar has the following buttons.



Create a new page. This is described in detail in [Creating a page](#).



Edit the currently selected page.



Delete the currently selected page.



Publish the currently selected page, so it is viewable to site visitors. See below for more information.



Revert the currently selected page to a previously published version.



Switch to the Content Editor environment.



Return to the normal view of the site.

Note!

The “Publish” button will in certain situations be named “Update” instead. This is caused by someone else modifying the same page. More details on this can be found in [Conflict resolution](#).

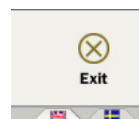
The other tabs are described in the sections [Tools](#) and [Editing page metadata & properties](#).

3.3 Navigating the site while in edit mode

The web page navigation menu can be used to move around the site as usual while in edit mode. The currently selected page is displayed in the window, and its name is shown in the edit toolbar.

3.4 Selecting among available page languages

If a page contains multiple languages you will see a language selector in the right end of the toolbar. Click any of the flag icons to display the corresponding version of the page.

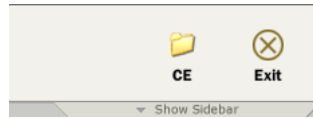


3.5 The sidebar

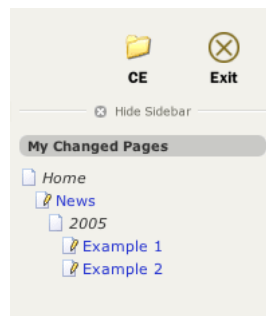
When you edit more than one page, it's useful to quickly navigate among all those pages. In the editor there is a special panel called the sidebar which lists all pages

where you have unpublished changes. Workflow-related information is also shown here.

To show the sidebar, click the “Show Sidebar” button in the bottom right corner of the toolbar:



When shown it may look like this:



To hide it, just click the button titled “Hide Sidebar”.

The listed items are displayed in a hierarchical format that corresponds to the site structure. However, only changed items or their parent directories are visible. In the picture above, the pages “News”, “Example 1” and “Example 2” have been changed as indicated by the pencil icon and blue link color. Also listed are “Home” and “2005” which have not been changed but are needed to complete the navigation structure for the changed items (and which may be clicked as well).

When page titles are too long to be displayed in full, you can place the mouse cursor over the text to get a tooltip with the complete title.

Please see the “Workflow” section for more information on workflow functionality in the sidebar.

3.6 Publishing a changed page

The “Publish” button makes your changes visible to other content editors and other site visitors (depending on how access permissions have been set up). To publish a page, navigate to that page and click the “Publish” button in the main toolbar tab.

Before the action is performed you have the option of providing a log message. All revisions of a page are stored for later retrieval, and giving a descriptive log message can help you and others to quickly see what change you made and why.

To write a log message, click the “+” icon and enter your text before finally clicking the “Publish Page” button:



3.7 Leaving edit mode, and publishing changed pages

To leave edit mode and go back to the normal view of the site, simply click the “Exit” button in the edit toolbar. When you do, you will have the option of automatically publishing all pages you have changed, including those you have edited during a previous session, but not yet published. If you want to do that, just check the check box that’s presented and click the “Exit” button. At this point you can also return to edit mode by instead clicking the “Cancel” button.

Note!

If the system detects that someone else has changed the page you have been working on between when you started editing it and when you tried to publish it, it will give you a warning, and refuse to publish the page. This is to avoid losing either your work or the work of the other person. If this happens, contact your site administrator, and he will be able to use Roxen CMS’s advanced conflict management features to resolve the conflict.

3.8 Edit mode vs invisible pages

Whenever you browse the site in edit mode, Roxen CMS will present pages slightly different from what you otherwise see. Specifically, you may see pages that are normally marked as invisible or pages that are scheduled to appear at a certain date. The same goes for e.g. sitemaps, keyword index pages, file listings etc. This behavior is due to the fact that you otherwise would not easily find these pages. When you return to normal browsing the visibility properties will be restored.

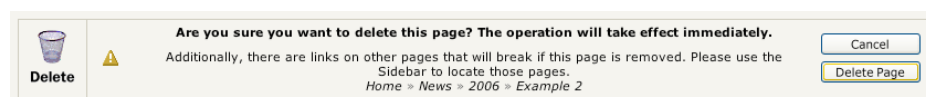
3.9 Link management

Roxen CMS offers link management functionality which avoids the problem of broken links when you move or copy pages or page components. This is fully automatic and does not require any additional steps in the page editor.

An additional benefit of the link manager is that the Roxen CMS knows if a given page is linked to from somewhere else. You can see a list of all locations linking to the current page in the Sidebar panel:



When you attempt to delete a page that is linked to from other pages the system presents this warning message:



4 Creating a new page

4.1 Page titles

Pages are created using the “New” button in the main toolbar tab. Before clicking it you need to navigate to the place in the site which will become the parent page for your new page.

When clicking “New” you will be asked to provide a title for the new page:



At this point you can type the title as you would like it to appear, complete with upper- and lowercase letters, spaces etc. The text you enter here will be stored in the page’s metadata where it can be changed at any time later on; it will also normally be shown in the page header and navigation menus.

More importantly, the title is also used for assigning a name to the new directory where this page will be located. This means the name will become a part of the page’s URL. Since there are a number of restrictions regarding how URLs are created you may later see that the name has been transformed to ensure it’s part of a valid URL. In particular, the following changes are applied:

Conversion to lowercase

All characters will be transformed into their lowercase equivalents.

Replacing of spaces

Spaces and other invalid characters will be converted to dash (“-“) characters. Sequences of multiple dashes are also removed.

Break-up of Unicode characters

Characters which cannot be represented in the ISO-8859-1 (Latin-1) character set will be split into its Unicode building blocks if possible. For example, ã is converted into a.

Appending of counter value to get unique name

If the computed directory name already exists, Roxen CMS will append a number to ensure the resulting URL is unique.

You can preview and modify the suggested directory name before the page is created. To do this, click the “+” icon on the right side of the title input field. The toolbar is then expanded to display a second text field:



The directory name is updated in real time as you modify the page title. Note that if you change the second text field by entering a custom directory name, any subsequent change to first field (the page title) will generate an automatic directory name again.

In most cases you now only need to click the “Create Page” button to complete the process. The web browser will display a blank new page (or a page with some predefined content) and you can continue the editing process as described in the next section, Editing a page.

4.2 Stationeries

In some instances, the creators of the web site has configured the page creation process to involve selection of a page stationery. This can even be true for some areas of a site and not for others.

A stationery is nothing more than a pre-built page that holds some content (and metadata) that will be inserted into all newly created pages. For example, the standard stationery in Roxen CMS sites contains a page header and page footer component.

If more than one stationery has been defined for a particular section of the site, you will be asked to pick which one you want to use when a new page is created:



Web developers who want to add stationeries to a site should use the “Use as Stationery” metadata described in Metadata.

5 Editing a page

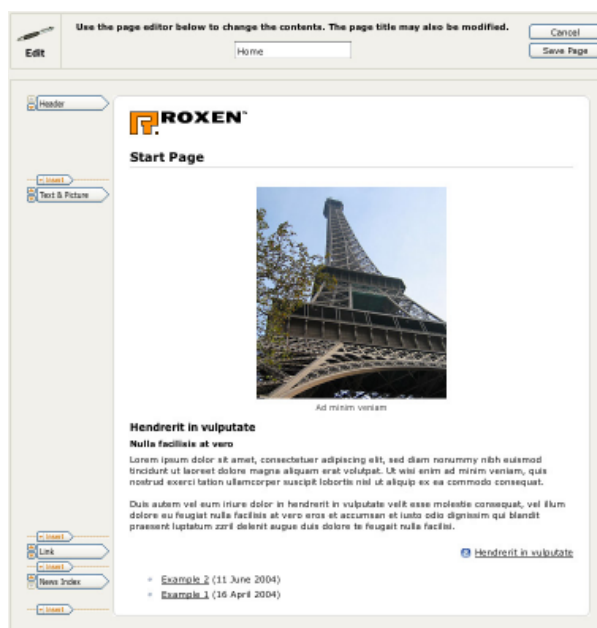
To insert one or several new components on a page, or change the contents of some component, first enter edit mode. Navigate to the page you want to edit using the web page navigation, unless you are already at the correct page. (See previous chapter for how to enter edit mode and navigate the site.)

When the page you want to edit is displayed in the window, and its name is shown in the edit toolbar, click the “Edit” button in the edit toolbar (not the “Enter edit mode” link in the web page navigation which will do nothing at this point).

In sites which are created with templates taken from recent versions of Roxen CMS, you can in most instances also click directly on the small “Edit” icon that is presented in the content area of a web page (pictured below). This will take you directly to the corresponding part of the page editor.



5.1 The page editor



In the page editor, you can edit and rearrange existing page components, or insert new components on the page. You can also change the page title.

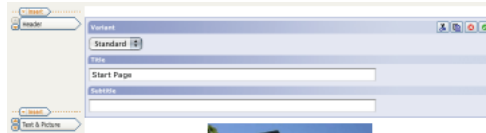
Each page component is represented by a small button to the left of the component on the page. Clicking the button will open the editor for that component, and allow you to change it.

Clicking the Insert button above each component except the header, accesses a pulldown menu where you can choose what type of component you want to insert at that place.

The position of the component can easily be changed by simply clicking the up and down arrows to the left of the component button.

5.2 Working with a component

As mentioned above, clicking on the name of a component in the left-hand margin will display the settings of that component. It can look like this:



In this example the Header component was chosen, and you can see that it has three parameters that you can edit:

- Variant
- Title
- Subtitle

The settings available in a particular component is described in the section Component types.

There is also a set of buttons in the upper right corner of the component editor:



Cuts the component from the page and places it on the clipboard.



Copies the component from the page and places it on the clipboard.



Deletes the component from the page. This action asks for confirmation before the change is made.



Accepts the changes made to the component and hides the input fields belonging to the component. Note that this step is not necessary for saving your changes. You can also click directly on any other component name or the “Save page” or “Cancel” buttons at the top of the window.

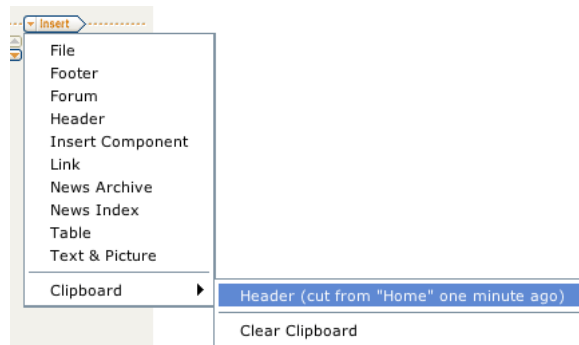
5.3 The clipboard

When cutting or copying components, they are placed on a clipboard maintained on the Roxen CMS server. This clipboard is not shared with other users.

Note!

The clipboard will be preserved as long as the server is not restarted. Don't rely on data staying there for a long period of time.

You can keep several components on the clipboard at the same time. You can also paste items on the same page or other pages within the same web site. To paste, click the “Insert” icon and move the mouse cursor to the last entry in the menu to see all items available for pasting. If some items are greyed out, they cannot be inserted on the current page; this may be caused by a limit on the number of allowed components of a certain type or similar types of restrictions.



The sub-menu also contains a command named “Clear Clipboard” which you can use to remove all items currently placed on the clipboard.

When copying and pasting components, the page editor will take care of adjusting links and paths to images or documents that are relative to the original page.

5.4 Exiting the page editor

Clicking the “Save Page” button will save your changes and return you to the main edit mode. Clicking “Cancel” will return you to the main edit mode without saving any of your changes. Remember that even if you save your changes, you can revert the page to its currently published state by clicking the “Revert” button in the edit toolbar.

5.5 Conflict resolution

5.5.1 Understanding conflicts

Roxen CMS allows the same page to be edited by multiple users at the same time. While at first this can sound dangerous, the system ensures that information contributed by the editors involved is not lost in the final version. However, in order to do this correctly, an editor also needs to take special action in circumstances where another person publishes a page that he is working on.

Why is Roxen CMS using this approach at all? Because there is a clear benefit in avoiding locks. Not all editing operations need to produce conflicting changes; for example, if one person fixes a typo in one paragraph at the top of a page while another person adds new text to the bottom of the same page, both changes can be merged together with a minimum of effort.

More discussion on version control and conflicts can be found in Version Control.

5.5.2 An overview to resolving conflicting changes

Web pages created in the Insite Editor environment will get a special status icon and message when a conflict is detected. You will also see that the “Publish” button is replaced by an “Update” button.



To take care of the conflict, follow this procedure:

1. Merge the latest changes from the site into your copy

By clicking “Update” the changes made in the most recently published version will be merged into your working copy.



Already at this stage it is possible that the conflict has been resolved since the changes that were imported may be made in a part of the page which you have not modified. Still, you need to review the page to see that it looks good together with your changes.

2. Resolve metadata conflicts in your unpublished page

If the published version of a page contains metadata and properties that conflict with your version (e.g. a different page title) you will be asked to select which values that should be preserved.

This process is taken care of in a special wizard that lists the possible choices together with radio buttons. Once you have completed the wizard, Roxen CMS continues to analyze the page to see if the content conflicts in some way. If true, you will be taken to the next step below.

3. Resolve content conflicts in your unpublished page

You will use the same page editor as you normally use to work on the content of a page. When you start using it you will however notice that it contains some extra messages and guiding elements as well as content originating both from your copy and the latest published version. Details of how this works can be found later in this section.

All analysis of content is performed on a component by component level. Your task now is to decide what content that should be removed, moved to a different place, or edited to become correct.

The type of changes necessary depends on what type of conflict the system has found. For instance, one of the types is created by moving a component while another person modifies it, and another type of conflict is caused when components are deleted. There are too many combinations to list them all, but regardless of how the situation arose you only need to learn about a handful of actions to solve all of them.

4. Publish the new version

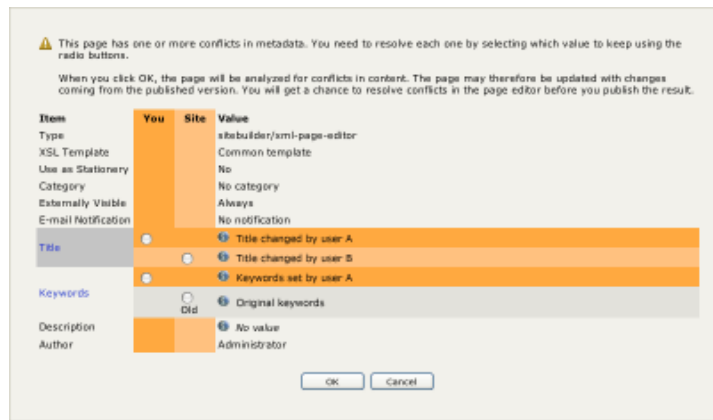
At this point the “Publish” button should be enabled for your use. When you click it, the page will be published exactly as it looks when you preview it.

Note!

In unusual cases the component-based conflict resolution will not be able to handle the page’s state. If that happens you will instead be offered to use the text-based (i.e. line-by-line) resolution for XML files. To find out more, read the Content Editor manual section covering the Update operation.

5.5.3 Resolving metadata conflicts

As described above, if the page has conflicting metadata you are given the opportunity to resolve this in a wizard. The wizard will appear when you click the “Update” button in the main toolbar tab.



You can leave the file untouched by clicking “Cancel”. If you choose to proceed you will need to make a selection from each pair of radio buttons in the left-hand column. The following selections are available:

You

A selection in this column preserves the metadata value from your version of the page.

You (Old)

Same as *You* but indicates that the chosen value equals the value that existed when you initiated the editing of the page. This means you will disregard a more recent change that someone else has made during your editing session.

Site

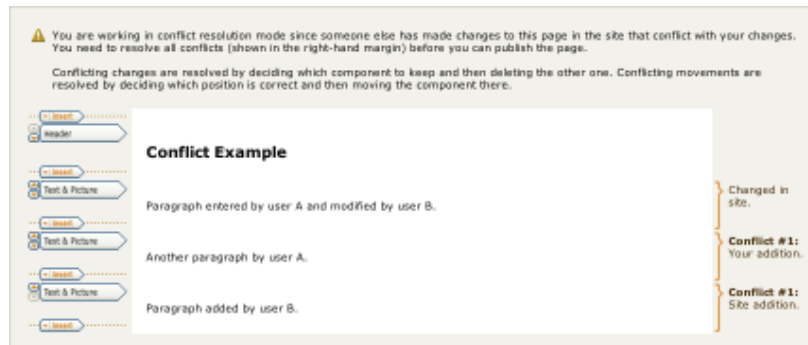
A selection in this column substitutes the metadata value coming from the site version of the page.

Site (Old)

Same as *Site* but indicates that the value in the site version is the same as it was when you initiated the editing of the page. In other words, it has not been changed by someone else during your editing session.

5.5.4 Resolving content conflicts in the page editor

Here is an example illustrating a conflict in the page editor:



Aside from the help text at the top, the most visible changes are the brackets and information message that have been added to the right-hand side of the window.

Each bracket associates an information message to a specific component in the page. Moreover, several components can be part of a single conflict; this is indicated by the “Conflict #x” text.

The example shown here (from user A’s point of view) has one conflict where users A and B have added a Text & Picture component at the bottom of the page, each one with some unique content. In addition to this, the first Text & Picture component in the page (beneath the Header component) has been modified by user B, though not in a conflicting way. User A is therefore only be notified about this change but no further action is required.

Returning to “Conflict #1”, user A should now choose whether to keep either or both of the conflicting paragraphs. The following options exist:

Delete one or both of the components

As soon as one of the conflicting components is deleted, the conflict disappears. Normally, the user will also choose to edit the other component to incorporate the new information from the component that is about to be removed.

Keep both components

Preserving both components in the page is a possibility. The user may decide to make further changes to either or both of them first.

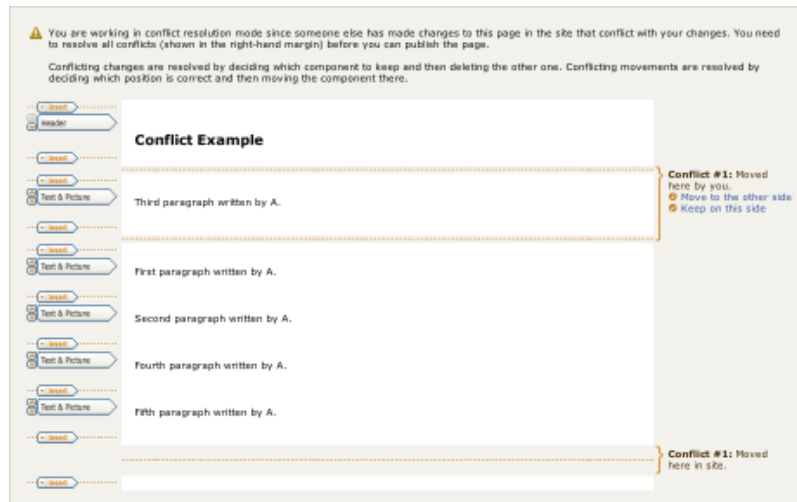
The conflict message will remain on the screen until the user actively acknowledges it. This step is needed to ensure that an unfinished page isn’t published accidentally. To acknowledge the conflict and mark it as solved, click on either of the components to open its editor form and click the brown checkmark icon in the upper right corner:



Acknowledge a resolved conflict by clicking the brown checkmark (far left among the icons seen here)

Only after all conflicts are resolved or acknowledged can the page be published. Note that you do not have to resolve all conflicts at once; you can click “Save Page” and return at a later time to complete the remaining conflicts.

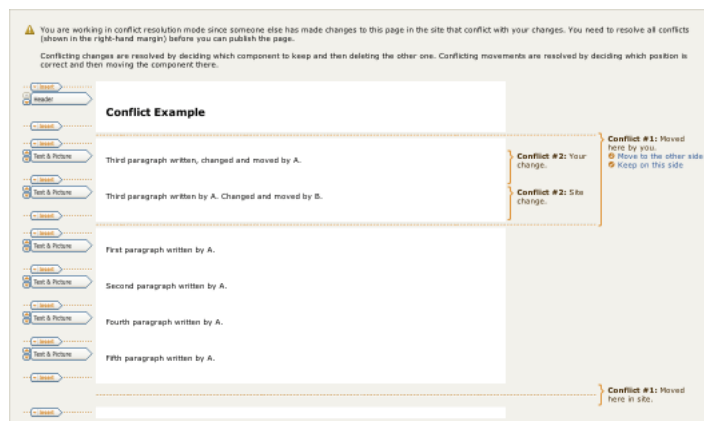
When a component is moved by two users you will run into the situation illustrated by the second example:



You need to decide which position is the right one for the conflicting component. You can toggle between the two possible solutions by clicking the icon (or link) labeled “Move to the other side”.

When you are satisfied with the result, click the icon/link labeled “Keep on this side”. This acknowledges the conflict as resolved.

We are going to present a third example:



In this case several changes have taken place at once. One of the components in the page has been moved and edited in two different ways by users A and B. The conflict is therefore two-fold:

Conflicting position

You will have to select the proper location of the conflicting component. (Illustrated as “Conflict #1” in the image.)

Conflicting content

You must decide which text the conflicting component should have. (Illustrated as “Conflict #2” in the image.)

You are free to resolve the conflicts in any order using the methods presented earlier in this section. In other words, the movement conflict is handled by the icon/links closest to the right edge of the window, and the content conflict is handled by deleting at least one of the components or acknowledging the presence of both in

the page (using the brown checkmark icon seen when clicking on either of them to edit their content).

5.6 Editing page metadata & properties

5.6.1 What are page metadata and properties?

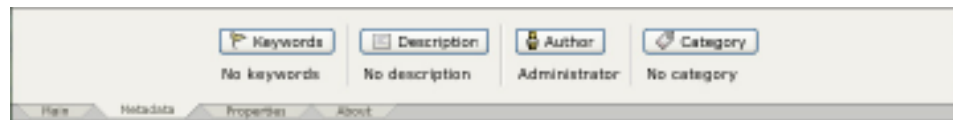
Metadata is information stored about a page but not directly part of the page content. It can be things like keywords or categorization. *Properties* are similar to metadata but instead of being data that describes the content it instead controls how the page is handled in the system. Workflow status and e-mail notification are examples of properties.

Roxen CMS allows you to change metadata and properties from the Insite Editor interface, and most changes are temporary until you publish the page. In a few cases there are exceptions to this rule and they are noted below.

5.6.2 Accessing metadata commands

Click the “Metadata” tab in the bottom left corner of the toolbar. This will replace the main buttons with a new set of buttons and status messages. To return to the main toolbar, click the “Main” tab.

Note that the actual toolbar may look different depending on what features your particular Roxen CMS installation uses.



The metadata settings are:

Keywords

Set keywords for the page for use in e.g. the search engine.

Changes take effect when the page is published.

Description

Set description for the page.

Changes take effect when the page is published.

Author

Set author of the page.

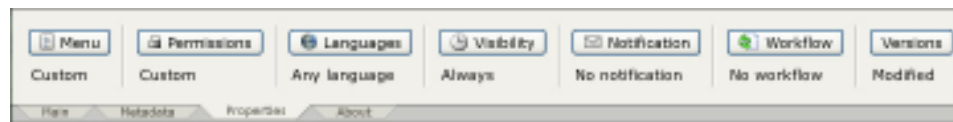
Changes take effect when the page is published.

Category

Rearrange, add or hide menu entries in the currently active navigation menu.

Changes take effect when the page is published.

5.6.3 Accessing page properties



Click the “Properties” tab in the bottom left corner of the toolbar. The property settings are:

Menu

Rearrange, add or hide menu entries in the currently active navigation menu.

Changes take effect when clicking the “Save Menu” button in the menu editor.

Permissions

Edit access permissions for the current page and all of its sub-pages as well as uploaded images or documents on these pages. (Note that uploaded images and documents may optionally be placed elsewhere in the site hierarchy and therefore not be affected by these permissions.)

Changes take effect immediately while still in the permissions dialog.

Languages

Adds or removes a page language.

Changes take effect when the page is published.

Visibility

Offers control of starting and/or ending times for page visibility. Before the starting time and after the ending time the page will not be available, and the corresponding menu entry in the web page navigation will be hidden to reflect this.

Changes take effect when the page is published.

Notification

Defines one or more e-mail recipients which should be notified at a particular date. This date can be set relative to the publish time or to the page visibility described above.

Changes take effect when the page is published.

Workflow

Shows workflow status for the current page, provided it has been enabled for the part of the site where this page resides.

Version

Displays version information for the current page.

Each of these commands will be described in detail in the following sections. For info on the basic toolbar buttons, see the section.

5.7 Keywords

5.7.1 Assigning page keywords

Page keywords can be used in many ways. Normally the standard layout templates copy the keywords into so-called `<META>` tags in the HTML output where external search engines can find them. The internal search engine in Roxen CMS also makes use of keywords.

Furthermore, by enabling the Site Keywords module in Roxen CMS it is possible to build index pages listing all keywords used in a site together with links to the corresponding pages.

To set the keywords for the current page, click the "Keywords" button in the "Metadata" toolbar tab. Next, enter the words using either space or comma as a separator.

5.8 Description

5.8.1 Providing a page description

Description serves a similar purpose as keywords (see Keywords) in that search engines can take advantage of this metadata.

To enter a page description, go to the "Metadata" toolbar tab, click the "Description" button and type the description into the text field.

5.9 Author

5.9.1 Setting page author

All newly created pages get the author metadata initialized to the name of the person creating the page. If the web site uses the author metadata to track current page responsibilities the author may need to be changed later on to reflect a change in ownership.

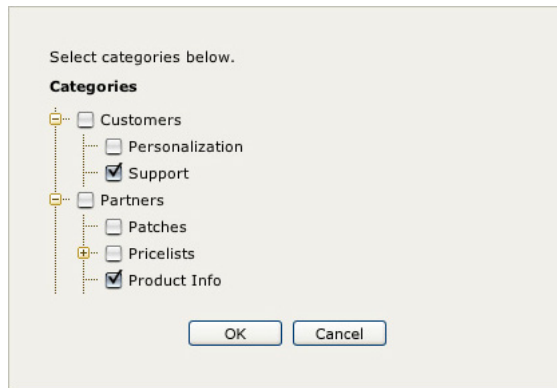
To change, select the name of the page author from the "Author" popup menu. Note that if the number of available names is too large the menu will be disabled.

5.10 Category

5.10.1 Categorizing web pages

The category system that is part of Roxen CMS allows you to mark a web page (or any other file object) as part of one or more user-defined categories. For example, categories may be used to indicate the target audience for the web page; another system could use categories to provide an alternate way of navigating through large sets of data, or assigning responsibilities for the content to a particular group or department.

Defining and making categories available in the site is not described here; please see the web developer documentation for instructions on how to do this.



To set, change or remove categories for the current web page, go to the “Metadata” toolbar tab and click the “Category” button. You will now get a tree view of each available categorization system (there could be several independent categorization systems in use at the same time). Using the “+” and “-” icons you can reveal or hide different levels in the tree. The category memberships are set by checking the checkboxes in front of the category names.

5.11 Menu

5.11.1 Menu editing overview

The site navigation interface is built automatically for you when you add or remove pages, but you also have the option of customizing menu entries. You can e.g. change the sorting order, add links to external pages, or hide one or more entries.

Each page contributes to a separate part of the total menu structure. Thus, the menu editor will present those menu entries which appear as immediate children to the page in question. These sub-menus are stored in individual XML files throughout the site and are normally only accessed through the graphical editing interface.

Each menu is built around one or more of the following parts:

Menu Entry

An entry which refers to a sub-page to the current page.

Menu Link

Custom URL which can point to internal or external pages.

Menu Divider

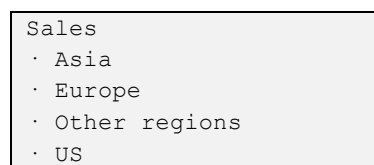
A horizontal divider line for cosmetic purposes.

Menu Remaining

A placeholder for all menu entries which have not been individually configured.

5.11.2 Relationship between pages and menu entries

Let’s consider a page “Sales” which has the sub-pages titled “Europe”, “Asia”, “US” and “Other regions”. By default you will get a menu on this form:

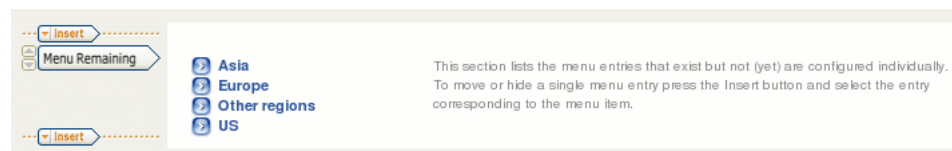


The entries are sorted alphabetically and are taken directly from the page titles for each sub-page. If you open this menu in the menu editor you will see that all existing entries are combined into one “Menu Remaining” part, i.e. the placeholder for menu entries which so far hasn’t been individually configured. This part is dynamic in that new sub-pages will be added and removed as needed when they are created or removed.

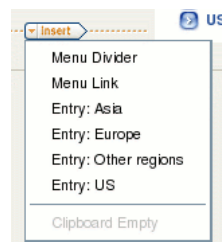
However, you may want to have the “Other regions” link put at the end and a dividing line in between. This involves splitting the “Menu Remaining” part into separate entries which can be placed individually. You can move menu parts up or down and set visibility for each part. Note though that hiding of parts only takes effect on published pages and not inside the editing environment (otherwise you wouldn’t be able to navigate to the pages referred from the links while in editing mode).

5.11.3 Using the menu editor

Continuing the example above, start by navigating to the “Sales” page. Next, open the editing toolbar and switch to the “Properties” tab, click on the “Menu” button and you will see the editor pictured below:



Using the “Insert” popup menu you can now add either a divider, a link or any of the pages listed in the “Menu Remaining” part. If you choose one of the latter, that particular item will be removed from the “Menu Remaining” part. Likewise, deleting an individual “Menu Entry” part will send that page title back into the part for remaining items.



Select “Entry: Other regions” from the popup to add it at the end of the menu, and then insert a divider in the same way. The final result will be:



Click the arrow buttons in the left column to rearrange parts, and click the “Menu [...]” buttons to configure the corresponding part. The options vary depending on the part type:

Menu Entry

You may set visibility, and the entry can be deleted.

Menu Link

You may set the link title, link URL, frame target and entry visibility. The link can be deleted.

Menu Remaining

The visibility can be set.

Menu Divider

You may specify an optional label and select a line style (e.g. solid or dashed), and the divider can be deleted.

5.12 Permissions

5.12.1 **Inherited versus explicit page access permissions**

Access permissions control which users that can see or edit a page. Permissions are inherited by sub-pages unless they are given other settings explicitly. The same holds true for uploaded images and documents which normally reside in the same folder as the page itself.

The status message in the properties tab of the toolbar will be either “Inherited” or “Custom” depending on if the permissions are inherited from a parent directory or set explicitly for the current page. As soon as explicit permissions are set there will be a corresponding “protection point” created internally in Roxen CMS. This is the name of the entity that stores actual settings, but normally you don’t need to know more about its inner workings.

The inheritance concept is not limited to a single directory level. It can be applied to any number of directories and their subdirectories. Initially the whole site will be controlled by the access permissions on the top-level “Home” page.

To view the dialog where you can customize the settings, click the “Permissions” button in the toolbar. At the right-hand side of the screen you will find a button with one of the following titles (depending on the current page status):

Set explicit permissions...

Asks you to verify that you want to create a protection point for the current page, or more specifically the directory where it’s stored. Click “Create” to proceed. The newly created protection point will get its initial settings from the closest parent directory for which the access permissions have been customized.

Remove explicit permissions...

Removes any custom access permissions for this page, or more specifically the directory where it’s stored. Click “Remove” to confirm that this is what you want. The new settings will be inherited from the closest parent directory for which the access permissions have been customized.

5.12.2 **Assigning permissions to groups**

Permissions are always given to groups of users. If you want to give individual users specific permissions they need to be put into separate groups first (which is a task for the administrator).

If the page is using inherited permissions, click the “Set explicit permissions...” button as described above. The “Permissions” table on the left-hand side describing the current permissions will now offer a number of buttons where you can add or remove groups as well as changing their settings.

By clicking “Add group” you get a search box where you can find and select one or more groups to add to the permission table. Existing groups can be removed using the red icon in the “Remove” column. Use the popup menu in the “Perm” column to set the permission to one of “None”, “Read” or “Write”.

5.12.3 Indirect membership

In some situations you may see a second table on the screen. This table is titled “Permissions inherited by group memberships” and lists those groups which have been given permissions through membership in one of the groups you’ve included in the first table. To override the permissions caused by inherited membership you must add the group to the “Permissions” table.

5.13 Languages

5.13.1 Several language variants of the same page

A web page can exist in a number of different languages at the same time. In the right end of the toolbar you will find a flag identifying the page language you are currently editing (if one language has been set for the page), and to switch you click any of the flag tabs.

You can add or remove language variants of a page at any time, but before adding the first language (or after removing the last one) the page is converted to a language-less state. This is apparent from the “Any language” message that will be displayed under the “Languages” button. Converting a page to or from the language-less state will not affect its content in any way.

Besides page content some metadata is also specified per language. In particular, the page title can be different for each language variant. The site navigation interface will pick the right title for the language requested by the browser.

5.13.2 Adding a page language

Click the “Languages” button and select the “Add language” option. You will then need to select the language from a popup menu (if the language is missing, ask your web site administrator to add it). Depending on if there already are languages defined for this page or not you are also offered to copy the page content from an existing variant.

5.13.3 Removing a page language

Click the “Language” button and select “Remove language”. Next, use the popup menu to pick the language variant you want to remove.

5.14 Visibility

5.14.1 Setting up time-controlled visibility of pages

When a page is published it usually becomes visible for external (meaning non-editing) site visitors right away and then stays accessible indefinitely. In some

instances you may want to change this by explicitly setting start and/or end time, or make the page invisible.

Click the “Visibility” button in the toolbar and select the type of visibility setting that you want from the popup menu:

Always visible

No restrictions on visibility.

Never visible

The page is never visible.

Visible until a specified time

This choice presents a calendar where you select the ending date. Use the left/right arrow buttons to browse other months, and the double arrow buttons step one year at a time. Click “This month” to return to the current month.

When you have found the wanted date, click its number in the calendar. The date will be marked with a black box and the visibility interval becomes highlighted. Past dates are greyed out and not possible to select.

Please select when this document should be accessible to external viewers.

Visible until a specified time

End date

July 2006

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

Current month

End time

10 : 27

OK Cancel

Finally, using the popup menus to the right of the calendar you can set the time of day in fifteen minute intervals.

Visible after a specified time

Again, a calendar will appear, this time letting you select the starting date and time. (See the description above.)

Visible during a specified time interval

This choice presents two calendars, each one working like what has been described earlier. Make sure you click the dates in both calendars so the highlighting of the selected interval is shown.

Note that irrespective of the visibility settings the page will stay visible while you are inside the editing environment.

5.15 Notification

5.15.1 Configuring e-mail notification for expired or changed pages

You can ask Roxen CMS to remind you of pages which, for example, are about to expire or which have content that you want to update periodically. This notification will be sent as an e-mail to one more addresses of your choice.

Start by selecting “Notification” in the toolbar. This will display a dialog where you can configure different parts of the notification:

Time of notification

The time may be either never, relative to another event, or an absolute date. The first and last choices are self-explanatory, while the middle one offers several variations; the event upon which the actual notification time will be calculated from can be any of the following:

- File publishing date
- Start of external visibility
- End of external visibility

Given an event the actual notification time can be offset a specified number of days. In case of visibility starting/ending dates the offset may be set to indicate an earlier date. (This is of course not applicable to publish time since that date isn't known beforehand.)

The event-relative times are dynamic and an outstanding notification will be rescheduled if the event it depends on is set to a different date. For example, suppose there is a notification registered for three weeks after the page publish date. Now, if the page is updated one week after the first publish date, the original notification will be canceled and replaced by another set to three weeks after the most recent publish date.

Check the “Repeat notification once a week” checkbox to have an event repeated weekly after the first notification time.

Recipients

The recipients of the notification message can be one or more e-mail addresses. If the page author's e-mail address is known in the internal database you can check the first checkbox to have it handled automatically. When the second checkbox is enabled you can enter a comma-separated list of addresses in the corresponding text field.

Message

By default the e-mail message will only contain the location of the web page. If you enter a custom message it will be included in the e-mail as well.

6 Workflow

6.1 Workflow processes and activities

Any site with more than a few people involved in content creation, layouting, auditing and deployment needs a structured way of dividing work tasks among users. Even more importantly, there must be a way to ensure quality of the published information. This could involve proof-reading, checking factual correctness, translation of content and getting approval from supervisors.

The purpose of workflow is to impose this control over pages or documents on the web site. Whenever such a page is created or changed Roxen CMS will handle the editing according to a structured model called a workflow process. A process is constructed from a set of activities like in this example:



A newly created page will start in the Authoring activity where, say, any user can take part in the writing process. Once that work has reached its completion the people responsible for the Translation activity will be notified that they have a new page to take care of. Since the page is now in the second activity only users that are members of the translation group can take part in the work. Finally, when translation is done the department supervisor gets a chance to verify that the pages are correct before putting them on the public site by moving the file to the Publish activity.

An administrator can decide whether certain activities should be completed sequentially or if they can run in parallel. In the example above the second activity (translation) cannot start before first one (authoring) is ready. However, the translation activity is comprised by two parallel subactivities since they are independent of each other. Finally, both translation activities need to finish before the Publish approval can take place. When the last activity of a workflow process completes the process itself ends and the page is published for other site visitors to access (unless the administrator has configured the process differently).

For an already published page a new workflow process will start automatically as soon as someone modifies the page. If the changed page is discarded before the first commit takes place in the first workflow activity the process will also terminate.

6.2 Users and to-do lists

Each user can easily view the activities they are assigned to in the Roxen CMS interface. When defining the workflow process the administrator can add restrictions on which users that can take part in what activities.

It's possible to assign an activity to several people (including pre-defined user groups in the Access Control system). When that happens all recipients will see the pending work in their to-do lists, but only the first one to accept the work can edit the page. In that event the page disappears from the other people's to-do lists.

If you are unable to complete the activity you can reassign it to someone else, either a single person or more people or groups. You can also peek at to-do lists of your colleagues as long as you are part of the same Access Control group and even forcefully overtake responsibility for an activity they have not completed.

6.3 Actions

During your work with workflow-controlled pages you will have a choice between the following actions:

Take

Accept to become responsible for an activity (e.g. the Spanish translation) for a given page. This is only needed if more than one person have been assigned to the activity; as soon as someone takes the activity it is removed from everyone else's to-do lists.

Force Take

Same as Take but only possible when peeking at other people's to-do lists. Note that you only overtake the responsibility and not the other person's unpublished changes for a page.

Approve

Used to signal that you have completed your work on the page. The workflow will then continue to the next activity in the process, or, if this is the last activity, end the workflow process. Normally ending a process makes the latest version of the page visible to people that are not logged in as Roxen CMS editors.

Reassign

Hand over the responsibility for the current activity to someone else.

Reject

Send the page back to an earlier workflow activity. In our example the Spanish translator can reject a page back to the Authoring activity. Note that in this particular situation such a rejection would terminate any ongoing German translation automatically since that will have to start over once authoring has been completed again.

When performing any of the Approve, Reassign and Reject actions you can provide a message explaining what you are doing. This message will be logged for future reference and also sent in e-mail notifications.

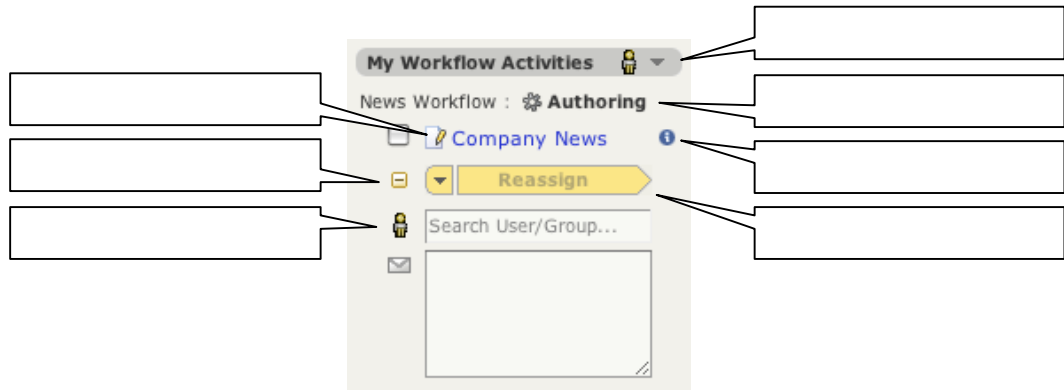
6.4 User interface

This is where you keep track of your to-do list and perform the different actions described earlier. Click "Show Sidebar" at the right end of the toolbar if the sidebar is

To-do list

Process and activity titles

Unfold button not currently open. You should then see the workflow panel, pictured below. It updates continuously even if you don't refresh the browser window in order to reflect ongoing assignments or status changes to pages in the site.



This picture illustrates the separate areas and controls within the panel. They are:

Workflow filter

Use this menu to show workflow activities that relate to you or to colleagues belonging to the group that you pick. The “Hide All” entry collapses the workflow panel; select another item from the menu to show it again.

Process and activity titles

Pages in your to-do list are grouped by their workflow process and activity. The header displays the process name first and then the name of the current activity. If the activity is a subactivity the header displays the enclosing activities as well to give you a clearer picture of their relationship.

To-do list

Lists all pages associated with a given activity. The list is divided in two sections: waiting and taken pages. The former are identified with a green arrow icon that lets you accept responsibility for a page, and the latter all have checkboxes which need to be checked before performing an action.



The picture above shows a situation where both translation activities are waiting to be taken.

Info button

When hovering over a page name you will see a blue info icon in the right margin. Click this icon to display more details about the activity plus all preceding activities.

Unfold button

Click this to unfold the additional controls described below. Used e.g. to log a message together with an action.

Action menu/button

This is a control which combines a menu and a button. Use the menu to select which action you want to perform. The button title displays the number of pages that will be affected. In some cases you will see a warning after selecting certain pages meaning that the selected action isn't allowed; uncheck the checkbox for the conflicting pages to enable the action button again.

Additional controls

Depending on the chosen action this area will include fields for selecting users or groups, selecting which activity to reject to, and a text field for entering a log message.

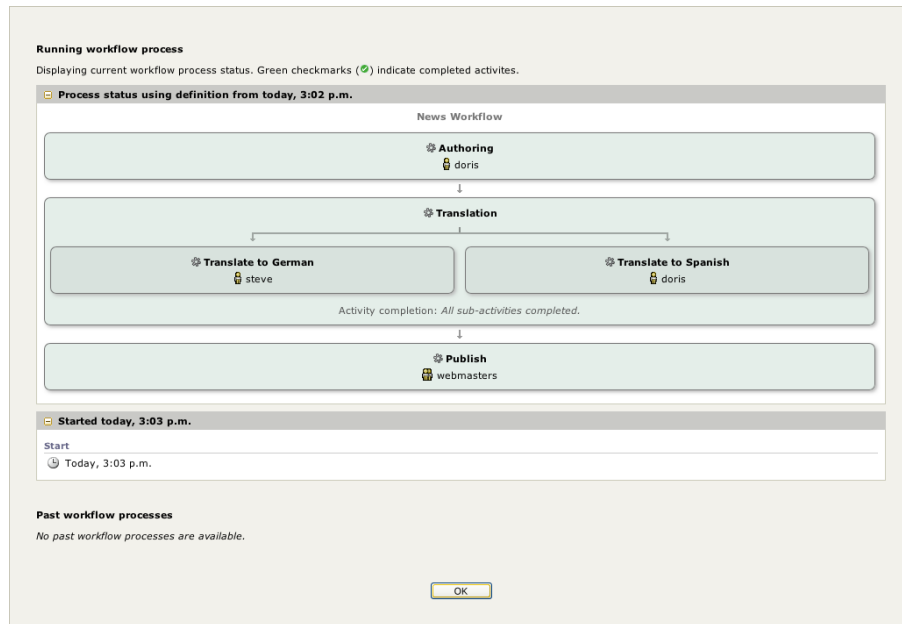
The user/group control searches interactively in the Access Control database (both on full name and login name) and you pick a recipient from the popup menu. Add more recipients by typing another search string and remove recipients by clicking the grey "X" icon. Here is an example where two users have been added as recipients:



When rejecting an activity you can optionally assign it to other people. Please note that if left empty the target activity will be assigned to those defined by the administrator (i.e. the default recipients for that activity when it was first run) and not to the last person to actually handle that activity.

6.5 Workflow status

To see the status of the current process in its entirety you can use the Workflow Status wizard in the "Properties" tab. This will show all activities graphically and mark completed ones with a green checkmark.



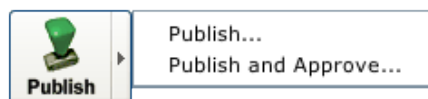
In addition to any ongoing process you get a full list of past processes together with graphical presentation of what the workflow process looked like historically (since it may have changed repeatedly over time). Please note that the user/group assignments in these depictions won't reflect the actual assignments in a specific workflow process – you need to read the log messages to get all the details.

Unfold any of the closed boxes by clicking the “+” icons to view the information inside.

6.6 Publishing pages

One of the main purposes of workflow is that you can edit pages and only make the changes visible to your colleagues until the workflow process ends. This means that Roxen CMS handles the “Publish” button in the Insite Editor toolbar differently for workflow-controlled pages compared to regular pages.

By keeping Publish and Approve actions separate a user can publish several revisions of a page without changing the current workflow activity. Similarly, a page can be approved right away if no changes are necessary.



The “Publish” button is slightly changed when working with workflow. You will notice that there is a black arrow indicating a popup menu; clicking the button will bring up a menu with two alternatives:

Publish

Normal publish action that doesn't change workflow status.

Publish and Approve

Publishes the page and approves it in a single action. This saves the extra steps of first clicking publish and then selecting the page in the workflow panel and

approve it separately. In this case the optional log message in the publish panel will be used as the workflow log message.

6.7 Deleting pages

Unlike normal editing a page deletion doesn't always make sense to process in a workflow. For instance, it wouldn't be relevant to ask translators to work on a document that no longer exists.

For this reason deletes can be configured to get special treatment in the workflow process. The administrator can allow deletes to succeed instantly when a user deletes the page, or define that the workflow is transitioned to an activity at the end of the process where the delete will be approved.

In case of the latter you may notice pages listed with a red cross on their icons in the workflow panel. That icon symbolizes the deleted state which need to be approved to complete the delete. Alternatively you should select the "Revert" command to restore the published version.

6.8 E-mail notifications

The administrator can configure e-mail notifications independently for publish and approve actions in each workflow activity. Furthermore, if the Access Control database contains e-mail addresses for individuals targeted in a reassign or reject action they will receive e-mails as well.

If several actions have been performed in short time they will be listed together in the same e-mail. You will see log message, workflow process and activities, affected pages and a link to the Roxen CMS site where the edit took place.

7 Versions

7.1 Displaying version information

Roxen CMS keeps a log of all page versions. The date shown in the “Properties” tab of the toolbar represents the last time of modification to the currently visible page. If you have local changes the status message will instead be “Modified”.

By clicking the “Versions” button you get a detailed list of all page versions where you can see the date and time of each modification as well as the name of the person who performed it. You can also use the “Revert” command in the “Main” toolbar tab to restore any of these versions.

8 Tools



User Preferences

Presents a wizard where you can edit your user preferences. This is currently limited to the choice of language for the product's user interface.

Change Password

Lets you set a new password for your account.

Application Launcher

Gives you access to the utility program Roxen Application Launcher. It is normally not needed for creating or editing web pages, but in some sites it can be used for working on documents locally on your computer.

Documentation

Opens a window containing this manual.

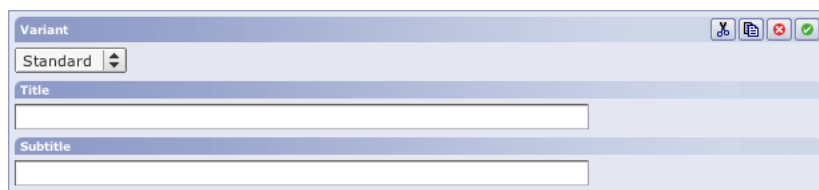
9 Components

9.1 Component types

Following are the different page component types available in Roxen CMS, and how to create and edit them.

Common features such as copying, pasting and deleting components are described in.

9.2 Header and footer



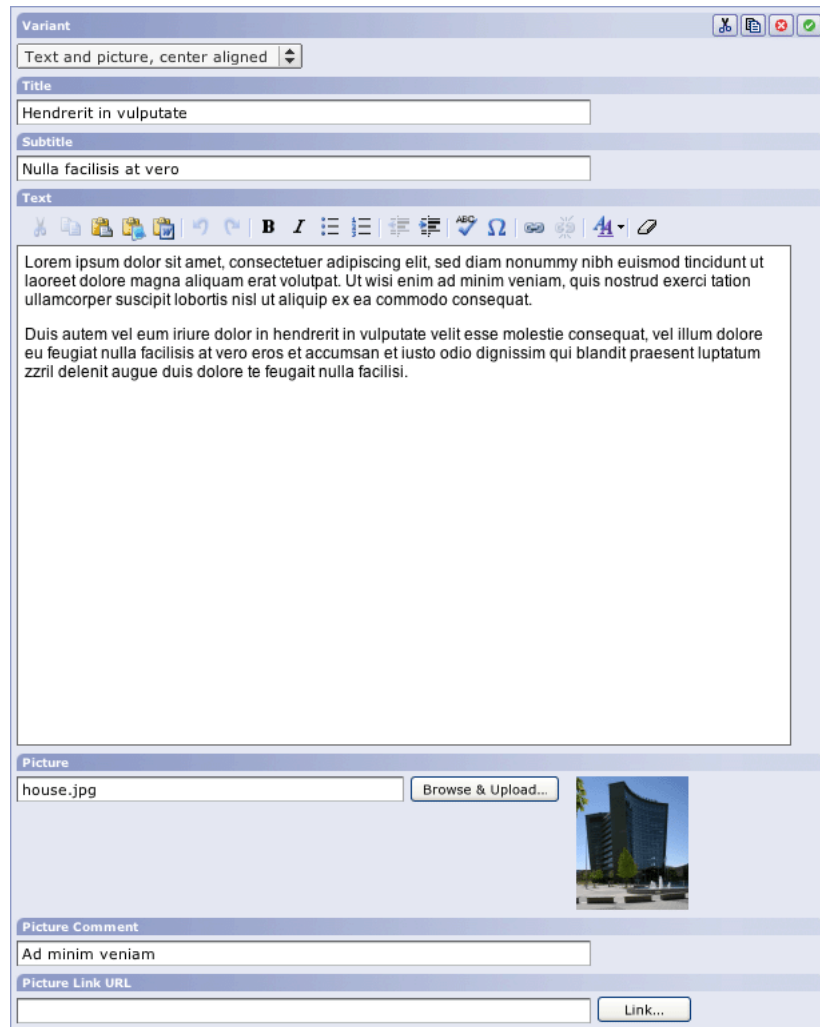
The screenshot shows a web-based editor for a header component. At the top, there is a 'Variant' dropdown menu set to 'Standard'. Below this are two text input fields: 'Title' and 'Subtitle'. The 'Title' field is currently empty, and the 'Subtitle' field is also empty. In the top right corner of the editor, there are four small icons: a copy icon, a paste icon, a delete icon, and a save icon.

In the header you can put a title and a subtitle on your page. You may also be able to choose from different variants of headers, if your particular site supports it. Normally you can leave the "Title" field empty to let the page template insert the title metadata instead. However, by entering a specific title in this component it will override the title metadata in the page header. This can be useful if you want a long title on the page and a shorter one in the navigation menus.

The footer is similar to the header, and its contents depend on how your particular site has been designed.

A page can only contain one header and one footer component.

9.3 Text and Picture component



The most important page component is the Text & Picture component. It is used to insert text with or without an attached image into a page.

9.3.1 Editor fields

Variant

Here you choose how you want your text and picture aligned on the page.

Title and Subtitle

The title and subtitle for this component.

Text

The text body of the component. The text editor works similar to a common word processor. You can select text with the mouse or Shift+arrow keys, and apply formatting using the toolbar above the text field. The following formatting alternatives are available:



- Cut

Cut selected text to the clipboard.

- Copy
Copy selected text to the clipboard.
- Paste
Paste clipboard contents.
- Paste as plain text
Paste clipboard contents without preserving style information.
- Paste from Word
Paste clipboard contents and preserve Word formatting.
- Undo
Undo last editing action.
- Redo
Repeat an action which has been undone.
- Bold
Make text bold.
- Italic
Make text italic.
- Bullet list
Create a bullet list. This may be used on a selection of paragraphs to convert them to the list format. A second click will restore normal paragraph style.
- Numbered list
Create a numbered list. This may be used on a selection of paragraphs to convert them to the list format. A second click will restore normal paragraph style.
- Decrease indent
Remove one level of indentation from the selected text.
- Increase indent
Increase the level of indentation for the selected text.
- Check spelling
Invokes the spell checker for the selected text, or for all of the text.
- Insert special character
Opens a palette of special characters that you can insert into the text area.
- Insert/Edit link
Creates a link to another web page, or edits an existing link if one is selected. When clicking the button a browser window will open. In this window you can browse to the page you want to link to or you can enter the link URL manually.

A link title, the text that will be displayed in the text, is suggested for you when you browse to the destination page. It may also be entered manually.

Finally, you can choose whether the new page should be opened in the same frame as the link (“Open in current frame”), in the whole browser window (“Open link in top frame”), or in a new browser window (“Open link in new window”).

Click “OK” to confirm your link settings.

- Remove link
Removes a web link from the selected text.
- Text color
Brings up a color selector for styling the selected text.
- Remove formatting
Remove any special formatting from the selected text.

Picture

Clicking the “Browse & Upload” button, a popup window is opened where you can see all available images as well as upload one from your local computer. The image is displayed next to the text according to the alignment scheme you choose in the “Variant” pulldown menu (see above).

Picture Comment

This is the caption that will be displayed under the image.

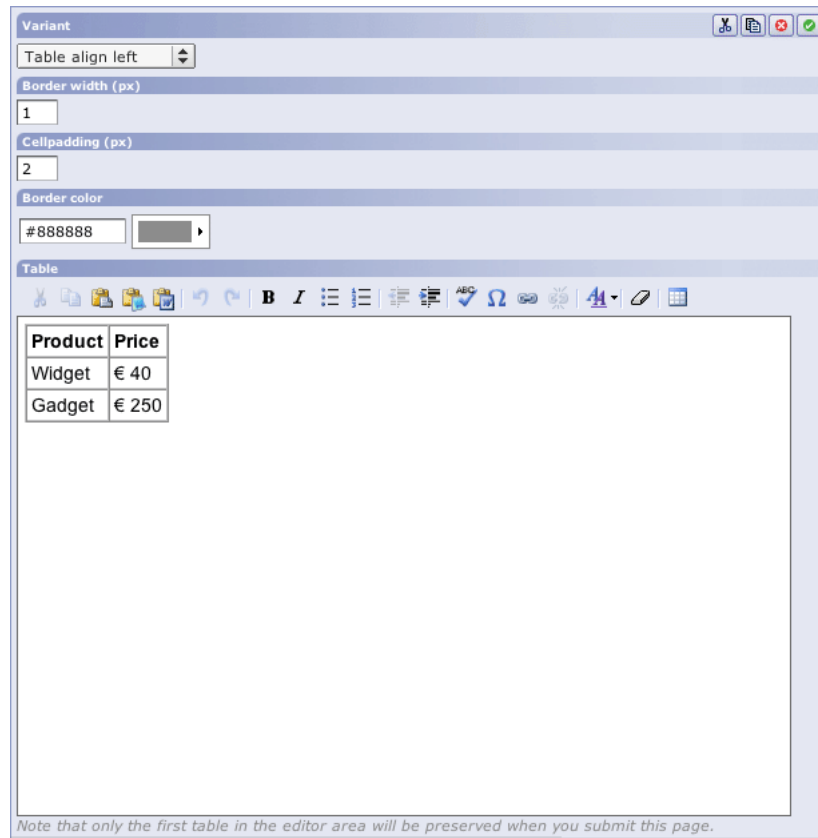
Picture Link URL

To make the image clickable you may enter a URL here.

9.3.2 Note about incompatible browsers

Some web browsers do not fully support the Rich Text editing control and will instead use a Java-based editor or plain text input field. This editor is not as capable as the one described above but the basic functionality is the same.

9.4 Table component



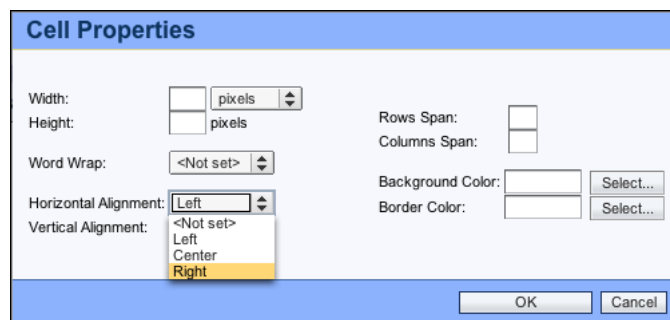
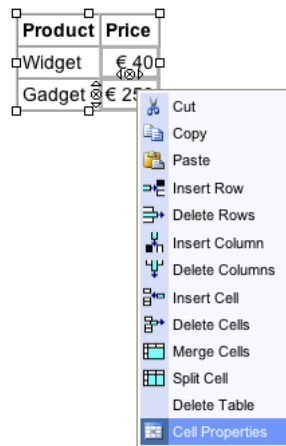
The table component allows you to organize content on a page in rows and columns.

Choose the variant for your table component, depending on how you want it to be positioned on the page. Border and padding values can be entered in the two following input fields (empty text means zero), and the color selector assigns a border color.

9.4.1 Rows and columns

By right-clicking on the table cell, you can access a pulldown menu that lets you create and remove rows and columns. You can also set the number of rows and columns by clicking the Table button in the button toolbar.

The same menu also includes commands for specifying formatting options such as cell alignment. In the picture below, the two cells in the right-most column are selected before bringing up the “Cell Properties” dialog:



9.4.2 Pasting tables from Microsoft Excel

You can paste a table from Microsoft Excel into the table component. When pasting a Microsoft Excel table, only the static contents of that table will be included in your table, not formulas or other dynamic contents.

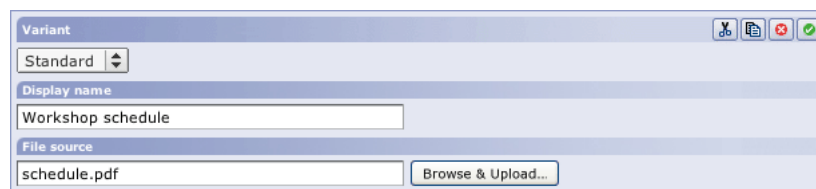
9.4.3 The text editor

See the section for the Text and Picture component for details on the basic functionality of the editing toolbar.

9.4.4 Note about incompatible browsers

Some web browsers do not fully support the Table editor described here and will instead use a Java-based editor or plain text input field. This editor is not as capable as the one described above but the basic functionality is the same.

9.5 File component



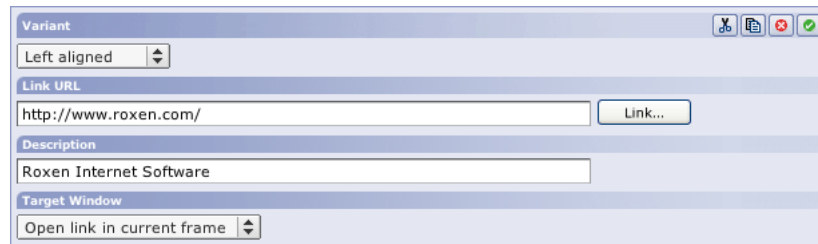
To make a link to a file that site visitors can download, use a file component.

The Variant pulldown menu gives you a choice of visual styles for this object, if your particular site supports this.

In the “Display name” text field, enter the name of the link that you want to be displayed on the page.

In the “File source” field, enter the path to the file on the server. Normally, you don’t have to put the file on the server manually, but can use the “Browse & Upload” button to bring up a file selector window where you also may upload the file from your own computer. The correct path to the file will then be displayed in the “File source” field automatically.

9.6 Link component



A link component is used when you want to include a link to another page, on the page you are editing.

The Variant pulldown menu gives you a choice of visual styles for this object, if your particular site supports this.

Enter the URL to the page you want to link to in the “Link URL” field. You can do this manually, or you can click on the “Link...” button to browse to the page. If you browse to the page you want to link to, the name of the page will automatically be suggested as your link description. This can be changed manually.

Enter the description of the link that will be displayed on the page, in the Description field, unless the suggested name is suitable.

You can also choose how the new page is going to be opened, from the “Target Window” pulldown menu:

Open Link in Current Frame

This will open the page in the same frame as the link is in.

Open Link in Top Frame

This will open the page in the whole browser, removing any existing frames.

Open Link in New Window

This will open a new browser window where the page is displayed, leaving the original page in the current browser window.

9.7 Forum component



This component creates a discussion forum inside the web page. For more information on the functionality provided in the forum, please see the section Forum Module.

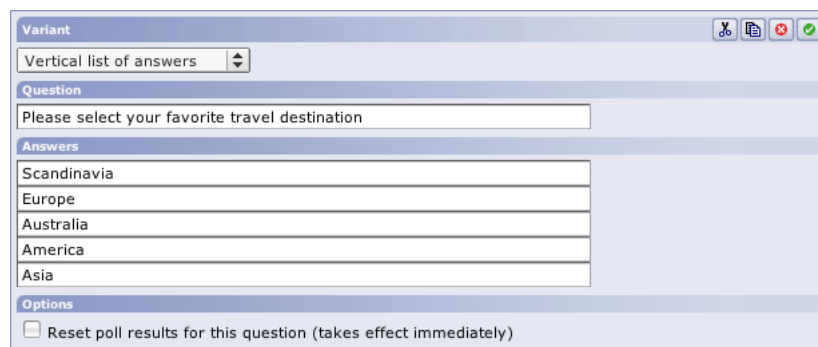
In the “Forum ID string” text field you may provide a unique identifier for this forum. This is needed if you want to present the same forum in several pages, in which case you would give the same identifier string in all occurrences of the Forum component.

If the identifier is not known, new database tables will be created right away for this forum. There will also be a set of Access Control protection points added to the AC interface to manage the new forum.

Note!

If you delete the forum component, the database information related to the forum will not be affected.

9.8 Poll component



The screenshot shows a configuration window for a poll component. At the top, there is a 'Variant' dropdown menu set to 'Vertical list of answers'. Below this is a 'Question' text field containing the text 'Please select your favorite travel destination'. Underneath the question are five 'Answers' text fields, each containing one of the following options: 'Scandinavia', 'Europe', 'Australia', 'America', and 'Asia'. At the bottom, there is an 'Options' section with a checkbox labeled 'Reset poll results for this question (takes effect immediately)' which is currently unchecked. The window has standard icons for help, save, delete, and OK.

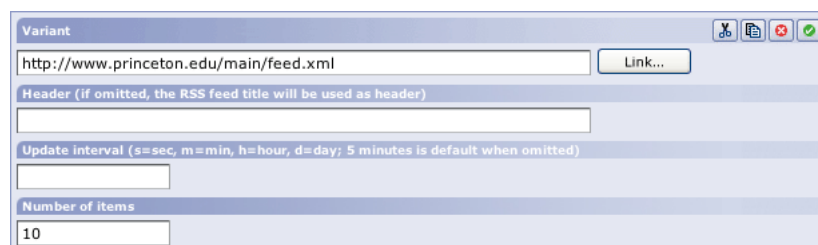
The Poll component creates a poll consisting of a question together with up to five possible answers.

The Variant pulldown menu gives you a choice of visual styles for this object, if your particular site supports this.

In the “Question” text field you should enter the question of the poll. Next, provide the possible answers in the “Answers” fields. If you have less than five answers, leave the remaining fields empty.

The poll uses a database to track the votes. When you replace the question and want to reset the current vote statistics you should check the “Reset poll results for this question” checkbox. Note that this takes effect immediately when you click the “OK” button.

9.9 RSS component



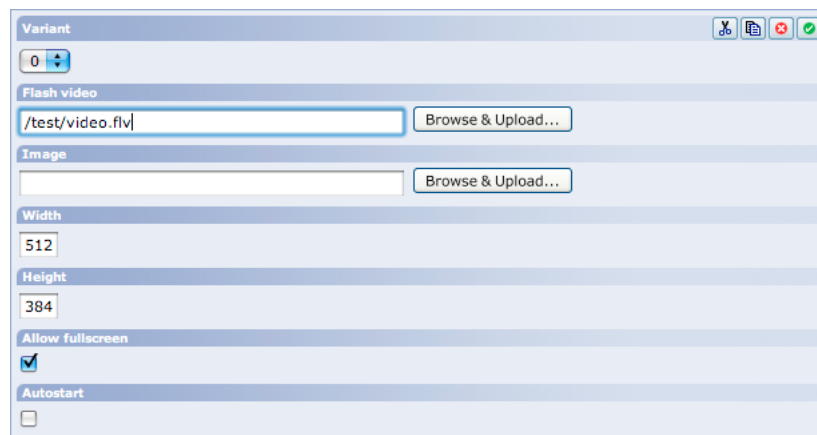
The screenshot shows a configuration window for an RSS component. At the top, there is a 'Variant' dropdown menu. Below it is a text field for the RSS feed URL, containing 'http://www.princeton.edu/main/feed.xml', with a 'Link...' button to its right. Underneath is a 'Header' text field with the instruction '(if omitted, the RSS feed title will be used as header)'. Below that is an 'Update interval' text field with the instruction '(s=sec, m=min, h=hour, d=day; 5 minutes is default when omitted)'. At the bottom, there is a 'Number of items' text field containing the value '10'. The window has standard icons for help, save, delete, and OK.

The RSS component inserts an RSS news feed in your page. You need to provide the URL for the feed and some optional parameters on display title, how often the content should be updated, and the maximum number of items to show.

When used in a page, the server will periodically ask the remote server for a list of headlines. The received data is then stored in a local database which ensures that performance is good even for high-traffic sites. Another advantage is that even if the remote host is temporarily unavailable your site can display the most recent set of headlines.

9.10 Flash video component

The flash video component inserts a flash player on your page. There is a lot of customization possibilities since it utilizes one of the most versatile players on the web – the Flowplayer (<http://www.flowplayer.org>).



The boxed version of this component lets you choose width and height for your movie player, whether or not to allow full screen mode and automatic start of playback once the movie has been buffered. It also allows you to choose a splash image to be shown before the user clicks play.

The video file can be uploaded using a standard Browse and Upload dialog, known from a variety of our components. The player supports flv-files, some H.264-files and a number of members of the mp4 family. Other files can be converted to one of these formats.

9.10.1 Developer note

The template handling the flash player is:

```
/roxen-files/cms-sites/4.5/components/flash-video-comp.xsl
```

Which in turn is imported via:

```
/roxen-files/cms-sites/4.5/components.xsl
```

The component imports all flash controls. If you wish to customize the flash player, check the documentation at <http://flowplayer.org/documentation/>